



## Agency Profiles Overview

### **Purpose of this document**

Agency Profiles provide functionality in Ceres to increase the information the food bank can track about the Agencies they work with. Profiles are designed to help food banks group their Agencies by various user defined and standard data fields. See the Related Topics area for other new Agency Services/ Agency Management components.

- Agency Attributes
- Agency Approval Date and Agency First Order Date
- FBC Program Type
- Senate District, City Council District, Ward, and School District
- 501(c)(3) Fields
- Agency Training
- Agency Certifications

None of the information in these fields will automatically update the business rules in other fields, like UNC Activity Status or Agency Groups, but can track data that will allow for proper assignment decisions.

*Ceres Object release 5.00.00 is required for the functionality described in this document.*

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## Agency Attributes

An Agency Attributes Table exists where three different types of flexible attributes can be defined. The options are: Attributes, Affiliation, and Tiering (Tier).

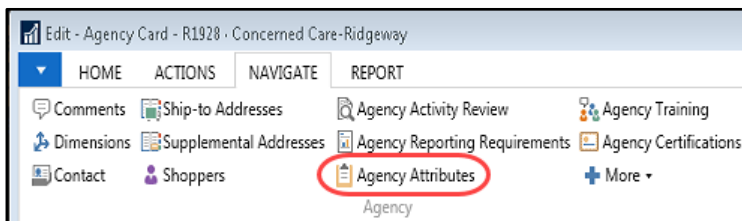
Attributes are intended to be data values to see groups of Agencies by their capabilities - such as storing frozen product, having a small parking lot, etc. You can assign one or many to each Agency.

Affiliation is for grouping Agencies by religious affiliation or similar. You can assign one or many to each Agency.

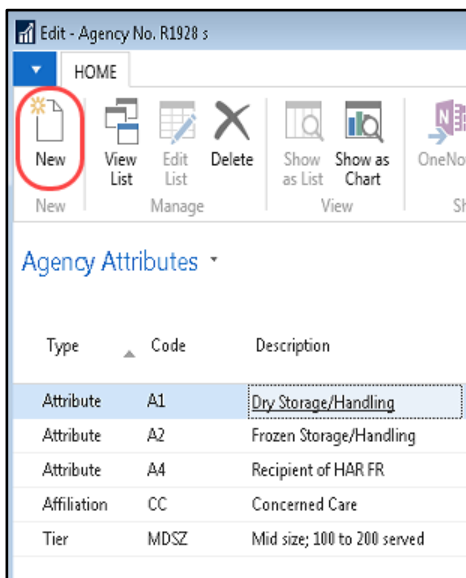
Tiering is to track a food bank assigned value or values to group agencies into priority groups or similar. You can assign one or many to each Agency.

Accessing:

1. Attributes can be accessed from Navigate → Agency → Agency Attributes on the Agency Card.



2. Select Home → New to create new attributes.



**Type:** Select an option for the type of Attribute you are creating. The options are: Attribute, Affiliation, or Tier.

**Code:** Input a Code to identify the Attribute.

**Description:** Enter a description for the Attribute.

**Note:** There is a count field of each Attribute Type on the Information FastTab of the Agency Card. Clicking on each count will open up the Agency Attribute Card for the Type of Attribute selected.

## Other Agency Fields: Agency Approval Date & Agency First Order Date

1. On the General FastTab of the Agency Card the following fields exist:

**Agency Approval Date:** Enter the date the Agency was approved as a member of the food bank.

**Agency First Order Date:** This is a Ceres-maintained field which will automatically updated based on the first order in the Agency Ledger Entries.

2. An FBC Agency Category field exists on the Agency General FastTab.

A0442 · Synergy Services-2

General

No.:	A0442	Fund No.:	UR
Parent Agency No.:	442	Location Code:	KAN
Name:	Synergy Services-2	Shipment Method Code:	DELIVER
Name 2:		FBC County Code:	MO-LAFAYET
Address:	Do Not Disclose	FBC Agency Category Code:	ABUSED
Address 2:		UNC Activity Status:	HOLDMULT
City:		Agency Approval Date:	2/26/1996
State:	MO	Agency First Order Date:	8/3/2012
ZIP Code:		Monitoring Expiration Date:	5/30/2014
Country/Region Code:		Last Date Modified:	6/11/2019
Balance (\$):	9,722.61	Last Modified By:	ESOPRO\RXF
Credit Limit (\$):	40,000.00	Blocked:	
		Dormant:	

Clicking on the dropdown takes you to the FBC Agency Category Code list.

Select - FBC Agency Categories

HOME NAVIGATE Finance Company - Master... ?

New View List Edit List Delete Qualifiers Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

New Manage Process View Show Attached Page

FBC Agency Categories Type to filter (F3) Code No filters applied

Code	Description	UNC Agency Category	Qu...	FBC Program Type
ABUSED	Abused Children	GROUP HOME	No	ON-SITE FD
BATTERED	Battered Persons	GROUP HOME	No	ON-SITE FD
BEFORE\AFT	Before\After Schoo...	CHILDREN	No	ON-SITE FD
CLUSTER	Harvesters Cluster ...	FOODBANK	No	FD PANTRY
DAYCARE	Daycare	DAYCARE	No	ON-SITE FD
DISASTER	Disaster Assistance	DISASTER	No	FD PANTRY

Each Agency Category Code is tied to an FBC Program Type Code.

- The FBC Program Type Code displays on the Information FastTab of the Agency Card. The field is non-editable from the Agency Card.

The screenshot shows the 'Information' FastTab of an Agency Card. Under the 'Agency Express' section, there are several dropdown menus and checkboxes. Under the 'Agency Type & Information' section, there are more dropdowns and checkboxes. The 'FBC Program Type' field at the bottom is circled in red and displays the value 'ON-SITE FD'.

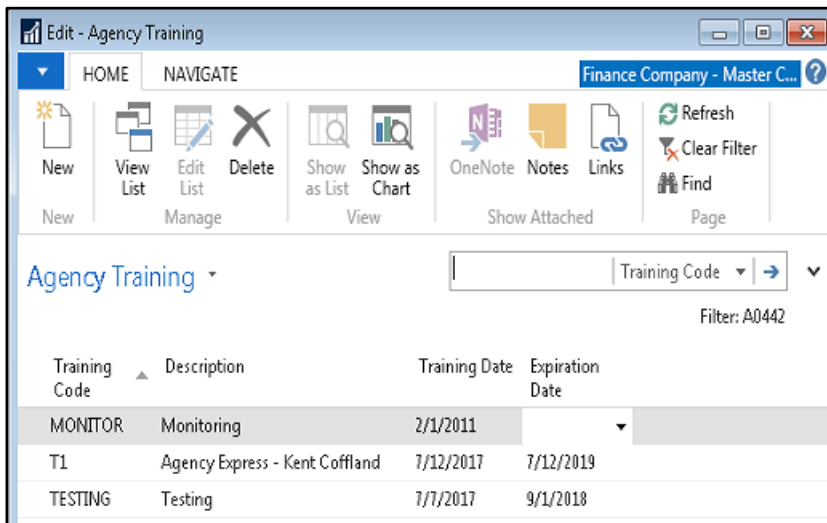
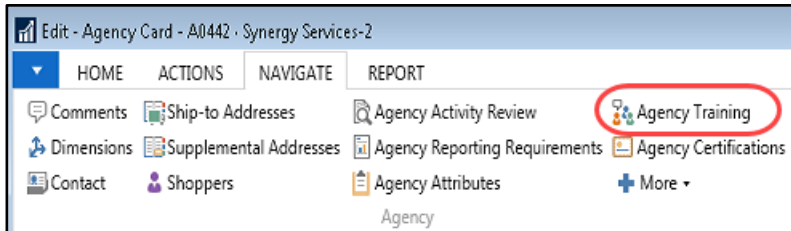
## 501(c)(3) Parent Agency Default Setup

- On the Agency & Receivables Setup, a field called Default 501(c)(3) from Parent, has been added. If this field is checked, 501(c)(3) information will flow from the Parent Agency Card to the Agency Card and the 501(c)(3) fields on the Agency Card will not be editable. See Agency Overview Documentation for more information regarding the 501(c)(3) FastTab on the Agency Card.

The screenshot shows the 'Agencies & Receivables Setup' form. The 'General' tab is selected. On the right side of the form, the 'Default 501(c)(3) from Parent' checkbox is checked and circled in red. Other settings include 'Discount Posting' set to 'No Discounts', 'Credit Warnings' set to 'Credit Limit', and 'Apply Grants to Credit Warnings' checked.

## Agency Training

1. Training information is recorded at the Agency level. Training can be tracked based on when it occurred or expires. To enter the information, from the Agency Card, click Navigate → Agency → Agency Training



**Training Code:** Select an existing Code. To setup new Codes, click on the down arrow in the Training Code field and then select Advanced → Home → New. Input a Code and Description to identify the training.

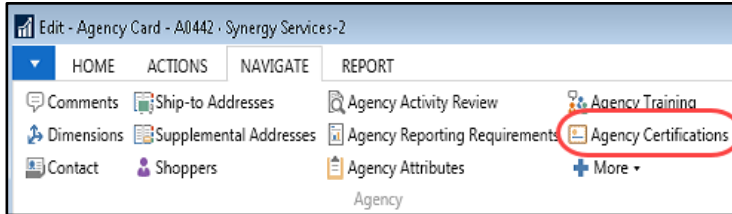
**Training Description:** Automatically updates when a Code is selected.

**Training Date:** Enter the date the training was completed.

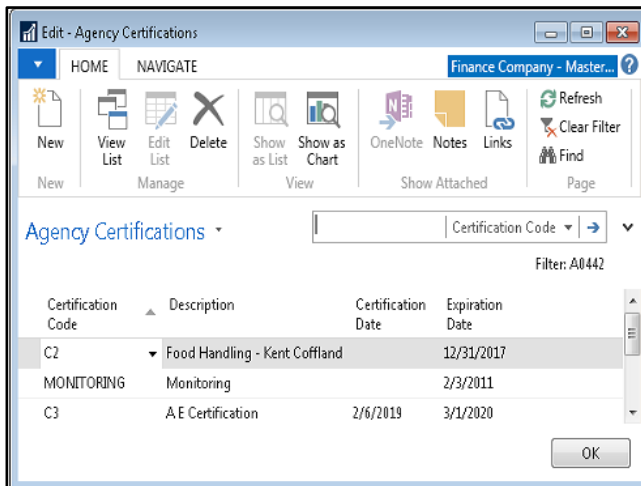
**Expiration Date:** Enter the date that the current training expires.

## Agency Certifications

1. Certification information is set at the Agency level. Certifications can be tracked based on expiration date. To enter the information, from the Agency Card, click Navigate → Agency → Agency Certifications



2. Update the fields in the Agency Certification Page. Click Home → New to add Agency Certifications:



**Certification Code:** Select a Code. To setup new Codes, click on the down arrow in the Certification Code field and then select Advanced → Actions → New. Input a Code and Description to identify the certification.

**Certification Description:** Automatically updates when a Code is selected.

**Certification Date:** Enter the date the Certification was completed.

**Expirate Date:** Enter the date the Certification expires.

## Related Topics

1. Agency Overview
2. Parent Agency Overview
3. Agency Order Overview
4. Agency Questionnaires
5. Agency Groups and Qualifiers
6. Agency UNC Activity Status by Group