



Agency Scheduling

Purpose of this document

The purpose of this document is to describe the process of creating and managing Food Bank shopping, pickup and delivery monthly schedules and Agency appointment times in Ceres. The Scheduling functionality may be used just in Ceres, or in conjunction with Agency Express 3.

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

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Creating Schedules and Appointments in Ceres

Scheduling in Ceres is based upon a Schedule Template and Location Code. There are currently three different types of Schedule Templates to work with:

1. Deliver
2. Pickup
3. Shopping

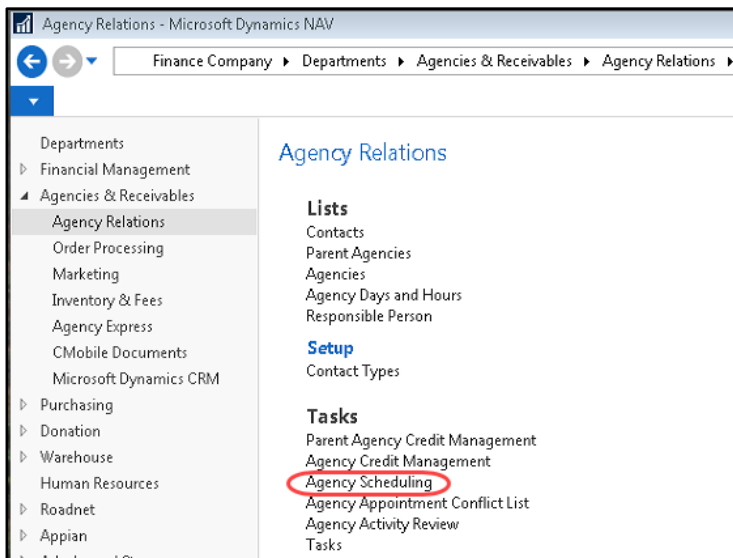
For each Schedule Template, it is possible to have one or more locations. For example, under the Deliver Schedule Template, we might want separate calendars for locations MAIN and OFFSITE. In such a scenario, we would need to create appointment lines for Schedule Template = Deliver and Location Code = MAIN, as well as Schedule Template = Deliver and Location Code = OFFSITE. The following sections will describe how best to set this up.

Note: If you use Agency Express the Schedule templates must be named exactly “Deliver”, “Pickup” and “Shopping” in order to function with Agency Express.

Creating Master Schedule Lines

The first step in the scheduling process is to create Master Schedule Lines for the Schedule Template and Location you wish to work with. Master Schedule Lines are essentially a blueprint for a particular calendar; they are not the actual appointment lines but rather appointments slots that appointment lines will eventually be created from. The following instructions and associated screenshots will provide added detail.

To create Master Schedule Lines, open the Agency Scheduling Matrix. This is accomplished from the Departments Menu by clicking Agencies & Receivables > Agency Relations > Agency Scheduling as illustrated:



Upon selecting Agency Scheduling, you will be taken into the Agency Scheduling form. From here, you will need to specify:

1. The Schedule Template you wish to use,
2. The Location Code you wish to work with, and the
3. Date Filter. (This defaults to the current date + 9 days)
 - a. To view other date ranges, hit either Next Set or Previous Set before “Show Matrix”.

Set buttons located at the top of the form. For this example, we are going to work with Schedule Template **Deliver** and Location Code **MAIN**.

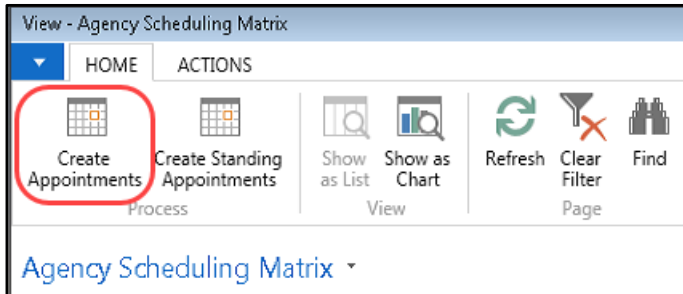
The screenshot shows the 'Edit - Agency Scheduling' window. The ribbon has 'HOME' and 'ACTIONS' tabs. Under 'ACTIONS', the 'Show Matrix' button is circled in red. Below the ribbon, the 'Agency Scheduling' section has a 'General' tab. It contains three filters: 'Schedule Template Filter' (set to 'DELIVER'), 'Location Filter' (set to 'MAIN'), and 'Date Filter' (set to '07/31/19..08/09/19'). An 'OK' button is located at the bottom right of the form.

Click Home → Show Matrix to view the appointment data for the Template, Location, and Date range. Currently there is no appointment data in this calendar.

The screenshot shows the 'View - Agency Scheduling Matrix' window. The ribbon has 'HOME' and 'ACTIONS' tabs. Under 'ACTIONS', there are buttons for 'Create Appointments', 'Create Standing Appointments', 'Show as List', 'Show as Chart', 'Refresh', 'Clear Filter', and 'Find'. Below the ribbon, the 'Agency Scheduling Matrix' section shows a table with the following headers: 'Appo... Time', '07/31/19-Maximum', '07/31/19-Scheduled', and '07/31/19-Standing'. The table body is currently empty.

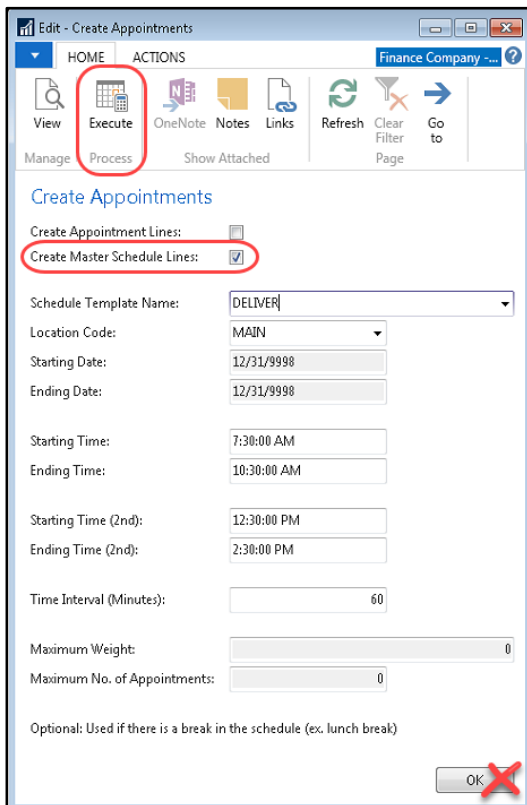
To generate appointments, we must first start by building the Master Schedule Lines. Select Actions > Functions > Create Appointments to open the Create Appointments page.

Note: In this example, the function to Create Appointments has been added to the Home ribbon for ease of access. You will run the function from whichever ribbon you have assigned it to.



From here you can specify information about the Calendar you wish to create.

The specific setup of Master Schedule Lines is flexible to allow customization per food bank. Be certain to include a Start Time and an End Time. If there will be a mid-day break (a lunch break for example) be sure to include a second Start Time and End Time as illustrated in the screenshot. Also, be sure to select the Create Master Schedule Lines checkbox. The Time Interval indicates how much time exists between appointments slots. In this example, the first appointment is at 7:30 and one occurs every hour through 10:30, with a lunch break and afternoon appointments starting at 12:30 and ending at 2:30.

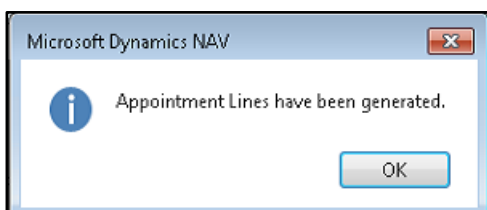


Note: Do not be concerned with the Starting Date and Ending Date when generating Master Schedule Lines, the 12/31/9998 is used behind the scenes for special processing, it does not concern us here.

When you are finished with your setup, hit the “Execute” button at the top of the page. Clicking OK cancels the task.

Note: In order to synchronize properly with Agency Express, Starting/Ending Times must include minutes that start with :00, :05, :10, :15, :20, through :55. It cannot start or end with any minute in-between five minute intervals. For example: 07:30:00 AM is a valid start time, but 07:32:00 AM is not.

When the master appointment lines are generated, you will receive a notification prompt:



You will notice that the Agency Scheduling Matrix now has a list of times on the right hand side of the page. These are the Master Schedule Lines, they form the general structure of the calendar. Without the master appointment lines generated, it would not be possible to create appointment lines.

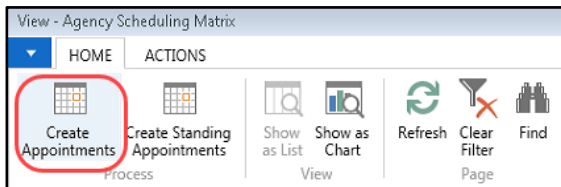
A screenshot of the 'Agency Scheduling Matrix' interface. The title 'Agency Scheduling Matrix' is at the top left. Below it is a table with four columns: 'Appo...', '07/31/19-Maximum', '07/31/19-Scheduled', and '07/31/19-Standing'. The first column is labeled 'Time' with a small upward arrow. The table contains a list of times from 7:30:00 AM to 2:30:00 PM in 30-minute increments. The first row, '7:30:00 AM', is highlighted in grey.

Appo...	07/31/19-Maximum	07/31/19-Scheduled	07/31/19-Standing
Time ▲			
7:30:00 AM			
8:30:00 AM			
9:30:00 AM			
10:30:00 AM			
12:30:00 PM			
1:30:00 PM			
2:30:00 PM			

Now that this has been completed, you can create Appointment Lines.

Creating Appointment Lines

Select Home > Create Appointments (or Actions → Functions → Create Appointments) to open the Create Appointments page.



Once the page has open, begin by selecting the Create Appointment Lines option. Next, select an appropriate Schedule Template Name, Location Code, Starting Date, and Ending Date. Starting Time and Ending Time must correspond to what was entered when creating the Master Schedule Lines. For example, if Master Schedule Lines are for 7:30am – 2:30pm, we could not create an Appointment Line for 3:30pm as no placeholder exists for it on the master calendar. The Time Interval will auto-populate based upon the Master Schedule Lines. Max Weight and Max No. of Appointments are set by user discretion. In this example, we have chosen a Max. No. of appointments per time slot of 1.

Note: If you are using Standing Appointments Only, this will need to be set to 0. Once all fields have been filled in, hit **Execute** to create Appointment Lines. As above, clicking OK cancels the task.

Edit - Create Appointments

HOME ACTIONS Finance Company ~...

View Execute OneNote Notes Links Refresh Clear Filter Go to

Manage Process Show Attached Page

Create Appointments

Create Appointment Lines: ☒

Create Master Schedule Lines: ☐

Schedule Template Name: DELIVER

Location Code: MAIN

Starting Date: 8/1/2019

Ending Date: 8/31/2019

Starting Time: 7:30:00 AM

Ending Time: 10:30:00 AM

Starting Time (2nd): 12:30:00 PM

Ending Time (2nd): 2:30:00 PM

Time Interval (Minutes): 60

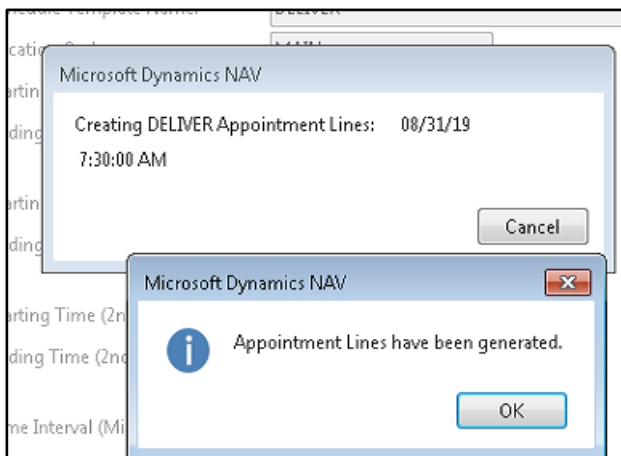
Maximum Weight: 0

Maximum No. of Appointments: 1

Optional: Used if there is a break in the schedule (ex. lunch break)

OK

A dialog box displays the process and when completed:



Click OK.

Once appointments have been created, you will notice that the Agency Scheduling Matrix has additional data under the Maximum column. This indicates that Appointment Lines have been

successfully generated. No data will appear in the Scheduled and Standing columns until later. At this point our Calendar is complete. Orders may now be scheduled against it.

Agency Scheduling Matrix ▾

Appo... Time	07/31/19-Ma...	07/31/19-Sc...	07/31/19-Sta...	08/01/19-Maximum	08/01/19-Scheduled	08/01/19-Standing	08/02/19-Ma...	08/02/19-Sch...	08/02/19-Sta...
7:30:00 AM				1				1	
8:30:00 AM				1				1	
9:30:00 AM				1				1	
10:30:00 AM				1				1	
12:30:00 PM				1				1	
1:30:00 PM				1				1	
2:30:00 PM				1				1	

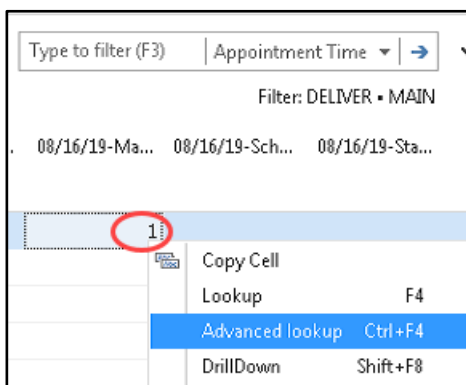
Note: This process must be completed for all combinations of Locations and Schedules that you are using.

Marking Days Off

Note: This must be done PRIOR to synchronizing schedules to Agency Express, if using.

If you anticipate being closed for a holiday, or will be operating on a revised schedule, you need to mark days/times off of the calendar. This prevents appointments from being scheduled during a time when the food bank is not open. In this example appointments have been created for the month of August. The Food Bank has a Company Picnic on August 16th, so appointments need to be removed for that day.

To do so, first make sure that the Matrix is displaying the time frame that includes the date you are planning to remove. (You may need to return to the Agency Scheduling start window and choose Next Set until that date is included). Once the Matrix opens, locate the date and right click the Maximum Appointments Column and select Advanced Lookup.



This opens the Appointment Detail Schedule window:

From here, select Actions → Functions → Check Remove Time on All.

Edit - Appointment Detail Schedule - DELIVER · MAIN · 8/16/2019 · 7:30:00 AM

HOME ACTIONS

Check Remove Time on All Uncheck Remove Time on All Remove Times

DELIVER · MAIN · 8/16/2019 · 7:30:00 AM

Filters

Schedule Template Name: DELIVER Appointment Date: 8/16/2019

Location Code: MAIN

Rem... Time	Appoin... Time	No. of Sched. Appts.	No. of Standing Appts.	Max. No. of Appointment...	Sched We
<input checked="" type="checkbox"/>	7:30:00 AM			1	
<input checked="" type="checkbox"/>	8:30:00 AM			1	
<input checked="" type="checkbox"/>	9:30:00 AM			1	
<input checked="" type="checkbox"/>	10:30:00 AM			1	
<input checked="" type="checkbox"/>	12:30:00 PM			1	
<input checked="" type="checkbox"/>	1:30:00 PM			1	
<input checked="" type="checkbox"/>	2:30:00 PM			1	

Once you have selected times to remove, hit Actions → Remove Times. Confirm that you wish to delete the lines by pressing “Yes”.

Edit - Appointment Detail Schedule - DELIVER · MAIN · 8/16/2019 · 7:30:00 AM

HOME ACTIONS Finance C

Check Remove Time on All Uncheck Remove Time on All Remove Times

DELIVER · MAIN · 8/16/2019 · 7:30:00 AM

Filters

Schedule Template Name: DELIVER Appointment Date: 8/16/2019

Location Code: MAIN

Rem...	Appoin...	No. of Sched. Appts.	No. of Standing Appts.	Max. No. of Appointment...	Scheduled Weight
<input checked="" type="checkbox"/>	7:30:00 AM			1	
<input checked="" type="checkbox"/>	8:30:00 AM			1	
<input checked="" type="checkbox"/>	9:30:00 AM			1	
<input checked="" type="checkbox"/>	10:30:00 AM			1	
<input checked="" type="checkbox"/>	12:30:00 PM			1	
<input checked="" type="checkbox"/>	1:30:00 PM			1	
<input checked="" type="checkbox"/>	2:30:00 PM			1	

Microsoft Dynamics NAV

? You are about to permanently delete 7 Appointment Lines. Lines with booked appointments or that have been sent to the web will not be deleted. Continue?

Yes No

All appointment lines for August 16th are now deleted and cannot be scheduled against as they no longer exist.

Agency Scheduling Matrix

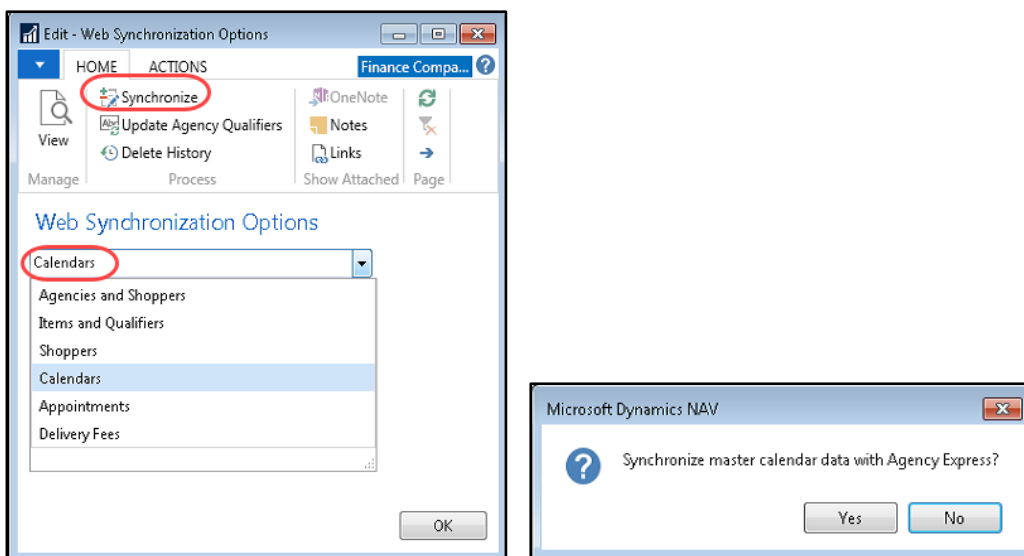
Appo... Time	08/1... Sched...	08/10/1... Schedu...	08/10/... Sched...	08/1... Sched...	08/1... Sched...	08/11... Sched...	08/12/1... Sched...	08/12/... Sched...	08/12... Sched...	08/13... Sched...	08/13/... Sched...	08/13/... Sched...	08/14/... Sched...	08/14/... Sched...	08/14/... Sched...	08/15/19... Sched...	08/15/19... Sched...	08/15/19-S... Sched...	08/16/19-Maxi... Sched...
7:30:00 AM							1			1			1						
8:30:00 AM							1			1			1						
9:30:00 AM							1			1			1						
10:30:00 AM							1			1			1						
12:30:00 PM							1			1			1						
1:30:00 PM							1			1			1						
2:30:00 PM							1			1			1						

Synchronizing Appointments (Calendars and Appointment Lines)

Before Creating Standing Appointments, it is recommended that you first Synchronize Calendars and Appointments. Standing Appointments are sent to AE as soon as they are generated, so it is better to have the 'template' for those standing appointments sent to the Web before you create them.

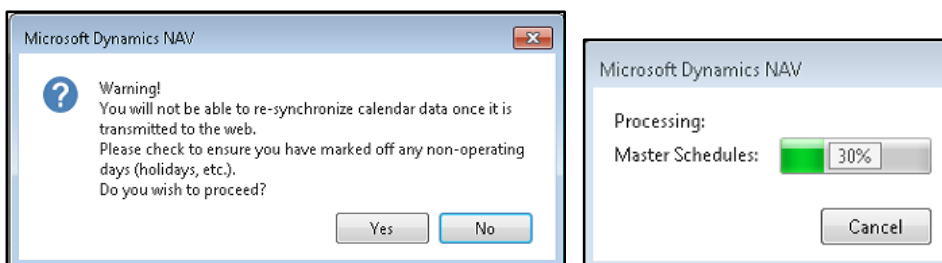
There are two pieces of scheduling data to be synchronized: **Calendar data** (In the Web Processing Queue they display as Type = "Schedule Master" entries and in the folder structure for AE, they are ISM files) and **Appointment data** (In the Web Processing Queue they display as Type = "Appointment" entries and ISQ files for AE).

To synchronize Calendars, go to Web Synchronization Options and choose Calendars in the drop-down. Then Home → Synchronize (clicking OK does nothing):



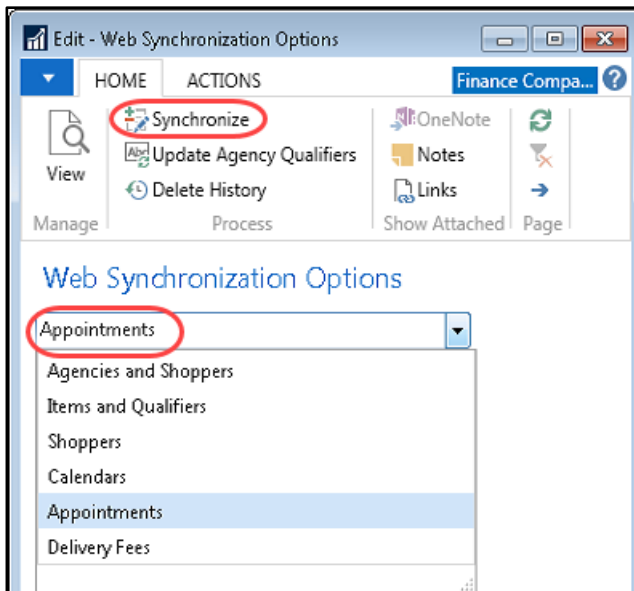
Note: Once you synchronize a calendar with the web you cannot make additional changes to it. For example, if you synchronize a calendar and realize later that you forgot to mark off a holiday, you must reach out to TechBridge as you cannot remove that date after the calendar has been synchronized. It is extremely important to make sure your calendar is correct before you send it to the web.

Click YES to Synchronize. A Warning will pop-up to confirm that you have confirmed your dates before you send the Calendar to AE:



When the Master Calendar has been synchronized, it will return you to the Web Synchronization Options window.

To synchronize appointment, select Appointments from the drop-down, then Home → Synchronize:



In the Web Processing Queue, Calendar entries will display as Type = Schedule Master:

Unprocessed Entries						
Web Processing Queue (Filtered)						
Process Outbox	Process Inbox	Statistics	Refresh View	Reset	Find	Filter
Inbound...	Type	Action	ID			Date
Outbound...						
Outbound	Schedule Master	Send	DELIVER	MAIN	08/01/1907:30 AM	8/1/2019

Appointments will display as Type = Appointment.

Note: If you use Standing Appointments only (no open or pre-reservation appointments) for a calendar, you will not see any appointment lines until you generate Standing Appointments.

Creating Standing Appointments

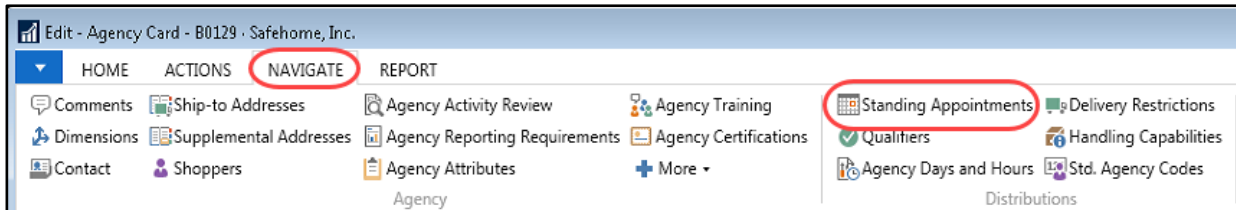
Standing Appointments are default appointment days/ times that can be established for Agencies. Using Standing Appointments only (Maximum No. of Appointments = 0) for certain calendars means that the Agencies cannot free-select appointments on AE, but must choose from available standing appointments. There are two ways to create standing appointments in Ceres:

1. Automatically via the Create Standing Appointment batch routine
2. Create standing appointments manually (usually single appointments as needed)

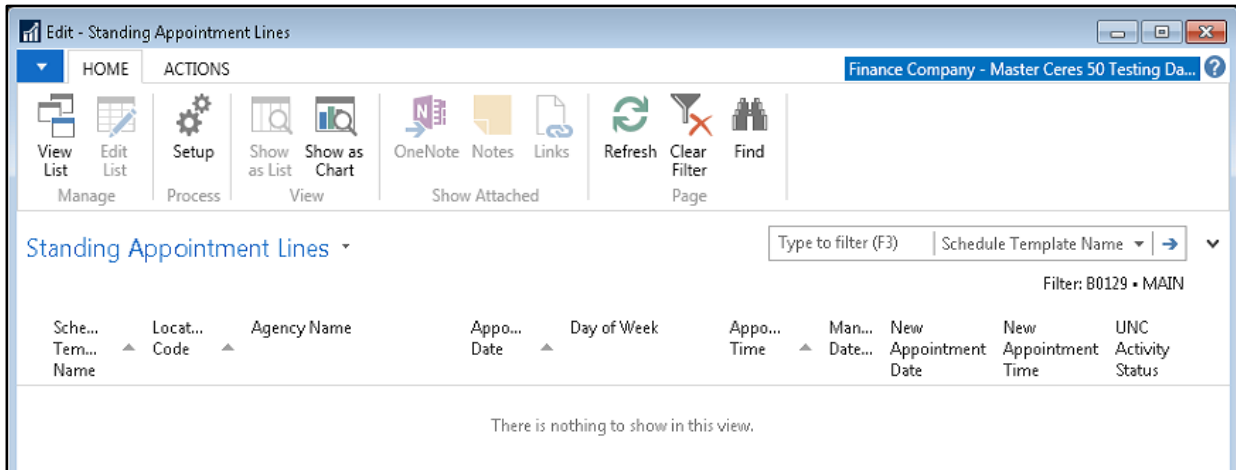
Automatic Standing Appointments

To automatically create standing appointments, you must first complete Standing Appointment Setup for the agencies in question. Once the Standing Appointment Setup (template) has been completed for an agency, it should not need to be modified unless a change has occurred due to their hours of operation or to the schedule itself).

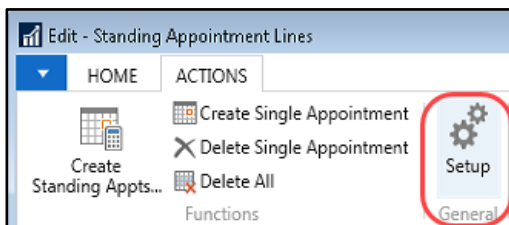
From an Agency card, select Navigate → Distributions → Standing Appointments:



This opens the Standing Appointment Lines for that Agency. If no standing appointment lines exist, that is because they have not been created yet.



To open Standing Appointment Setup, click the Setup option from Actions → General:



If a template already exists, then the setup lines will display, if not, you will need to create the template lines per the needs of the foodbank and agency:

Agency No.	Schedule Template Name	Location Code	Description	Week No. in Month	Day of Week	Date in Month	Appointment Time	Every X Weeks	Every X Weeks Last Appointment Date
B0129	DELIVER	MAIN	1st Wednesday of month	1	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	Third Wednesday of month	3	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	25th of month	0		25	9:30:00 AM	0	
B0129	DELIVER	MAIN	Every 3 weeks	0		0	10:30:00 AM	3	7/25/2019

Agency No: The agency number that is associated with the standing appointment setup.

Schedule Template Name: Enter which type of standing appointment is being created. Enter either PICKUP or DELIVER.

Location Code: Enter the location for the appointment. This should always match the location this agency is serviced from.

Description: This field allows you to enter a description matching the setup for others to easily see what the standing appointment setup is. Examples would be “Every Wednesday” or “1st Thursday of the Month”.

Week No. In Month: Use this field to specify which occurrence of the appointment day in the month (1-5). Entering a 2 here would indicate the 2nd occurrence of the appointment date in each month. If any Agency has appointments on the 2nd and 4th Wednesdays in a month, it would be necessary to enter these only multiple lines, one with a 2 in the field and a second line with a 4 in this field. If the agency has an appointment every week, simply enter a zero (0) in this field indicating that the appointment occurs every week.

Day of Week: Enter the day of the week the appointment is scheduled on. The drop down will allow you to choose from all 7 days.

Date in Month: This field is used when the appointment doesn’t fall on a particular day but rather on a date in the month. For example if the agency always picks up on the 1st of the month you would enter a 1 here. If this field is used, then you should not be entering any information in the Week No. in Month field or the Day of Week field. They are mutually exclusive. If the agency picks up twice a month on the 1st and 15th, you would setup this up on to different lines one for each pickup.

Appointment Time: Enter the time slot for the appointment. This field is validate in the Master Schedule and must be a valid time slot for the Schedule Template Name and Location Code provided.

Every 'X' Weeks: Use this field in place of the Day of Week and Day of Month for appointments that occur every 'X' weeks where X represent the number of weeks between appointments. For example, if any agency had a delivery every 2 weeks, you would enter a 2 here. Enter any number greater than 1.

Every 'X' Weeks Last Appointment Date: Enter the date of the last appointment date when using Every 'X' Weeks appointments. This will be used to calculate the next appointment for the agency.

Agency No.	Schedule Template Name	Location Code	Description	Week No. in Month	Day of Week	Date in Month	Appointment Time	Every X Weeks	Every X Weeks Last Appointment Date
B0129	DELIVER	MAIN	1st Wednesday of month	1	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	Third Wednesday of month	3	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	25th of month	0		25	9:30:00 AM	0	
B0129	DELIVER	MAIN	Every 3 weeks	0		0	10:30:00 AM	3	7/25/2019

Example Standing Appointment Setup

The first Standing Appointment Setup Line indicates scheduling standing appointments for agency **B0129** every **first Wednesday** of the month at **9:30am**.

Line number two indicates scheduling a standing appointment for the same agency on the **third Wednesday** day of every month at **9:30am**.

Line number three indicates scheduling standing appointments on the **25th** of every month at **9:30am**.

Line number four indicates using a setting for every x number of weeks (**cannot be set to 1 or used with Week No. in Month, Day of Week or Date in Month**). In the Last Appointment Date column, use a date that will correspond with the last appointment date before the first appointment date for this agency based on. When Create Standing Appointments is run, the system will update the "Every X Weeks Last Appointment Date" with the last standing appointment created for the time frame, so that the system knows where to start the next time the process is run.

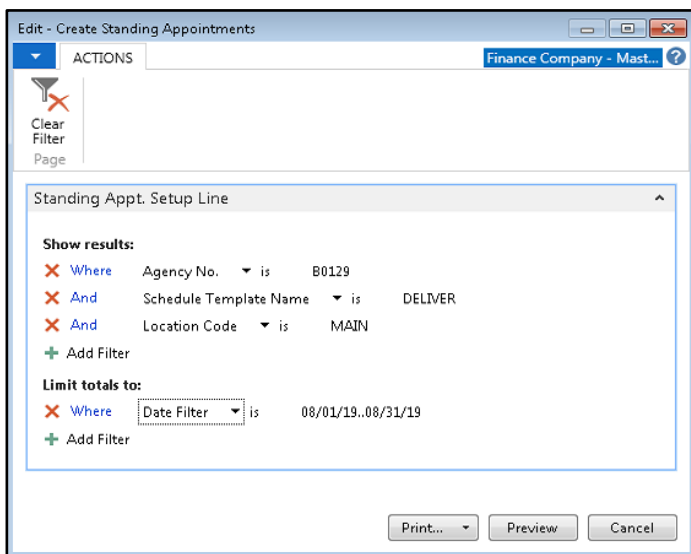
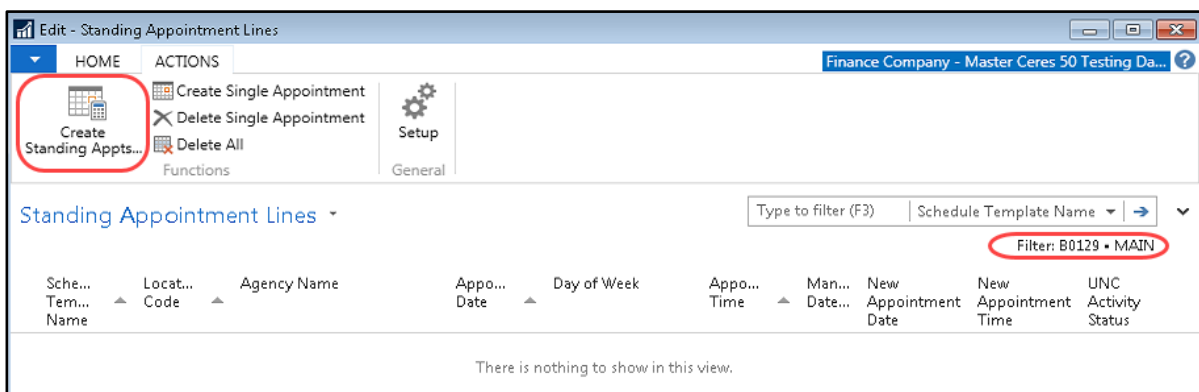
Once satisfied with the Setup page, hit OK to go back to the Standing Appointments page.

Note: Standing Appointment Setup is generally relatively static. In other words, you shouldn't anticipate having to change this very often once completed unless an agency, or even the food

bank, deems it necessary. You will need to complete this for any agency that you wish to automatically create standing appointments for, but once setup is complete, you should not need to revisit often.

Creating Standing Appointments from the Agency Card (less common):

Now that setup is complete, you can automatically create appointments for this agency. This is done by selecting Actions → Functions → Create Standing Appointments. You will notice that the Create Standing Appointments routine is pre-filtered for the agency you are working with. We will run the routine globally in the next section, but for now, leave the agency filter in place. You will need to enter a date filter. Typically we enter a date filter that matches the date range for the calendar we just created. Because we just created appointment for the month of January, we will create standing appointment for the month of January as well. Once the filter has been entered, hit Preview to create standing appointments for your agency.



If any errors occurred during this process and a standing appointment cannot be created, an exception report will print indicating this fact. In this case, no errors occurred so the exception report would not show any data. You will now notice that standing appointments have been created for this particular agency.

Edit - Standing Appointment Lines

HOME

ACTIONS

Create Standing Appts...

Create Single Appointment

Delete Single Appointment

Delete All

Setup

General

Finance Company - Master Ceres 50 Testing Dat...

Standing Appointment Lines

Type to filter (F3)

Schedule Template Name

Filter: B0129 • MAIN

Sche... Tem... Name	Locat... Code	Agency Name	Appo... Date	Day of Week	Appo... Time	Man... Date...	New Appointment Date	New Appointment Time	UNC Activity Status
DELIVER	MAIN	Safehome, Inc.	8/7/2019	Wednesday	9:30:00 AM				ACTIVE
DELIVER	MAIN	Safehome, Inc.	8/15/2019	Thursday	10:30:00 AM				ACTIVE
DELIVER	MAIN	Safehome, Inc.	8/21/2019	Wednesday	9:30:00 AM				ACTIVE
DELIVER	MAIN	Safehome, Inc.	8/26/2019	Monday	9:30:00 AM				ACTIVE

The reason there is no appointment for 8/25/19 is that it falls on a Sunday, so the system generated an appointment for the next available calendar date, 8/26/19.

Notice that the Every X Weeks Last Appointment Date in Setup was updated to account for the most recent appointment date:

Standing Appt. Setup Lines									
Type to filter (F3)					Agency No.				
Agency No.	Schedule Template Name	Location Code	Description	Week No. in Month	Day of Week	Date in Month	Appointment Time	Every X Weeks	Every X Weeks Last Appointment Date
B0129	DELIVER	MAIN	1st Wednesday of month	1	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	Third Wednesday of month	3	Wednesday	0	9:30:00 AM	0	
B0129	DELIVER	MAIN	25th of month	0		25	9:30:00 AM	0	
B0129	DELIVER	MAIN	Every 3 weeks	0		0	10:30:00 AM	3	8/15/2019

Creating Standing Appointment for Multiple Agencies (most common)

Creating standing appointments for multiple agencies at a time is the most common function. This is done through the Agency Scheduling Matrix. From the Agency Scheduling Matrix, select Actions → Functions → Create Standing Appointments.

View - Agency Scheduling Matrix

HOME ACTIONS

Finance Company - Master Ceres 50 Testing Data...

Create Appointments

Create Standing Appointments

Show as List

Show as Chart

Refresh

Clear Filter

Find

Process

View

Page

Agency Scheduling Matrix

Type to filter (F3)

Appointment Time

Filter: DELIVER • MAIN

Appo... Time

08/01/19-...

08/01/1...

08/01/...

08/0...

08/0...

08/02...

08/03/1... Schedule Available

08/03/... Sched...

08/03... Sched...

08/04... Sched...

08/04/... Sched...

08/04/... Sched...

08/05/... Sched...

08/05/... Sched...

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This will open the same request form as before. In this case, an Agency No. filter will not be displayed as you are creating standing appointments for all applicable agencies. Schedule Template Name and Location Code will default based upon the calendar opened before selecting Create Standing Appointments. You must input the Date Filter.

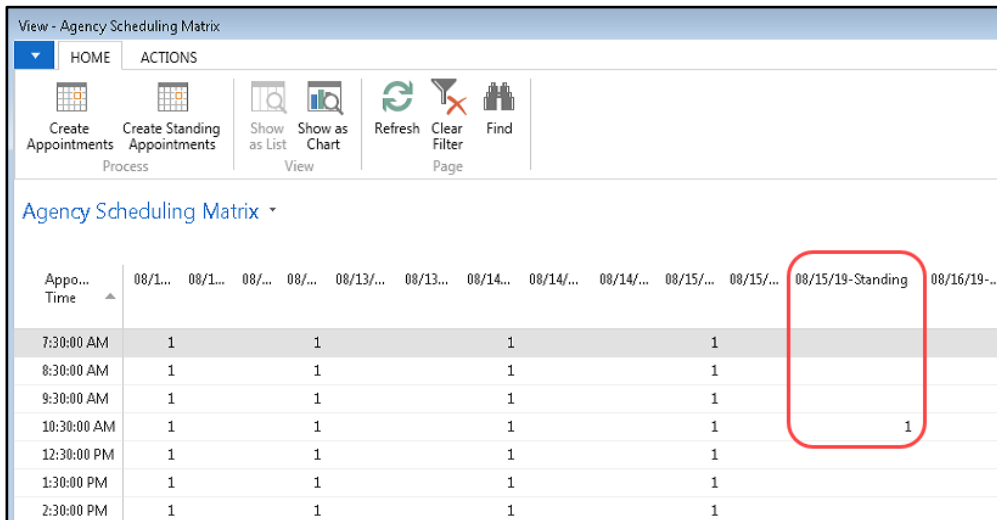
Note: This process can only be run for an entire month (the dates created are based on the appointment lines you created earlier and may not be for an entire month if that's how you schedule). The report cannot run without it. Confirm entries then hit preview (or Print if you want a .pdf or printout) to create standing appointments for all agencies based on settings.

If any exceptions are encountered, you will receive a notification and an exception report will display:

Create Standing Appointments						
Standing Appointment Exceptions						
Ceres 5.0 Testing						
8/1/2019 3:15 PM						
Page 1						
ESOPROVCJW						
Agency No.	Schedule Template Name	Location Code	Appt. Date	Appt. Time	Comment	
B0129	DELIVER	MAIN	8/7/2019	9:30 AM	Standing Appointment Line already exists for this program.	
	DELIVER	MAIN	8/21/2019	9:30 AM	Standing Appointment Line already exists for this program.	
	DELIVER	MAIN	8/28/2019	9:30 AM	Standing Appointment Line already exists for this program.	
Total records skipped for Agency B0129						3
Total Records Skipped						3

Exceptions were reported because I previously created the appointments for B1029 from the Agency Card.

Standing appointments are now reflected on our calendar. In this example, we have a standing appointment on the 15th at 10:30 am. Once this standing appointment is used on an order, it will be deleted and replaced by a scheduled appointment (this process is explained in greater detail in the *AE3 Managing Web Orders* document), and will display under the Scheduled column instead.

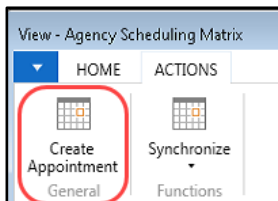


The screenshot shows the 'View - Agency Scheduling Matrix' interface. It includes a top navigation bar with 'HOME' and 'ACTIONS' tabs. Below the navigation bar are icons for 'Create Appointments', 'Create Standing Appointments', 'Show as List', 'Show as Chart', 'Refresh', 'Clear Filter', and 'Find'. The main area displays the 'Agency Scheduling Matrix' table. The table has columns for appointment times and dates. A red box highlights the cell for the date '08/15/19-Standing' at the time '10:30:00 AM', which contains the value '1'.

Appo... Time	08/1...	08/1...	08/...	08/...	08/13/...	08/13...	08/14...	08/14/...	08/14/...	08/15/...	08/15/...	08/15/...	08/15/19-Standing	08/16/19-...
7:30:00 AM	1			1			1			1				
8:30:00 AM	1			1			1			1				
9:30:00 AM	1			1			1			1				
10:30:00 AM	1			1			1			1			1	
12:30:00 PM	1			1			1			1				
1:30:00 PM	1			1			1			1				
2:30:00 PM	1			1			1			1				

Manually Creating (SINGLE) Standing Appointments

You can manually create a single standing appointment (an appointment without an Order yet) from the Agency Scheduling Matrix by selecting Actions → General → Create Appointment.



Most of the fields will default based upon the calendar. You will however need to specify an Agency and an Appointment Date. When satisfied with entries, hit Create Appt. to create the standing appointment.

The image displays two side-by-side screenshots of a web application window titled "Edit - Create Single Appointment". The window has a ribbon interface with tabs for "HOME" and "ACTIONS". Under the "HOME" tab, there are icons for "View", "Create Appt", "Notes", and "Links". The "ACTIONS" tab is active, showing a "Finance C..." button. The main content area is titled "Create Single Appointment" and contains the following fields:

- Schedule Template Name: DELIVER (dropdown menu)
- Location Code: MAIN (dropdown menu)
- Agency No.: A0592 (dropdown menu)
- Appointment Date: 8/13/2019 (dropdown menu)
- Appointment Time: 7:30:00 AM (text input)

An "OK" button is located at the bottom right of the form.

Note: You can also create a single appointment from the Agency Card (or by highlighting the Agency in the LIST view) by going to Navigate → Distributions → Standing Appointments → Actions → Functions → Create Single Appointment (or you can add the function to your Action Pane).

Note: It is not necessary to Synchronize Appointments after generating Standing Appointments as they are immediately dropped in the Web Processing Queue for handling as soon as they are created.

Related Topics

1. Agency Express Managing Web Orders
2. Agency Order Overview
3. Agency Overview
4. Agency Express Overview of File Structure and Data Synching
5. Agency Express 3 Agencies, Shoppers and Items