

Parent Agency Overview

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Purpose of this document

This document describes the fields available for a Parent Agency and how to set up a Parent Agency.

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Purpose

Generally Parent Agencies are the entities that receive billing for orders distributed to its agencies. One or more Agencies may be linked to a single Parent Agency. Parent Agencies can be used to track receivables and produce consolidated statements for all of its Agencies. This document describes the fields available for a Parent Agency.

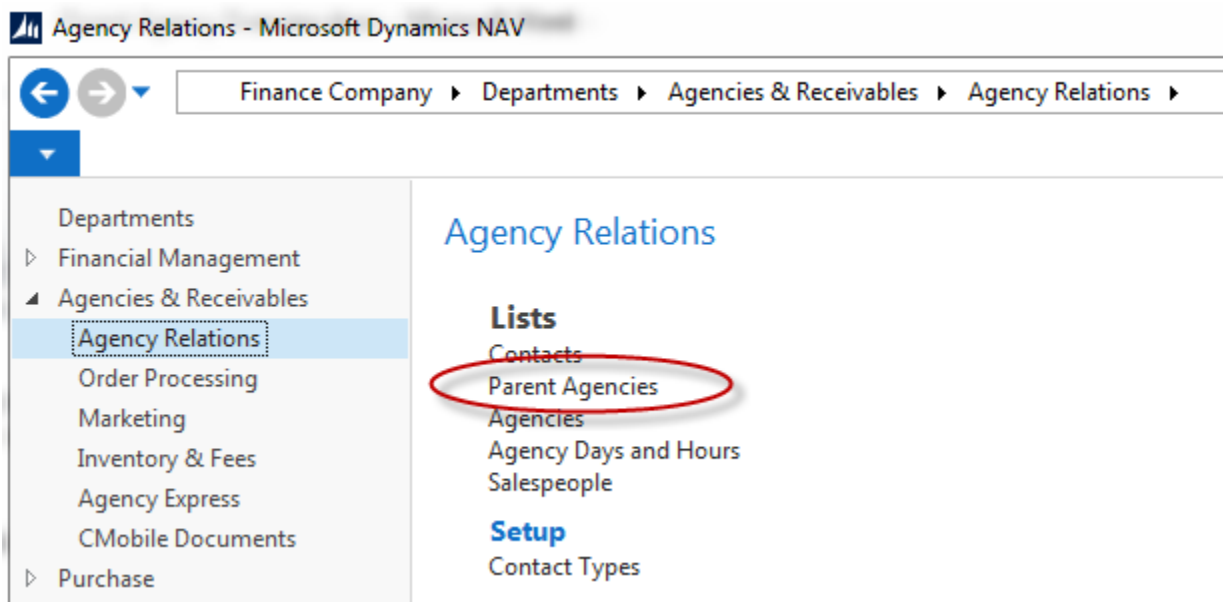
All transactions related to an Agency will also be linked to the Parent Agency specified on the Agency Card. The transaction entries contain a separate field referencing the Parent Agency. This includes Agency Ledger Entry (Parent Agency No.), Item Ledger Entry (Parent Source No.), and G/L Entry (Parent Source No.)

Note: The “Use Parent Agency” setting in Agency & Receivables must be checked in order to link Agencies to Parent Agencies. If this setting is not checked the Parent Agency No. field will be unavailable on the Agency Card.

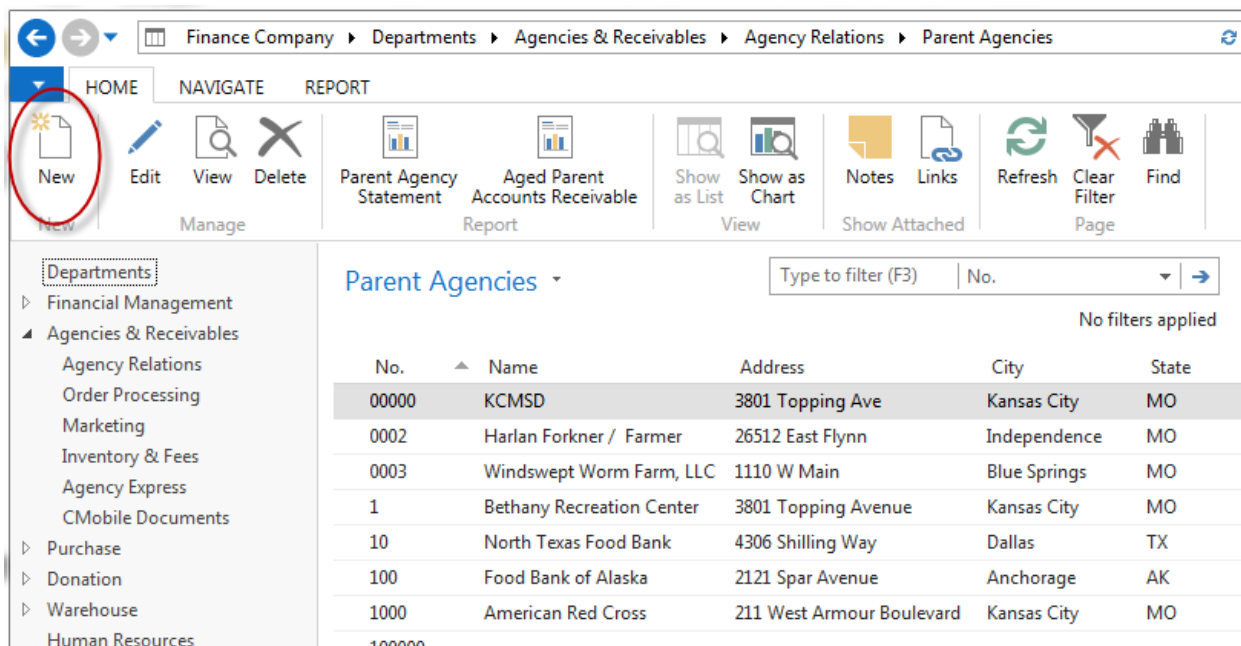
Ceres Object release 4.00.00 is required for the functionality described in this document.

Accessing Parent Agencies

1. The Parent Agencies card can be accessed from Departments → Agencies & Receivables → Agency Relations → Parent Agencies. You will see the listing of Parent Agencies that exist within Ceres. This List provides a quick glance of the Parent Agencies, contact information, responsible branch, default location and status.



- Click New on the Home Ribbon to create a new Parent Agency. Parent Agencies may be edited by highlighting Parent Agency in the List, then right clicking and selecting Edit (or by double clicking on the record).



Finance Company > Departments > Agencies & Receivables > Agency Relations > Parent Agencies

HOME NAVIGATE REPORT

New Edit View Delete Parent Agency Statement Aged Parent Accounts Receivable Show as List Show as Chart Notes Links Refresh Clear Filter Find

Departments

- Financial Management
- Agencies & Receivables
 - Agency Relations
 - Order Processing
 - Marketing
 - Inventory & Fees
 - Agency Express
 - CMobile Documents
- Purchase
- Donation
- Warehouse
- Human Resources

Parent Agencies

Type to filter (F3) No. No filters applied

No.	Name	Address	City	State
00000	KCMSD	3801 Topping Ave	Kansas City	MO
0002	Harlan Forkner / Farmer	26512 East Flynn	Independence	MO
0003	Windswept Worm Farm, LLC	1110 W Main	Blue Springs	MO
1	Bethany Recreation Center	3801 Topping Avenue	Kansas City	MO
10	North Texas Food Bank	4306 Shilling Way	Dallas	TX
100	Food Bank of Alaska	2121 Spar Avenue	Anchorage	AK
1000	American Red Cross	211 West Armour Boulevard	Kansas City	MO
100000				

General Tab

1012 · Harvest Church

General

No.: 1012 Phone Ext. No. :

Name: Harvest Church Contact: Pastor Steve Houpe

Name 2: Search Name: HARVEST CHURCH

Address: 4300 N. Corrington Balance (\$): 0.00

Address 2: Credit Limit (\$): 500.00

City: Kansas City Sales (\$): 0.00

State: MO Lbs. Distributed: 0.00

ZIP Code: 64117 Blocked:

Phone No. : 816-455-7777 Last Date Modified: 7/16/2012

Last Modified By: KJK

Show fewer fields

No.: This is the main identifier for the Parent Agency, which can be entered as any combination of text and numbers. Ceres can be set up to automatically number each Parent Agency Card for you, or you can enter the number manually.

Name: Enter the Parent Agency's name. You can enter a maximum of 50 characters, both numbers and letters. The contents of the Name field are typically printed on invoices and similar documents. Therefore enter the name as you want it to appear.

Name 2: An extension of the Name field. This field can be used for names longer than 50 characters. This field is also 50 characters in length.

Address: Enter the Parent Agency's address. The address should be the physical street address of the Parent Agency.

Additional addresses, phone numbers, and contact information can be setup using the Supplement Address functionality. A Supplemental Addresses FactBox displays to the right of the Card. This FactBox provides a link to any Supplemental Addresses that have been setup for this Parent Agency. See the Supplemental Address documentation for more information.

Address 2: An extension of the Parent Agency's address, such as a suite number or building number. Up to 50 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

City: Enter the city where the Parent Agency is located.

State: Enter the state where the Parent Agency is located.

Zip Code: Enter the zip code where the Parent Agency is located.

Note: If you fill in the zip code field with a zip code that is linked to a single city in the zip code table, Ceres will fill in the city field automatically. If there is more than one city linked to the zip code, Ceres displays a list of the relevant cities for you to choose from. If the zip code is not set up in the zip code table, you must enter the city manually.

Phone No.: Enter the primary phone number for this Parent Agency. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890, is recommended. The value entered here will also appear on the Communication FastTab.

Phone Ext. No.: Field for entering a phone extension up to 6 characters.

Contact: Enter the name of the person you regularly contact when you do business with this Parent Agency.

Search Name: Automatically defaults to the Name field but can be overridden. This can be used as an alternative field from which to search or find the Parent Agency.

Note: If the search name was inserted automatically by Ceres, it will be changed each time you change the Name field. If you inserted the search name manually, it will not be changed automatically when the Name field is changed.

Balance (\$): This field displays, in \$, the Parent Agency's current balance. This is the total for all Agencies linked to this Parent Agency. Ceres automatically calculates and updates the contents of the field using the entries in the Amount (\$) field in the Agency Ledger Entries. You can filter the Balance (\$) field so that its contents are based only on certain Agencies or a date range. To see entries that make up the amount shown, click the AssistButton in the field.

Credit Limit (\$): This field displays, in \$, the Parent Agency's credit limit. This is the total of the credit limits for all Agencies linked to this Parent Agency. Ceres automatically calculates and updates the contents of the field using the entries in the Credit Limit (\$) field in the Agency table. To see the entries that make up the amount shown, click the AssistButton in the field

Sales (\$): This field displays, in \$, the Parent Agency's fees. This is the total for all agencies linked to this Parent Agency. Ceres automatically calculates and updates the contents of the field using the entries in the Amount (\$) field in the Agency Ledger Entries. You can filter the Sales (\$) field so that its contents are based only on certain Agencies or a date range. To see the entries that make up the amount shown, click the AssistButton in the field.

Lbs. Distributed: This field displays, in LBs, the Parent Agency's total weight distributed. This is the total for all Agencies linked to this parent agency. Ceres automatically calculates and updates the contents of the field using the entries in the Ext. Gross Weight field in the Item Ledger Entries. You can filter the Lbs. Distributed field so that its contents are based only on certain Agencies or a date range. To see the entries that make up the amount shown, click the AssistButton in the field.

Default Branch Code: If the food bank has several branches responsible for the administration of different agencies, you may enter the Default Branch Code to designate which branch is responsible for this Parent Agency.

Blocked: The blocked field is used to designate which transactions are allowed for this Parent Agency. Allowable choices are:

Blank - Any transaction is allowed for this parent agency.


Ship – New agency orders and shipments cannot be created for this parent agency. Existing shipments not yet invoiced can be invoiced.

Invoice – New agency orders, new shipments and new invoices cannot be created for this parent agency. Existing shipments not yet invoiced cannot be invoiced.

All – No transaction is allowed for this parent agency, including payments.

Note: Agencies can be setup to have their billing related documents (Invoices, Statements, etc.) sent to the Parent Agency's address if desired. This is accomplished the checking the "Send Invoice to Parent Agency" field on the Invoicing FastTab of the Agency Card.

Communications Tab

Communication			
Phone No. :	<input type="text" value="816-455-7777"/> 	E-Mail:	<input type="text"/>
Phone Ext. No. :	<input type="text"/>	Home Page:	<input type="text"/>
Fax No.:	<input type="text"/>		

Phone No.: Enter the primary phone number for this Parent Agency. If entered on the General FastTab, the same number will be entered here and vice versa:


Phone Ext. No.: Enter the phone extension for the phone number above. If entered on the General FastTab, the same number will be entered here and vice versa.

Fax No.: Enter the Parent Agency's fax telephone number. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890.

E-Mail: Enter the Parent Agency's e-mail address. You can enter a maximum of 80 characters, both numbers and letters. In the field is a button with a picture of an envelope on it. If Ceres is integrated with an e-mail system, you can click this button to open a window in which you can create and send a message. If you have entered an address in the E-mail field, Ceres automatically fills in this address in the To... field.

Home Page: Enter the Parent Agency's home page address. You can enter a maximum of 80 characters, both numbers and letters. Ceres is integrated with the Internet; you can click the button to the right of the field to access the parent agency's home page.

Invoicing Tab

Invoicing	
Invoice Copies:	<input type="text"/> 

Invoice Copies: Enter the default number of invoice copies that you would like to print for this Parent Agency. This number refers to copies in addition to the original. Entering a number of 1 here will result to 2 documents printed, the original and one copy. The default entered here may be overridden by the Default No. of Copies setup. See the Default No. of Copies document for more information.

Shipping Tab

Shipping ^	
Default Location Code:	<input type="text"/>

Default Location Code: Enter the default location code for the Parent Agency. If the field contains a location code, Ceres will automatically assign the Location Code to new Agencies created for this Parent Agency. If an Agency has a default Location Code, Ceres will suggest items from that particular inventory location when you enter Agency Orders.

501(c)(3) Tab

501(c)(3) ^			
501(c)(3) No.:	<input type="text"/>	501(c)(3) Adv. Ruling No.:	<input type="text"/>
501(c)(3) Name:	<input type="text"/>	501(c)(3) Shared No.:	<input type="text"/>
501(c)(3) Expiration Date:	<input type="text"/>	501(c)(3) Shared:	<input type="checkbox"/>
501(c)(3) Contact:	<input type="text"/>	501(c)(3) Date Received:	<input type="text"/>
501(c)(3) Phone No.:	<input type="text"/>	Church Qualifier Name:	<input type="text"/>
501(c)(3) Adv. Ruling End Date:	<input type="text"/>	Letter of Umbrella:	<input type="text"/>

501(c)(3) No.: Enter the 501(c)(3) number for this Parent Agency. This number can be different than the individual Agencies that are associated this Parent Agency.

501(c)(3) Name: Enter the 501(c)(3) name for this Parent Agency

501(c)(3) Expiration Date: Enter the date when the Parent Agency's 501(c)(3) status expires.

501(c)(3) Contact: Enter person to contact related to the Parent Agency's 501(c)(3) status.

501(c)(3) Phone No.: Enter the phone number of the associated contact.

501(c)(3) Adv. Ruling End Date: Enter the date when the Parent Agency's 501(c)(3) Advanced Ruling expires

501(c)(3) Adv. Ruling No.: Enter the 501(c)(3) Advanced Ruling Number

501(c)(3) Shared No.: Enter the 501(c)(3) Shared Number for this Parent Agency.

501(c)(3) Shared: Put a checkmark if the Parent Agency's 501(c)(3) status is shared with the individual Agencies that are associated with this Parent Agency. When this field is checked the 501(c)(3) information will automatically flow to Agencies associated with the Parent agency.

501(c)(3) Date Received: Enter the date the Parent Agency's 501(c)(3) status was granted.

Church Qualifier Name: Enter the name of the Church this Parent Agency qualified for non-profit status.

Letter of Umbrella: Enter the Letter of Umbrella this Parent Agency is operating under for non-profit status.

Related Topics:

1. Agency Overview
2. Agency Profiles
3. Supplemental Addresses
4. Default Report Copies
5. Agency and Donor Email Documents