

Supplemental Addresses

Purpose of this document

Supplemental Addresses can be used to document additional addresses for various entities. They are in addition to the base site address and shipping address. Supplemental Addresses are available for Parent Agencies, Agencies, Parent Vendors, Vendors, Parent Donors, and Food Drive Donors.

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

Supplemental Addresses Page 1 of 27 Last Reviewed 6/15/2020

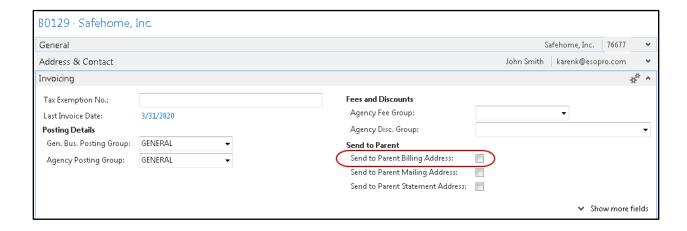
Table of Contents

SUPPLEMENTAL ADDRESS OPTIONS	3
SUPPLEMENTAL ADDRESSES SETUP	4
SHARED SUPPLEMENTAL ADDRESS SETUP	11
SHARING A SUPPLEMENTAL ADDRESS	14
SUPPLEMENTAL ADDRESS FLOW	17
AGENCY ADDRESSESVENDOR ADDRESSESDONOR AND FOOD DRIVE DONOR ADDRESSES	21
REPORTS	26
APPIAN	27
RELATED TOPICS	27

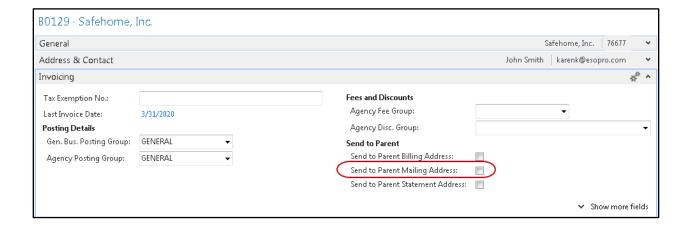
Supplemental Address Options

The following options are supported with Supplemental Addresses. Multiple addresses of a given Type can be defined per source. However, only one address (at a time) can be marked as the default for the source. For example, you can have multiple address of Type Billing Address but only one of them can be marked as the Default Billing Address for a given Agency.

Billing Address - This option applies to Parent Agencies and Agencies. A Send to Parent Billing Address field exists on the Invoicing FastTab of the Agency Card. Check the Send to Parent Billing Address field if you want the Parent Agency's billing address to be the default instead of the Agency's billing address.



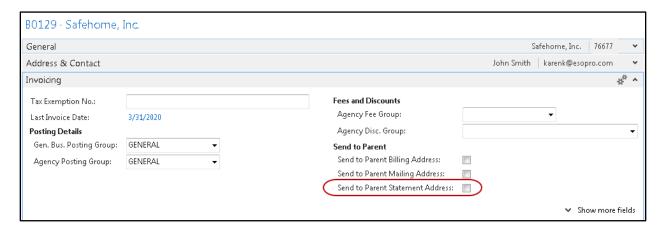
Mailing Address - This option applies to Parent Agencies, Agencies, Parent Vendors, Vendors, Parent Donors, Donors, and Food Drive Donors. A Send to Parent Mailing Address field exists on the Invoicing FastTab of the Agency, Vendor, and Donor Cards. Check the Send to Parent Mailing Address field if you want the Parent Agency, Parent Vendor, or Parent Donor mailing address to be the default instead of the Agency, Vendor, or Donor mailing address.



Ship-To Address. This option applies to Agencies only. *Each site should decide whether they are going to use the Supplemental Ship-To Address functionality or the base Ceres Ship-To Address functionality. Both should not be deployed.* The Supplement Ship-To Address will automatically flow to the Agency Order whereas the Ship-To Address will only flow if a Ship-To Code is manually selected on the Agency Order. See Agency Ship To Addresses for more information on that functionality.

Buy-from / Order Address – This option applies to Vendors only.

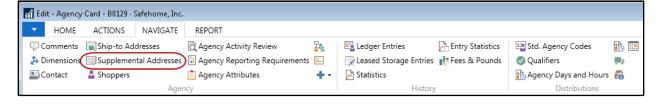
Statement Address – This option applies to Parent Agencies and Agencies. A Send to Parent Statement Address field exists on the Invoicing FastTab of the Agency Card. Check this field if you want to send the statement to the Parent Agency's Statement address.



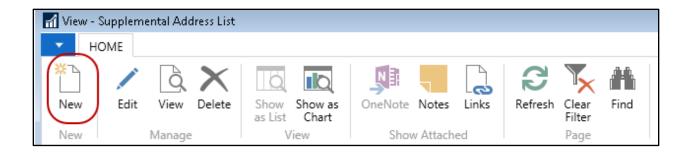
Supplemental Addresses Setup

Supplemental Addresses can be accessed from Parent Agencies, Agencies, Parent Vendors, Vendors, Parent Donors, Donors and Food Drive Donors, from the Card or List:

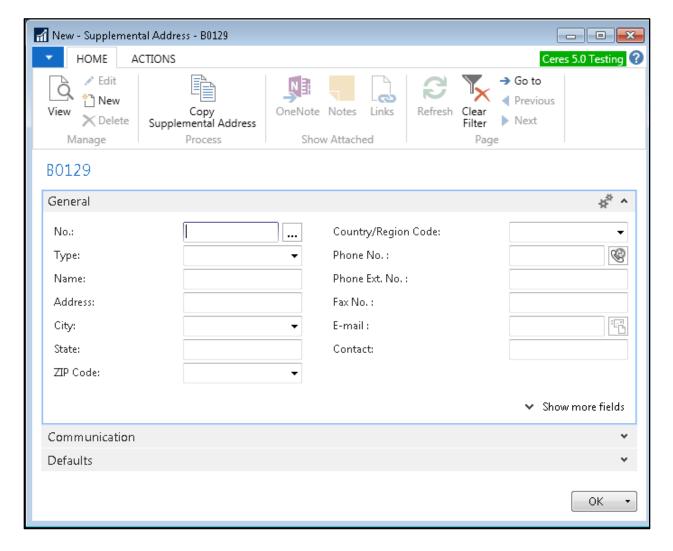
1. From the Card or List click Navigate → Supplemental Addresses. You will see the listing of Supplemental Addresses that exist within Ceres for that record. Below is an example of how to access the Supplemental Addresses from an Agency.



- 2. The Supplemental Address List is displayed.
- 3. Click Home \rightarrow New to create a new Supplemental Address.

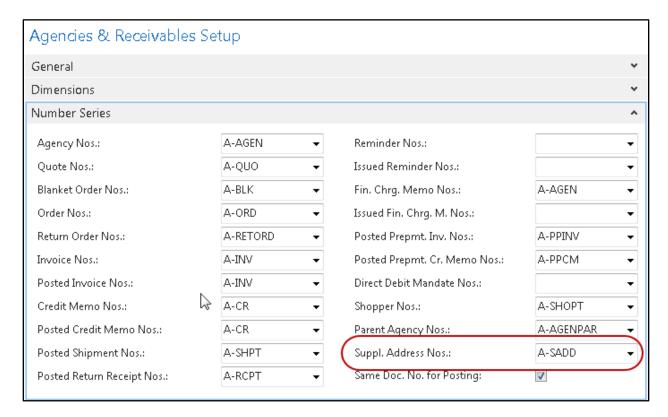


4. The Supplemental Address Card Page is displayed. Update the Card as needed. A description of the fields follows:



No.: This is the main identifier for the Supplemental Address, which can be entered as any combination of text and numbers. To manually assign a No, input a value in the No. field. Alternatively you can have a Supplement Address No automatically assigned by tabbing off the field if setup or clicking on the ellipsis button, selecting a No. Series form the List, and then clicking the OK button.

For automatic numbering, you must first input a No. Series in the Suppl. Address Nos. field on the Numbering FastTab of the Agencies & Receivables Setup, Purchases & Payables Setup, and Donation Setup. Below is an example of the Agencies & Receivables Setup.



Type: Select the type that best fits the purpose or use of the address. You can choose from the following:

Blank – Identifies the address is informational only and will not be used as a default address elsewhere in Ceres.

Billing Address – Identifies the address as being used for billing correspondence and allows the address to be flagged as the Default Billing Address.

Mailing Address – Identifies the address as being used for mailing correspondence and allows the address to be flagged as the Default Mailing Address.

Ship-to Address – Identifies the address as being used for shipping correspondence and allows the address to be flagged as the Default Ship-to Address.

Buy-from/Order Address – Identifies the address as being used for purchase order correspondence and allows the address to be flagged as the Default Buy-from/Order Address.

Supplemental Addresses Page 6 of 27 Last Reviewed 6/15/2020

Statement Address – Identifies the address as being used for statement correspondence and allows the address to be flagged as the Default Statement Address.

Multi-Purpose – In some cases an address may serve more than one purpose. For instance, the address may be used for billing and mailing. The option allows for any or all defaults to be set for the address.

Name: Enter the name for this Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers.

Name 2: An extension of the Supplemental Address name field. This field can be used for names longer than 30 characters. This field is also 30 characters in length.

Address: Enter the address for this Supplemental Address, such as a mailing address or billing address. Up to 30 characters can be added here, using any type of text or numbers.

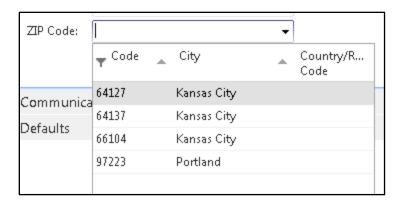
Address 2: An extension of the Supplemental Address field.

City: Enter the city for this Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

State: Enter the state for this Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

Zip Code: Enter the zip code for this Supplemental Address.

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 Supplemental Address. The field is 30 characters in length and you should use a consistent format when entering the number, such as: (123) 456-7890 for example. The value entered here will also appear on the Communication FastTab.

Supplemental Addresses Page 7 of 27 Last Reviewed 6/15/2020

Phone Ext No.: Enter a phone extension for this Supplemental Address.

Fax No.: Enter the fax number for this Supplemental Address. The field is 30 characters in length and you should use a consistent format when entering the number, such as: (123) 456-7890 for example.

E-Mail: Enter the e-mail address for this Supplemental Address. Up to 80 characters can be added here, using any type of text or numbers, in a standard e-mail address format.

Contact: Enter the primary contact name for this Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers.

Country/Region Code: Select the Country Code from the lookup list, primarily used to determine the address formatting on documents applicable for the selected Country.

Defaults: As outlined above, there are five different Supplemental Address options. Place a checkmark in corresponding fields to designate that this is the default Supplemental Address for this address option



Default Billing Address - Check this field if the Supplemental Address is the default billing address. This setting will be overridden if the Send to Parent Billing Address field is checked.

Default Mailing Address - Check this field if the Supplemental Address is used as the default mailing address. This setting will be overridden if the Send to Parent Mailing Address field is checked.

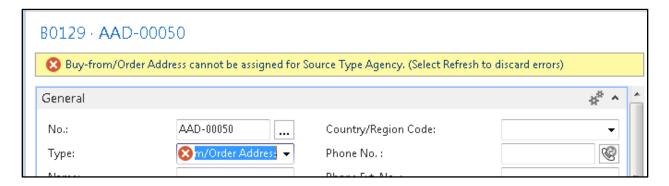
Default Ship-To Address – Check this field if the Supplemental Address is used as the default ship-to address. This field must be checked before the Shared Pick-Up Address field can be checked.

Default Buy-from/Order Address: Check this field if the Supplemental Address is used as the default Buy-from Order Address.

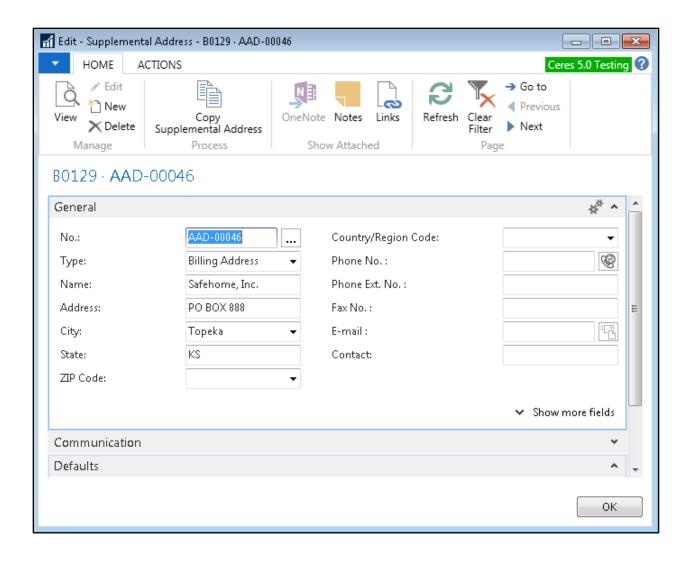
Supplemental Addresses Page 8 of 27 Last Reviewed 6/15/2020

Default Statement Address: Check this field if the Supplemental Address is used as the default address on statements. This setting will be overridden if the Send to Parent Statement Address field is checked.

Note: If an unsupported option is selected an error message will display. For example, Supplemental Buy-from/Order Addresses are not supported for Agencies. Therefore if a user tries to select a Type of Buy-from/Order Address an error message such as one shown below will be presented.



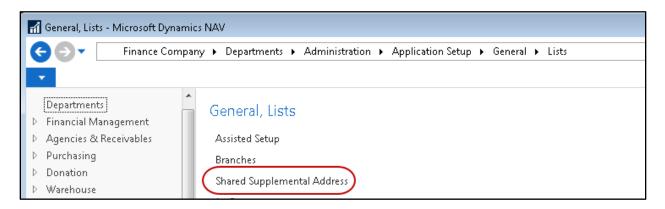
5. Click the OK button to complete the setup of the Supplemental Address.



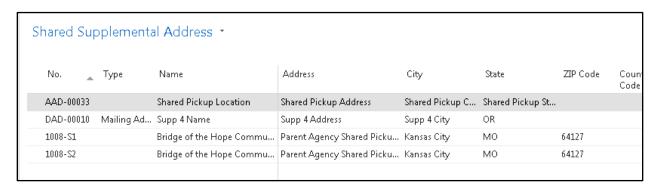
Shared Supplemental Address Setup

Shared Supplemental Addresses can be associated with Parent Agencies, Agencies, Parent Vendors, Vendors, Parent Donors, Donors and Food Drive Donors, and are setup in the same manner as Supplemental Addresses. The most typical use of a shared address is a shared delivery location for Agencies.

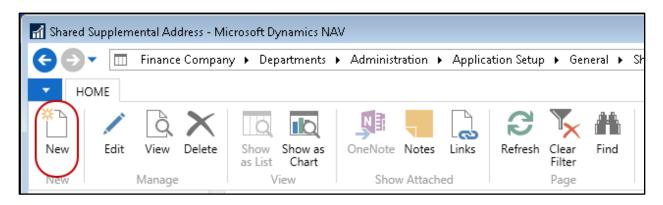
1. To access Shared Supplemental Addresses go to Departments → Administration → Application Setup → General → Lists → Shared Supplemental Addresses.



2. The Shared Supplemental Address List Page is displayed.

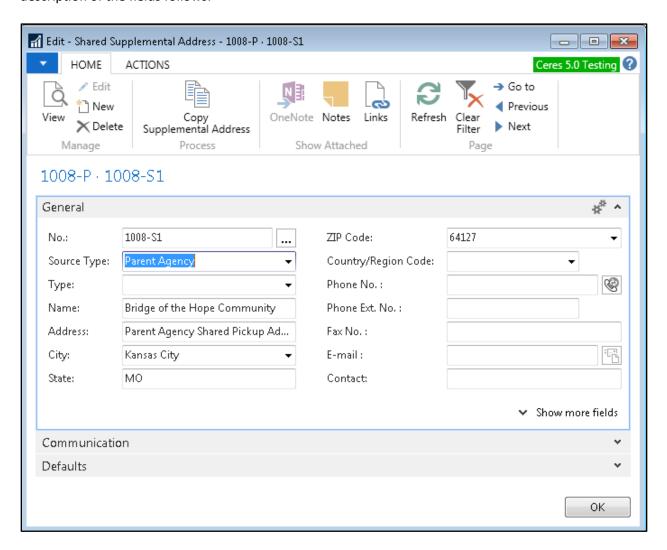


3. Click Home \rightarrow New to create a new Shared Supplemental Address.



Supplemental Addresses Page 11 of 27 Last Reviewed 6/15/2020

4. The Shared Supplemental Address Card Page is displayed. Update the Card as needed. A description of the fields follows:



No.: This is the main identifier for the Supplemental Address, which can be entered as any combination of text and numbers. To manually assign a No, input a value in the No. field. Alternatively you can have a Supplement Address No automatically assigned by tabbing off the field if setup or clicking on the ellipsis button, selecting a No. Series form the List, and then clicking the OK button.

For automatic numbering, you must first input a No. Series in the Suppl. Address Nos. field on the Numbering FastTab of the Agencies & Receivables Setup, Purchases & Payables Setup, and Donation Setup. Below is an example of the Agencies & Receivables Setup.

Source Type: Select Source Type from the List. This is the type of record this Shared Supplemental Address can be associated with. The options are Agency, Vendor, Donor, Parent Agency, Parent Vendor, Parent Donor, and Food Drive Donor.

Supplemental Addresses Page 12 of 27 Last Reviewed 6/15/2020

Type: Select the type that best fits the purpose or use of the address. You can choose from the following:

Billing Address – Identifies the address as being used for billing correspondence and allows the address to be flagged as the Default Billing Address.

Mailing Address – Identifies the address as being used for mailing correspondence and allows the address to be flagged as the Default Mailing Address.

Ship-to Address – Identifies the address as being used for shipping correspondence and allows the address to be flagged as the Default Ship-to Address.

Buy-from/Order Address – Identifies the address as being used for purchase/order correspondence and allows the address to be flagged as the Default Buy-from/Order Address.

Statement Address – Identifies the address as being used for statement correspondence and allows the address to be flagged as the Default Statement Address.

Multi-Purpose – In some cases an address may serve more than one purpose. For instance, the address may be used for billing and mailing. The option allows for any or all defaults to be set for the address.

Name: Enter the name for this Shared Supplemental Address. For shared pickup address, enter the site or location where the product will be picked up vs. an Agency Name. Up to 30 characters can be added here, using any type of text or numbers.

Name 2: An extension of the Shared Supplemental Address name field. This field can be used for names longer than 30 characters. This field is also 30 characters in length.

Address: Enter the address for this Shared Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers.

Address 2: An extension of the Shared Supplemental Address field.

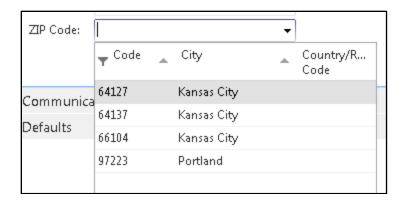
City: Enter the city for this Shared Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

State: Enter the state for this Shared Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

Zip Code: Enter the zip code for this Shared Supplemental Address.

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.

Supplemental Addresses Page 13 of 27 Last Reviewed 6/15/2020



Phone No.: Enter the primary phone number for this Shared Supplemental Address. The field is 30 characters in length and you should use a consistent format when entering the number, such as: (123) 456-7890 for example. The value entered here will also appear on the Communication FastTab.

Phone Ext No.: Enter a phone extension for this Shared Supplemental Address.

Fax No.: Enter the fax number for this Shared Supplemental Address. The field is 30 characters in length and you should use a consistent format when entering the number, such as: (123) 456-7890 for example.

E-Mail: Enter the e-mail address for this Shared Supplemental Address. Up to 80 characters can be added here, using any type of text or numbers, in a standard e-mail address format.

Contact: Enter the primary contact name for this Shared Supplemental Address. Up to 30 characters can be added here, using any type of text or numbers.

Country/Region Code: Select the Country Code from the lookup list, primarily used to determine the address formatting on documents applicable for the selected Country.

Defaults: As outlined above, there are five different Shared Supplemental Address options. Place a checkmark in corresponding fields to designate that this is the default Supplemental Address for this address option

Note: The same information can be specified for a Shared Supplemental Address as for a non-shared Address.

5. Click the OK button to complete the setup of the Shared Supplemental Address

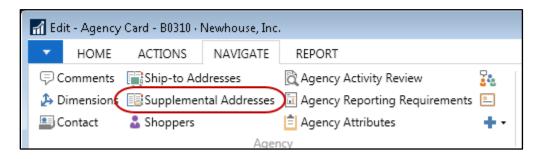
Sharing a Supplemental Address

Once a Shared Supplemental Address has been created, it can be associated (shared) with other sources (Agency, Donor, Vendor, etc.). To associate a Shared Supplement Address with a Source, go to the List or

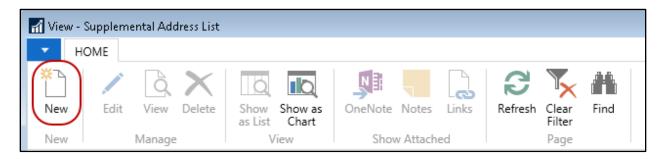
Supplemental Addresses Page 14 of 27 Last Reviewed 6/15/2020

Card Page for the desired Source. In this example we'll share the newly created Shared Supplemental Address with an Agency. However, the steps shown here also apply to associate a Shared Address with any other source type (Donor, Parent Donor, Vendor, Parent Vendor, etc.).

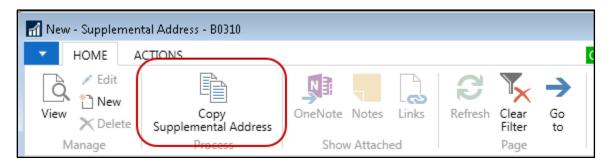
1. From the List or Card Page for the desired source, click Navigate → Supplemental Addresses.



2. Click Actions \rightarrow New to create a new Supplemental Address.

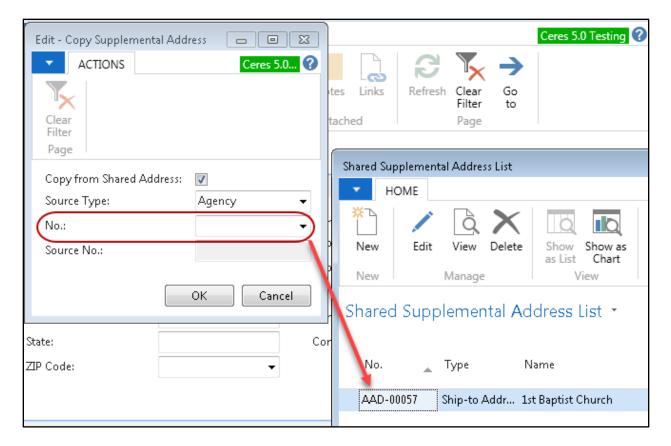


3. One the Supplemental Address Card Page, ensure that the No. has been updated and then click the Copy Supplemental Address Action Item.



4. The Copy Supplemental Address Page will be displayed.

Supplemental Addresses Page 15 of 27 Last Reviewed 6/15/2020



Copy from Shared Address - Place a check mark here to see only Shared Address via the No. dropdown. Leave unchecked to see a listing of non-Shared Addresses.

Source Type - Select the Source for the "Copy-from" address.

No. - Select the address to be copied into the newly created address.

5. Once the appropriate address to copy has been specified, click the OK button. Ceres will display a confirmation dialog. Click Yes to continue or No to cancel the operation.

Note: The Copy Supplemental Address process is available for both Shared and non-Shared Address. Thus you can copy any address into an existing address. Further, the Copy Supplemental Address process enforces singular defaults. Thus if the Shared or non-Shared Address is marked as a default (e.g. Default Ship-to Address) and the source being copied to already has an address marked as the Default Ship-to Address, Ceres will halt the process with an informative error.

6. Return to the Supplemental Address List Page to view all of the addresses. Shared Supplemental Addresses are bolded so they can easily be distinguished from non-Shared Addresses.

Supplemental Addresses Page 16 of 27 Last Reviewed 6/15/2020



7. Shared Addresses can only be administered (created or modified) from the Shared Address Page as noted above. When opening the Card Page for an associated Shared Supplement Address (such as the one we created in this example), the Card Page will be displayed in its non-editable state.

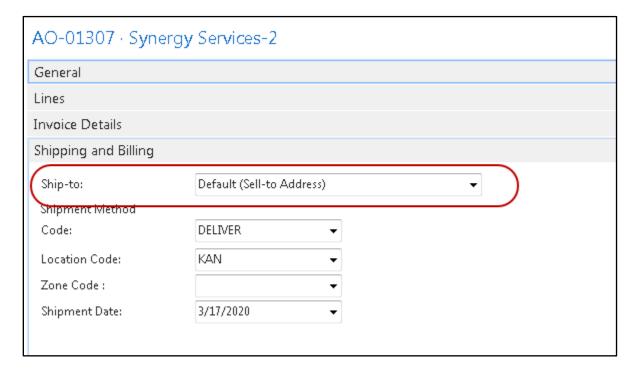
Supplemental Address Flow

Supplemental Addresses use the same logic as general addresses in how they flow to document headers. Below is an outline as to how addresses flow.

Agency Addresses

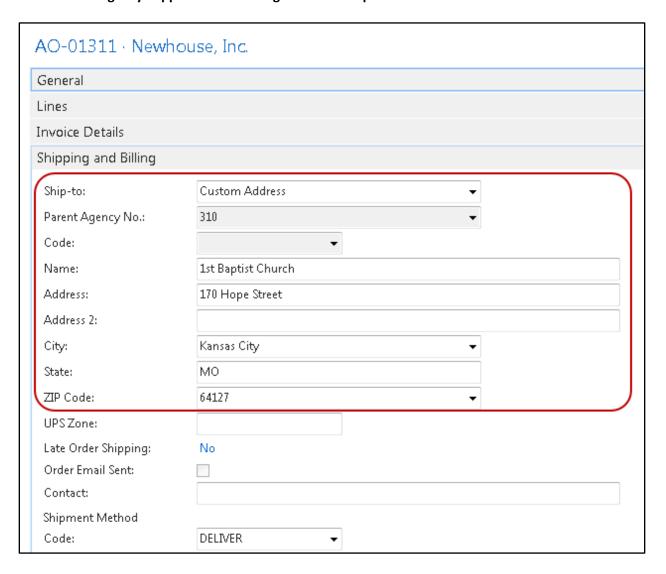
Physical (Site) Address: Recommend using the address fields on General FastTab of the Agency Card as the physical site address. This address will flow to the General FastTab of the Agency Order if a Supplemental Mailing Address does not exist.

Shipping and Billing FastTab of the Agency Order - No Agency Supplemental Addresses setup.



Supplemental Addresses Page 17 of 27 Last Reviewed 6/15/2020

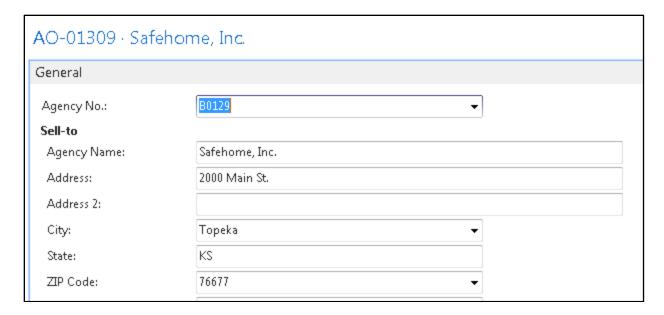
Shipping and Billing FastTab of the Agency Order - Send to Parent Mailing Address checked and a Parent Agency Supplemental Mailing Address Setup.



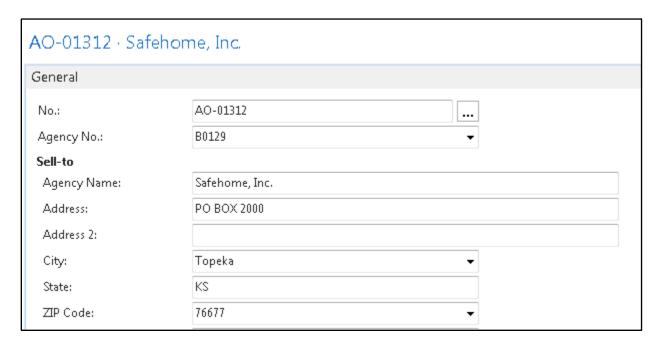
Default Billing Address: Supplemental Billing Address. This address will flow to the Invoicing FastTab of the Agency Order. If no Supplemental Address is found, Ceres will flow the address on the General FastTab of the Agency Card. However, if the Send to Parent Billing Address field on the Invoicing FastTab of the Agency Card is checked, Ceres will use the address from the Parent Agency. That address can be a Supplemental Address or the general address.

General FastTab of the Agency Order - Send to Parent Billing Address not checked and no Agency Supplemental Address setup.

Supplemental Addresses Page 18 of 27 Last Reviewed 6/15/2020



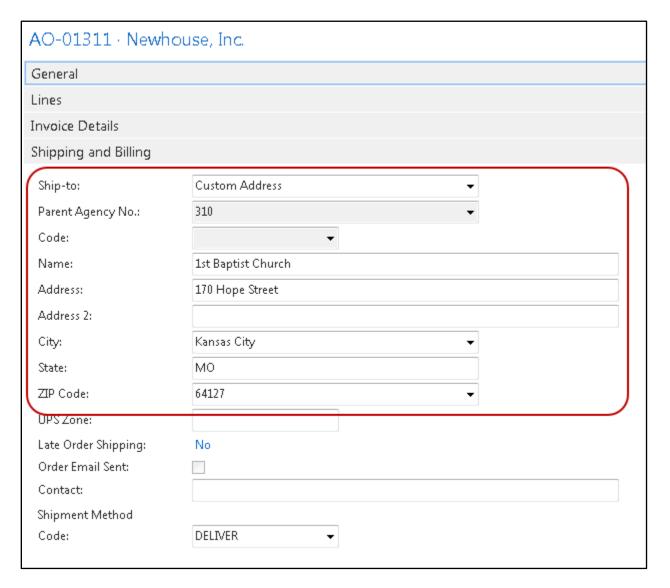
General FastTab of the Agency Order - Send to Parent Billing Address checked.



Note: A Parent Agency Supplemental Billing Address must be setup for address to flow

Default Ship-To Address: Supplemental Shared Pick-up or Supplemental Ship-To Address. This address will flow to the Shipping and Billing FastTab of the Agency Order. If no Supplemental Address is found, Ceres will flow the address fields on the General FastTab of the Agency Card to the Shipping and Billing FastTab of the Agency Order. However if a Ship-To Code is selected on the Agency Order and no Supplement Shared Pick-up Address is found, then the Ship-To Address will flow to the Shipping and Billing FastTab of the Agency Order.

Shipping FastTab of the Agency Order – Shared Supplemental Address setup for Agency



Default Statement Address: The Statement Address does not flow to the Agency Order. Instead it is used when printing the Parent Agency Statement or the Agency Statement.

Agency Statement Billing Address - Send to Parent Statement Address not checked

Safehome, Inc. John Smith 2000 Main St. Topeka, KS 76677

STATEMENT

Statement Date: 7/31/2019

Agency ID: B0129

Page: 1

Agency Statement Billing Address - Send to Parent Statement Address checked

Safehome, Inc. 2000 Old Line Avenue Kansas City , MO 64127

STATEMENT

Statement Date: 7/31/2019

Agency ID: B0129

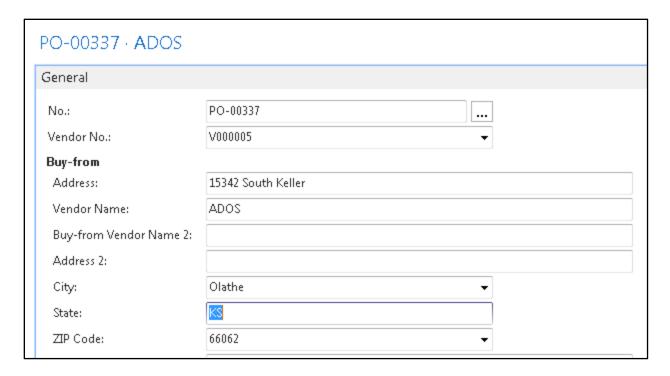
Page: 1

Vendor Addresses

Physical Address: Recommend using the address fields on General FastTab of the Vendor Card as the physical address. This address will flow to the General FastTab of the Purchase Order if no Supplemental Mailing Address is found.

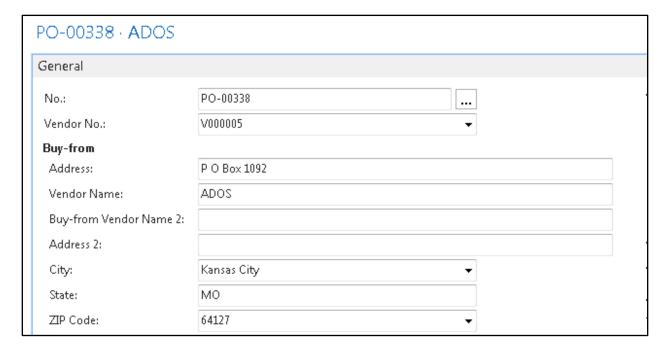
General FastTab of the Purchase Order - No Supplemental Addresses setup.

Supplemental Addresses Page 21 of 27 Last Reviewed 6/15/2020



Default Mailing Address: Supplemental Mailing Address. This address will flow to the General FastTab of the Purchase Order. If no Supplemental Address is found, Ceres will use the address on the General FastTab of the Vendor Card. However, if the Send to Parent Mailing Address field on the Invoicing FastTab of the Vendor Card is checked, Ceres will use the address from the Parent Vendor. That address can be a Supplemental Address or the general address

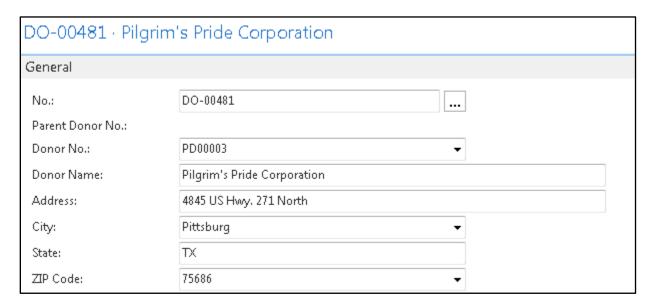
General FastTab of the Purchase Order – Vendor Mailing Supplemental Address and Send to Parent Mailing Address not checked



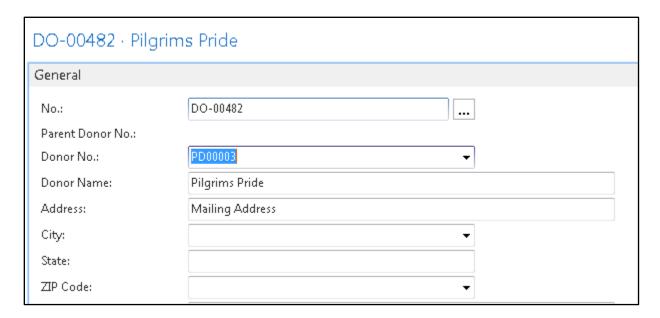
Donor and Food Drive Donor Addresses

Physical Address: Recommend using the address fields on General FastTab of the Donor and Food Drive Donor Card. The address will flow to the General FastTab of the Donation Order if no Supplemental Mailing Address is found.

General FastTab of the Donation Order - With no Supplemental Addresses

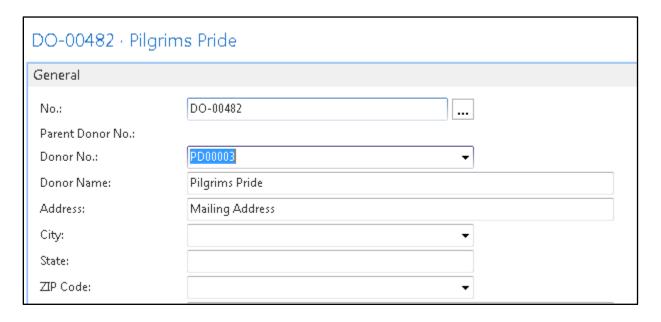


Default Mailing Address: Supplemental Mailing Address. This address will flow to the General FastTab of the Donation Order. If no Supplemental Address is found, Ceres will use the address on the General FastTab of the Donor Card. However, if the Send to Donor Mailing Address field on the Invoicing FastTab of the Donor Card is checked, Ceres will use the address from the Parent Donor. That address can be a Supplemental Address or the general address.

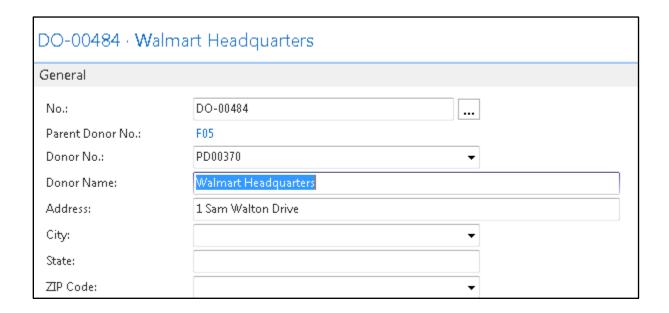


Supplemental Addresses Page 23 of 27 Last Reviewed 6/15/2020

General FastTab of the Donation Order – With Supplemental Address and Send to Parent Mailing Address not checked



General FastTab of the Donation Order - With Send to Parent Mailing Address checked



Reports

Whatever address (general or supplemental) is on the various FastTabs of the un-posted documents will automatically flow to the posted document when the transaction is posted. The address on the posted documents is used when printing document reports, such as the Agency Invoice or the Posted Donation Receipts. For other reports, such as the Agency Statement, the address that prints is based on the Supplemental Address setup.

Below is a List of reports that support Supplemental Addresses:

Report	Billing Address	Mailing Address	Shared Pick-Up (Ship-To) Address	Buy- From / Order Address	Statement Address
Agency Order	٧	٧	٧		
Agency Invoice	٧	٧	٧		
Agency Receipt	٧	٧	٧		
Agency Return Order	٧	٧	٧		
Agency Credit Memo	٧	٧	٧		
Agency Statement					٧
Parent Agency Statement					٧
Purchase Order		٧		٧	
Purchase Invoice		٧		٧	
Purchase Receipt		٧		٧	
Purchase Return Order		٧		٧	
Purchase Credit Memo		٧		٧	
AP-Check		٧			
Donation Order		٧			
Donation Receipt		٧			
Donation Return Order		٧			
Posted Donation Receipt		٧			
Donation Receipt Summary					٧
Reminder		٧			
Fin. Charge Memo		٧			

Supplemental Addresses Page 26 of 27 Last Reviewed 6/15/2020

Appian

When Donation Orders are exported by Appian, the Donor's physical address will be used and not the Supplemental Address, if applicable.

Related Topics

- 1. Agency Overview
- 2. Parent Agency Overview
- 3. Agency Order Overview
- 4. Appian Overview and Integration
- 5. Donor Overview
- 6. Parent Donor Overview
- 7. Donation Order Overview
- 8. Vendor Overview
- 9. Parent Vendor Overview
- 10. Purchase Order Overview
- 11. Vendor Overview
- 12. Ship-to Addresses

Supplemental Addresses Page 27 of 27 Last Reviewed 6/15/2020