



Parent Agency Overview

Purpose of this document

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 5.00.00 is required for the functionality described in this document.

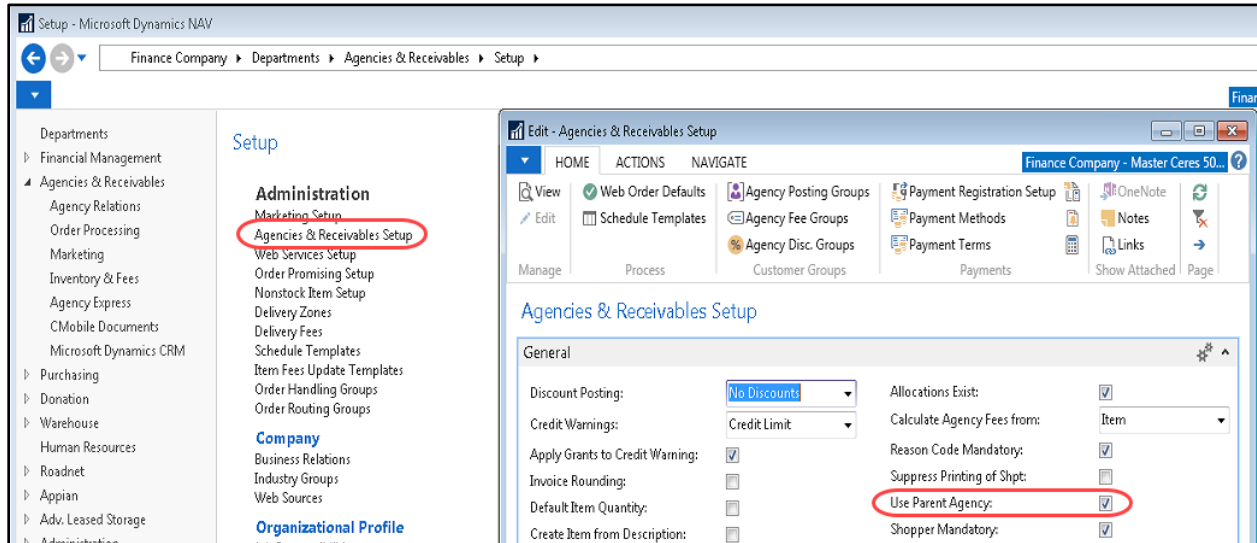
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Agencies & Receivables Setup – Use Parent Agency

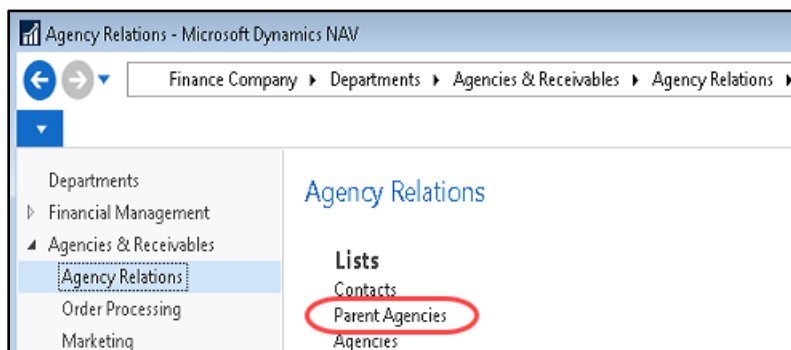
The “Use Parent Agency” setting in Agency & Receivables must be checked in order to link Agencies to Parent Agencies. If this setting is not checked the Parent Agency No. field will be unavailable on the Agency Card.

To access this setting, go to Departments → Agencies & Receivables → Setup → Agencies & Receivables Setup. The Use Parent Agency field is on the General FastTab.

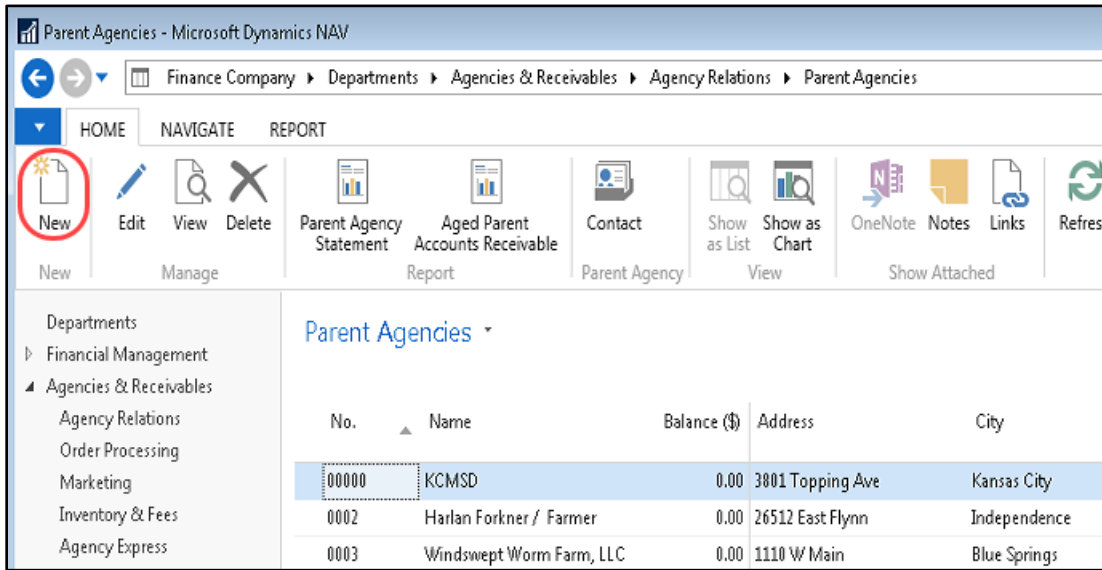


Accessing Parent Agencies

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, default location, and more.



- Click New on the Home Ribbon to create a new Parent Agency. Additionally, 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).



General Tab

1000 · American Red Cross

General

No.:	1000	Contact:	Cooper Cooper
Name:	American Red Cross	Search Name:	AMERICAN RED CROSS
Name 2:		Balance (\$):	0.00
Address:	211 West Armour Boulevard	Credit Limit (\$):	11,000.00
Address 2:		Fees (\$):	0.00
City:	Kansas City	Lbs. Distributed:	0.00
State:	MO	Default Location Code:	
ZIP Code:	64111	Blocked:	
Phone No.:	816-555-1212	Last Date Modified:	6/20/2019
Phone Ext. No.:		Last Modified By:	ESOPRO\CJW

^ 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 if manual numbering is allowed.

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.

Note: 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 value 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 value in the field

Fees (\$): 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 value 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 value in the field.

Default Location Code: If the food bank has several branches responsible for the administration of different agencies, you may enter or select from a list the Default Location Code to designate which Location 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.

Last Date Modified: The system will update the Last Date the Parent Agency card was modified.

Last Modified By: The system will update the Last Modified by value when values are changed.

Address & Contact Tab

The screenshot shows a web form for '1000 · American Red Cross'. The 'Address & Contact' tab is active. The form is divided into two columns: 'Address' and 'Communication'. The 'Address' column contains fields for 'Address' (211 West Armour Boulevard), 'Address 2', 'City' (Kansas City), 'State' (MO), and 'ZIP Code' (64111). The 'Communication' column contains fields for 'Phone No.' (816-555-1212), 'Phone Ext. No.', 'Fax No.', 'E-Mail' (cooper@cooper.org), and 'Home Page'. A 'Show fewer fields' button is located at the bottom right of the form.

Address Info: Populates from the General FastTab.

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.

501(c)(3) Tab

1000 · American Red Cross			
General American Red Cross ▼			
Address & Contact ▼			
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" value="▼"/>	501(c)(3) Shared:	<input type="checkbox"/>
501(c)(3) Contact:	<input type="text"/>	501(c)(3) Date Received:	<input type="text" value="▼"/>
501(c)(3) Phone No.:	<input type="text"/>	Church Qualifier Name:	<input type="text"/>
501(c)(3) Adv. Ruling End Date:	<input type="text" value="▼"/>	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