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Agency Ship-to Addresses

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Purpose of this document

This document describes how to use the Agency Ship-to Address in order to have more than one shipping address for each agency.
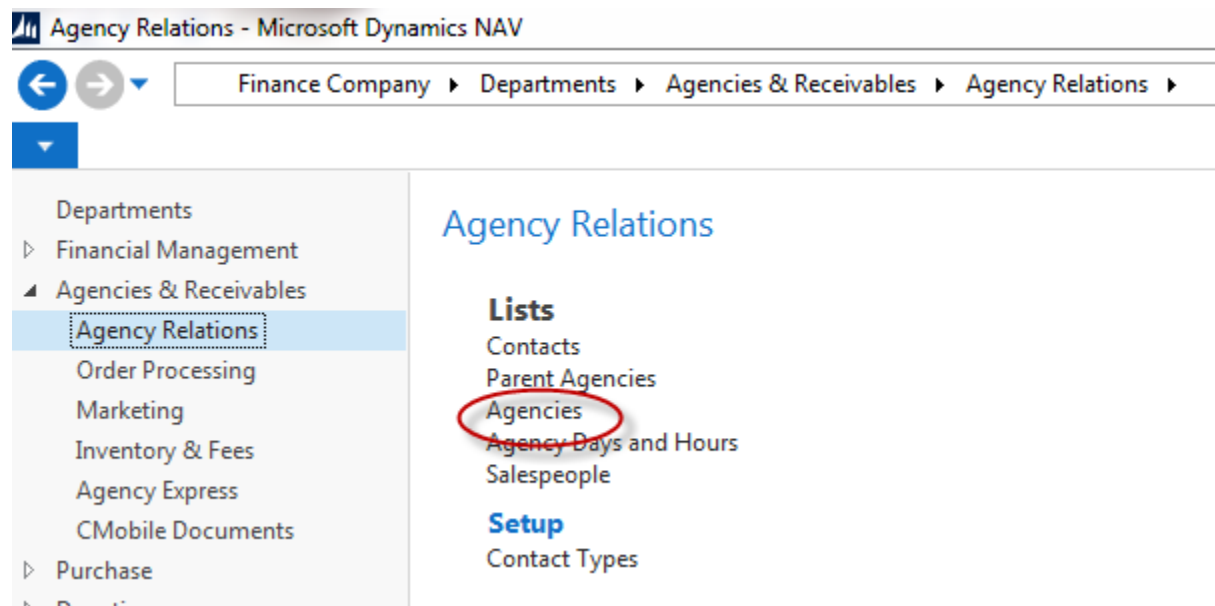
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Purpose

Agency Ship-to Addresses provide the ability to have one or more shipping addresses for one Agency. One of the Ship-to Addresses may be designated as the default ship to address. In the case of multiple ship-to addresses, the default should be set to the address that is most often used. During Agency Order entry, the default ship address will be used; however the user can override it at that time.

Ship-to Addresses can be shared as outlined in the Supplemental Addresses document, the functionality has some overlaps.

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

Accessing Agency Ship-to Addresses

1. Agency Ship-to Addresses can be accessed from either the Agency Card or from Departments → Agencies & Receivables → Agency Relations →Agencies. A list of Agencies will display

2. Select the Agency you wish to use by right-clicking on it and selecting edit or selecting "edit" from the Home Ribbon.

3. From the Agency Card, select Navigate → Ship-to Addresses.

4. This will display a List of Ship-to Addresses currently setup for this Agency. Select New to create a new Ship-to Address. Right-click on any existing line and select edit to update an existing record, or click Edit from the Home Ribbon.

General Tab

C1466 Friendship House DEFAULT Friendship House

Code: This is the main identifier for the Ship to Address, which can be entered as any combination of text and numbers.

Name: Enter the Ship-to Name. You can enter a maximum of 50 characters, both numbers and letters

Name2: An extension of the Name field.

Address: Enter the Ship-to Address. Additional addresses, phone numbers, and contact information can be setup using the Supplement Address functionality.

Address 2: An extension of the Address field.

City: Enter the city of the Ship-to Address.

State / Zip Code: Enter the state of the Ship-to 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.

Zip Code: Enter the zip code of the Ship-to 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, the program fills in the City field automatically. If there is more than one city linked to the ZIP code, the program 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.

Country/Region Code: Select the Ship-to Address country/region code

Phone No.: Enter the primary number for the Ship-to Address telephone number. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890, is recommended 123-456-7890 or (123) 456-7890

Contact: Enter the name of the person you regularly contact at this Ship-top Address.

Location Code: Enter the default location code for the ship-to. If the ship-to has a location code, the program will always suggest items from that particular inventory location when you enter agency orders for this ship-to address.

Shipment Method Code: Select a Code for the shipment method to be used when you ship to this agency.

Shipment Agent Code: This field is used to specify a 3rd party shipping company to be used to deliver to the Agency.

Shipping Agent Service Code: This field specifies the service level to be used when shipping via a 3rd party shipping company specified by the shipment agent code. You must first select the Shipment Agent code before selecting a shipping agent service code.
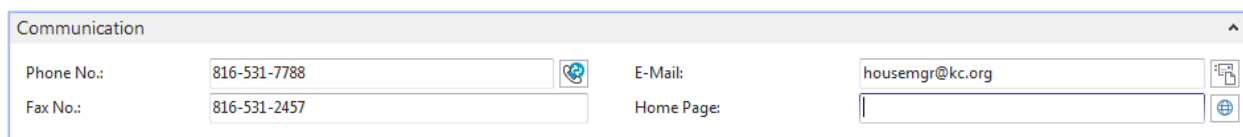
Service Zone Code: Not used in Ceres.

Last Date Modified: This field is maintained by Ceres and displays the date the Ship-to Address was last modified.

Tax Liable: Sales tax related field that is currently not being used.

Tax Area Code: Sales tax related field that is currently not being used.

Site Address: This field designates this Ship-to Address is a site address.

Communication Tab

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: 123-456-7890 or (123) 456-7890

Fax No.: Enter the fax number for this Ship-to Address. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890.
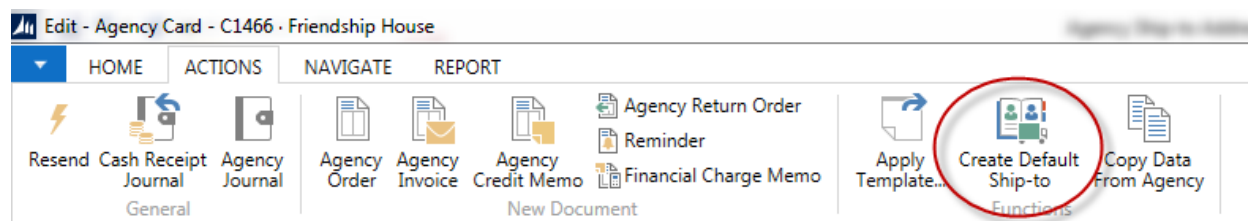
E-Mail: Enter the email address for this Ship-To Address. You can enter a maximum of 80 characters, both numbers and letters. In the field is a button with a picture of an envelope on it. If your program is integrated with an e-mail system, you can click this button to open a window in which you can 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 home page for this Ship-to Address. You can enter a maximum of 80 characters, both numbers and letters. If your program is integrated with the Internet, you can click the button to the right of the field to access the agency's home page.
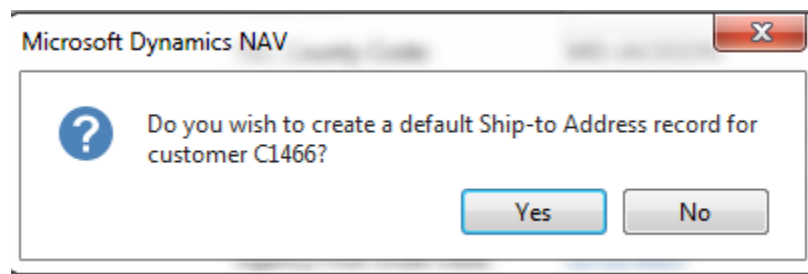

Creating a Default Ship-to Address for the Agency

For Agencies that have multiple Ship-to Addresses in addition to the main agency address, this function automatically creates the default Ship-to Address to be the same as the Agency's main address. When you use the function, it copies the name, address, contact, and phone number from the agency card into a ship-to address with a code of DEFAULT.
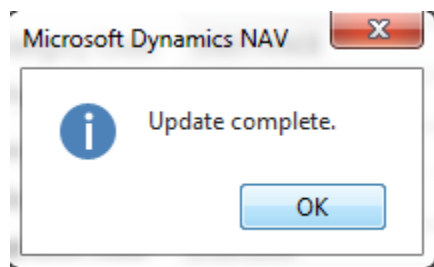
1. To use this function select Actions →Functions → Create Default Ship-to from the Agency Card.

2. Ceres will prompt you with a message confirming you want to create the default Ship-to Address.

3. Press Yes to complete the function. If the Agency already has a default Ship-to Address, you will receive an error message stating that the address already exists. Upon successful creation Ceres will report this with the Update complete message.

Note: After creating a default ship-to address, the system will assign the code of DEFAULT to the Agency's Default Ship-To Code: on the Shipping FastTab of the Agency Card.

Related Topics:

1. Agency Overview
2. Agency Order Overview
3. Supplemental Addresses
4. Appian Integration and Overview