



Donation Order Archiving

Purpose of this document

Donation orders are used to process orders/product receipts from donors that do not involve a dollar value. Ceres allows you to archive donation orders, and this document discusses the process to set up and execute the archival. This document discusses the process to execute the archiving of donation orders.

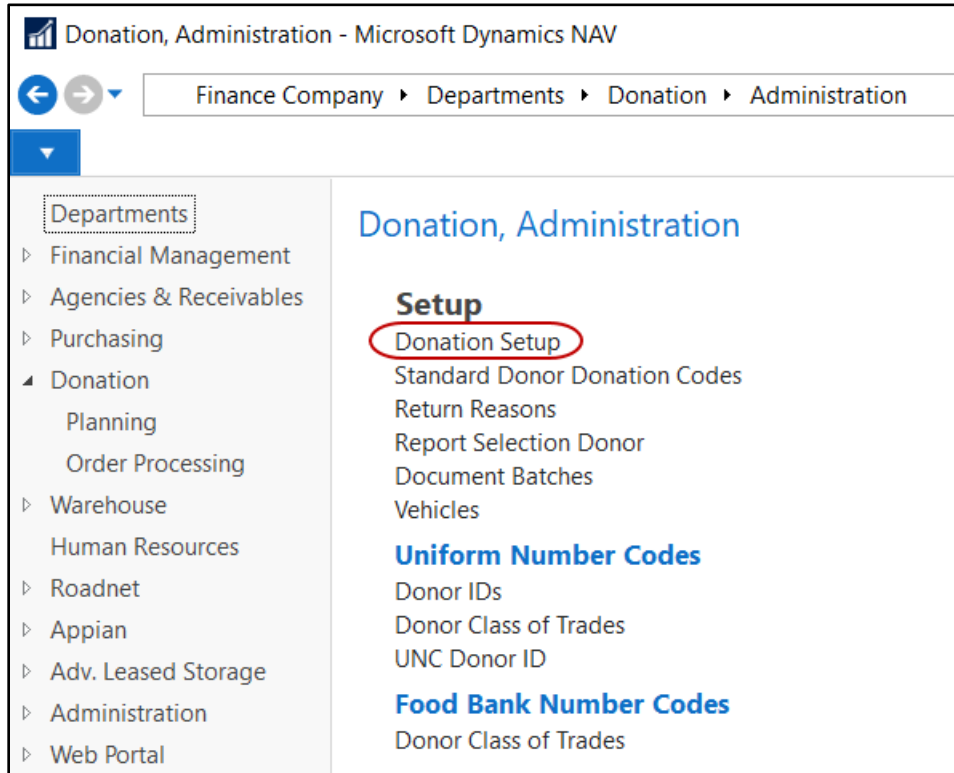
Ceres Object release 5.00.00 is required for the functionality described in this document.

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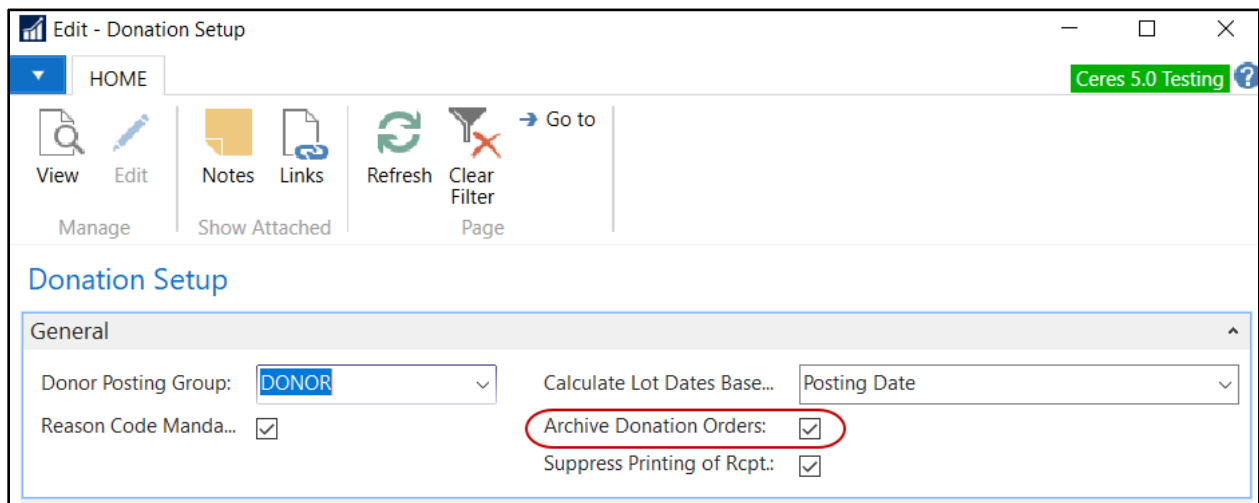
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Setup

1. Archiving of donation orders is a configurable setting in the Donation Setup. To access the Donation Setup, select Departments → Donation → Administration → Setup.

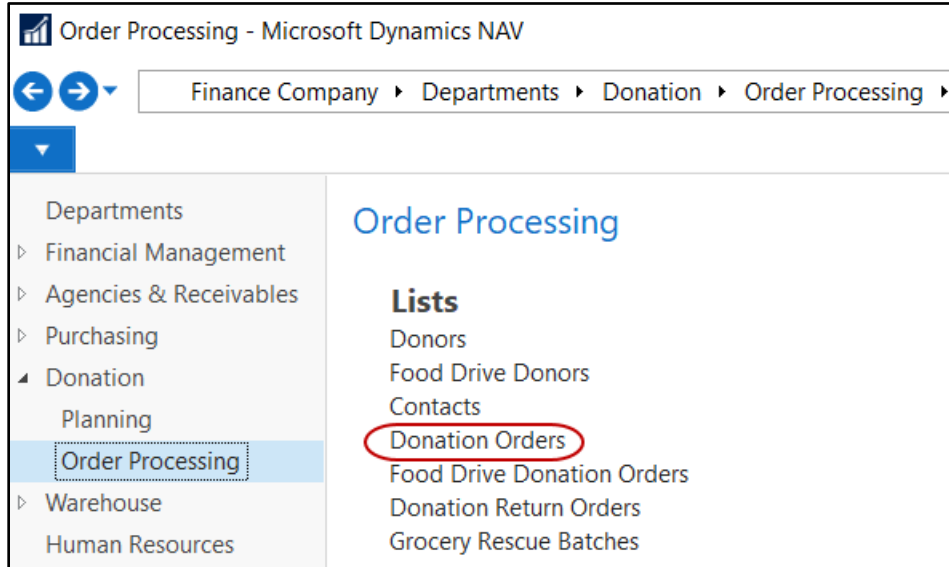


2. The Archive Donation Order field allows you to specify whether you want Ceres to automatically archive donation orders during the posting process. For automatic archiving, place a check mark in the box.

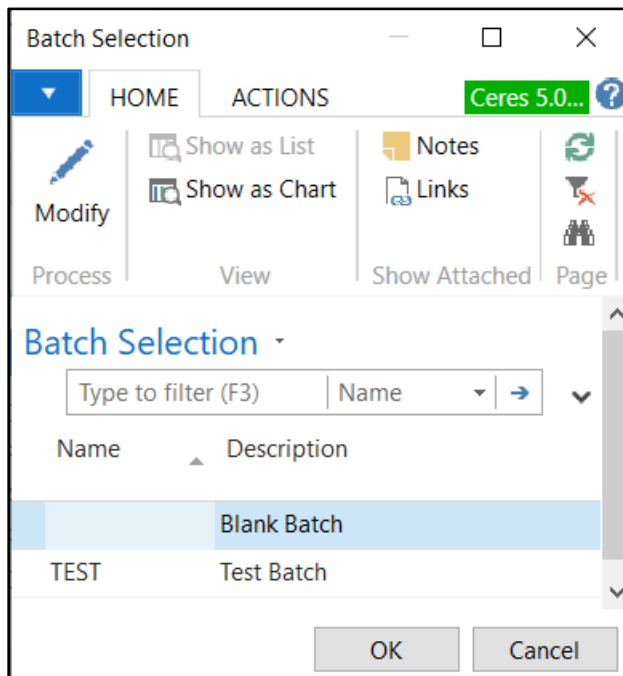


Archiving Donation Orders

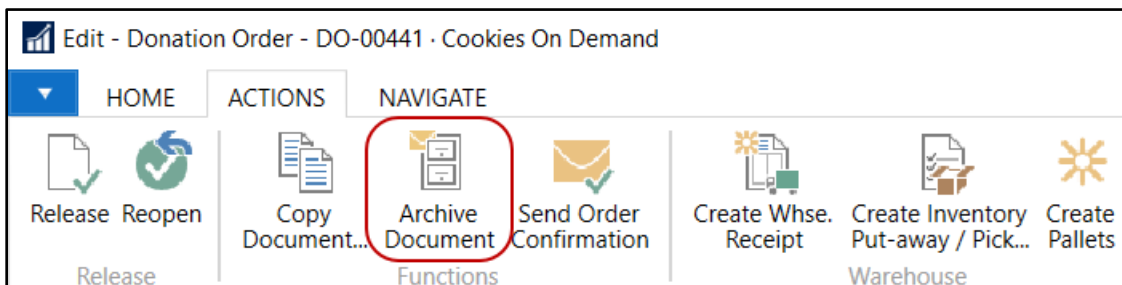
1. Donation orders can be archived manually or automatically. To archive a donation order, go to Departments → Donation → Order Processing → Donation Orders.



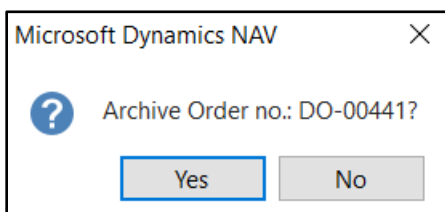
2. If you are using batches, select your batch from the batch list; otherwise click Cancel.



3. A list of open donation orders will be displayed. Select Home → New to create a new order.
4. To manually archive a donation order, select Actions → Functions → Archive Document.



5. An Archive Order no: message will display. Select Yes to archive the order and No to cancel the process.



6. Once the donation order is archived, a confirmation message will display, and the No. of Archived Versions field is updated to reflect the number of times an order has been archived. You can drilldown to the archived orders by clicking on the value associated with the No. of Archived Versions field.

DO-00441 · Cookies On Demand			
No.:	DO-00441	Posting Date:	1/27/2020
Parent Donor No.:		Order Date:	1/27/2020
Donor No.:	PD00001	Document Date:	1/27/2020
Donor Name:	Cookies On Demand	Donor Order No.:	
Donor Name 2:		Donor Shipment No.:	
Address:	5252 Speaker Road	Donor Invoice No.:	
Address 2:		Responsible Person Code:	
City:	Kansas City	Fund No.:	UR
State:	KS	FBC Product Source:	A2H LOCAL
ZIP Code:	66106	UNC Product Source:	A2H LOCAL
Contact:	Eric Stanley	FBC Product Category:	DONATED
Phone No.:	913 281 7300	FBC Reason for Donation:	
Ext.:	1234	UNC Notice No.:	DO-00441
No. of Archived Versions:	2	Blue Receipt:	<input checked="" type="checkbox"/>

Donation Order Archives

Type to filter (F3)

Version No.

Filter: Order • DO-00441 • 1

Versi... No.	Date Archived	Time Archived	Archived By	No.	Parent Donor No.	Donor No.	Donor Name
1	4/2/2020	10:04:19 PM	ESOPRO\KJK	DO-00441		PD00001	Cookies On Demand
2	4/2/2020	10:04:44 PM	ESOPRO\KJK	DO-00441		PD00001	Cookies On Demand

- Automatic archiving occurs when a donation order is posted.

Archived Donation Orders

- To view Archived Donation Orders once the donation order has been posted, go to Departments → Donation → Archive → History. Archiving options are available for donation orders, food drive donation orders, and donation return orders.

Donation, Archive - Microsoft Dynamics NAV

Finance Company ▶ Departments ▶ Donation ▶ Archive

Departments

- Financial Management
- Agencies & Receivables
- Purchasing
- Donation
 - Planning
 - Order Processing
- Warehouse
- Human Resources
- Roadnet
- Appian
- Adv. Leased Storage

Donation, Archive

History

- Donation Order Archives
- Food Drive Donation Archives
- Donation Return Order Archives
- Closed Food Drives
- Posted Donation Receipts
- Posted Food Drive Receipts
- Posted Donation Orders
- Posted Donation Credit Memos
- Posted Food Drive Orders
- Processed Grocery Rescue Batches

2. Select one of the Archive options for a list of documents that have been archived. The documents display in Version No, Document No. order. Locate the document you want to view and select Home → Manage → View.

Donation Order Archives - Microsoft Dynamics NAV

Departments > Donation > History > Donation Order Archives

Search (Ctrl+F3)

Ceres 5.0 Testing

HOME NAVIGATE

View Delete Show as List Show as Chart Notes Links Refresh Clear Filter Find

Manage View Show Attached Page

Departments

- Financial Management
- Agencies & Receivable
- Purchasing
- Donation
 - Planning
 - Order Processing
- Warehouse
- Human Resources
- Roadnet

Donation Order Archives

Type to filter (F3) Version No. No filters applied

Version No.	Date	Time	Archived By	No.	Donor No.	Donor Name
2	4/2/2020	9:43:15 PM	ESOPRO\KJK	DO-00482	PD00003	Pilgrims Pride
1	4/2/2020	9:39:53 PM	ESOPRO\KJK	DO-00482	PD00003	Pilgrims Pride
3	4/2/2020	10:13:16 PM	ESOPRO\KJK	DO-00441	PD00001	Cookies On Demand
2	4/2/2020	10:04:44 PM	ESOPRO\KJK	DO-00441	PD00001	Cookies On Demand
1	4/2/2020	10:04:19 PM	ESOPRO\KJK	DO-00441	PD00001	Cookies On Demand

Related Topics

1. Donation Order Overview
2. Donor Overview
3. Food Drive Overview
4. Donation Return Order Overview
5. Donation Credit Memo Overview