



## Donor Overview

### **Purpose of this document**

This document discusses the setup of the Donor Cards for all types of product donors. Typically, food banks do not establish donor records in Ceres for financial donors, food drives/food drive donors are a subset of product donors and are discussed in a separate document.

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

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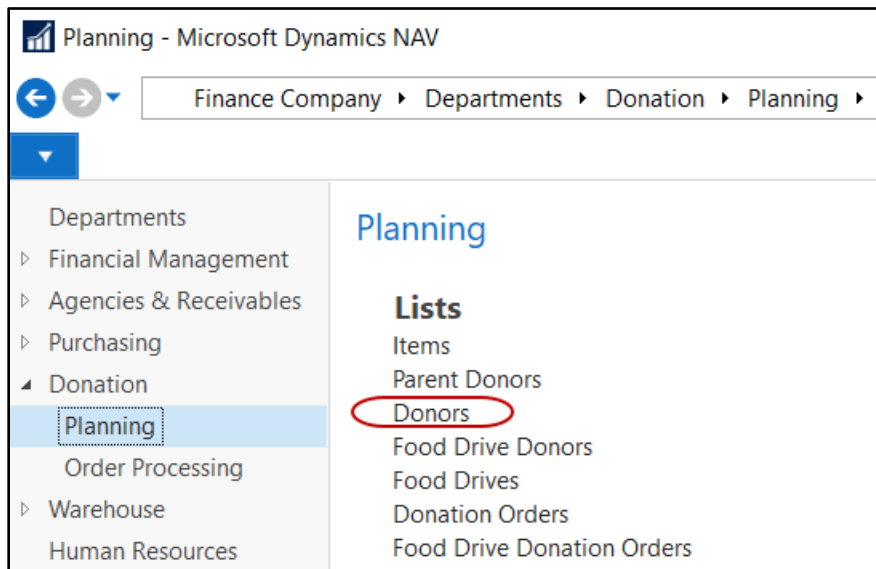
## Overview

Food banks receive product from various donors throughout the year and need an accurate method of tracking receipts from each donor. Many of the donors are retail chain grocery stores where there is a regional or corporate office that the individual stores report to. In these instances, food banks need to track receipts for each store yet report the receipts in aggregate to the regional or corporate office.

To accomplish this, a parent donor/donor structure was created. The individual chain store would be setup as a donor and the regional office as the parent donor. The donor can be linked to the parent donor for tracking and reporting purposes.

## Creating Donors

1. The Donor Card can be accessed from Departments → Donation → Planning → Lists → Donors. A list of donors that exist within Ceres will display. The List provides a quick glance of the donor information including the default location.



- Click Home → New to create a new donor. Donors may be edited by highlighting a donor in the List, then selecting Home → Manage → Edit.

Donors - Microsoft Dynamics NAV

Finance Company ▶ Departments ▶ Donation ▶ Planning ▶ Donors

HOME ACTIONS NAVIGATE REPORT

New Donation Order Donation Return Order Edit View Delete Ledger Entries Statistics Show as List Show as Chart Notes Links Refresh Clear Filter

Departments

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

Donors

Type to filter (F3) No.

Show results:

Where Blocked is

And Dormant is No

+ Add Filter

No.	Name	Address	City	State
PD00371	Wal-Mart Supercenter #184	600 N.E. Coronado Drive	Blue Springs	MO
PD00372	Wal-Mart Supercenter #319	2015 West Foxwood Drive	Raymore/Belton	MO

- The Donor Card will display. Fill in the fields on the General FastTab as needed.

PD00009 · T1177 Target			
General			
No.:	<input type="text" value="PD00009"/>	FBC Donor Class of Trade Cod...	RETAIL
Parent Donor No.:	<input type="text" value="F06"/>	FBC Product Source Code:	A2H LOCAL
Name:	<input type="text" value="T1177 Target"/>	FBC Product Category Code:	DONATED
Name 2:	<input type="text"/>	FBC County Code:	
Address:	<input type="text" value="8420 N Madison ..."/>	Fund No.:	UR
Address 2:	<input type="text"/>	Blue Receipt:	<input checked="" type="checkbox"/>
City:	<input type="text" value="Kansas City"/>	CMobile Related:	<input type="checkbox"/>
State:	<input type="text" value="MO"/>	Food Drive Donor:	<input type="checkbox"/>
ZIP Code:	<input type="text" value="64155"/>	Date Donor Added:	
Country/Region Code:		Last Date Modified:	1/29/2019
Search Name:	<input type="text" value="T1177 TARGET"/>	Last Modified By:	SWPROS\RXF
Responsible Person Cod...		Blocked:	
UNC Donor ID No.:	<input type="text" value="6228"/>	Dormant:	<input type="checkbox"/>

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

**Parent Donor No.:** If applicable, enter the Parent Donor No. or use the lookup to select the Parent Donor No. from the Parent Donor List.

**Name:** This field provides the main name of the donor. Up to 50 characters can be added here, using any type of text or numbers. 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:** This field would typically be the street number and street name of the donor. Up to 50 characters can be added here, using any type of text or numbers. The contents of the Address field are often used when you print something, so enter it as you want it to appear.

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 donor See the Supplemental Address documentation for more information.

**Address 2:** An extension of the donor'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 of the donor. 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 of the donor. 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 of the donor.

**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.

ZIP Code:	66208	
Country/Region Code:	Code	City
Last Date Modified:	64127	Kansas City
Last Modified By:	64137	Kansas City
Gross Weight:	66104	Kansas City
	66208	Prairie Village

**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. In addition, this field can be sorted on or filtered in various lists to view or select donors for a specific Country.

**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 donor.

**Responsible Person Code:** Enter the code for the person responsible for this donor by entering the Code or selecting from the lookup list.

**UNC Donor ID No.:** If applicable, enter the assigned UNC Donor ID Number or select it from the lookup list. UNC Donor ID's provided by Feeding America.

**FBC Fields:** The fields that start with FBC are Food Bank Code fields. The fields are the Food Bank equivalent of the UNC fields. The FBC fields are linked to the pre-defined UNC fields.

**Fund No.:** If applicable, enter the Fund No. or select it from the lookup list, for the default Fund from which payments to this Donor will be made.

**Blue Receipt:** If donations from this donor are Blue Receipted (as published by Feeding America) then check this box.

**CMobile Related:** Check this box to designate that this is a CMobile Donor.

**Food Drive Donor:** Check this box to designate that this is a food drive donor. Once checked, this donor will no longer appear in the Donor List but will appear in the Food Drive Donor List. See the Food Drive Enhancement Procedure Document for more information.

**Date Donor Added:** This field can be filled in by the user indicating when the donor record was added to Ceres.

**Last Date Modified:** This field is maintained by Ceres and displays the date the donor was last modified.

**Last Modified By:** This field is maintained by Ceres and display the login identification of the user that last modified the donor.

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

**<Blank>** - Any transaction is allowed for this donor.

**Payment** - Does not apply to donors.

**All** - No transaction is allowed for this donor

**Dormant:** Check this box to designate that this donor is dormant. Checking this field automatically sets the filter value to Yes and excludes this record from displaying on the List.

4. Move to the Address & Contact FastTab and fill in the fields as needed.

Address & Contact			
<b>Address</b>		<b>Contact</b>	
Address:	8420 N Madison Avenue	Contact:	Amanda Salifbary
City:	Kansas City	Phone No.:	816-436-8711
State:	MO	Phone Ext. No. :	
ZIP Code:	64155	Fax No.:	
		Email:	rf32757@gmail.com
		Home Page:	www.esopro.com

**Address Information:** The previously entered address information from the General FastTab will also display here.

**Contact:** Enter the primary contact of the donor.

**Phone No.:** Enter the primary phone number for this donor. 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 fax number for this donor. The field is 30 characters in length.

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

**Home Page:** Enter the Internet home page for this donor. Up to 80 characters can be added here, using any type of text or numbers.

5. Move to the Invoicing FastTab and fill in the fields as needed.

Invoicing			
Last Invoice Date:	1/29/2019	Receipt Delivery Email:	nathanaela@esopro.c...
Gen. Bus. Posting Group:	GENERAL	Receipt Delivery Email 2:	
Donor Posting Group:	DONOR	Receipt Email Option:	All Posting
Send to Parent Mailing Address:	<input type="checkbox"/>	Document Sending Profile:	
Send to Parent Statement Addr.:	<input type="checkbox"/>		

**Last Invoice Date:** This field auto-populates when the first order for this donor is posted.

**Gen. Bus. Posting Group:** This field can be left blank or filled in with the appropriate selection, depending on the objectives of the individual food bank. Please press F1 for more information on these fields.

**Donor Posting Group:** This field is typically used by most food banks to differentiate between vendors and donors. This selection will determine which payable account will be used in posting transactions for this donor.

**Send to Parent Mailing Address:** If this field is checked and if a Supplemental Mailing Address is set up for the parent donor, the Supplemental Mailing Address of the Parent Donor will flow to the General FastTab of the donation order. Refer to the Supplemental Address Procedure Document for more information.

**Send to Parent Statement Address:** If this field is checked and if a Supplemental Mailing Address is set up for the parent donor, the Supplemental Statement Address of the parent donor will flow to the General FastTab of the donation order. See the Supplemental Address Procedure Document for more information.

**Receipt Delivery Email:** Fill in recipient email address to send Invoices based on the Receipt Email Option selection below.

**Receipt Delivery Email 2:** Fill in recipient email address to cc invoices based on the Receipt Email Option selection below.



**Receipt Email Option:** Select one the options below.

**Blank** – No Donation receipt emails will be sent.

**On Post only** – Donation receipt emails will be sent if Post is selected when posting the document.

**On Post and Print only** – Donation receipt emails will be sent if Post and Print is selected when posting the document.

**Batch Posting** - Donation receipt emails will be sent if Post Batch is selected when posting the document.

**All Posting** - Donation receipt emails will be sent if either Post or Post and Print or Batch Posting is selected when posting the document.

**Manual – with warning on post** - Donation receipt emails will be sent if Actions → Send Order Confirmation is selected from a Donation Order or if Actions → Send Receipt is selected from a posted donation receipt. A warning will display if the Order Confirmation was previously sent (see Receipt Email Sent on the Shipping FastTab of a donation order).

**Document Sending Profile:** Select from the drop down list of user defined Codes based on how you want to send documents to this donor. Examples are.

Code	Description
DEFAULT	Default rule used if no other provided
EMAIL	Email on Post or Post and Print

To setup new Profiles, click on New at the bottom of the window and then select Enter a Code and a Description. Click on Default if the newly created Profile is the default. In the Print, Email, Disk, and Electronic Document No fields select one of the options from the drop down list.

Below is an example of how the Email Document Sending Profiles should be setup to work in conjunction with the base Ceres emailing of agency and donor documents functionality. Refer to the Agency and Donor Document Emailing Procedure Document for more details.

6. Move to the Receiving FastTab and fill in the field as needed.

**Location:** Select a location, if product from this donor is generally received at the same location.

**Shipment Method Code:** In this field, you can select a code for the method that you want the donor to use when shipping items to you. Once you have entered the code here, when you print donation orders to send to this donor, the program will suggest the chosen shipment method as a default.

**Shipping Agent Code:** If the donor typically ships the donation to the Food Bank, you can enter the shipping agent that the donor normally uses for your donation orders. You can enter a maximum of 20 characters, both numbers and letters.

**Lead Time Calculation:** In this field, you can enter a date formula for the amount of time that it generally takes to replenish this item. The system uses this field to calculate the date fields on order and order proposal lines.

On the donation order line, the Order Date + Lead Time Calculation = Planned Receipt Date. If you have not entered a lead time calculation on the Item cards, the program will use this field to calculate the lead time on donation orders for this donor.

**Roadnet Location Type:** This field is used with Roadnet to identify the type of location this entity is. Select a valid form the available choices.

**Order Handling Group Code:** In this field, you can enter the default order handling group code which is associated with donation orders from this Donor. Note, this field does not send to Roadnet in the export files. This field is available as a filter and an optional export field with the Appian export.

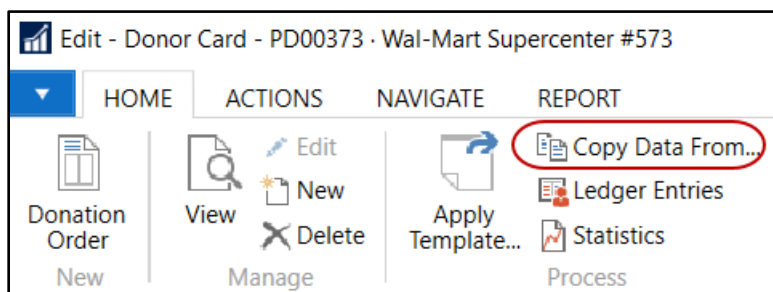
**Order Routing Group Code:** In this field, you can enter the default order routing group code that is associated with donation orders from this donor. Note, this field does not send to Roadnet in the export files. This field is available as a filter and an optional export field with the Appian export.

**Special Instructions:** Enter and special instructions required for this donor pertaining to receiving. This can be used for directions, hours of pickup, etc.

## Using the Copy Feature to setup new Donors

Donors can also be setup by using the copy functionality if the donor that you are setting up has numerous field values in common with another donor in the system. The field values of the selected donor will be copied to the new donor that the user is currently setting up. The User can then edit the fields on the new donor as needed. To use this functionality, follow the steps outlined below.

1. From the Donor Card, click New on the Home Ribbon to create a new Donor Card.
1. If Manual Nos. are used, enter the donor number or tab through the No. field if you have assigned a document number series for donors.
2. Select Home → Process → Copy Data From.



3. Select the donor you would like to copy from in the Donor List and double click on the number.
4. Make the necessary changes to the applicable fields.

## **Related Topics**

1. Parent Donor Overview
2. Food Drive Overview and Enhancements
3. Donation Order Overview
4. Appian Overview and Integration
5. Supplemental Addresses
6. Agency and Donor Document Email Functionality
7. Order Handling Groups and Order Routing Groups