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Donor Overview

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Purpose of this document

This document discusses the setup of the Donor cards for all types of product donors.

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Purpose

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.

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.

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

Accessing Donors

1. The Donor Card can be accessed from Departments → Donation → Planning → Lists →Donors. You will see the listing of Donors that exist within Ceres. This provides a quick glance of the Donor information including the default location.
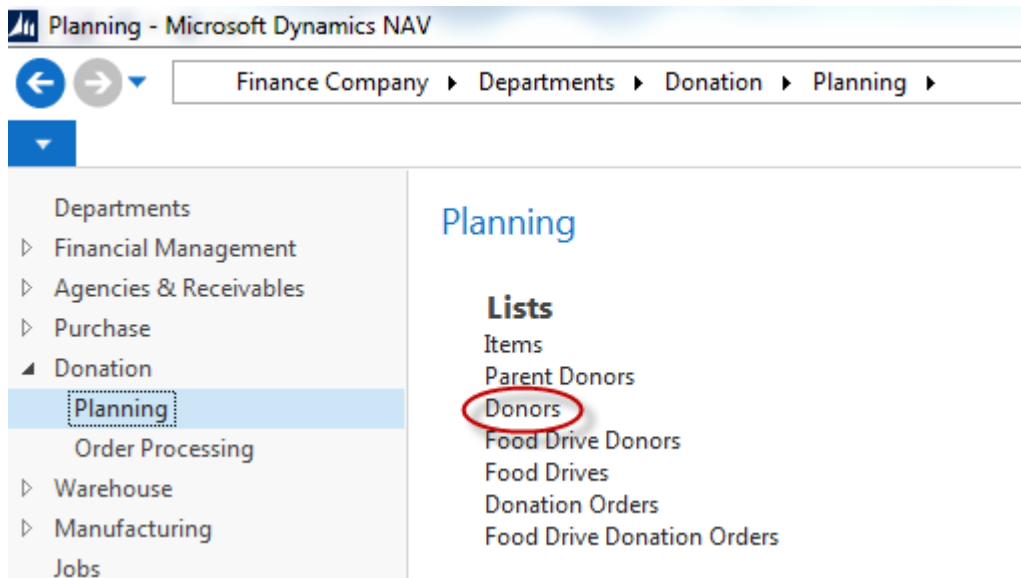
2. Click New on the Home Ribbon to create a new Donor. Donors may be edited by highlighting a Donor in the List, then right clicking and selecting Edit (or by double clicking on the Donor number).

General FastTab

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 button 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.

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.

Phone No.: Enter the primary phone number for this Donor. 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.

Primary Contact No.: If a contact was setup for this Donor previously, the User can select that Contact from the lookup list and the Contact field will be populated with the name of the Contact.

Contact: Enter the primary contact name for this Donor if not populated by entering the Primary Contact No. above. Up to 30 characters can be added here, using any type of text or numbers.

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.

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.

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

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

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,

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.

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.

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 documentation for more information

Date Donor Added This field can be filled in by the user indicating when the Donor Record was added to Ceres

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.

Communication FastTab

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 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 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.

IC Partner Code: This field is only applicable if the food bank has multiple companies setup for consolidation purposes. The Donor's IC partner code would be entered or selected from the lookup list, if the Donor is one of your intercompany partners.

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

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

Receipt Email Option: Select one the options below:

On Post only
On Post and Print only
Batch Posting
All Posting
Manual - with warning on post
Manual - without warning on post

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)

Manual – without 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. No warning will display, even if the Order Confirmation was previously sent (see Receipt Email Sent on the Shipping FastTab of a Donation Order).

Invoicing FastTab

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. See the Supplement Address documentation for more information

Receiving FastTab

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.

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

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.

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. Click New on the Home Ribbon.
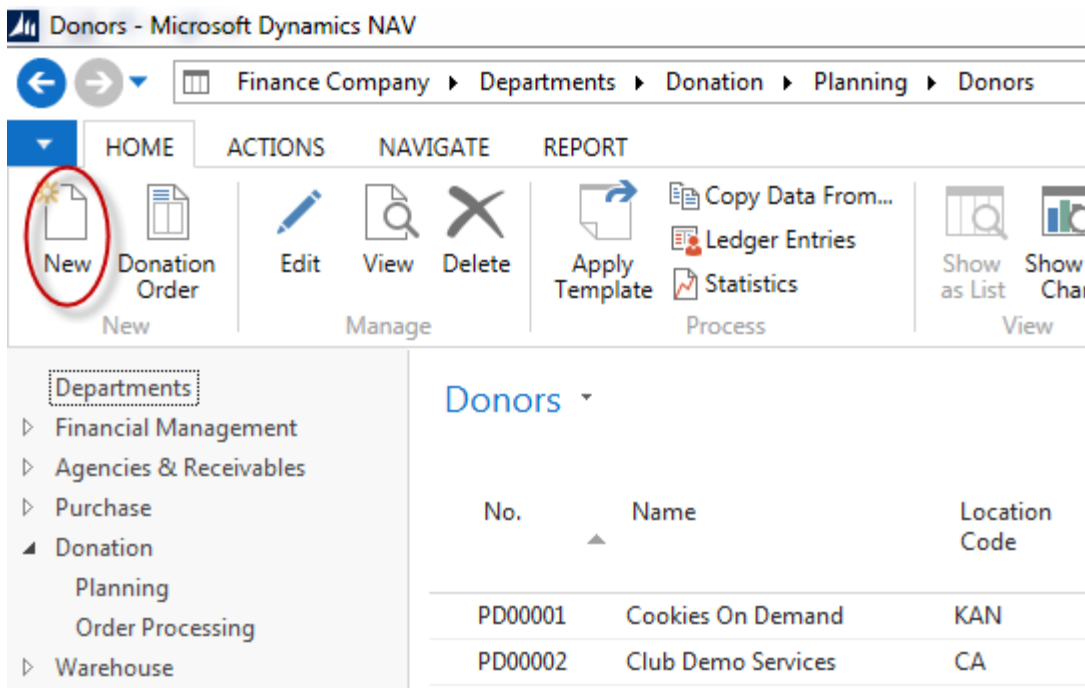
2. If Manual Nos. are used, enter the Donor number or tab through the No. field if you have assigned a document number series for donors.

3. Navigate to Home → Copy Data From…
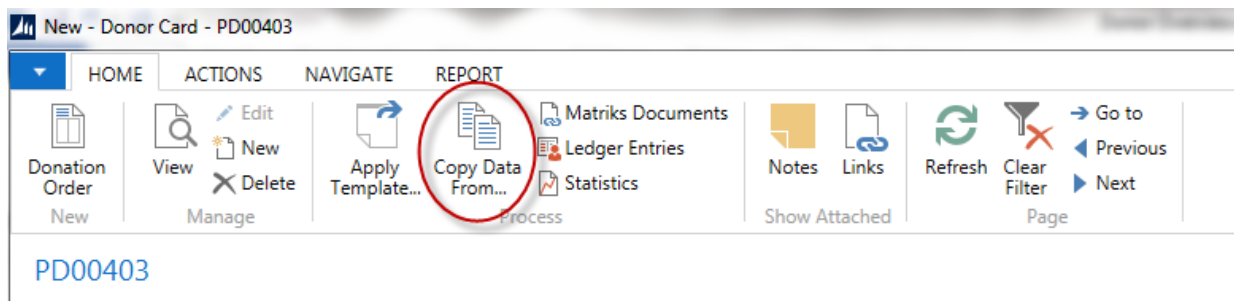
4. Select the Donor you would like to copy from in the Donor List and double click on the number.

5. 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