



## Food Drive Donation Order Overview

### **Purpose of this document**

This document outlines the food drive enhancement functionality that was added to base Ceres to better support tracking of donors and product that is received from a food drive.

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

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## Overview

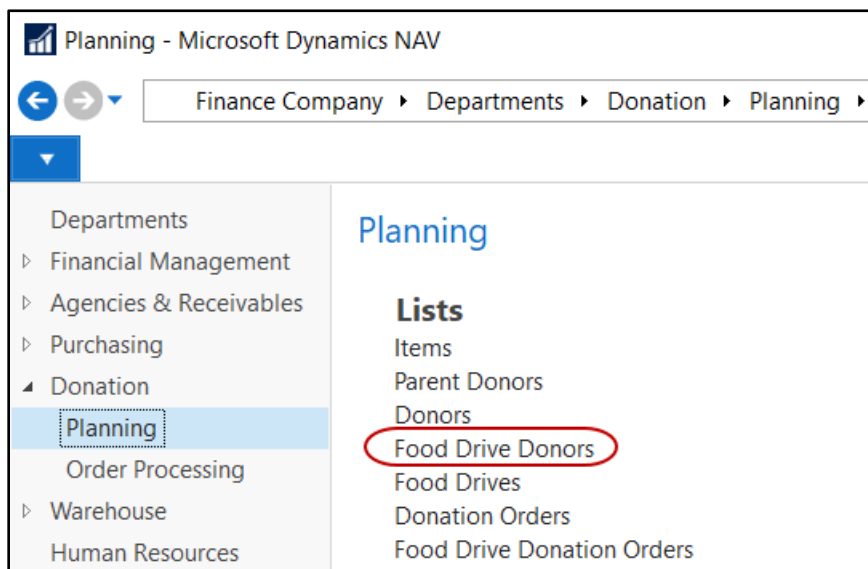
The food drive order functionality is comprised of

1. Data Capture
  - a. Separation of food drive donors from regular donors
  - b. Separation of food drive donation orders from regular donation orders
  - c. Additional fields on the donor cards and donation orders for tracking and reporting purposes
2. Routing
3. Reporting
  - a. Food Drive Materials Summary
  - b. Food Drive Scheduling
  - c. Food Drive Stops Reports

## Creating Food Drive Donors

Food drive donors can be setup separately from donors. This allows food drive activity to be accessed from one menu and non-food drive activity from another.

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



1. The Food Drive Donor field on the Donor/Food Drive Donor Card, designates whether a record is a food drive donor. Once this field is toggled it acts as a filter to exclude or the food drive donors from the Donor Lists. In other words, only records that are marked as Food Drive Donor will display in the Food Drive Lists and vice versa. In the below example, FD was included as part of the Donor No. to easily identify a food drive donor from a regular donor.

**FD00010 · Cosentino's Price Chopper**

**General**

<b>No.:</b>	FD00010	<b>FBC Donor Class of Trade Co...</b>	OTH
<b>Parent Donor No.:</b>		<b>FBC Product Source Code:</b>	FDR
<b>Name:</b>	Cosentino's Price ...	<b>FBC Product Category Code:</b>	FOOD DRIVE
<b>Name 2:</b>		<b>FBC County Code:</b>	
<b>Address:</b>	22210 West 66th ...	<b>Fund No.:</b>	UR
<b>Address 2:</b>		<b>Blue Receipt:</b>	<input type="checkbox"/>
<b>City:</b>	Shawnee Miss...	<b>CMobile Related:</b>	<input type="checkbox"/>
<b>State:</b>	KS	<b>Food Drive Donor:</b>	<input checked="" type="checkbox"/>
<b>ZIP Code:</b>	66226	<b>Date Donor Added:</b>	
<b>Country/Region Code:</b>		<b>Last Date Modified:</b>	3/20/2014
<b>UNC Donor ID No.:</b>		<b>Last Modified By:</b>	SWPROS\NPA
<b>Responsible Person Cod...</b>		<b>Blocked:</b>	
		<b>Dormant:</b>	<input type="checkbox"/>

2. Click Home → New to create a new food drive donor. Food drive donors may be edited by highlighting a donor in the List, then selecting Home → Manage → Edit.

**Food Drive Donors - Microsoft Dynamics NAV**

Finance Company ▶ Departments ▶ Donation ▶ Planning ▶ Food Drive Donors

**HOME ACTIONS NAVIGATE**

**New** **Edit** View Delete Ledger Entries Statistics Show as List Show as Chart Notes Links Refresh Clear Filter Find

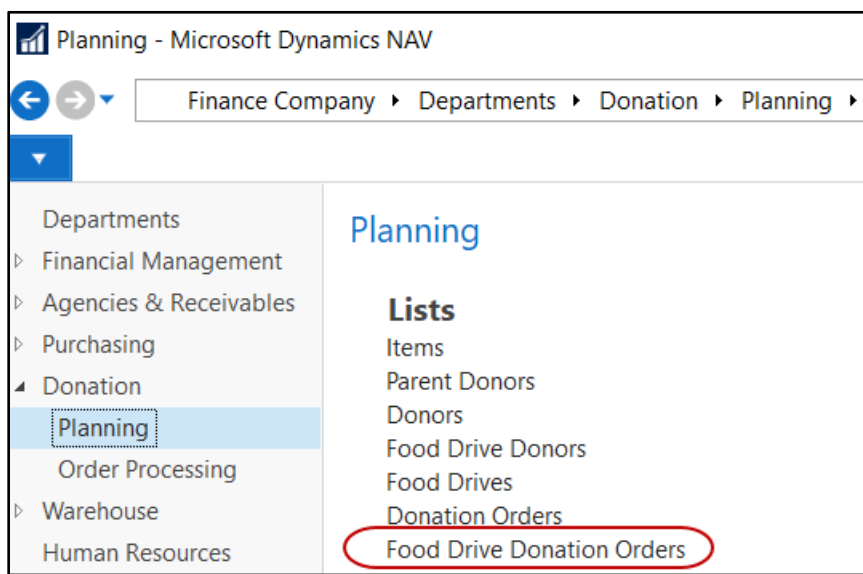
**Food Drive Donors** Type to filter (F3) No. Filter: • No

No.	Name	Address	City
FD00008	Country Club Swim Association	2920 Verona Road	Shawnee Mission
FD00009	South and Associates, P.C.	6363 College Boulevard,	Overland Park
FD00010	Cosentino's Price Chopper	22210 West 66th Street	Shawnee Mission
FD00011	Dillons	14301 Metcalf Avenue	Overland Park

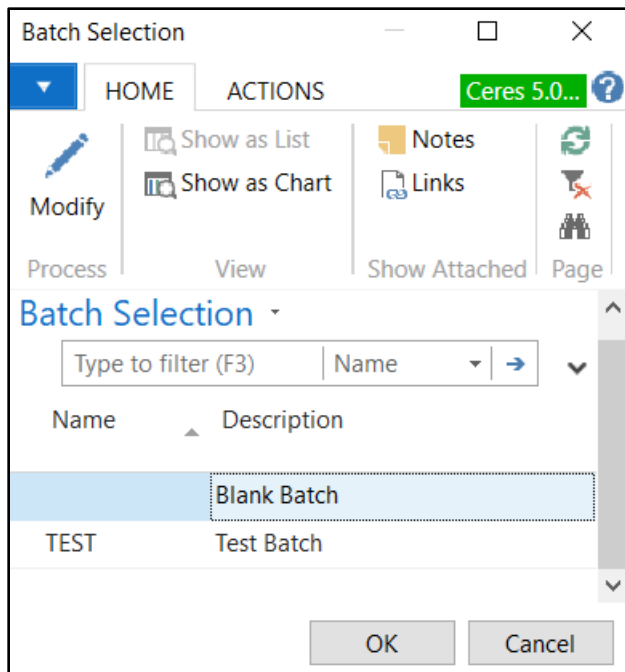
3. Refer to the Donor Overview Procedure Document for additional information on how to setup a donor.

## Creating Food Drive Donation Orders

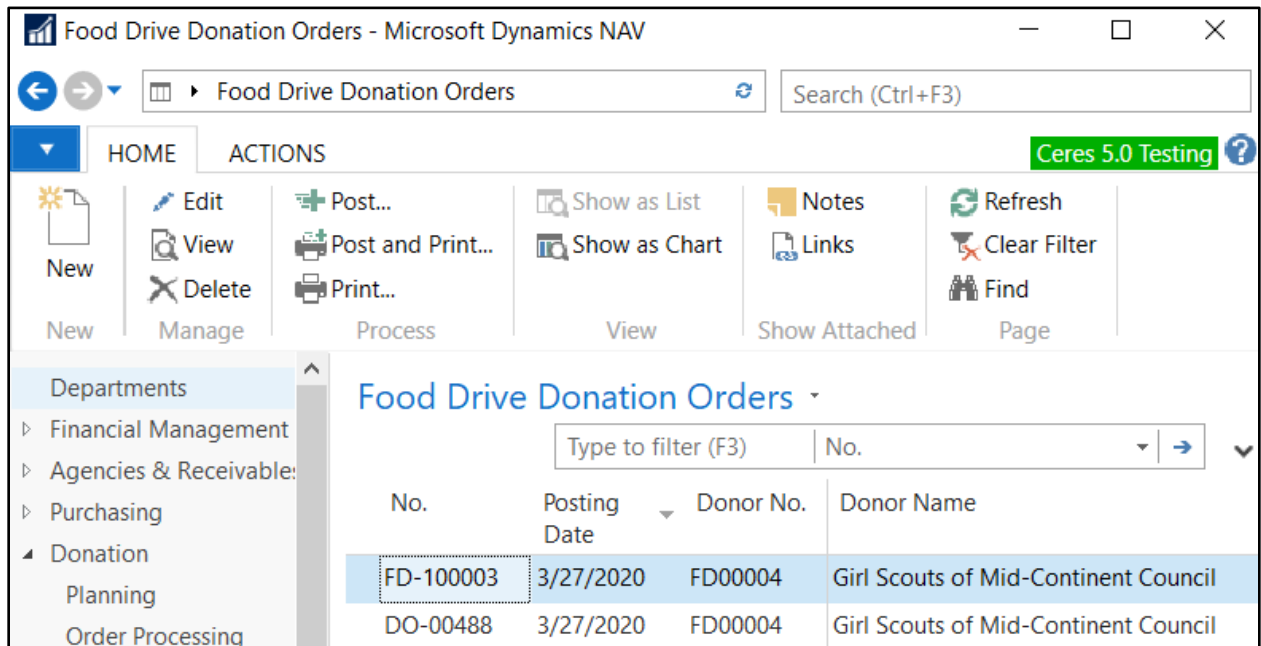
1. The food drive donation order can be accessed from Departments → Donation → Order Processing → Food Drive Donation Orders.



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

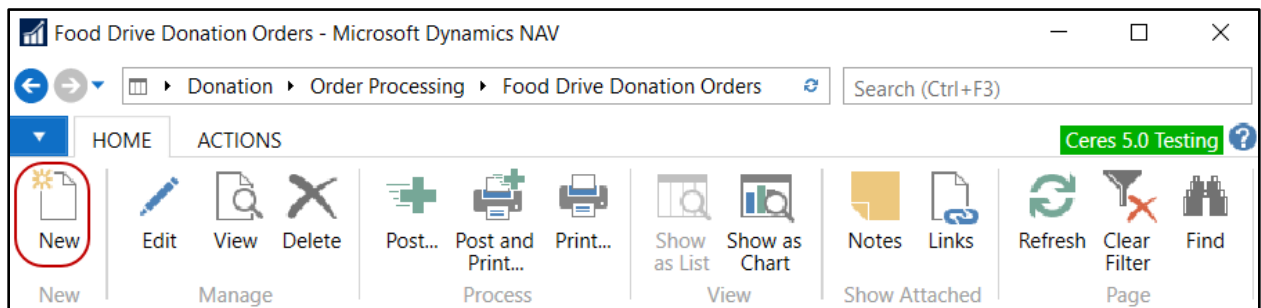


3. A list of open food drive donation orders that exist within Ceres will display. Select one from the list to edit or create a new order.



## Food Drive Donation Order Header

1. To create a new donation order, select New → Home.



- Press the Enter key to have Ceres automatically assign the next document number in the No. field. This will also fill in the Posting Date, Order Date, and Document Date by using the Work Date. If different document numbering was setup for food drive orders, click on the ellipsis button to the right of the No. field and then select a No. Series Code.

**New - Food Drive Donation Order - FD-100004**

HOME ACTIONS NAVIGATE

View Edit New Delete Manage Release Post... Post and Print... Process

**FD-100004**

General

No.: FD-100004 ...

Parent Donor No.:

Donor No.:

Contact No.:

Donor Name:

**No. Series List**

HOME NAVIGATE

New View List Edit List Delete Lines Relationships Manage Navigate

Code	Description	Starting No.
D-DNRPD	Product Donors	PD00400
D-ORD	Donation Orders	DO-00001
D-ORDFD	Food Drive Doantion Orders	FD-100000

- In the Donor No. field on the General FastTab, enter the food drive donor number or use the lookup to select the food drive donor from the List. The food drive donor's name, address, contact, and fund will flow from the Food Drive Donor Card.

**FD-100004 · Cosentino's Price Chopper**

General

No.:	FD-100004	...	Posting Date:	4/6/2020	▼
Parent Donor No.:			Order Date:	4/6/2020	▼
Donor No.:	FD00027	▼	Document Date:	4/6/2020	▼
Contact No.:		▼	Donor Order No.:		
Donor Name:	Cosentino's Price Cho...		Donor Shipment No.:		
Address:	9717 North Ash Avenue		Donor Invoice No.:		
City:	Kansas City	▼	Responsible Person Code:		▼
State:	MO		Fund No.:	UR	▼
ZIP Code:	64157	▼	FBC Product Source:	FDR	▼
Contact:	Lou DeMarco	▼	UNC Product Source:	LOCAL	
Phone No.:	816-883-2770		FBC Product Category:	FOOD DRIVE	▼
Ext.:			FBC Reason for Donation:		▼
No. of Archived Versions:	0		UNC Notice No.:		
Posting Description:	Order FD-100004		Blue Receipt:	<input type="checkbox"/>	
Department Code:	4000	▼	Food Drive No.:		▼
Project Code:		▼	Assigned User ID:		▼
Grant No.:		▼	Status:	Open	▼

**Note:** Only donors that are not marked as a food drive donor will display in the Donor List from a donation order, and only donors that are marked as a food drive donor will display in the Donor List from a food drive donation order.

4. If you are using Dimension, do a lookup in the Department Code field and select a department, or if this donation is part of a project, lookup in the Project Code and select a project.
5. Do a lookup in the FBC fields. FBC Product Source and FBC Product Category are mandatory fields which provide information to the Quarterly Poundage Report. The UNC Product Source field will update based on the FBC Product Source selected. FBC Reason for Donation is optional.
6. To associate the order with a food drive, do a lookup in the Food Drive No. field and select a food drive.
7. Update other fields as needed.
8. Move to Shipping FastTab and update fields as needed.

Shipping	
Ship-to Name:	Kansas City Warehouse
Ship-to Address:	3801 Topping Avenue
Ship-to City:	Kansas City
Ship-to State:	MO
Ship-to ZIP Code:	64127
Ship-to Contact:	David
Ship-to UPS Zone:	
Special Instructions:	
Inbound Whse. Handling Time:	
Lead Time Calculation:	
Requested Receipt Date:	
Promised Receipt Date:	
Expected Receipt Date:	
Sell-to Agency No.:	
Ship-to Code:	
Order Address Code:	
Shipment Method Code:	
Order Handling Group Code:	
Order Routing Group Code:	
Location Code:	KAN

**Special Instructions:** This is a free form text field can be used to enter special instructions about this order.



**Location Code:** Enter the Location where the product will be received. The Location Code entered here will flow to the food drive donation order lines.

**Order Handling Group Code:** This field will default from the donor and can be overridden if required. This field typically identifies how the order will be handled.

**Order Routing Group Code:** This field will default from the donor and can be overridden if required. This field typically identifies how the order will be routed.

9. Move to the Food Drive FastTab and update the fields as needed. The information on various fields is used in the food drive reports.

Food Drive	
No. of Participants:	1,000.00
Funds Collected:	1,225.00
Barrels Delivered:	50
Boxes Delivered:	100
Posters Delivered:	20
Pallets Delivered:	2
Totes Delivered:	10
Driver Needed:	<input type="checkbox"/>
Expected Receipt Date:	5/10/2020
Delivery Information:	
Food Drive Drop Date:	4/15/2020
Pick Up Date:	5/15/2020
Pick Up Time:	7:00:00 AM
Barrels Picked Up:	0
Boxes Picked Up:	0
Vehicle:	
Pallets Picked Up:	0
Totes Picked Up:	0
Swap:	<input type="checkbox"/>
Overflow:	<input type="checkbox"/>
Overflow Qty.:	0.00

**No of Participants:** Enter the number of participants that are associated with this order. This is information only field in that it does not print on any reports,

**Funds Collected:** Enter the \$ collected from the food drive. This is an information field only in that amounts entered here are not associated with a Deposit or the Cash Receipt Journal.

**Barrels, Boxes, Posters, Pallets, and Totes Delivered:** In each of these fields entered the total quantity that was delivered to the food drive site. Values entered in these fields print on the Food Drive Materials Summary and the Food Drive Scheduling report.

**Driver Needed:** Check this field if a driver is needed for this food drive. This field prints on the Food Drive Materials Summary and the Food Drive Scheduling report.

**Expected Receipt Date:** Enter the date when you expect to pick up/receive the food drive product. This date prints Food Drive Materials Summary and the Donation Stops report.

**Delivery Information:** This a text field where delivery information about this food drive order can be entered. Information entered in this field prints on the Food Drive Materials Summary.

**Food Drive Drop Date:** Enter the date you plan on dropping off the food drive supplies.

**Pickup Date and Pickup Time:** Enter the date and time you plan on picking up the food drive product.

**Barrels, Boxes, Pallets, and Totes Picked Up:** In each of these fields, enter the total quantity of barrels, boxes, pallets, and totes that were picked up from the food drive site. These fields print on the Food Drive Materials Summary Export FD Scheduling to Excel report.

**Vehicle:** From the drop down list, select the vehicle that is needed to deliver or pickup food drive product or supplies. This field prints on the Food Drive Material Summary and the Food Drive Materials Summary Export FD Scheduling to Excel report.

**Swap:** Check the Swap box to indicate that pallets, boxes, etc. will be swapped when materials are dropped off or when product is picked up. This field prints on the Food Drive Materials Summary.

**Overflow and Overflow Quantity:** Check the Overflow box to indicate that extra pallets, boxes, etc. are needed to handle the overflow. In the Overflow Quantity field, input the quantity. These fields print on the Food Drive Materials Summary.

10. If you are using Appian to route your order, update the fields on the Appian FastTab as needed.

Appian			
Route:	<input type="text" value="0"/>	Export to Appian:	<input type="checkbox"/>
Stop:	<input type="text" value="0"/>	Appian Routing Sent:	<input type="checkbox"/>
Leg:	<input type="text" value="0"/>	Appian Routing Date:	<input type="text" value=""/>
Total Cubic Feet:			0.00

## Food Drive Donation Order Lines (Subform)

1. Move to the lines of the donation order. Here you specify which items are being donated.
2. In the Type field, select item.

3. In the No. field, type in the item number or use the lookup to select the item from the list. The item's description, unit of measure, and gross weight will flow forward to the line.

Donation Order Subform						
Line ▾ Functions ▾ Find Filter Clear Filter						
Type	No.	Description	Quantity	Unit of Measure Code	Location Code	Bin Code
Item	20000	Assorted Bulk	850	LB	KAN	01-101-A
Item	20010	Non Food Items	150	LB	KAN	01-101-A

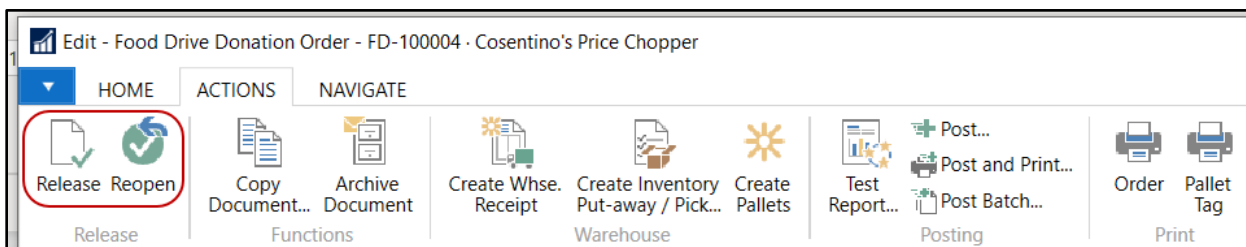
4. In the Location Code field, select the location where the Item will be received.
5. If the location you specified is set up to require bins, select a bin on the Bin Code field.
6. The quantity is in reference to the Unit of Measure Code. If Lot Nos. has been specified on the Item Card, a Lot No. will be generated at this time. If the item is donated on more than one lot, you will need to create an additional line.
7. If applicable, fill in the Lot Expiration Date, Lot Consume By Date, and Ship by Date fields.

**Note:** These fields may have already been pre-generated by the calculation formulas set on the Item Card. In this case, you may review and adjust these dates on the order as necessary.

8. Select the dimension values that apply to the item for this order. If you inputted a Department Code and Project Code on the General FastTab, the value will flow to the line.
9. Repeat the steps above for each additional item that will be received.

## Releasing the Document

1. When the data entry is complete, the order can be released by selecting Actions → Release. This locks the order from users being able to enter more items or change quantities. The order can be reopened by selecting Actions → Release → Reopen.



2. Reopen and release the order as many times as needed to update the order.

## Receiving

Food drive donation orders can be received through the food drive donation order, or via warehouse processes. In this example, we will receive from the food drive donation order. If you would like to receive via Receipts and Put-Aways, please refer to the Warehouse Put-Away Overview Procedure Document.

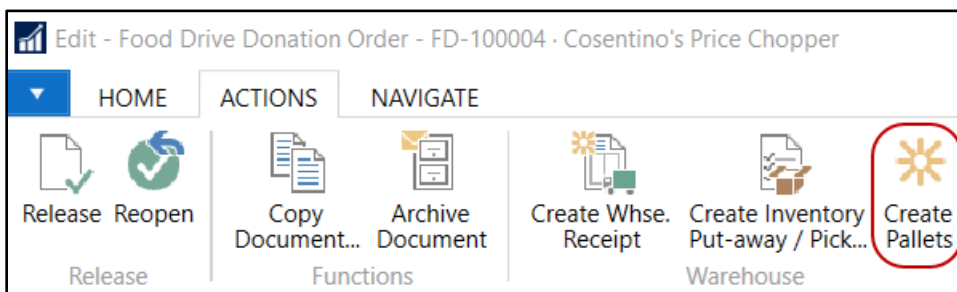
1. When the items you ordered arrive, return to Departments → Donation → Order Processing → Food Drive Donation Orders.
2. Select the food drive donation order from the List you want and select Home → Manage → Edit.
3. Enter today's date in the Posting Date field.
4. On the Assigned User ID field, use the lookup to select the user in charge of receiving the products.
5. Move to the lines of the donation order.
6. Update the Qty. to Receive field with the actual quantity that is being received into inventory.

**Note:** If the Qty. to Receive is lower than the Quantity field, you will be completing a partial receipt. You can return to the Order later to post more receiving. In the example below, the user will receive a portion of the first item now and the other portion at a later time.

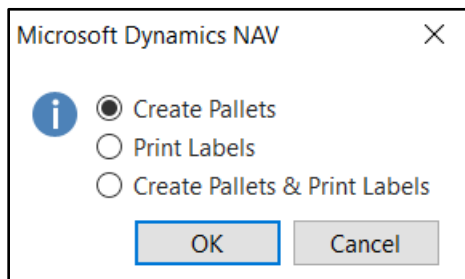
7. Verify the Lot No. field shows the correct lot number. To assign a different lot, type in a different number.
8. If the items are palletized, fill in the Tier and Height fields. Tiers are the number of units per level; height is the number of levels. In the example below, we will receive 1 pallet of each item that are 1,00 level high and 1 deep.

Tier	Height
1	1000
1	1000

9. To create pallet, select Home → Process → Create Pallets.



10. Select one of the following options and then click OK.

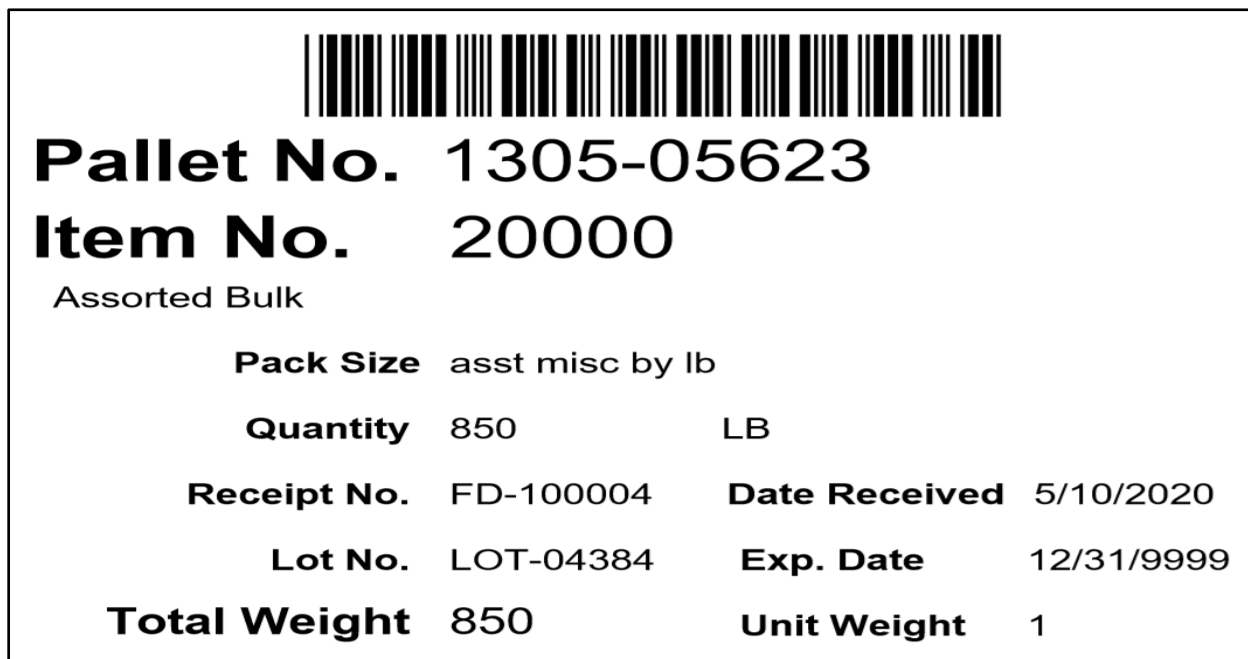


A Microsoft Dynamics NAV dialog box titled "Microsoft Dynamics NAV" with a close button (X) in the top right corner. On the left is an information icon (i). The dialog contains three radio button options: "Create Pallets" (which is selected), "Print Labels", and "Create Pallets & Print Labels". At the bottom are two buttons: "OK" and "Cancel".

11. Ceres will assign pallet numbers to the palletized items and split the lines according to the tiers and height.

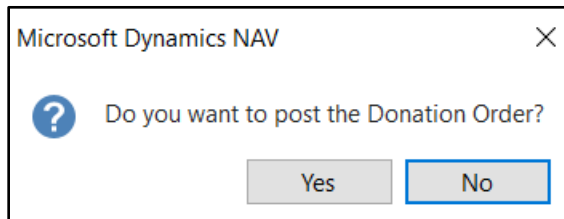
Donation Order Subform						
Line ▾ Functions ▾ Find Filter Clear Filter						
Type	No.	Description	Location Code	Bin Code	Pallet No.	Lot No.
Item	20000	Assorted Bulk	KAN	01-101-A	1305-05623	LOT-04384
Item	20010	Non Food Items	KAN	01-101-A	1305-05624	LOT-04385

12. Once you have verified the data, select Home → Process → Post, or select Post & Print to print a receiving document.
13. If you wish to create pallets first and then print pallet tags, click on Create Pallets twice. The first time choose Create Pallets. The second time choose Print Labels. Various pallets tag reports exist that can be linked to Report Selections. Below is an example of Report 14012531 – Pallet Tag 11X8.5 w/ Barcode.



A pallet tag report example. At the top is a barcode. Below it, the text "Pallet No. 1305-05623" is displayed in a large, bold font. Below that, "Item No. 20000" is displayed in a large, bold font. Under "Item No.", the text "Assorted Bulk" is displayed. Below this, the text "Pack Size asst misc by lb" is displayed. Below that, the text "Quantity 850 LB" is displayed. Below this, the text "Receipt No. FD-100004 Date Received 5/10/2020" is displayed. Below that, the text "Lot No. LOT-04384 Exp. Date 12/31/9999" is displayed. At the bottom, the text "Total Weight 850 Unit Weight 1" is displayed.

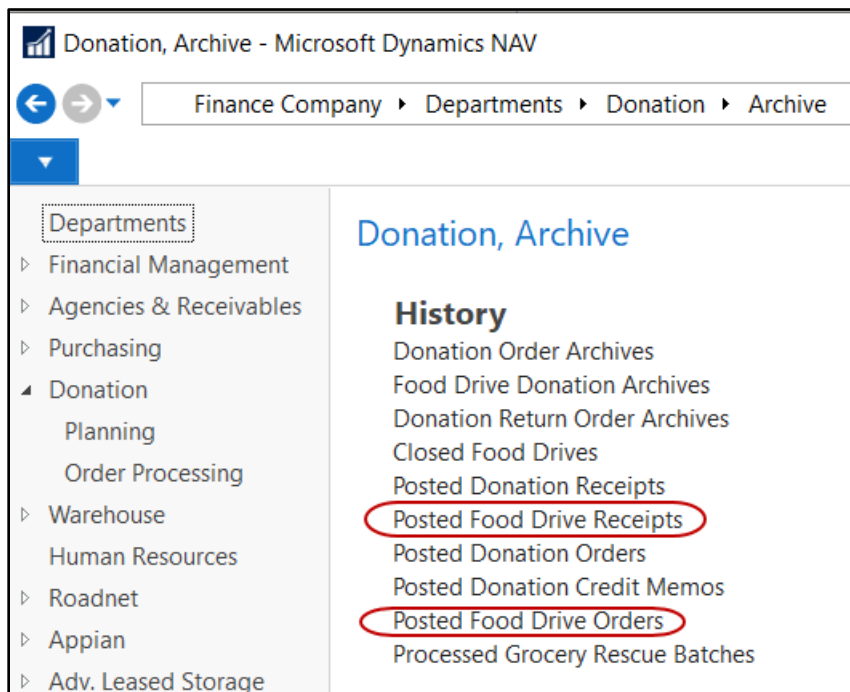
14. If you need a pallet tag for a lot tracked only Item (not palletized), select Actions → Print → Pallet Tag.
15. To receive the donation order, select Home→ Process → Post. Select Yes to post the donation order and receive the product into inventory.



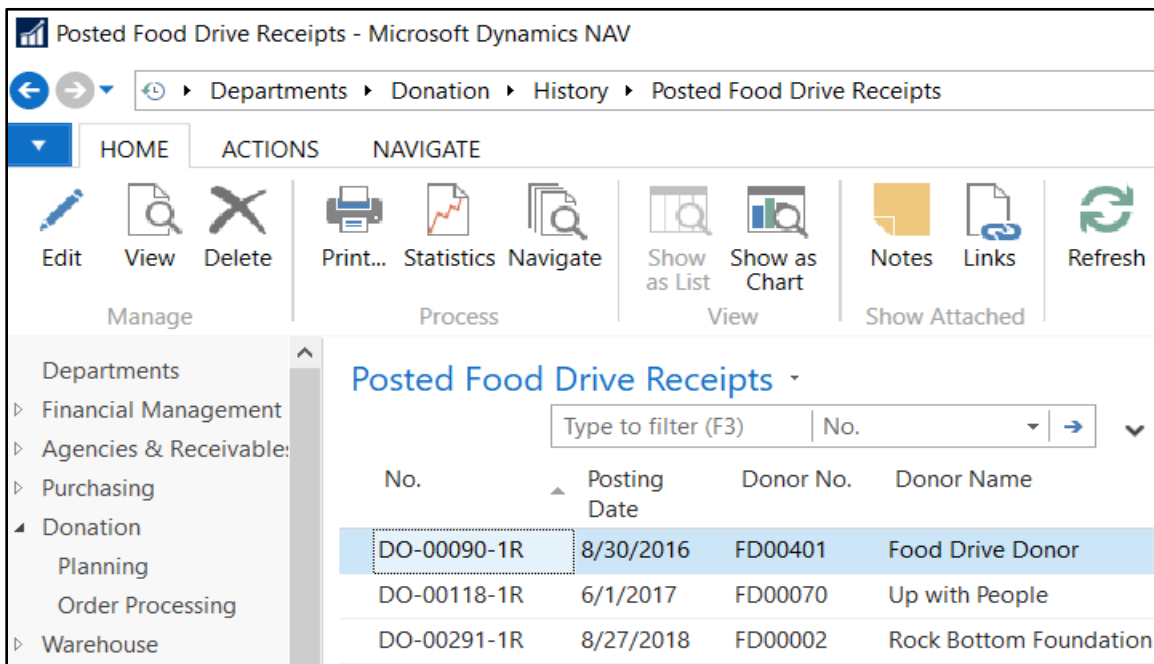
16. If you have received the donation order in full, the order will be deleted. Historical data can be obtained from the posted food drive donation receipts or from posted food drive donation orders.

## Posted Food Drive Receipts and Posted Food Drive Orders

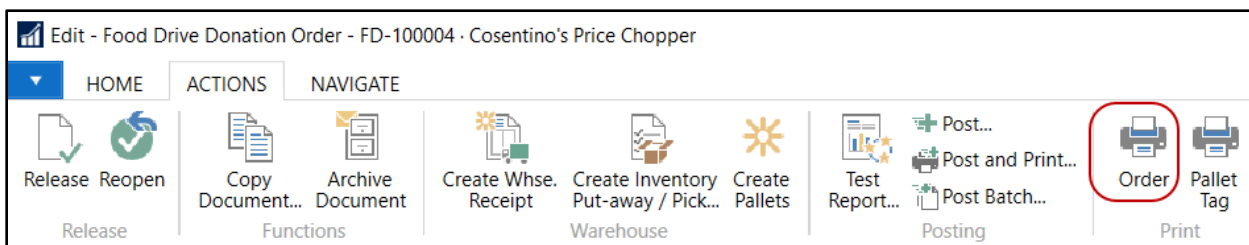
1. Once the food drive donation order has been posted, you can access the posted food drive receipts or posted food drive orders from Departments → Donation → Archive→ Posted Food Drive Receipts or Posted Food Drive Orders.



2. Select Posted Food Drive Receipts or Posted Food Drive Order and a list of documents will display.

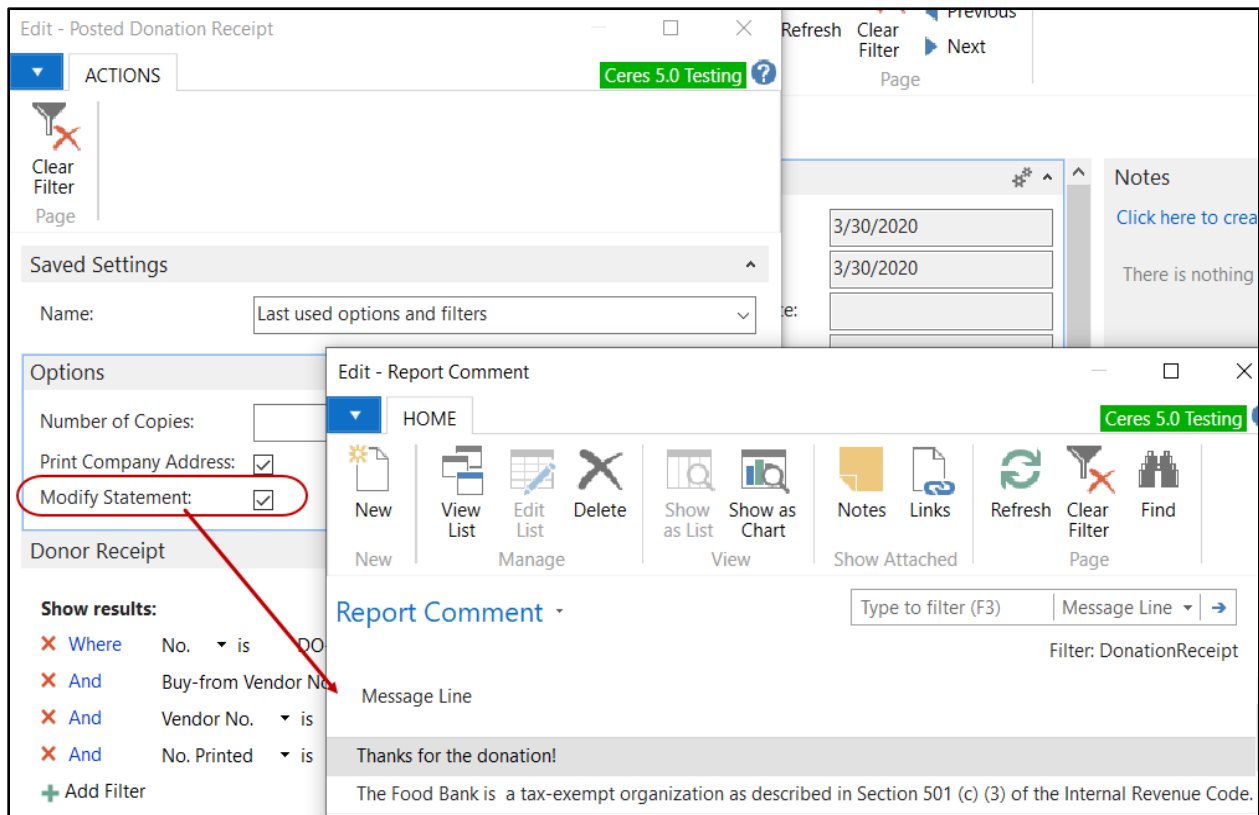


3. Select the desired document then select Actions → Print → Order.



4. Select the number of copies desired. This is the number of copies in addition to the original. If Default No. of Copies are setup, inputting an amount below will override the setup.
5. Check the box if you would like to print the Company Address on the document

- Click the Modify Statement check box to modify the standard statement that will print on all Donation Receipts. The following is the recommended verbiage from Feeding America. Simply replace The Food Bank with the name of your food bank. This option only applied to posted food drive receipts.



- You can also email the receipts. For more information, please see the Agency and Donor Document Emailing Procedure Document.



## Reporting

Three food drive reports were created to support the food drive functionality.

### Food Drive Materials Summary

The report outlines the materials that need to be dropped off or picked up for each food drive site. This report can be accessed from Departments → Donation → Order Processing → Documents.

<b>Ceres 5.0 Testing</b> 100 Main Street Kansas City , MO 64127	<b>Food Drive Materials Summary</b>												
	Donation Order Number: FD-100003												
	Donation Order Date: 3/27/2020												
	Page: 1												
From: Girl Scouts of Mid-Continent Council Carol Connor 8383 Blue Parkway Drive Kansas City, MO 64133	Ship To: Kansas City Warehouse David 3801 Topping Avenue Suite 1461 Kansas City , MO 64127												
Food Drive Drop Date: 4/15/2020 12:00:00 AM	Contact Name: Carol Connor												
Expected Received Date: 5/10/2020 12:00:00 AM	Contact Phone No.: 816-358-8750 ex												
Notice No.													
Donor ID: FD00004													
<b>Delivery Information</b>													
<hr/>													
<b>Drop-Off</b>	<table><tr><td>Barrels Delivered</td><td>Boxes Delivered</td><td>Totes Delivered</td><td>Pallets Delivered</td><td>Posters Delivered</td><td>Vehicle</td></tr><tr><td>50</td><td>100</td><td>10</td><td>2</td><td>20</td><td></td></tr></table>	Barrels Delivered	Boxes Delivered	Totes Delivered	Pallets Delivered	Posters Delivered	Vehicle	50	100	10	2	20	
Barrels Delivered	Boxes Delivered	Totes Delivered	Pallets Delivered	Posters Delivered	Vehicle								
50	100	10	2	20									
<b>Pickup</b>	<table><tr><td>Barrels Picked Up</td><td>Boxes Picked Up</td><td>Totes Picked Up</td><td>Pallets Picked Up</td></tr><tr><td>0</td><td>0</td><td>0</td><td>0</td></tr></table>	Barrels Picked Up	Boxes Picked Up	Totes Picked Up	Pallets Picked Up	0	0	0	0				
Barrels Picked Up	Boxes Picked Up	Totes Picked Up	Pallets Picked Up										
0	0	0	0										
<b>Misc.</b>	<table><tr><td>Swap</td><td>Overflow</td><td>Overflow Qty.</td><td>Driver Needed</td></tr><tr><td>No</td><td>No</td><td>0.00</td><td>Yes</td></tr></table>	Swap	Overflow	Overflow Qty.	Driver Needed	No	No	0.00	Yes				
Swap	Overflow	Overflow Qty.	Driver Needed										
No	No	0.00	Yes										
<hr/>													
Signature: _____	Date: _____												

## Export FD Scheduling to Excel

This is an export the Food Drive Materials Summary grouped by Shipment Method Code which lists materials required and to be picked by Donor by Date. The export can be accessed from Departments → Donation → Tasks → Order Processing. An excerpt of the report is below.

	A	B	C	D	E	F	G	H	I	J
1	<b>Food Drive Materials Summary</b>									
2	<b>Request Date: 04/06/20; User ID: ESOPRO\KJK</b>									
3										
4	<b>Food Drive Delivery Date: 04/01/20..06/30/20</b>									
5										
6	<b>Method</b>					<b>Barrels</b>	<b>Boxes</b>	<b>Posters</b>	<b>Pallets</b>	<b>Totes</b>
7	<b>Code</b>	<b>Donor No.</b>	<b>Donor Name</b>	<b>Order No.</b>		<b>Required</b>	<b>Required</b>	<b>Required</b>	<b>Required</b>	<b>Required</b>
8										
9										
10	<b>Food Drive Date: 04/15/20</b>									
11		FD00004	Girl Scouts of Mid-Continent Council	FD-100003		50	100	20	2	10
12		FD00027	Cosentino's Price Chopper	FD-100004		50	100	20	2	10
13										
14		<b>Food Drive Drop Date 04/15/20 Totals:</b>				<b>100</b>	<b>200</b>	<b>40</b>	<b>4</b>	<b>20</b>
15										
16		<b>Shipment Method Code Totals:</b>				<b>100</b>	<b>200</b>	<b>40</b>	<b>4</b>	<b>20</b>
17										
18	<b>Report Totals</b>									

## Food Drive Donation Stops

The new report summarizes the number of stops (i.e. donation orders) by date that can be grouped by Location Code. This report can be printed for food drive donation orders or donation orders. This report can be accessed from Departments → Donation → Order Processing → Documents.

As noted above, the Begin Date and End Date filters are based on the Expected Receipt Date field on the food drive donation order. Please note that location grouping is based on the Location Code on the Shipping FastTab of the donation order.

<b>Donation Stops</b>		4/6/2020 2:14 PM
Finance Company		Page 1
		ESOPRO\KJK
Food Drive and Product		
<b>Date</b>	<b>No. Of Orders</b>	
<b>Location Code</b> KAN		
04/15/20	2	
05/10/20	2	

## **Related Topics**

1. Donor Overview
2. Donation Order Overview
3. Food Drive Overview
4. Appian Overview & Integration
5. Donor Preferred Pickup Days and Hours