Donor Change on Posted Donation

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Purpose of this document

This document discusses how to update the donor number, within specific guidelines, after already posting a donation.

Table of Contents

Purpose

After posting a donation order it may be necessary to update the Donor to whom the donation order is related. This need is based on human error e.g. the wrong Donor was specified for the donation order. The Update Donor Number functionality can be used to correct this issue, with some limitations on its' use.

Note that **no** changes can or will be made via this batch update to Items, Item Quantities, or any details of the transaction other than changing the donor information on the record. The Parent Donor must be the same for the original and the new Donor. Security is in place to prevent unauthorized users from running this process.

Ceres Object release 4.00.00 is required for this functionality.

Configuring Security

1. Navigate to the User Setup record for the user you which to assign this permission. Departments → Administration→ Application Setup → Users → User Setup.
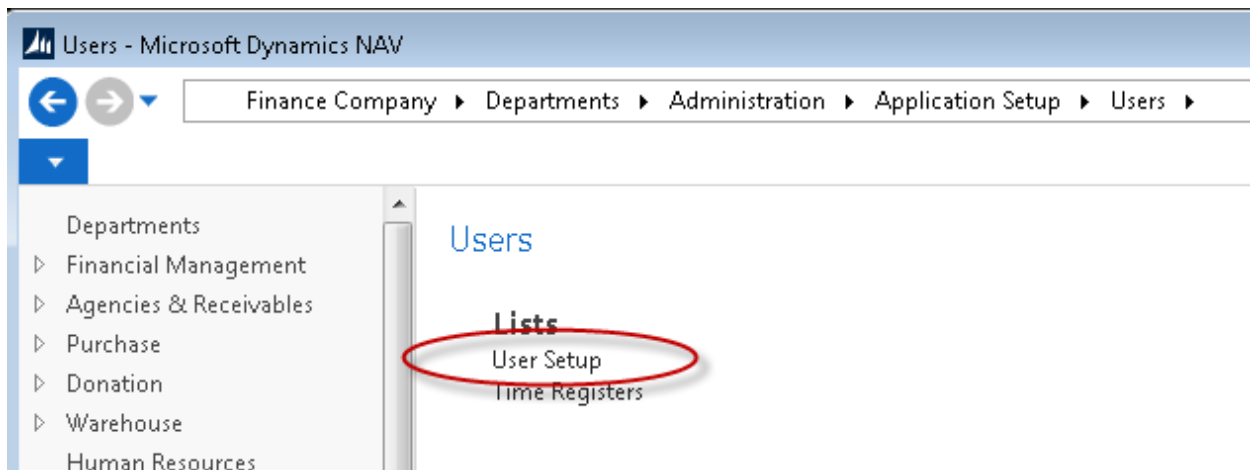
2. The User Setup List page will be displayed. Locate the desired user's record and edit the list by double clicking the user's record.

3. Locate the Change Donor on Posted Orders option as shown below and place a check mark in the box.

User Setup ▾

User ID	Allow Posting From	Allow Posting To	Regi... Time	Time She...	Ove... Cre...	Mo... Cre...	Ove... Acti...	View We...	Default Item Display Se...	Default Locatio...	Default CMobile ...	Override Item R...	Change Donor on Posted Or...	Allow Adv...	Allow Cre...
ESP			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐
SLL			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☐	☐
SSY			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☐	☐
SWPROS\DCC			☐	☐	☐	☐	☐	☑	Donor then I...			☐	☐	☑	☐
SWPROS\JAL			☐	☐	☐	☐	☐	☐	Donor then I...			☐	☐	☑	☐
SWPROS\JBL			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐
SWPROS\KJK			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐
SWPROS\LCG			☐	☐	☐	☐	☐	☐	Donor then I...			☐	☐	☑	☐
SWPROS\NPA			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐
SWPROS\ODL			☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐
SWPROS\RDJ			☐	☐	☐	☐	☐	☐	Donor then I...			☐	☑	☐	☐
SWPROS\RJB	7/1/2000	6/30/2020	☐	☐	☐	☐	☐	☑	Donor then I...			☐	☐	☑	☐
SWPROS\RXF			☐	☐	☑	☑	☑	☑	Donor then I...			☑	☑	☑	☐
SWPROS\W...	7/1/2000	6/30/2020	☐	☐	☑	☑	☑	☑	Donor then I...			☐	☑	☑	☐

Updating Donor Number on Posted Donation Orders

1. The process of changing the Donor is initiated from the posted donation order history record. These can be accessed from Departments → Donation → History → Posted Donation Orders.

2. The Posted Donation Order List page will be displayed.

3. Select the posted donation order by double-clicking on it or using right-click and choose edit from the list of actions.

4. Choose Home → Update Donor Number s shown above. The Update Donor Number request page will be displayed.

If Ceres has **not** been configured for you to complete this process a message similar to the one shown below will be displayed.
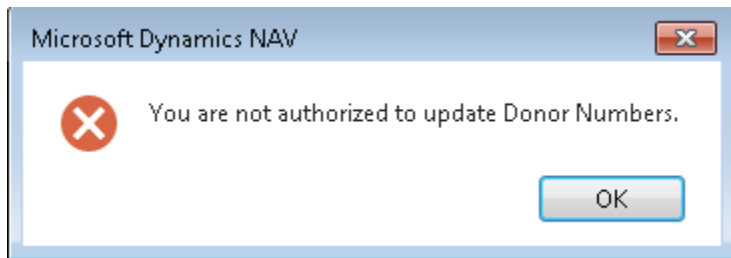
5. The current Donor number and Donor name will be populated by Ceres based on the related Posted Donation Order's Donor information.

6. You must enter the new Donor in the "New" section.

7. Select the Update check box if you wish to have Ceres effect the changes. Left unselected, the report will simply provide a preview of the information what will be changed by this process. Normally you would check this box and press "Print" to complete the process. If you have the "Update" box checked you will not be allowed to preview as a hard copy is required when performing this update. If you attempt to "Update" without printing you will receive the following error message.

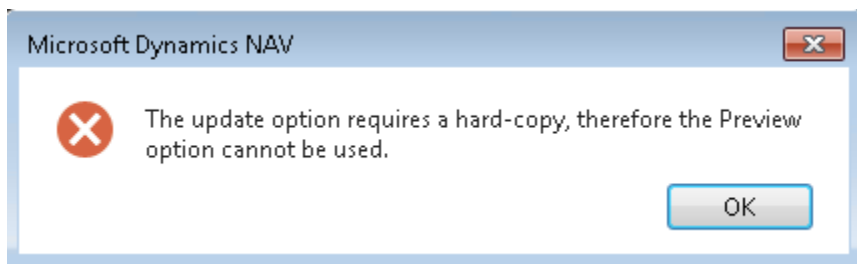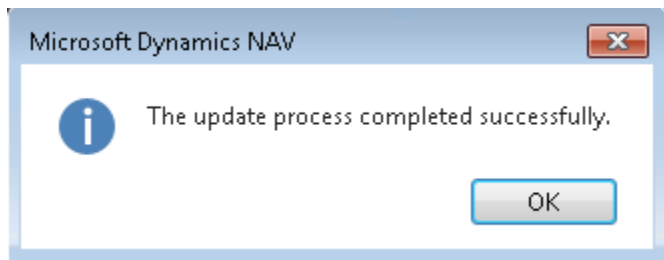8. When you select print with the update option checked, the process will run and all related records are updated. At the completion of the process you will receive the following message and the donation order will show the new donor information.

9. The printed report will capture the information changed in the database by the process. Here is an example of the reports output.

Document No.: DOR-0001-1 Donor No.: D-1080 New Donor No.: D-0008

Entry No.	Table No.	Table Name	Primary Key
1	122	Purch. Inv. Header	DOR-0001-1
2	123	Purch. Inv. Line	DOR-0001-1,10000
3	25	Vendor Ledger Entry	37
4	380	Detailed Vendor Ledg. Entry	2
5	17	G/L Entry	36
6	17	G/L Entry	37
7	254	Tax Entry	2
8	5802	Value Entry	1
9	120	Purch. Rcpt. Header	DOR-0001-1R
10	121	Purch. Rcpt. Line	DOR-0001-1R,10000
11	32	Item Ledger Entry	1

Related Topics:

1. Donation Order Overview
2. Donation Credit Memos
3. Donation Return Orders
4. Blue Receipt Reporting