

## 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.

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## Purpose

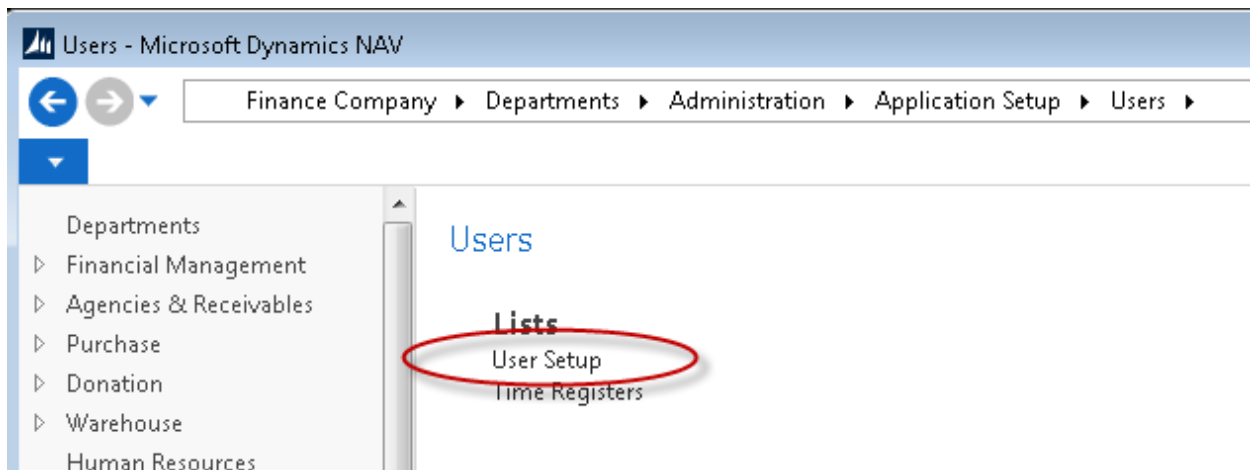
After posting a donation order it may be necessary to update the Donor to whom the donation order is related. This need is based on human error e.g. the wrong Donor was specified for the donation order. The Update Donor Number functionality can be used to correct this issue, with some limitations on 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			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SLL			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSY			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SWPROS\DCC			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\JAL			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\JBL			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\JKK			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\LCG			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\NPA			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\ODL			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\RDJ			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SWPROS\RJB	7/1/2000	6/30/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\RKF			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SWPROS\W...	7/1/2000	6/30/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Donor then L...			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot shows the Microsoft Dynamics NAV interface. The top navigation bar displays the path: Finance Company > Departments > Donation > History > Posted Donation Orders. The left sidebar shows the 'Departments' menu with 'Donation' selected. The main area shows the 'History' page with a list of tasks and archives. The 'Posted Donation Orders' item is circled in red.

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

Posted Donation Orders - Microsoft Dynamics NAV

Finance Company ▶ Departments ▶ Donation ▶ History ▶ Posted Donation Orders

HOME ACTIONS NAVIGATE

Edit View Delete Print... Statistics Navigate Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Page

Manage Process View Show Attached

Departments

- ▶ Financial Management
- ▶ Agencies & Receivables
- ▶ Purchase
- ▶ Donation
  - ▶ Planning
  - ▶ Order Processing
- ▶ Warehouse
- ▶ Human Resources
- ▶ Roadnet
- ▶ Appian
- ▶ Administration
- ▶ Matriks Doc

Posted Donation Orders

No.	Donor No.	Donor Name	Order Date	Posti... Date
DO-93155-1	PD00384	Wal-Mart Supercenter #2855	3/1/2012	3/1/2012
DO-00300-1	PD00376	Wal-Mart Supercenter #2955	7/11/2012	7/16/2012
DO-93158-1	PD00398	Wal-Mart Supercenter #35	7/27/2012	7/27/2012
FD-00021-1	PD00003	Pilgrim's Pride Corporation	8/2/2012	8/2/2012
DO-93165-1	PD00001	Cookies On Demand	10/21/2012	10/21/2012
DO-93162-1	PD00001	Cookies On Demand	10/23/2012	10/23/2012
DO-93163-1	PD00005	DBJ Vending	10/23/2012	10/23/2012
DO-93164-1	PD00004	Pfizer Consumer Healthcare	10/24/2012	10/24/2012
DO-93166-1	PD00320	Walgreens	11/1/2012	11/1/2012

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

Edit - Posted Donation Order - DO-93165-1 - Cookies On Demand

HOME ACTIONS NAVIGATE

View Edit Delete **Update Donor Number** Update FBC/UNC Product Source Codes Print... Statistics Matriks Documents OneNote Notes Links Refresh Clear Filter Go to Previous Next

DO-93165-1 - Cookies On Demand

General

No.:	DO-93165-1	Project Code:	
Parent Donor No.:		Posting Date:	10/21/2012
Donor No.:	PD00001	Document Date:	10/21/2012
Contact No.:		Order No.:	DO-93165
Donor Name:	Cookies On Demand	Donor Order No.:	
Address:	5252 Speaker Road	Responsible Person Code:	
City:	Kansas City	UNC Notice No.:	
State:	KS	UNC Reason for Donation:	QUALITY
ZIP Code:	66106	Fund No.:	UR
Contact:	Eric Stanley	FBC Product Source:	LOCAL
No. Printed:	5	UNC Product Source:	LOCAL
Grant No.:		FBC Product Category:	DONATED
Department Code:		Food Drive No.:	
		Last Modified By:	ESP

▼ Show more fields

Purchase Invoice

Gross Weight: 24,000

Notes

[Click here to create a new note.](#)

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

Edit - Update Donor Num...

ACTIONS

Clear Filter Page

Options

Current

Donor No.: PD00001

Donor Name: Cookies On Demand

New

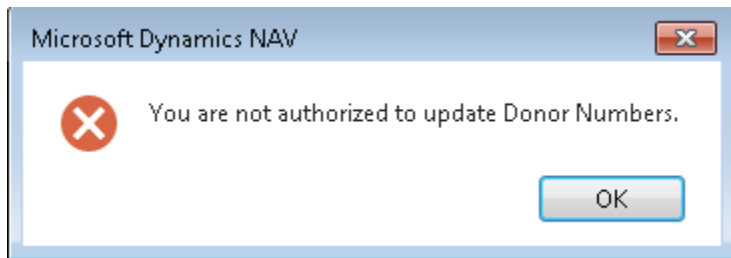
Donor No.: FD00008

Donor Name: Country Club Swim ...

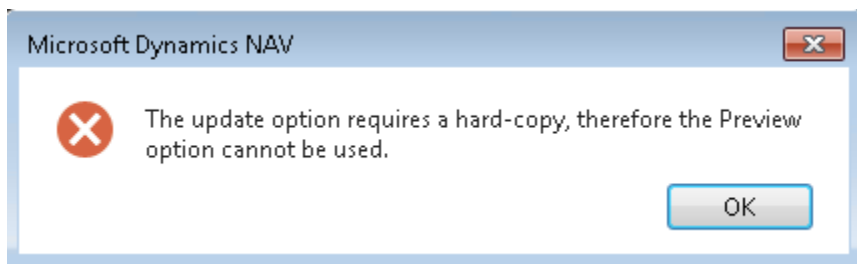
Update: ☐

Print... Preview Cancel

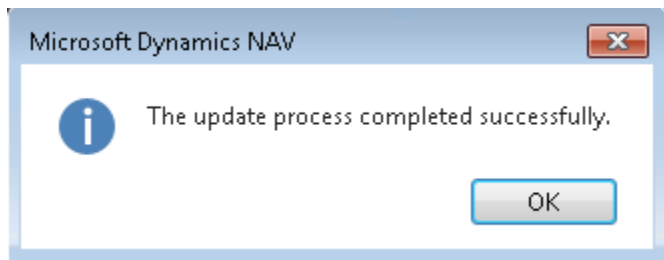
If Ceres has **not** been configured for you to complete this process a message similar to the one shown below will be displayed.



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