

Food Drive Enhancements

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document outlines the enhancements made to the Food Drive Overview functionality. Both are included in all versions of Ceres 4.

Copyright © Feeding America 2014, All Rights Reserved.

This document may be printed and reproduced only by Feeding America and member organizations.

Table of Contents

PURPOSE.....	3
FOOD DRIVE DONORS AND FOOD DRIVE DONATION ORDERS.....	3
ROUTING.....	7
REPORTING	7
FOOD DRIVE MATERIALS SUMMARY.....	7
EXPORT FD SCHEDULING TO EXCEL	9
FOOD DRIVE DONATION STOPS	9
RELATED TOPICS.....	10

Purpose

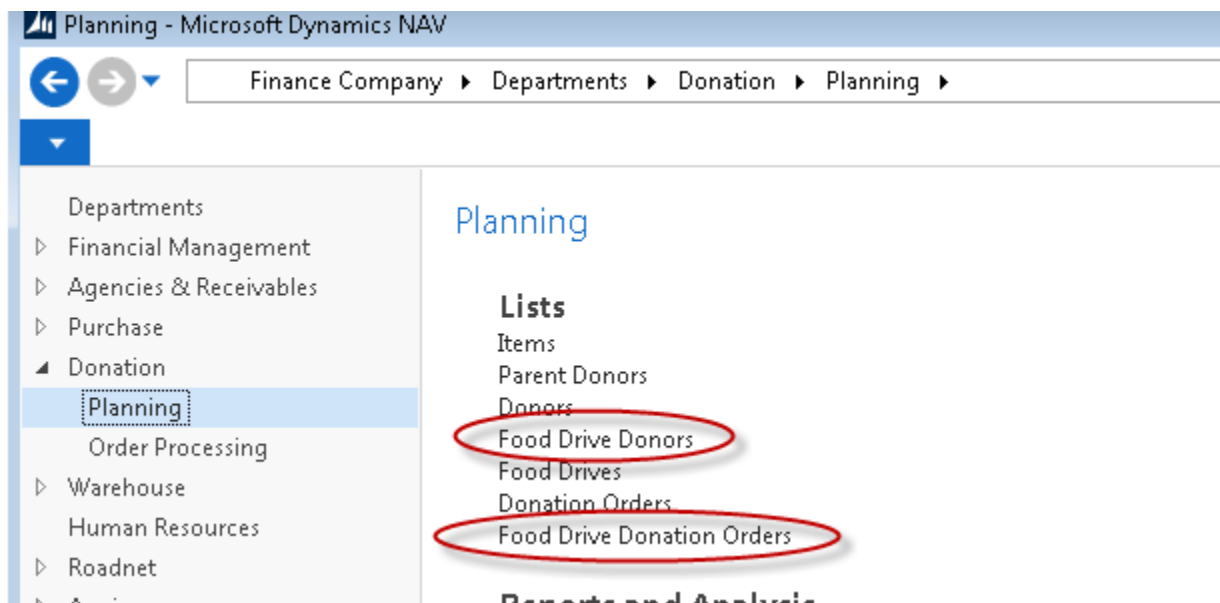
The base Ceres food drive functionality (Procedure: Food Drive Overview) was enhanced to better meet the needs of the food banks related to data entry, reporting, and routing support. The enhancements include:

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 (see Appian Overview documentation for more details)
3. Reporting
 - i. Food Drive Materials Summary
 - ii. Food Drive Scheduling
 - iii. Food Drive Stops Reports

Ceres object release 4.00.00 is required for the functionality defined in this procedure.

Food Drive Donors and Food Drive Donation Orders

Food Drive Donors and Food Drive Donation Orders were added to Donation menu. This allows food drive activity to be accessed from one menu and non-food drive activity from another.



1. To separate the two, a new field called Food Drive Donor was added to the Donor Card and the Food Drive Donor Card. 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.

Edit - Food Drive Donor Card - FD00001 · Olivia Ferthers

HOME ACTIONS NAVIGATE

Food Drive Donation Order View New Delete Statistics Matrics Documents OneNote Notes Links Refresh Clear Filter Page

FD00001 · Olivia Ferthers

General

No.:	FD00001	Balance (\$):	0.00
Parent Donor No.:		UNC Donor ID No.:	
Name:	Olivia Ferthers	Blue Receipt:	<input type="checkbox"/>
Name 2:		Responsible Person Code:	
Address:	9312 Dearborn Street	FBC Donor Class of Trade Co...:	INDIVIDUAL
Address 2:		FBC Product Source Code:	FDR
City:	Overland Park	FBC Product Category Code:	FOOD DRIVE
State:	KS	FBC County Code:	
ZIP Code:	66207	Fund No.:	UR
Country/Region Code:		Blocked:	
Phone No.:	913-649-2747	Last Date Modified:	3/20/2014
Phone Ext. No.:	456	Last Modified By:	SWPROS\NPA
Primary Contact No.:		CMobile Related:	<input type="checkbox"/>
Contact:		Food Drive Donor:	<input checked="" type="checkbox"/>
Search Name:	OLIVIA FERTHERS	Date Donor Added:	
		Dormant:	<input type="checkbox"/>

2. To create a food drive order, click on Food Drive Donation Orders and then select New.

Alternatively you can create a new Food Drive Donation Order from the Food Drive Donor List or Food Drive Donor Card Page. While on the list or card record for a given Food Drive Donor, Select the Food Drive Donation Order Action to display the Food Drive Donation Order in the 'New' mode.

Edit - Food Drive Donor Card - FD00004 - Girl Scouts of Mid-Continent Council

HOME ACTIONS NAVIGATE

Food Drive Donation Order New View New Delete Statistics Matrics Documents OneNote Notes Links Refresh Clear Filter Go to Previous Next

FD00004 · G View (Ctrl+Shift+R) Open the page in read-only mode. t Council

General

No.: FD00004 Balance (\$): 0.00

Parent Donor No.: UNC Donor ID No.:

Name: Girl Scouts of Mid-Co... Blue Receipt: Responsible Person Code:

Donor :

Gross W

This Mo

This Yea

Last Yea

To Date

3. Tab through the No. field and a document number will be assigned automatically. 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.

General

No.: DO-00039 Posting Date: 8/18/2014

Parent Donor No.:

Donor No.:

Contact No.:

Donor Name:

Address:

City:

State:

ZIP Code:

Contact:

Phone No.:

Ext.:

No. of Arch:

Posting Des:

Department:

No. Series List


HOME NAVIGATE

Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

No. Series List

Type to filter (F3)

Code	Description	Starting No.	Ending No.	Last Date Used	Last No. Used
D-DNRPD	Product Donors	PD00400		12/21/2012	PD00400
D-ORD	Donation Orders	DO-00001		8/18/2014	DO-00039
D-ORDFD	Food Drive Doantion Orders	FD-100000		11/15/2013	FD-100001

4. Enter the Donor No. or use the lookup button  to select the Donor No. from the Donor List. Only donors that are marked as "Food Drive Donor" will appear in the list. After tabbing off of this field, a number of fields will automatically be filled in (Donor Name, Address, City, State, ZIP, etc.).

Note: If the Food Drive Donation Order was launched from the Food Drive Donor List or Food Drive Donor Card page, the Donor No. will be automatically assigned by Ceres.

5. Review and update the fields as needed on the General and Shipping FastTabs. For report filtering purposes, make sure to select a Location Code on the Shipping FastTab.
6. Scroll down to the Food Drive FastTab and update the information. The fields on this FastTab were created specifically for food drives and will only display on a Food Drive Donation Order. A description of the fields follows.

Food Drive	
No. of Participants:	0.00
Funds Collected:	0.00
Barrels Delivered:	0
Boxes Delivered:	0
Posters Delivered:	0
Pallets Delivered:	0
Totes Delivered:	0
Driver Needed:	<input type="checkbox"/>
Delivery Information:	<div></div>
Food Drive Drop Date:	
Pick Up Date:	
Pick Up Time:	
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
Expected Receipt Date:	

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.

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.

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.

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 need to handle the overflow. In the Overflow Quantity field, input the quantity. These fields print on the Food Drive Materials Summary.

Routing

Food Drive Donation Orders follow the same routing workflow as standard Donation Orders as outlined in the Appian document.

Reporting

Three new reports were created to support the food drive enhancements.

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.

JITC Test
100 Main Street
Kansas City, 64127
MO

Food Drive Materials Summary

Donation Order Number: DO-00039

Donation Order Date: 8/18/2014

Page: 2

From: Girl Scouts of Mid-Continent Council
Carol Connor
8383 Blue Parkway Drive
Kansas City, 64133
MO

Ship To:

Food Drive Drop Date
Expected Received Date:
Notice No.
Donor ID FD00004

Contact Name Carol Connor
Contact Phone No. 816-368-8750 ex

Delivery Information

Drop-Off

Barrels Delivered	Boxes Delivered	Totes Delivered	Pallets Delivered	Posters Delivered	Vehicle
0	0	0	0	0	

Pickup

Barrels Picked Up	Boxes Picked Up	Totes Picked Up	Pallets Picked Up
0	0	0	0

Misc.

Swap	Overflow	Overflow Qty.	Driver Needed
No	No	0.00	No

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.

Food Drive Materials Summary									
Request Date 07/31/12 User ID: KJK									
Food Drive Delivery Date 07/31/12..08/31/12									
Shipment Method Code	Donor No.	Donor Name	Order No.	Barrels Required	Boxes Required	Posters Required	Pallets Required	Totes Required	Driver Needed
Food Drive Date: 08/03/12									
	FD00028	Sprint Nextel	FD-00020	10	15	5	100	2	Yes
Food Drive Drop Date 08/03/12 Totals:				10	15	5	100	2	
Shipment Method Code Totals:				10	15	5	100	2	
Report Totals:				10	15	5	100	2	

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.

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. This report can be accessed from Departments → Donation → Order Processing → Documents.

Donation Stops
Ceres 2009 - JITC

7/31/2012 3:55 PM
Page 1
SWPROS\KJK

Food Drive

Date	No. Of Orders
------	------------------

Location Code KAN

04/13/12	1
08/03/12	1

Related Topics:

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