



Donor Change on Posted Donation Orders

Purpose of this document

After posting a donation order it may be necessary to update the donor to whom the donation order is related. This need arises from the wrong donor being specified on the donation order. This document explains how to change or update the donor number on posted donation order.

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

Table of Contents

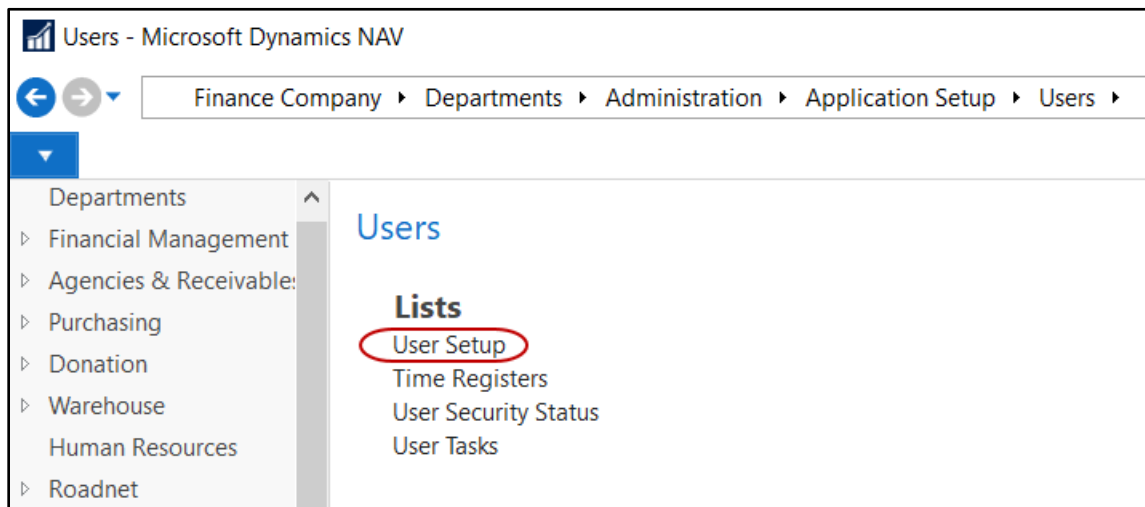
OVERVIEW	3
SETUP	3
UPDATING DONOR NUMBER ON POSTED DONATION ORDERS	4
RELATED TOPICS.....	8

Overview

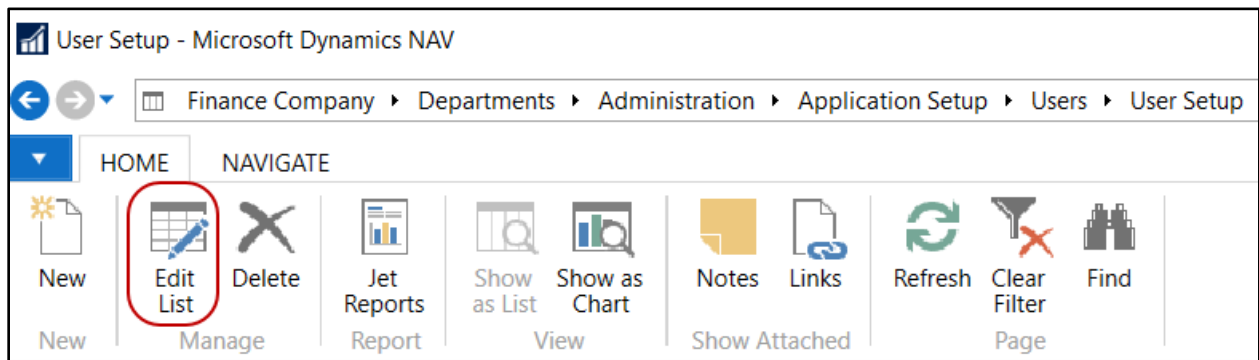
The Update Donor Number functionality can be used to correct the donor associated with posted donation order. The Update Donor Number functionality does not update items, item quantities, or any details of the transaction other than changing the donor information on the record. The parent donor must be the same for the original and the new Donor. Security is in place to prevent unauthorized users from running this process.

Setup

1. The Change Donor on Posted Documents field in the User Setup controls which users can or cannot run the Update Donor Number function. To access the User Setup, go to Departments → Administration → Application Setup → Users → User Setup.



2. From User Setup List Page, select Home → Manage → Edit. You are now in edit mode and will be able to make changes to the setup.



3. Locate the desired user's record you want to update and place a check mark in the Change Donor on Posted Orders field. This user has now been granted permission to run the Update Donor Number function.

User ID	Allow Posting From	Allow Posting To	Override Credit Limit Warning	Modify Credit Limit	Override Activ. Status Warning	View Web Sync	Change Donor on Posted Orders
ESOPRO\CJW			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ESOPRO\JBL	10/2/2018	4/9/2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ESOPRO\KJK			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ESOPRO\RXF	12/1/2019	12/31/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ESOPRO\WWH			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ESP			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Updating Donor Number on Posted Donation Orders

1. The process of changing the Donor is initiated from the posted donation order. Posted donation orders can be accessed from Departments → Donation → Archive → History.

Donation, Archive - Microsoft Dynamics NAV

Finance Company > Departments > Donation > Archive

Departments

- Financial Management
- Agencies & Receivables
- Purchasing
- Donation
 - Planning
 - Order Processing
- Warehouse
- Human Resources
- Roadnet
- Appian
- Adv. Leased Storage

Donation, Archive

History

- Donation Order Archives
- Food Drive Donation Archives
- Donation Return Order Archives
- Closed Food Drives
- Posted Donation Receipts
- Posted Food Drive Receipts
- Posted Donation Orders**
- Posted Donation Credit Memos
- Posted Food Drive Orders
- Processed Grocery Rescue Batches

- 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

Manage: Edit, View, Delete
Process: Print..., Statistics, Navigate
View: Show as List, Show as Chart
Show Attached: Notes, Links
Page: Refresh, Clear Filter, Find

Departments

- Financial Management
- Agencies & Receivable
- Purchasing
- Donation**
 - Planning
 - Order Processing
- Warehouse
- Human Resources
- Roadnet
- Appian

Home

Posted Donation Orders

Type to filter (F3) | No. | →

No.	Posting Date	Donor No.	Donor Name	Order Date
DO-00481-1	3/26/2020	PD00003	Pilgrim's Pride Corporation	3/26/2020
DO-00478-1	3/24/2020	PD00001	Cookies On Demand	3/24/2020
DO-00429-1	3/19/2020			12/5/2019
DO-00415-1	3/19/2020	PD00014	Safeway, Inc	8/22/2019
DO-00413-1	3/19/2020	D00005	T1188 Target	5/23/2019
DO-00394-1	3/19/2020	PD00001	Cookies On Demand	11/15/2018
DO-00363-1	3/19/2020	PD00320	Walgreens	10/30/2018

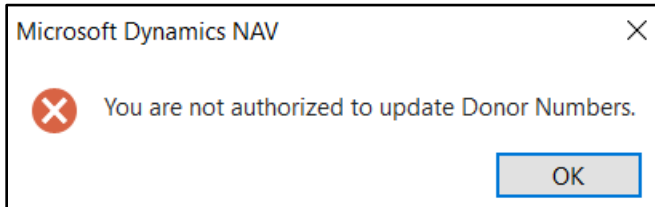
- Locate the posted donation order you want to change, and then select Home → Manage → Edit.
- From the Posted Donation Order, select Home → Process → Update Donor Number.

Edit - Posted Donation Order - DO-00413-1 - T1188 Target

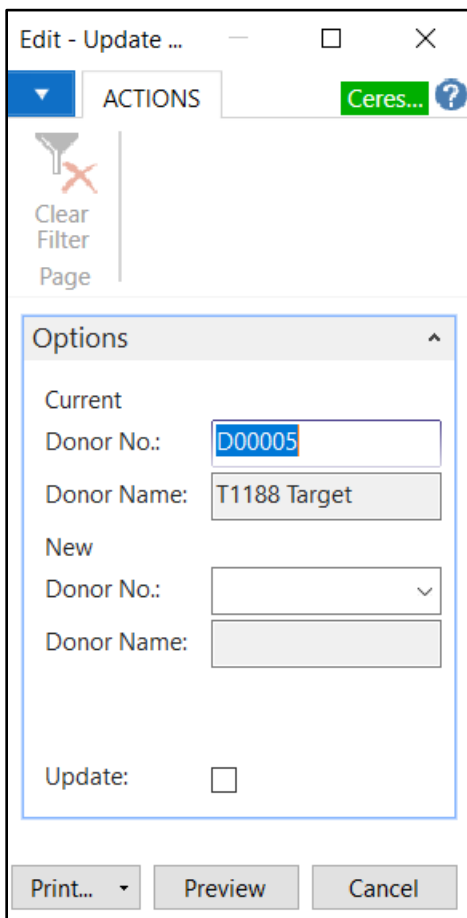
HOME ACTIONS NAVIGATE

Manage: View, Edit, Delete
Process: Update Donor Number, Update FBC/UNC Product Source Codes
Show Attached: Print..., Statistics, Navigate
Show Attached: Notes, Links
Page: Refresh, Clear Filter, Go to, Previous, Next

5. If Ceres has not been configured for a specific user to complete this function, the following message will display. Click OK to clear the message.



6. Whereas if the user is configured to complete this function, the Update Donor Number Request Page will be displayed. The current Donor number and Donor name will populate by based on the related posted donation order's donor information.



7. Enter the new Donor in the New Donor No. field.

Edit - Update ...

ACTIONS Ceres... ?

Clear Filter Page

Options

Current

Donor No.: D00005

Donor Name: T1188 Target

New

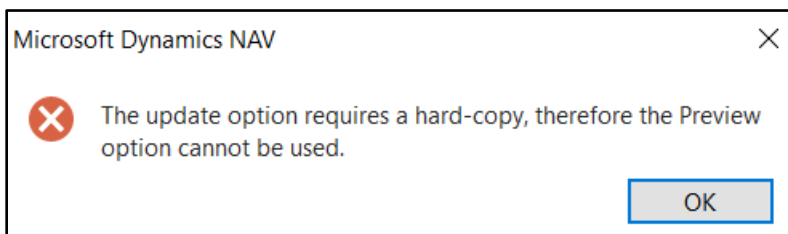
Donor No.: PD00001

Donor Name: Cookies On Demand

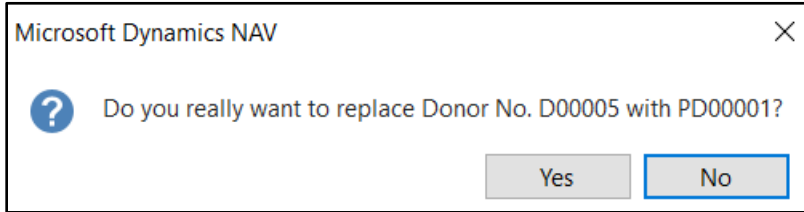
Update:

Print... Preview Cancel

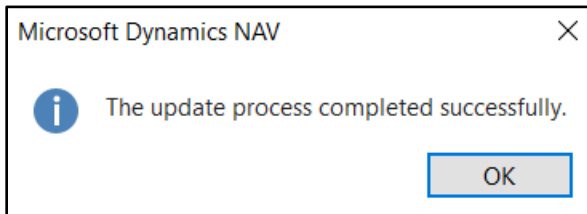
8. Place a checkmark in the Update box if you wish to have Ceres effect the changes. Left unselected, the report will simply provide a preview of the information what will be changed by this process. Normally you would check this box and press Print to complete the process. If you have the Update box 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.



- When you select print with the Update box checked, a confirmation message will display. Click Yes to replace the Donor No. and No to cancel the process.



- 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.



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

Update Posted Donation Order, Donor Number				4/2/2020 9:09 PM
Finance Company				Page 1
				ESOPRO\KJK
Document No.: DO-00413-1 Donor No.: D00005 New Donor No.: PD00001				
Entry No.	Table No.	Table Name	Primary Key	
1	122	Purch. Inv. Header	DO-00413-1	
2	123	Purch. Inv. Line	DO-00413-1,10000	
3	25	Vendor Ledger Entry	57409	
4	380	Detailed Vendor Ledg. Entry	5704	
5	17	G/L Entry	57408	
6	17	G/L Entry	57409	
7	254	Tax Entry	3468	
8	5802	Value Entry	27804	
9	120	Purch. Rcpt. Header	DO-00413-1R	
10	121	Purch. Rcpt. Line	DO-00413-1R,10000	
11	32	Item Ledger Entry	22347	

Related Topics

- Donation Order Overview
- Donation Credit Memos
- Donation Return Orders
- Blue Receipt Reporting