



## Food Drive Overview

### **Purpose of this document**

This document illustrates how to setup, manage and track food drives conducted by the food bank in Ceres. There is a supplemental document covering Food Drive Enhancements as well.

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

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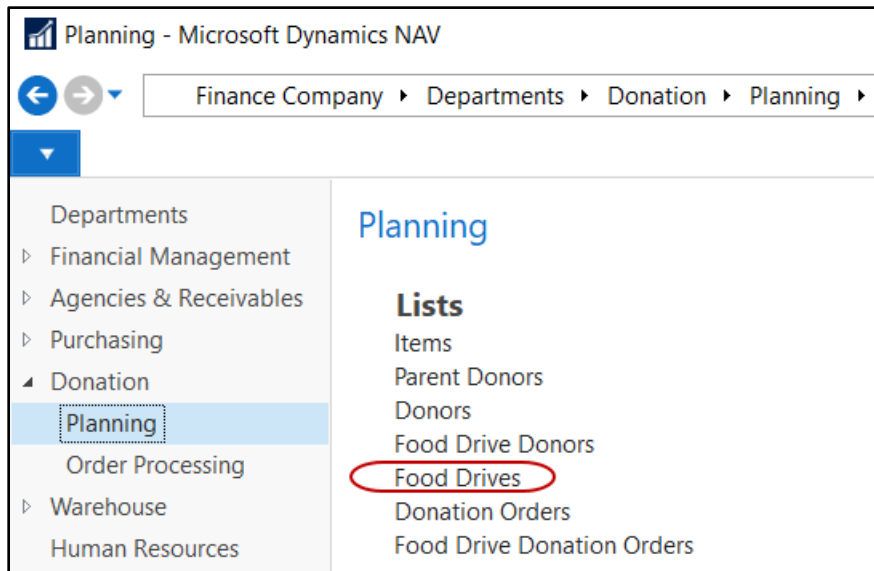
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## Overview

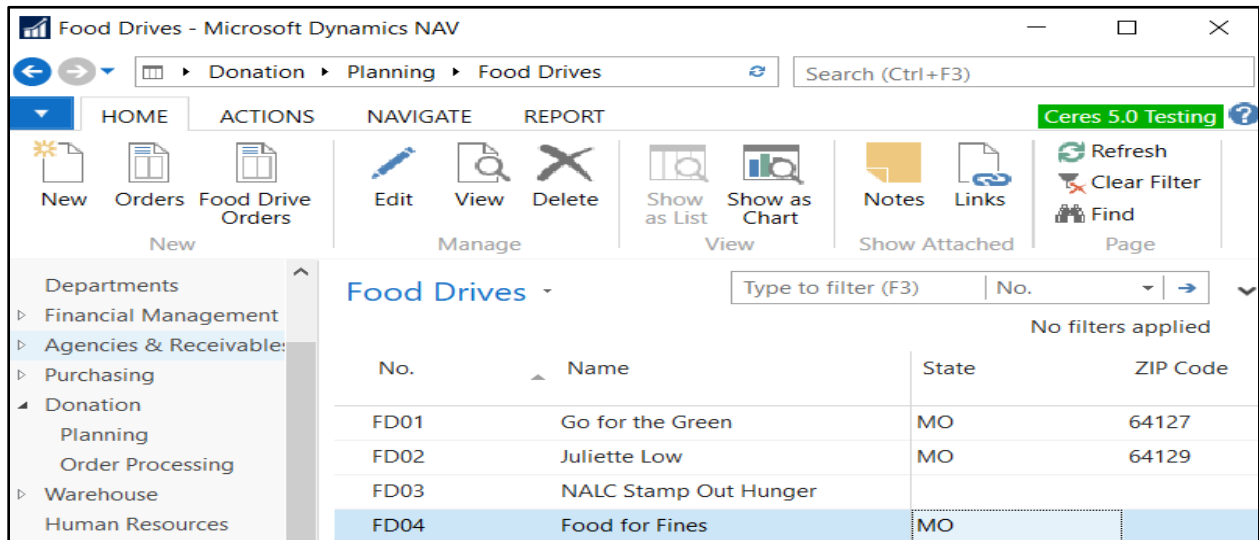
The food drive process provides the user with the tools necessary to setup, manage and track food and fund drives conducted by the food bank. It allows for the tracking of both monetary donations through cash receipts journals, deposits and product donations through the donation order process. Food drive contacts and food drive donor information assists the user in coordinating food drive tasks. Food Drive Statements provide the needed information to track the metrics of the food drive.

## Creating Food Drives

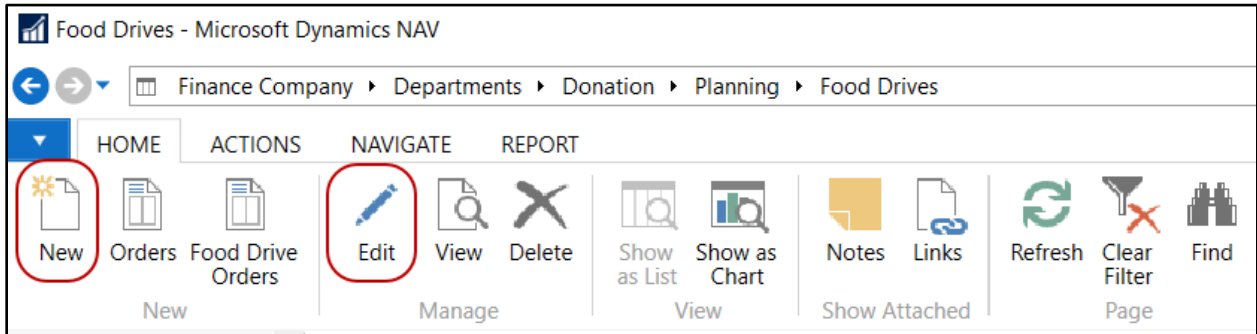
1. To access Food Drives, go to Departments → Donation → Planning → Food Drives.



2. A List of foods drives that have been setup in Ceres will display.



3. Select Home → New to create a new food drive. Select Home → Manage → Edit to edit a food drive.



4. From the Food Drive Card, update the fields on the General FastTab as needed.

**FD1 · Go for the Green**

**General**

No.:	<input type="text" value="FD1"/>	Start Date:	<input type="text"/>
Title:	<input type="text" value="Go for the Green"/>	End Date:	<input type="text"/>
Name:	<input type="text" value="Go for the Green"/>	Donation Amount:	0.00
		Gross Weight Received:	1,346

**No.:** This is the main identifier for the food drive, which can be entered as any combination of text and numbers. Ceres can be set up to automatically number each Food Drive Card for you, or you can enter the number manually.

**Title:** Enter a descriptive title of the food drive. Many food drives are annual so it might be helpful to enter a time period as part of title (For example: Spectrum 2020 or USPS Spring 2020).

**Name:** Enter a name associated with the food drive. This field needs to be filled in for the Name to display on the food drive list.

**Start Date:** Here you can enter the starting date of the food drive.

**End Date:** Here you can enter the ending date of the food drive.

**Donation Amount:** This field displays, in \$, the total received in donations posted to this food drive. Double click on the field to see the entries that make up the amount shown.

**Gross Weight Received:** This field displays in pounds the total received in donated product on posted donation order to this food drive. Double click on the weight to see the entries that make up the amount shown.

5. Move to the Address & Contact FastTab and update the fields as needed.

Address & Contact ⌵

<p><b>Address</b></p> <p>Address: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>City: <input type="text" value="Kansas City"/> ▾</p> <p>State: <input type="text" value="MO"/></p> <p>ZIP Code: <input type="text"/> ▾</p> <p>County Code: <input type="text"/> ▾</p>	<p><b>Contact</b></p> <p>Phone No.: <input type="text"/></p> <p>Fax No.: <input type="text"/></p> <p>E-Mail: <input type="text"/></p> <p>Home Page: <input type="text"/></p> <p>Please see Food Drive Contacts for more detail</p>
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**Address:** Enter the street address or the mailing address of the food drive. If the food drive consists of multiple sites it is suggested that you enter the address for the main location on the General Tab.

**Address 2:** An extension of the Address field. Up to 50 characters can be added here, using any type of text or numbers.

**City:** Enter the city where the food drive is located.

**Note:** If you fill in the City field before the ZIP Code field, and if the city is linked to a single ZIP code in the ZIP Code table, the program fills in the ZIP Code field automatically. If there is more than one ZIP code linked to the city in the City field, the program displays a list of ZIP codes for you to choose from. If the city is not set up in the ZIP Code table, you must enter the ZIP code manually.

**State:** Enter the state where the food drive is located.

**Zip Code:** Enter the zip code for this food drive.

**Note:** If you fill in the zip code field with a zip code that is linked to a single city in the zip code table, Ceres will fill in the city field automatically. If there is more than one city linked to the zip code, Ceres displays a list of the relevant cities for you to choose from. If the zip code is not set up in the zip code table, you must enter the city manually.

ZIP Code:	<input type="text" value="66208"/> ▾										
Country/Region Code:	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Code</th> <th style="text-align: left;">City</th> </tr> </thead> <tbody> <tr> <td>64127</td> <td>Kansas City</td> </tr> <tr> <td>64137</td> <td>Kansas City</td> </tr> <tr> <td>66104</td> <td>Kansas City</td> </tr> <tr style="background-color: #e0e0e0;"> <td>66208</td> <td>Prairie Village</td> </tr> </tbody> </table>	Code	City	64127	Kansas City	64137	Kansas City	66104	Kansas City	66208	Prairie Village
Code	City										
64127	Kansas City										
64137	Kansas City										
66104	Kansas City										
66208	Prairie Village										
Last Date Modified:											
Last Modified By:											
Gross Weight:											

**Country Code:** Select the Country Code from the lookup list, primarily used to determine the address formatting on documents applicable for the selected Country.

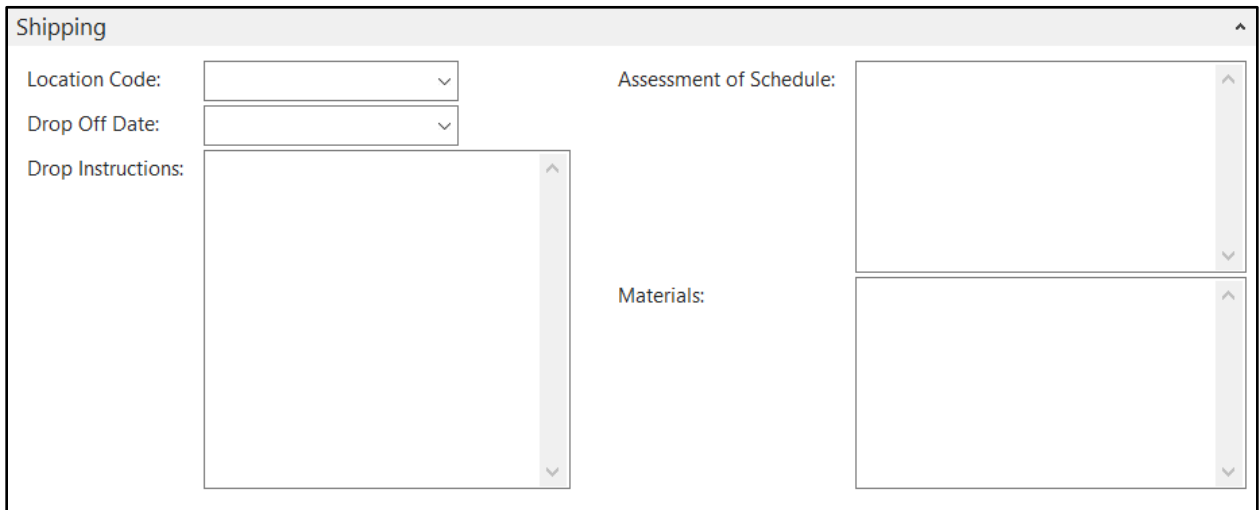
**Phone No.:** Enter the primary phone number for this food drive. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890, is recommended.

**Fax No.:** Enter the fax number for this food drive. The field is 30 characters in length. A consistent format when entering the number, such as: (123) 456-7890.

**E-Mail:** Enter the primary contact's e-mail address for this food drive. You can enter a maximum of 80 characters, both numbers and letters.

**Home Page:** Enter the home page address for this Food Drive. You can enter a maximum of 80 characters, both numbers and letters.

6. Move to the Shipping FastTab and update the fields as needed.



The screenshot shows a 'Shipping' tab with the following fields:

- Location Code:** A dropdown menu.
- Drop Off Date:** A dropdown menu.
- Drop Instructions:** A large text area with a vertical scrollbar.
- Assessment of Schedule:** A text area with a vertical scrollbar.
- Materials:** A text area with a vertical scrollbar.

**Location Code:** Enter the Location where the food drive product will be received.

**Drop Off Date:** Enter the date the product is scheduled to be dropped off or picked up for this food drive.

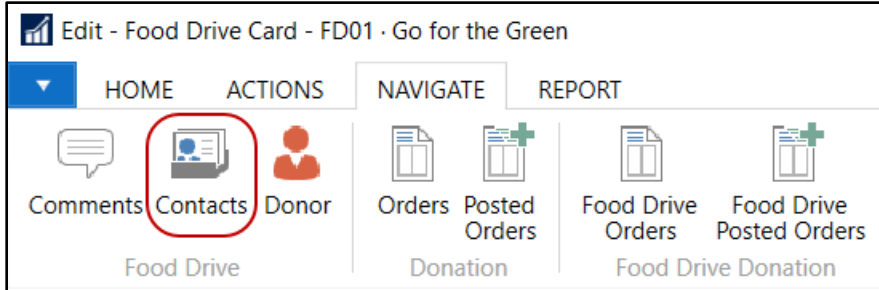
**Drop Instructions:** Use this field to describe detailed instructions regarding the delivery of the food drive product to the food bank.

**Assessment of Schedule:** Use this field to describe the scheduling for delivery and pickup of product, any difficulties getting materials to the locations, and back with full barrels, etc.

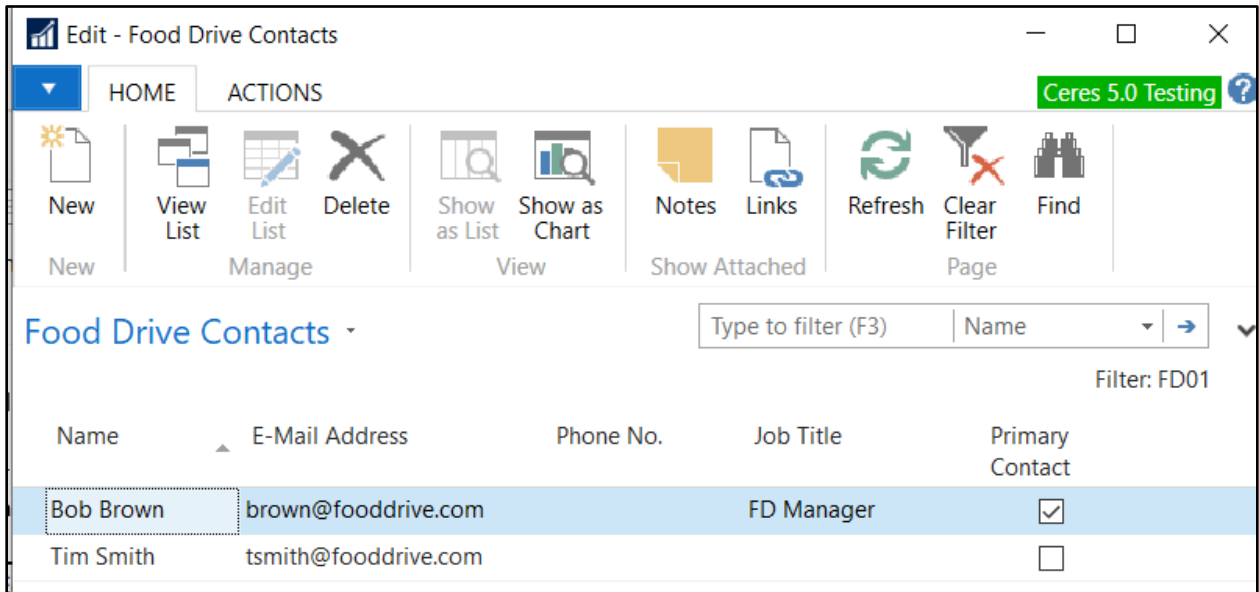
**Materials:** Use this field to describe the materials needed at the locations, including barrels, posters, flyers, etc.

## Food Drive Contacts

1. To setup contacts for a food drive, select Navigate → Food Drive → Contacts. On the Food Drive Contacts Page, you may enter as many contacts as necessary.

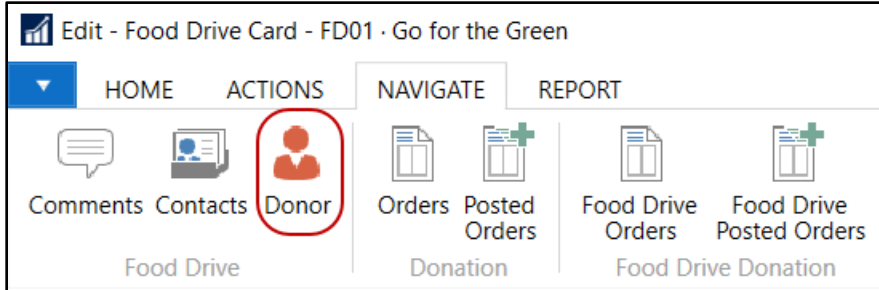


2. To add a new contact, Select Home → New.
3. Enter the Contact Name, E-Mail address, Phone No., Job Title. If this contact is the primary contact for the food drive, check the Primary Contact field.

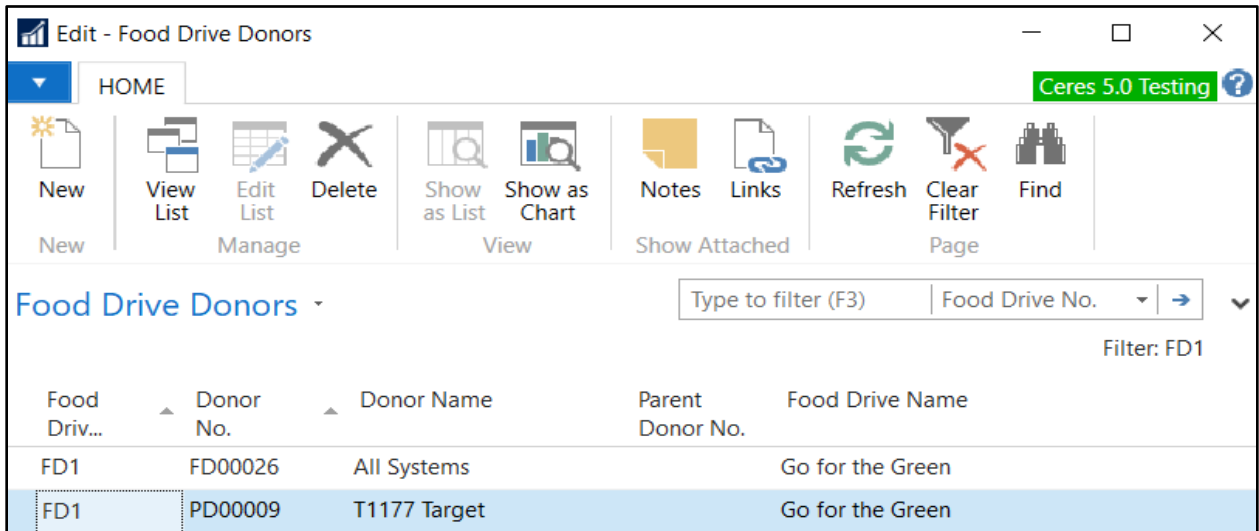


## Food Drive Donors

1. To setup or link donors to a food drive, select Navigate → Food Drive → Donor. On the Food Drive Donors Page, you may enter as many donors as necessary.



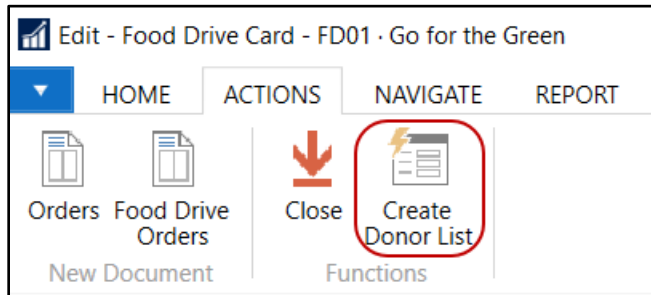
2. Select Home → New to add a donor.
3. Enter the Donor No. or do a lookup and select from the list of donors. The Parent Donor No. will fill in automatically if the donor is assigned to a parent donor.



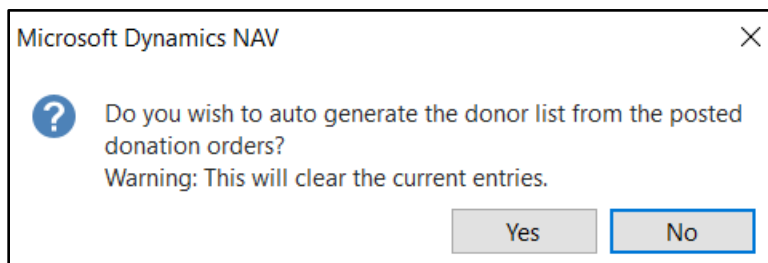


## Create Food Drive Donor List

1. You have the option to create the Donor list automatically from posted donation orders. This option, if used, will delete any donors currently assigned to the food drive and replace them with the donors from all posted donation orders associated with the food drive. To use this function, select Actions → Functions → Create Donor List.

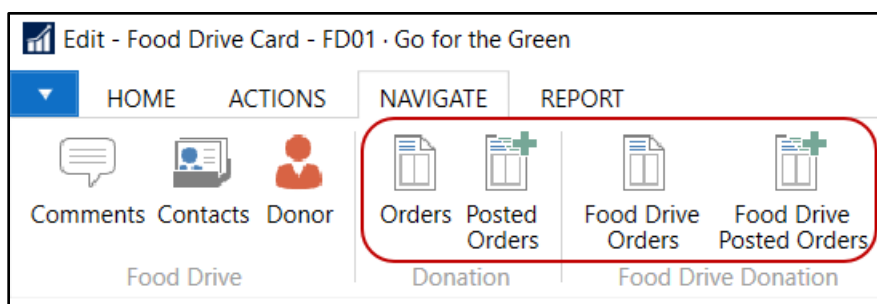


2. Ceres will prompt the user with the following message. Select Yes to create the Donor List. Selecting No will cancel the process and the Donor List assigned to the food drive will remain unchanged.



## Donation Orders associated with a Food Drive

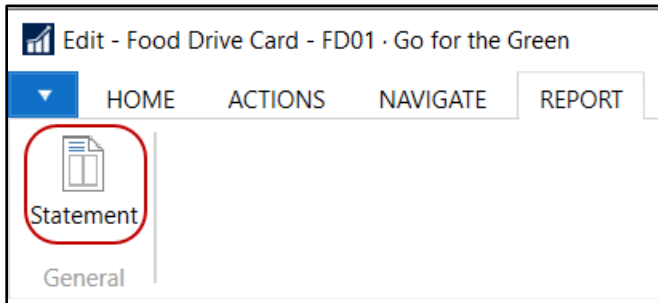
1. To access donation orders associated with the food drive select Navigate → Donation / Food Drive Donation → Orders, Posted Orders, Food Drive Orders, or Food Drive Posted Orders.



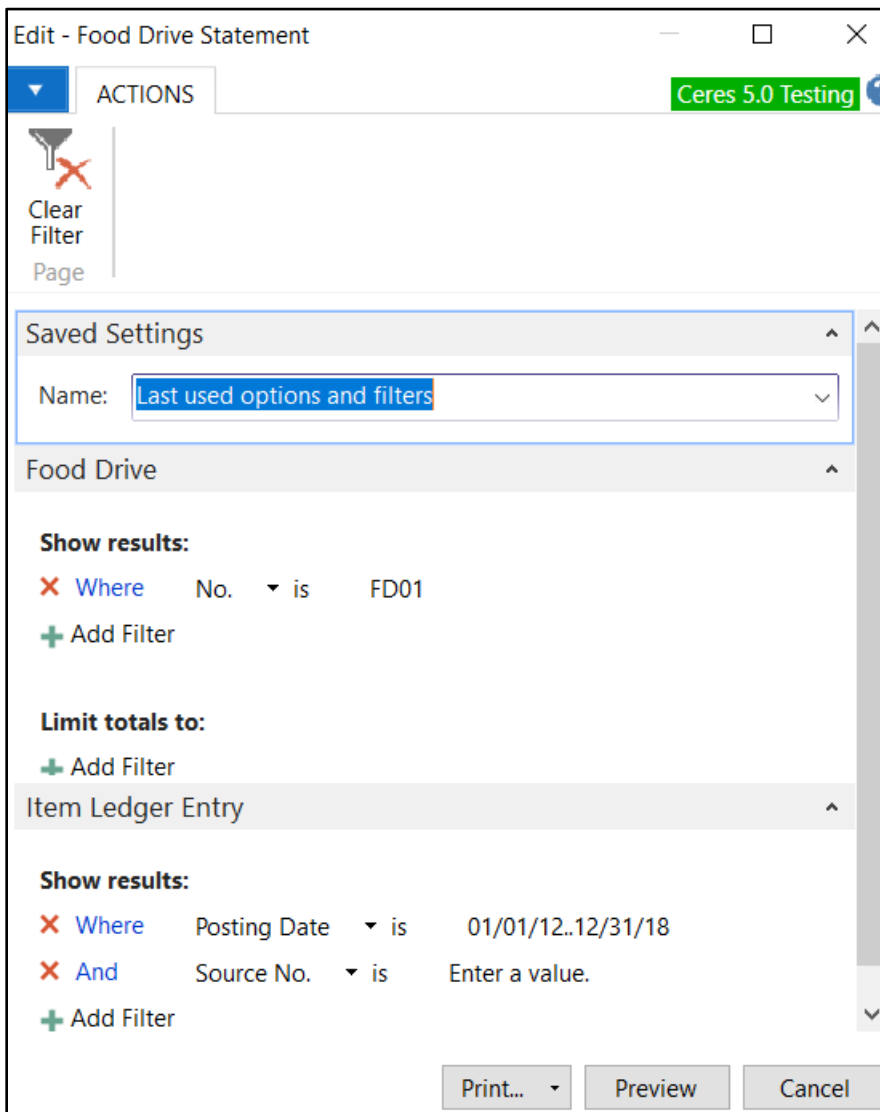
**Note:** Only posted orders are shown in food drive statements, and the Gross Weight Received field on the Food Drive Card.

## Printing Food Drive Statements

1. To access Food Drive Statements, select Report → General → Statement.



2. On the Food Drive Tab, set a Food Drive No. filter. On the Item Ledger Entry Tab, enter a date range in the Posting Date field. Other filters can be set based on how you want to run the report.

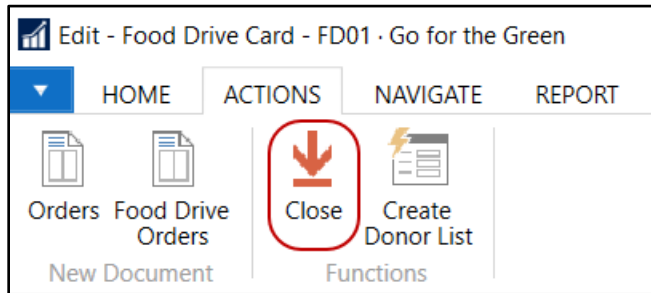


3. Click Preview to preview the report or Print to print a hard copy. Below is an example of a Food Drive Statement.

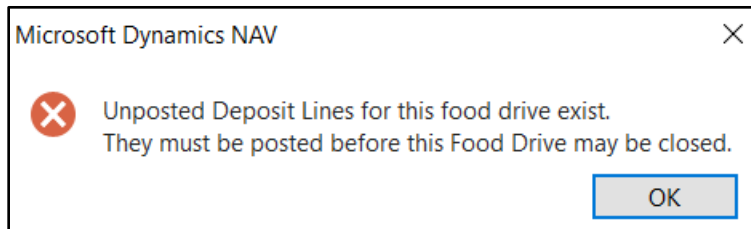
Food Drive Detail						4/2/2020 3:54 PM	
Ceres 5.0 Testing						Page 1	
						ESOPROIKJK	
Food Drive: No.: FD01							
Item Entry: Posting Date: 01/01/12..12/31/18							
<b>Food Drive Information</b>							
FD01	Go for the Green	Phone:			Contact:		
No.	Posting Date	Document No.	Item No.	Description	Quantity	Unit of Measure Code	Ext. Gross Weight
FD00026	7/16/2012	FD-00004-1R	99999	Food Drive	322	LB	322
FD00026	7/16/2012	FD-00004-1R	99999	Food Drive	294	LB	294
FD00026	7/16/2012	FD-00004-1R	99999	Food Drive	586	LB	586
FD00026	7/16/2012	FD-00004-1R	99999	Food Drive	144	LB	144
Total For Donor FD00026							1,346
Food Drive Totals							1,346
Posting Date	G/L Account No.	Document No.	Description			Amount	
2/3/2015	100001	CRJ-00021	Test			100.00	
3/26/2020	100000	CRJ-00043	Cash Donations from FD!			1,225.00	
3/26/2020	100000	CRJ-00044	FD! Cash Donation			2,450.00	
Donation Amount Total						3,775.00	
<b>Report Totals</b>					\$3,775.00		1,346

## Closing a Food Drive

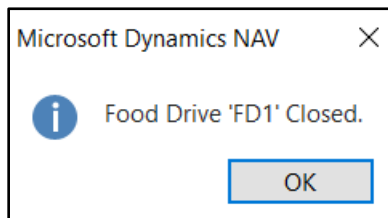
1. At the completion of the food drive you may close it. Closing the food drive will not prevent you from posting additional monetary contributions or posting donor orders to the food drive. The close process will flag the food drive as closed and it will no longer appear on the Food Drive List. To close a food drive, select Actions → Functions → Close.



2. If this food drive is associated with un-posted Cash Receipt or Deposit Lines, they must be posted or deleted before you can close a Food Drive. If not, the below message will display.

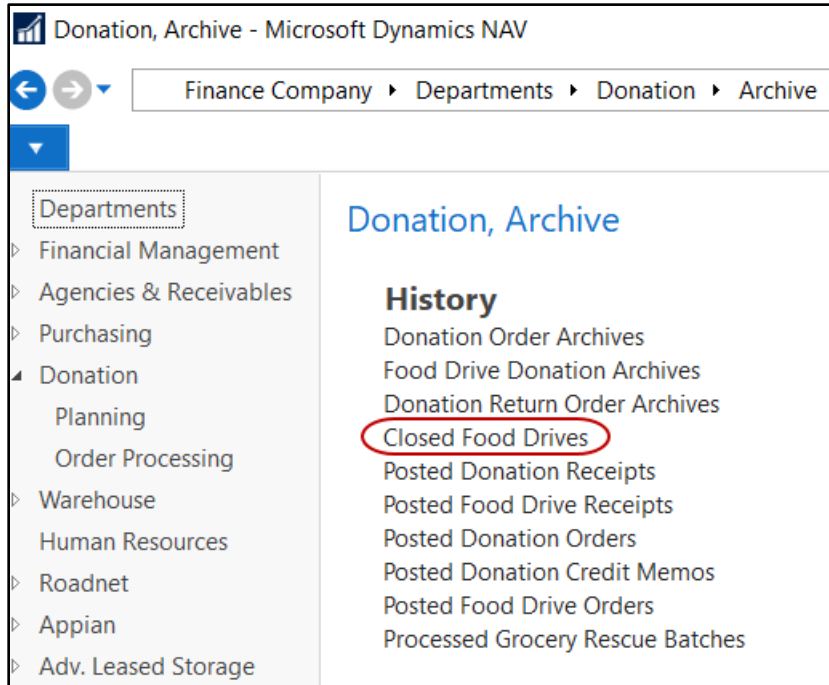


3. A message will display will letting you know the food drive has been closed.

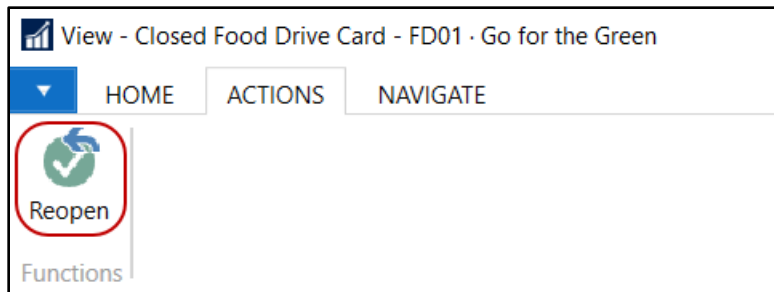


## Re-opening a Food Drive

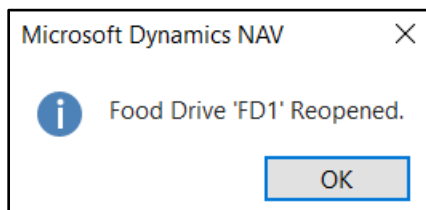
1. Once a food drive has been closed you can reopen it. To reopen a food drive, select Departments → Donation → Archive → History → Closed Food Drives.



2. Select the food drive you want to reopen.
3. On the Closed Food Drive Card, select Actions → Functions → Reopen.



4. A message will display letting you know the food drive has been reopened.



## Entering Cash Donated to Food Drives

Food banks regularly receive cash donations during food drives in addition to donated products. Ceres has the ability to record cash donations related to a food drive. Cash Receipts and Deposit procedure documentation is available. How to record cash donations for food drives is outlined below.

### Using the Cash Receipt Journal for Food Drive Cash Donations

1. Enter the cash receipt line as you normally would. In the Food Drive No. field select the food drive the cash donation is associated with.
2. In the Amount field, enter the cash donation received.

Cash Receipt Journal									
Batch Name: AGENCY						Type to filter (F3)	Document Type	No filters applied	
Document Type	Posting Date	Docum... Date	Document No.	External Document No.	Account Type	Account No.	Food Drive No.	Description	Amount (\$)
Payment	3/31/2020	3/31/2020	CRJ-00045	FDD1000	Bank Account	1000	FD01	Food DRive \$ dontations	250.00

3. Post the Cash Receipt Journal. Once the Journal is posted, the Donation Amount field on the Food Drive Card will be updated with the amount of the cash donation.

## Using Deposits for Food Drive Cash Donations

1. Enter the deposit line as you normally would. In the Food Drive No. field select the food drive the cash donation is associated with.
2. In the Credit Amount field, enter the cash donation received.

**DEP-1039 (DEFAULT)**

**General**

No.: DEP-1039 ... Posting Date: 3/30/2020  
Bank Account No.: 1000 Document Date: 3/30/2020  
Total Deposit Amount: 550.00 Fund No.:  
Total Deposit Lines: 550.00 Department Code:  
Difference: 0.00 Project Code:

**Lines**

Account Type	Account No.	Account Name	Food Drive No.	Description	Document Date	Document Type	Document No.	Credit Amount
G/L Account	430000	Events - Support	FD01	Events - Support	3/30/2020	Payment	FD200	550.00

3. Post the deposit. Once the deposit is posted, the Donation Amount field on the Food Drive Card will be updated with the amount of the cash donation.

## Related Topics

1. Donor Overview
2. Food Drive Donation Order Overview
3. Donation Order Overview
4. Cash Receipts Journal
5. Bank Deposits