



Parent Donor Overview

Purpose of this document

This document discusses the setup of the Parent Donor Cards for all types of product donors. Typically, food banks do not establish a parent donor or donor records in Ceres for financial donors. Food drives and food drive donors are a subset of product donors and are discussed in a separate document.

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

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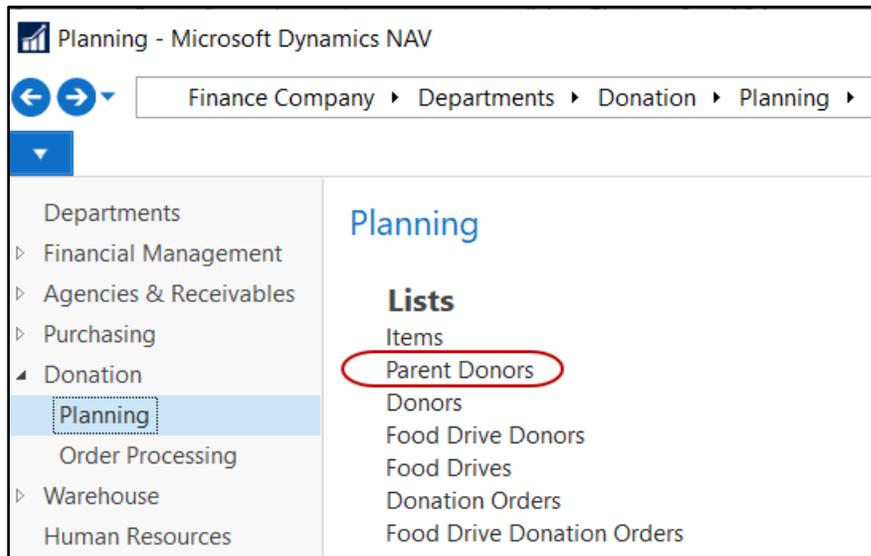
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Overview

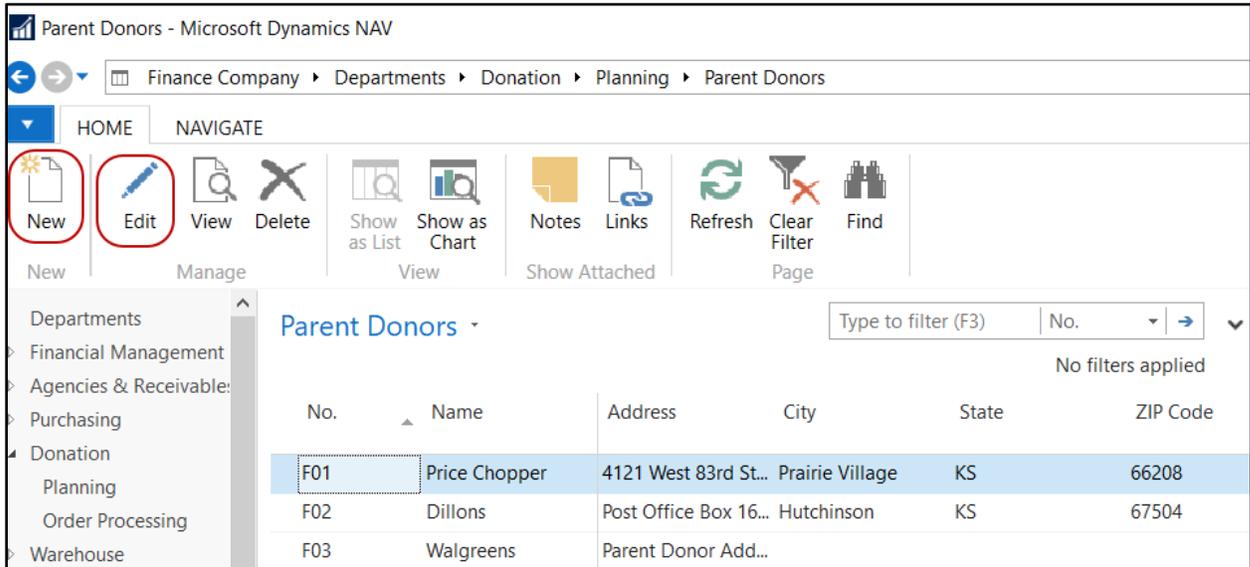
Food banks receive product from various donors throughout the year and need an accurate method of tracking receipts from each donor. Many of the donors are retail chain stores where there is a regional or corporate office that the individual stores report to. In these instances, food banks need to track receipts for each store yet report the receipts in aggregate to the regional or corporate office. To accomplish this, a parent donor / donor structure was created. The individual chain store would be setup as a donor and the regional office as the parent donor. The donor can be linked to the parent donor for tracking and reporting purposes.

Creating Parent Donors

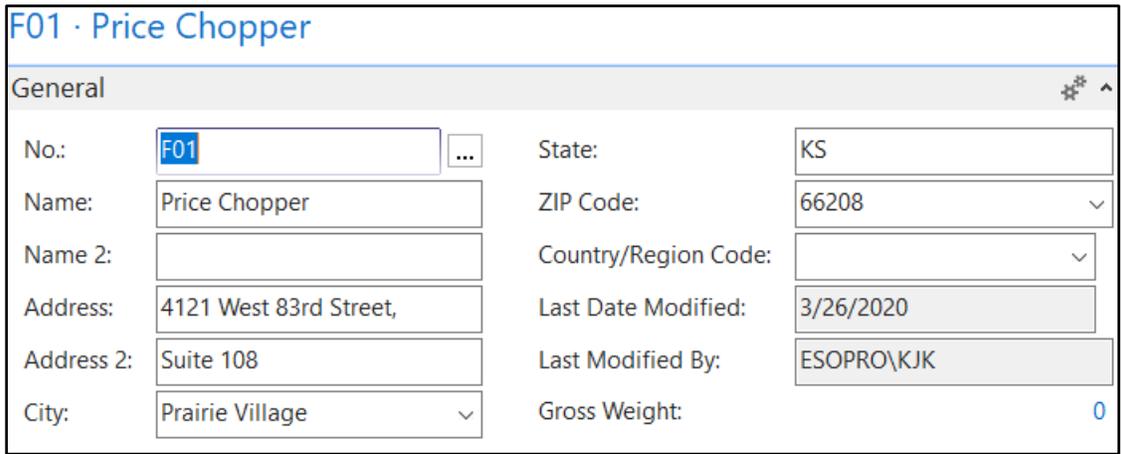
1. Parent Donors can be accessed from Departments → Donation → Planning → Parent Donors.



2. Select Home → New to create a new parent donor. Parent Donors may be edited by highlighting a vendor in the List, and then selecting Home → Manage → Edit.



3. The Parent Donor Card will display. Fill in the fields on the General FastTab as needed.



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

Name: Enter the name of the Parent Donor. Up to 50 characters can be added here, using any type of text or numbers. Therefore, enter the name as you want it to appear on documents.

Name 2: An extension of the parent donor's name. This field can be used for names longer than 50 characters. This field is also 50 characters in length.

Address: This field would typically be the street number and street name of the parent donor. Up to 50 characters can be added here, using any type of text or numbers. The contents of the Address field are often used when you print something, so enter it as you want it to appear.

Additional addresses, phone numbers, and contact information can be setup using the Supplement Address functionality. A Supplemental Addresses FactBox displays to the right of the Card. This FactBox provides a link to any Supplemental Addresses that have been setup for this parent donor. See the Supplemental Address documentation for more information.

Address 2: An extension of the parent donor's address, such as a suite number or a building number. This field is also 50 characters in length.

City: Enter the city of the parent donor. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

State: Enter the state of the parent donor. Up to 30 characters can be added here, using any type of text or numbers. Enter it as you want it to appear in printed documents.

Zip Code: Enter the zip code of the parent donor.

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:	66208	
Country/Region Code:	Code	City
Last Date Modified:	64127	Kansas City
Last Modified By:	64137	Kansas City
Gross Weight:	66104	Kansas City
	66208	Prairie Village

Country/Region Code: Enter the country or region where the parent donor is located. This field is optional.

Last Date Modified: This field is maintained by Ceres and displays the date the parent donor was last modified.

Last Modified By: This field is maintained by Ceres and display the login identification of the user that last modified the parent donor.

Gross Weight: This field displays, in pounds, the parent donor's total weight received. This is the total for all donors linked to this parent donor. Ceres automatically calculates and updates the contents of the field using the entries in the Ext. Gross Weight field in the Item Ledger Entries. To see the entries that make up the amount shown, drilldown on the field

Donor List

1. For a list of all donors related to this parent donor, select Navigate → Parent Donor → Donor List.

The screenshot displays two side-by-side windows from a software application. The left window is titled 'Edit - Parent Donor Card - F01 - Price Chopper' and features a ribbon with 'HOME', 'NAVIGATE', and 'REPORT' tabs. Under the 'NAVIGATE' tab, the 'Donor List' button is circled in red. Below the ribbon, there are sections for 'Parent Donor' with various icons and a 'General' section with input fields for No., Name, Address, and City. The right window is titled 'View - Donor List' and has a ribbon with 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT' tabs. It shows a 'Donor List' view with a table of donor information. A red arrow points from the circled 'Donor List' button in the left window to the 'Donor List' view in the right window.

No.	Name	Address
PD00288	Cosentino's Price Chopper	830 East Main Street
PD00322	Cosentino's Price Chopper	5800 Wilson Road
PD00323	Cosentino's Price Chopper	1030 West 103rd Street
PD00324	Cosentino's Price Chopper	22210 West 66th Street
PD00339	Cosentino's Price Chopper	1100 South 7 Highway
PD00341	Cosentino's Price Chopper	8700 East 63rd Street

Related Topics

1. Donor Overview
2. Donation Order Overview
3. Supplemental Addresses
4. Agency and Donor Email Documents