

# RQ<sup>®</sup>

Retail Management

## **Charitable Donations Module Setup Guide**

The Charity Donation setup allows for the creation of charitable donation programs in all or some of a company's locations. Local charities or national campaigns can be configured to collect small donations at the point of sale. Free The Children has been pre-configured for easy setup, should you choose to embrace a partnership with this organization. To complete the setup, there are only a few simple steps required.

## **Financial Setup for Charity Donation Programs**

The funds collected are similar to a Vendor Deposit, so it is recommended that an individual Vendor Account and liability G/L be created for each charity. Please consult your financial experts to determine the best configuration for the organization.

## **Charity Donation Setup**

Setting up any donation program is as simple as choosing the appropriate name, Vendor Account, and Locations. Once these have been set, the donation program can be enabled. Please note that any time a donation program is enabled or re-enabled, a user agreement must be accepted.

## **Donation Widget**

There is a Charity Donation Widget that can be added to the Home Console of any user. As is the case for all widgets, it can be added via Role Management and locked out by the security setting Widget: Charity Donation. The widget shows each employee the company's progress made towards the donation goal along with the amount they have collected individually. Breakdown by location is also shown in the widget for some healthy competition between participating locations.

## **Donations Summary Report**

Detailed information regarding the donations collected can be accessed in the Donations Summary Report. This report can be searched by location and date, and shows the invoices with donations. Security for this report is managed using Report: Donations Summary Report. Security can be restricted by location and assigned full access or no access.

## Setup Fields - Detailed

Donations list (left hand) – The donations programs currently available to be configured are arranged on the left hand side of the screen. Note: Their current status and dates of activity are listed below the names.

Donation Name – This must be a unique name for each donation program.

Vendor Account – A new vendor account for each donation program is recommended. Any Vendor Account used for a donation will not be visible in the other Vendor Account lists throughout the program as they are operating in a different way.

Date Range – This can be set as Unavailable for pending or past programs, as well as continual or by a specified date range.

Donation Value – Donation values must be a number between \$1 and \$10. Amounts are restricted to \$10 and under so that there is no need for tax receipts, which the system is not currently configured to handle.

Donation Target – This is an optional amount that acts as a target for your donation program. It may be shared with the customer by selecting “Show on Invoice” which will include an additional line on the invoice comments of a donation invoice.

URL – This is an optional field to include if the charity has a website. It is also optional to print the URL on the invoice so your customers can learn more about the charity.

Description – This is a description of the charity which will be shared with the sales staff. It is meant to be customer facing and act as an explanation of the charity if the sales staff are asked. It can be viewed from the widget and the POS interface where you see a little “i” for information.

Notes – This is an internal notes section for the charity: e.g. contact information for your charity rep.

Location – The locations that are taking part in the donation program. Any one location can only have one active donation at a time. As a result, locations that are engaged in a donation program cannot be saved to a new program that will conflict.