THE EDGE®

Donating an Item

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Introduction

The **Donate Item** feature in The Edge allows you to donate items and track the activity.

Permissions

1. To permit associates to perform donation transactions:

2. Go to **Administrative=>Associates**.

3. Locate the associate in question and open the associate's record.

4. Select the **Security** tab.

5. Check **Donate an Item**.

6. Select **OK/Save and Close**.

Point of Sale

To donate an item:

1. Conduct a sale from the POS screen as usual.

2. Create sale item lines as usual using **Sell Item**.

3. To indicate an item is to be donated, in the line item, select **More…**.
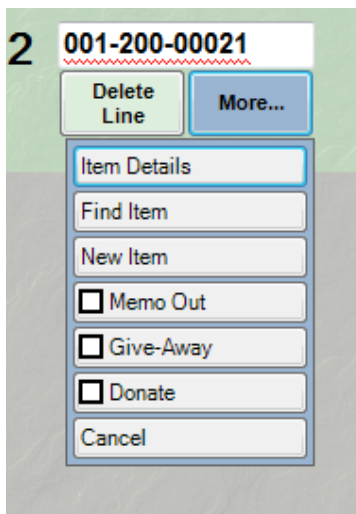
4. From the **More…** sub-menu, select **Donate**.

5. The sale line item will indicate a price of zero.

6. Continue the transaction as usual.

NOTE!

The customer must have a designation as being a tax-exempt entity, and there must be a tax ID number on record. To designate a customer as tax exempt, find the customer record, and in the Options tab, check the Tax Exempt option.

NOTE!

Donated items can only be "sold" alone or with other items to be donated.

NOTE!

Donations may only be returned by the person to whom they were donated.

Other Considerations

QuickBooks

For those using integrated accounting with QuickBooks, assign the **Donation** feature to an appropriate expense account with the guidance of your accountant.   Accounts are changed in **Administrative ►QuickBooks ► Setup QuickBooks Integration ►Accounts**.

When an item is donated, the appropriate inventory asset account is reduced and the assigned donation expense account is increased.

Gift Receipts

A donation may facilitate the need for a gift receipt. The gift receipt list selector does show "donation" in the beginning of the description in case you wish to exclude it.

Item Filter

New item status, donation, can be included or excluded on any inventory or filter using the letter code **N**.

Reports

To see a report of donation activity, go to **Reports=>Inventory=>Donations**.