

POS-1b Page | 1 of 1

Category	POS
Course	Donations
Version	1.0
Client	Generic
Software	2.13.0.0

Collect Appeal Donations

To collect donations on behalf of an appeal, create an AR account which customers can make donations against.

Procedure to Collect Donations on Behalf of an Appeal

Hints and Tips

- ✓ Create a different account for each appeal that your business collects donations for.
- ✓ The account **Code** will be used to identify the appeal at POS.
- ✓ The **Name** and **Code** of the appeal account print on the customers receipt.
- ✓ **Instructions** display when the operator selects the account in the transaction; it's useful to remind them about important information.
 - POS must be configured to display **Instructions**. This is set in the POS Config **System** menu -> **Location Setup** -> **Configure** -> **Account** tab -> **Account** tab -> **Display Instructions** check box.
- ✓ If your store has several lanes, you may decide to have two stamps created; this'll make it quicker to complete donations.
- ✓ Display the **Code** for the appeal at each POS register, so that operators know what to do.
- ✓ If your store doesn't usually use customer accounts, the **Pay Account** button may not be enabled at POS; contact SUREfire support if required.
- ✓ Run the **Account Details** report to obtain the total donations received for the appeal.
 - Enter the **Account Code** for the appeal in the parameters box.
 - The Total displays as a negative, but represents all donations (payments) made into the account between the selected dates.

<p>1. Create an AR 'credit' account for the appeal.</p> <ol style="list-style-type: none"> a. From the HOS/BOS Receivables menu, select Accounts. b. Click New. c. In the Code field, type a simple account number. d. In the Name field, type the name of the appeal; e.g. QLD Flood Appeal. e. In the Instructions field, optionally type 'Remember to stamp receipt'. f. Click Save. g. Click the Parameters tab. h. Select the Account Type option Account. i. Click Save. j. Click Close. <p><i>*All other fields default to the correct value or don't apply to the purpose of this account.*</i></p>	
<p>2. Contact your stationary supplier to create a stamp. The stamp should say:</p> <p>[insert name of appeal] e.g. QLD flood appeal c/o Salvation Army ABN 53678533122 (Donations over \$2.00 are tax deductible)</p>	
<p>3. To take a donation from a customer at POS, record it as an account payment:</p> <ol style="list-style-type: none"> a. On the Customer ID Menu screen, enter the account number for the appeal. <i>*You may have to press MISC -> Change Customer ID to display the Customer ID Menu screen in your system.*</i> b. Press Next. c. Press MISC -> Pay Account. d. Enter the amount of the donation. e. Press Process Acct Payment. f. Finalise the transaction as usual. g. Stamp the receipt with the appeal stamp; <i>*Call the Supervisor over if they hold the stamp.*</i> h. Follow store process to file the store copy of the receipt. 	