



Rounding up for Charitable Giving

For stores looking to participate in charitable giving events, clerks will need an option to record the amount donated during the transaction as well as provide managers and accountants a way to run reports for the amounts given.

Anthology recommends creating a special department, setting it non-taxable and creating an inventory record to track the amount of the Donation (round up amount) in each transaction. The following steps and screenshots can help you quickly set up for an event. If your store will be doing multiple programs, consider creating a specific inventory record for each scenario, using the Title, Author and/or Publisher fields to distinguish between them. **Note:** as of 9.6.300/400 versions, clerks will need to calculate the amount of roundup, Anthology does not currently automatically do this calculation for you. A later version will have a more automated option.

Getting Ready

- 1) **Create new Department:** Go to Master Files | Departments and Select F4 New, give a full name and shortcode, set to WebExclude (if you list inventory online) then F10 Save Changes.
- 2) **Set Department to non taxable:** Go to Master Files | Taxes | Tax Tables and uncheck the Taxable box for the newly created Department, F10 Save Changes.
- 3) **Create new inventory Sku:** Go to Master Files | Quick Inventory Add and enter a meaningful Sku and title. **Important-** set the Department to the newly created one, this will ensure your customer does not get an extra tax on the donation amount. Repeat on any other Tax Tables you may use during the event. Close and reopen Anthology on the cash register stations to ensure changes take effect.

Adding Round Up amount to Transaction

Clerks can ring up sales as normal, pausing before F3 Take Tenders. Find and fill in the amount needed to roundup to the nearest dollar for the specially created sku. You can keep the calculator open or you can use the built in calculator in Anthology, or print out the attached chart for quick reference.



For example, a \$14.58 totaled sale needs an additional 0.42 cents to roundup to an even \$15 as shown below.

# of items	Tax	0.83	Total	14.58
3	SubTotal	13.75		

Type	ISBN / SKU	Qty	Price	Tax	Disc %	Ext
Sale	LATTE_LG	1	3.75	✓	0.000	3.75
Sale	BROWNIE	1	4.00	✓	0.000	4.00
Sale	SAND_HAM	1	6.00	✓	0.000	6.00
Sale	ROUNDUP	1	0.42		0.000	0.42

# of items	Tax	0.83	Total	15.00
4	SubTotal	14.17		

Create Department

Departments

Name: Round Up Donation Short code: ROUND Inactive

List Details QH/OO Sales POs Returns

Default purchase discount for costing: 0.00

Shelf feet: .

Square feet: .

SuperType: [v]

Department discount schedule: (None)

Block discount:

Web name: [v]

Exclude from Web:

Sales Discount

Start date: / /

End date: / /

Discount Schedule: (None)

F1 Help F4 New F9 Delete record F10 Save F11 Print

Update Tax Table

Taxes Maintenance

Name: Sales Tax Short code: SALET Inactive

List Details

Format: Standard Sequence of application: 1

Rate: 6.0000 Account name in accounting: [v]

Minimum: 0.00 Round Up Tax shipping? VAT tax

Trade credits are tax-exempt

Departments	Included
Pl_9.5.102	<input checked="" type="checkbox"/>
Periodical	<input type="checkbox"/>
Round Up Donation	<input checked="" type="checkbox"/>
Service Charges	<input checked="" type="checkbox"/>
Stationary	<input checked="" type="checkbox"/>
USED BOOKS	<input checked="" type="checkbox"/>
Video	<input checked="" type="checkbox"/>
_CostTest	<input checked="" type="checkbox"/>
ChcMember	<input checked="" type="checkbox"/>

Select all Unselect all

F1 Help F4 New F9 Delete record F10 Save F11 Print

Create SKU

Quick Inventory Add

ISBN / SKU: ROUNDUP Item / UPC: ROUNDUP Retail: 0.00 list: 0.00 Web: 0.00 Cover: 0.00

Alt ISBN: Title/Description: Round up for Donations

Author: Donation Round Up

Add Publisher Preferred Department: ROUND UP DONATIO Media: (None)

Publisher: [v] Section1: (None) O/H: 0 Max: 0 Min: 0

Distribr1: [v] Section2: (None) Published: / / Bin: [v]

Distribr2: [v] Make ISBN-13 primary: Status: (None) Sales discount: 0.00

Distribr3: [v] Stock Item: Returnable Web Exclude Used book Trade Short

Keywords: [v] Remainder No discount

Notes: [v]

Text: [v]

Display as: Plain Text HTML

Publisher: [v] Binding: [v] Subject: [v]

Save Settings Auto Save Increment onhand Print Labels Serialize

F9 Back F1 Help F2 Create a SKU F3 Clear Locks F5 Web F7 Quick Label F8 Print Labels F12 Save