

Round Up For Charity

Booklog offers two ways to set up a "Round up for Charity" program. One uses a non-inventory item, and the other uses a department sale.

Both options take minimal setup time (perhaps 15 minutes), and negligible staff training time. Ringing up the donation is also quick, but may require staff to take a few seconds to calculate the round up amount.

Busy stores may want to have a small chart next to the register, showing the "round up" amount. For example, the chart would show that a sale ending in .27 would require .73 to round up to the nearest dollar.

Option 1: Sell a Non-Inventory Item for Donations

Advantages of this option: Stores that don't currently use the Department Sale feature are more familiar with selling items than doing Department Sales. The item will appear on inventory reports and the title text will appear on customer receipts.

Create a Donations Department

Create an untaxed donation department for tracking purposes.

1. Go to Maintenance| Department.
2. The Department pick list will open.
3. Press the Insert key on your keyboard.
4. A new department record will open.
5. In the Department Code field, enter "DONA".
6. In the Description field, enter "Donation".
7. Set the Taxable radio button to No.
8. Save your changes.

Create a Non-Inventory Item Record for Donations

Non-inventory items may be sold like normal items, but their Quantity on Hand is not deducted. This feature is perfect for donations.

1. Open the Inventory Search window and click New, or press the Insert key on your keyboard.

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2. A new inventory record will appear.
3. Give the record a SKU in the ISBN/SKU field. It can be a word like "DONATION", or it can be a number.
4. Enter a brief explanation in the Title field. This will appear on the customer's receipt.
5. If there's a default price you want to use for donations (like \$1.00), type it in the List Price field. Otherwise, leave the field as \$0.00.
6. Assign the item to the newly created Donations department.
7. Move to the Miscellaneous tab.
8. Check the Non Inventory check box.
9. Save your changes.

Put a Bar Code at the Register (Optional)

Create a scannable barcode for cashiers, and put it at each register.

To do so, print a barcode label from the newly created inventory record, or print the Inventory Scan Sheet report.

Ring Up the Donation Item

1. If the customer chooses to donate, scan the barcode next to the register or type the SKU of the donation item into the register.
2. A new line will be added to the register, with the Donation item in it.
3. Check the Due field at the bottom of the register to see how much will be needed to round up to the nearest dollar.
4. Edit the Price field to round up the to the nearest dollar. (This is when a small chart near the register helps!)
5. Click Process to complete the sale as usual.

Report on Donations

Run the Sales History Report for the Donations department.

Option 2: Conduct Department Sales for Donations

Advantages of this option: Some already use Department Sales, and staff at these stores find them easy and familiar. Setup is approximately 5 minutes faster.

Create a Donations Department

Create an untaxed donation department for tracking purposes.

6. Go to Maintenance| Department.
7. The Department pick list will open.
8. Press the Insert key on your keyboard.
9. A new department record will open.
10. In the Department Code field, enter "DONA".
11. In the Description field, enter "Donation".
12. Set the Taxable radio button to No.
13. Assign a Dept Sale Hot Key from the pull-down list.
14. Save your changes.

Ring Up the Donation Department Sale

1. If the customer chooses to donate, click the Dept Sale icon, or press the Dept Sale Hot Key combination that you assigned to the department.
2. A new line will be added to the register, with the Donation department in it.
3. Check the Due field at the bottom of the register to see how much will be needed to round up to the nearest dollar.
4. Edit the Price field to round up the to the nearest dollar. (This is when a small chart near the register helps!)
5. Click Process to complete the sale as usual.

Report on Donations

Run the Sales History Report for the Donations department.

More Help

Call Booklog if you need more help! Our regular support hours are 8:00 AM to 8:00 PM, Monday through Friday. Weekend support hours are from 8:00 AM to 6:00 PM on Saturday. A weekend surcharge may apply.

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Contact training@booklog.com if you would like to sign up for a training session.

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