

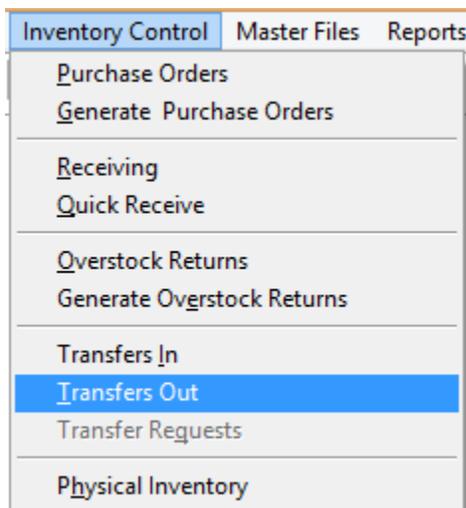
Working with Donations in Anthology

Overview:

Visual Anthology does not directly accommodate donations through its interface. However there are two easy, effective way to track and automatically adjust your inventory levels when making donations of your inventory items.

Using Transfers Out

Open the Inventory Control | Transfers Out menu option.



- Next choose F4 New TO
- In the destination section choose "Other" and enter a meaningful description like "Donation to New Middle School". It doesn't matter what you put there as long as you know what it refers to.
- In the ISBN/SKU field you may either scan or lookup the items to be donated. It is important to note that when you are creating this type of Transfer Out (TO) you want be sure the REQ and SHIP fields match. REQ is the amount being requested and SHIP is the amount you are sending. It doesn't seem likely you would donate something you don't have so these fields will match.
- Next choose the enter line button.
- Once you have entered all the items you wish to donate simply
 - F10 to save
 - F11 to Print
 - F12 to Post the Transfer

Using Overstock Returns

To accomplish this, we will need to use two different parts of the Anthology interface; the Vendors screen and Overstock Returns module. Basically what we will be doing is creating a “new” vendor called DONATION and then using Overstock Returns to tell Anthology to return books to that new vendor. This method will automatically reduce the on hand levels, give you an interface to view your donations, and allow you print an invoice for the transaction. **Note: Once you have created the vendor “Donation” you will not need to recreate it each time. Simply use the one you have already created.**

First we need to create a new vendor in our system.

- Go to Master Files | Vendors
- Click the F4 New button
- In the Name field, enter DONATION and press the TAB key
- Your short code should be filled in automatically
- Click the F10 Save button to save the new record

Now we can create a Return for this vendor.

- Go to Inventory Control | Overstock Returns
- Click the F4 New RI button

- In the Vendor field, type DONATION (you can also use the Vendor Assistant to locate this vendor)
- In the Line Item Entry section, enter the SKU for the item you wish to donate (you can also use the Inventory Assistant to locate this item).
- In the QTY field, enter the quantity you are going to donate.
- In the REASON field, you could choose "Overstock" or leave it blank.
- In the INVOICE field, you add invoice information or leave it blank.
- The LIST price should be filled in for you. If you are going to get a receipt for your donation for tax purposes, there are a few things to consider here:
 - As you know in the book industry and certainly in Anthology, List and Retail are typically recorded as same value in inventory. In many cases, you would be getting a receipt for your donation to use on your taxes. List price, in the case of books would reflect the selling cost of most items and therefore accurately represent the value of the merchandise.
 - You may also discount the price by using the DISC % field if you wanted to show the cost of the book and not its retail value.
 - For USED BOOKS and NON-BOOK items (sidelines), this becomes very important. Often, the List price represents the actual cost of the item. To determine the Retail price, you need to look at the List and Retail fields on the InfoPanel. If these values are different, you will need to decide which one to use. You may then simply overwrite the existing value in the Line Item Entry (LIST) field.
- Once you have all the items you are donating in the Return, click F12 Post to complete. Now you can review all your donations by going to the Master Files | Vendor screen, select the DONATION vendor, and choose the Returns tab.