
Customer Editor

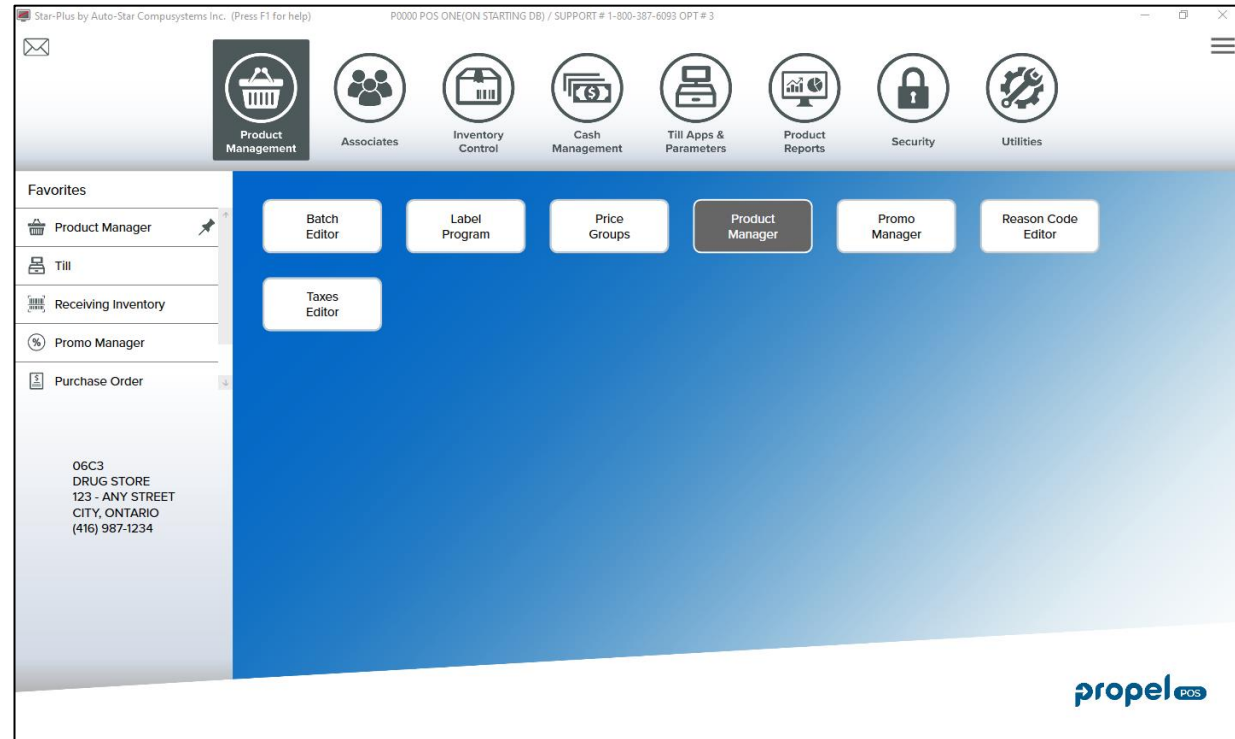
Creating a Donation Event

Pharmacy Technology Solutions — Issued October 2023

Customer Editor: Creating a Donation Event

- The Donation Editor purpose is to create events and track donation for a specific charity at the Till.
- A unique charity item must be created in Product Manager and then attached to each Donation Event.
- The charity item is used to track the transactions that contain donations and record the amounts of donations for an event.
- The Donation Editor will track how much has been donated for each charity and will display it under the Current Balance and Total Balance to display on the screen within the editor.

1. Click the **Product Management** icon.
- All Charity barcodes must be created in Product Manager first.
2. Click the **Product Manager** function button.



Product Manager: Creating a Donation Bar Code

3. Click the **Add F5** button.



4. Click the **Generate Bar Code** button.

5. Type the **Report Description**.

- *This is a detailed description of the product that will appear on the reports.*

6. Type the **POS Description**.

- *This is a short description of the product.*
- *This description appears on the customer's Till receipt.*
- *Be brief in the description; the space in this field is limited to 22 characters.*

7. Type the **Fineline** code.

- *It is important the products are put into the correct Finelines for reporting.*
- *You may create a new fineline for Donations, ensure that the proper Category is attached to the new Fineline.*

8. Type the **Vendor** code.

- *This is the code for the Vendor of the product.*
- *You may need to create a new vendor code for the charity.*

9. Select the applicable **Tax** boxes.

- *These are the taxes that will be applied when the product is sold at the Till.*

10. Click the **Add** button.

The screenshot shows the 'Create A New Product' dialog box. It includes the following fields and controls:

- Bar Code:** 4700000008, with a 'Generate Bar Code' button.
- Vendor Item Number:** (empty)
- Report Description:** LOCAL SOCCER TEAM
- POS Description:** LOCAL SOCCER TEAM
- Size:** (empty)
- UOM:** (empty), with a look-up button (...)
- Fineline:** DON, with a look-up button (...)
- Price Method:** 1 - Regular Retail (dropdown)
- Regular Retail:** 0.00, **Break Qty:** 1, **Special Price:** 0.00
- Vendor:** MED, with a look-up button (...)
- Target Margin:** 0.00, **Case Qty:** 1, Purchase By Case
- Regular Cost:** 0.000, **Cost Code:** (empty)
- Min. On Hand Qty:** 0, **Max. On Hand Qty:** 0
- Taxes:** HST13, HST5
- Buttons:** Add, Apply, Cancel



Clicking on the Look-up button (...) displays a list of Vendor names and Vendor codes.

Product Manager: Creating a Donation Bar Code

- 11. Click the **Sales Parameters** tab.
- 12. Click the drop-down button ▼ to select the **Purchase Price Required?** to be **Yes**.
- 13. Click the drop-down button ▼ to select the **Purchase Price Required?** to be **No**.
- 14. Click the drop-down button ▼ to select the **Inv. Control Status** to **None**.
- 15. Click the **Save F7** button.
- 16. Click the **Close F10** button.

The screenshot shows the 'Product Manager' application window. The 'Sales Parameters' tab is active. The 'Purchase Price Required?' dropdown is set to 'Yes', and the 'Inv. Control Status' dropdown is set to 'None'. The 'Save F7' and 'Close F10' buttons are highlighted at the bottom of the window.

Field	Value
Bar Code	47000000008
EIline	DON
Report Desc.	LOCAL SOCCER TEAM
Active?	Yes
POS Desc.	LOCAL SOCCER TEAM
Phase Out?	No
Created By Till?	No
Number Of Products	1159
Created	(Mon) Nov 27/2023 10:55:18
Modified	
Last Sold	
Activated	(Mon) Nov 27/2023 10:55:18

Sales Parameters

Minimum Customer Age	0	Maximum Purchase Qty.	0
Reference Required?	No	Package Weight	0.000
Purchase Price Required?	Yes	Inv. Control Status	None
Purchase Qty. Required?	No	Exclude From G.W.P. Calculation	No
Sales Time Restrictions		Discounts Not Allowed	No
Payment Restrictions		Promotable	Yes
Family Codes		Is A Coupon?	No
Return Allowed	Yes	Individual Scanning	No
		Taxable Size	0.000
		Commission Item	No
		Commission	0.00
		Commission Brand	
		Percent	
		Manual Tare Required	No
		Online Item	No

Taxes

HST13% HST5%

Comments

Legend

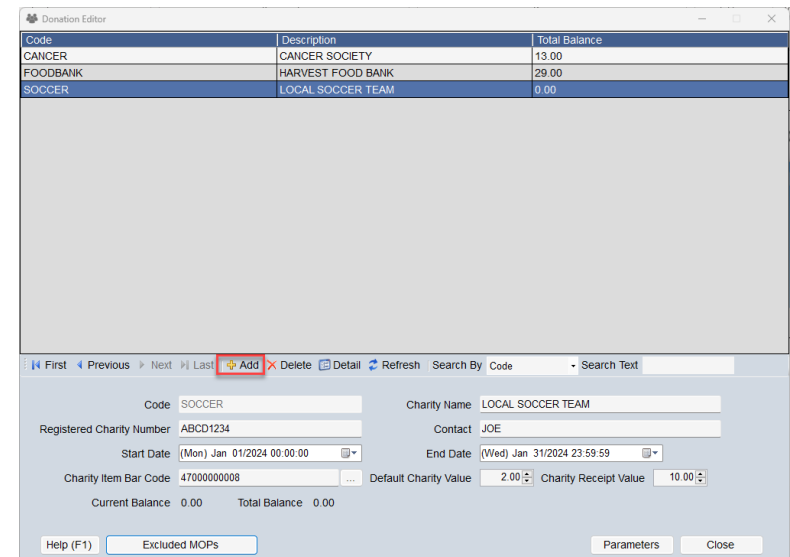
HELP F1 PREVIOUS F2 NEXT F3 DELETE F4 ADD F5 FIND F6 SAVE F7 LABEL F8 PRINT F9 CLOSE F10

Associates: Creating a Donation Event



1. Click the **Associates** icon.
 - The function buttons that appear are related to the Associates Application bar.
2. Click the **Donation Editor** function button.

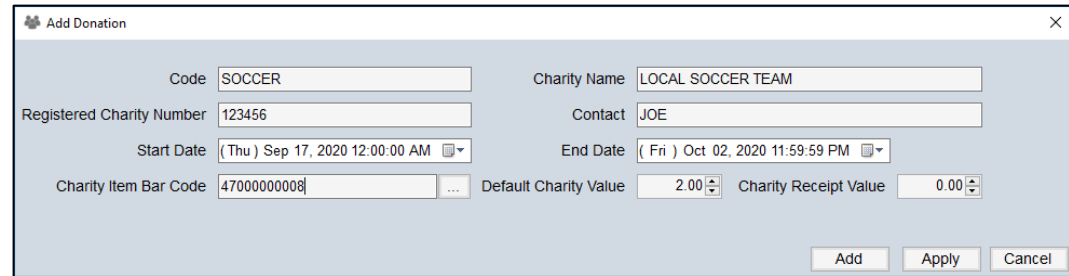


3. Click the **Add** button.



Associates: Creating a Donation Event

4. Type the **Code** for the Charity event.
5. Type the **Charity Name**.
6. Type in the **Registered Charity Number**.
7. Type in the **Contact** name of the Donation event.
8. Click the **Calendar**  button for the **Start and End field**.
 - *This field sets the start date and end date for the promotion to begin.*
9. Click the **Month**.
 - *This is the month that you want the charity event to start.*
10. Click the **Date**.
 - *This is the day of the month you want the charity event to start.*
11. Click the **Look-Up**  button to select the **Charity Item Bar Code**.
 - *This is the bar code that you created in Product Manager for the charity group.*
12. Type the **Default Charity Value**.
 - *The till will prompt for the value entered here; however, customers may donate any value they chose.*
13. Type the dollar amount for a **Charity Receipt Value**.
 - *This is the amount that a donation needs to be so that you can provide the customer with a receipt.*
14. Click the **Add** button.



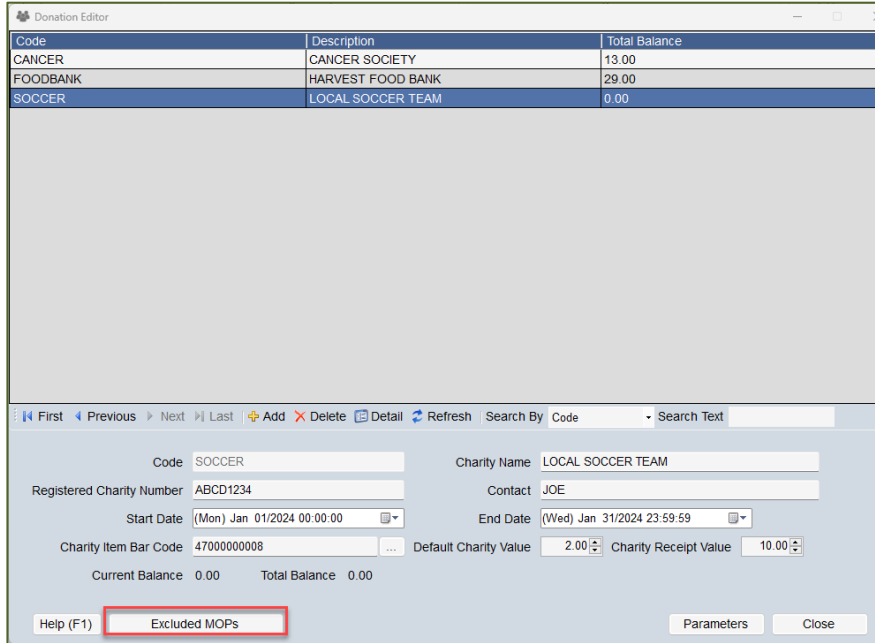
Code	SOCCER	Charity Name	LOCAL SOCCER TEAM		
Registered Charity Number	123456	Contact	JOE		
Start Date	(Thu) Sep 17, 2020 12:00:00 AM	End Date	(Fri) Oct 02, 2020 11:59:59 PM		
Charity Item Bar Code	47000000008	Default Charity Value	2.00	Charity Receipt Value	0.00



Multiple charity events can be active at the same time.

Associates: Creating a Donation Event

15. Click **Exclude MOPs** button.

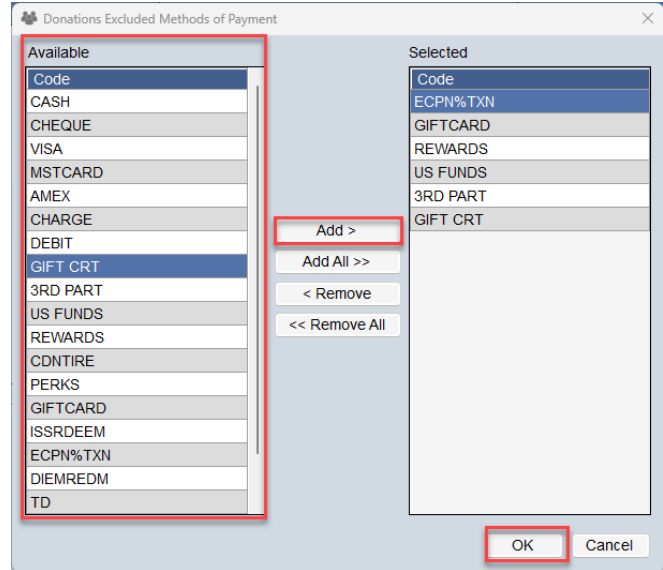


16. Select the MOPs you would like to exclude from the Donation prompt at the Till.

17. Select the **Add** button.

18. Click the **OK** button.

19. Click the **Close** button.



Associates: Creating a Donation Event

20. Click the **Parameters** button.

21. Select the parameters for the donation:

- **Donation Default Value** – this determines the default donation value that will be used when creating new donation events.
- **Include Customer Value Option** – determines if the Till donation amount screen displays an option for rounding up the total sale value to the next nearest dollar to be used as the donation amount.
- **Include Round Up to Nearest 1, 5, or 10 Dollar Options** – determines if the Till donation amount screen displays an option for rounding up the total sales value to the nearest 1, 5, or 10 dollar increments to be used as the donation amount.

22. Click the **Close** button.

23. Click the **Close** button.

The screenshot shows the 'Donation Editor' application window. At the top, there is a table with three columns: Code, Description, and Total Balance.

Code	Description	Total Balance
CANCER	CANCER SOCIETY	13.00
FOODBANK	HARVEST FOOD BANK	29.00
SOCCER	LOCAL SOCCER TEAM	0.00

Below the table is a 'Donation Parameters' dialog box. It contains the following options, all of which are checked:

- Donations Enabled
- Donation Default Value: 2.00
- Include Custom Value Option
- Include Round Up To Nearest 1 Dollar Option
- Include Round Up To Nearest 5 Dollars Option
- Include Round Up To Nearest 10 Dollars Option

Below these options is a text box explaining the rounding options:

This determines if the Till donation amount screen displays an option for rounding up the total sale value to the next nearest 10 dollar increment to be used as the donation amount.
Unchecked = Round Up option will not display
Checked = Round Up option will display (Default)

At the bottom of the dialog box is a 'Close' button. In the background, the main application window shows fields for Registered Charity Number (ABCD1234), Contact (JOE), Start Date ((Mon) Jan 01/2024 00:00:00), End Date ((Wed) Jan 31/2024 23:59:59), Charity Item Bar Code (47000000008), Default Charity Value (2.00), and Charity Receipt Value (10.00). At the bottom of the main window, there is a 'Parameters' button and a 'Close' button.

Till Application – Processing a Donation at the Till

Now that you have created the Donation Event, let's take a quick look at how it will work at the till.

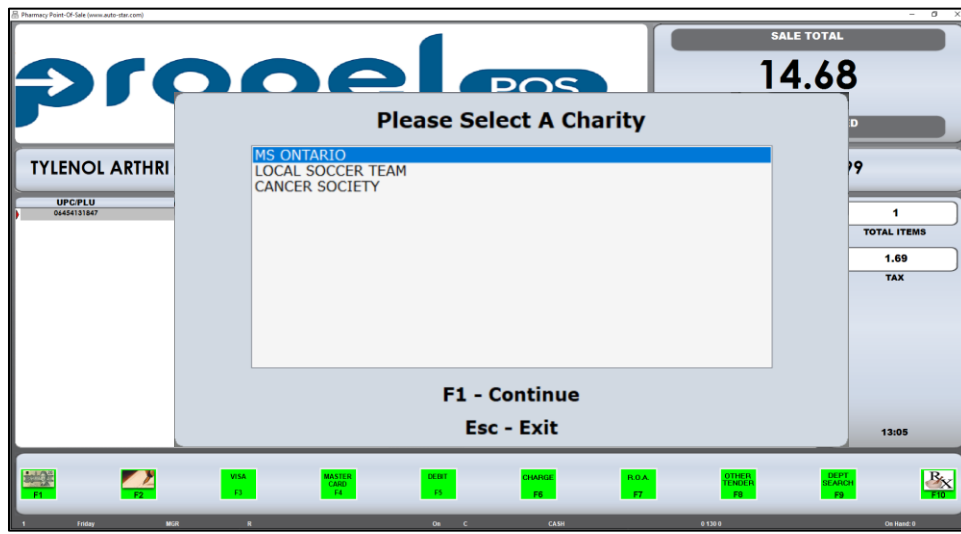
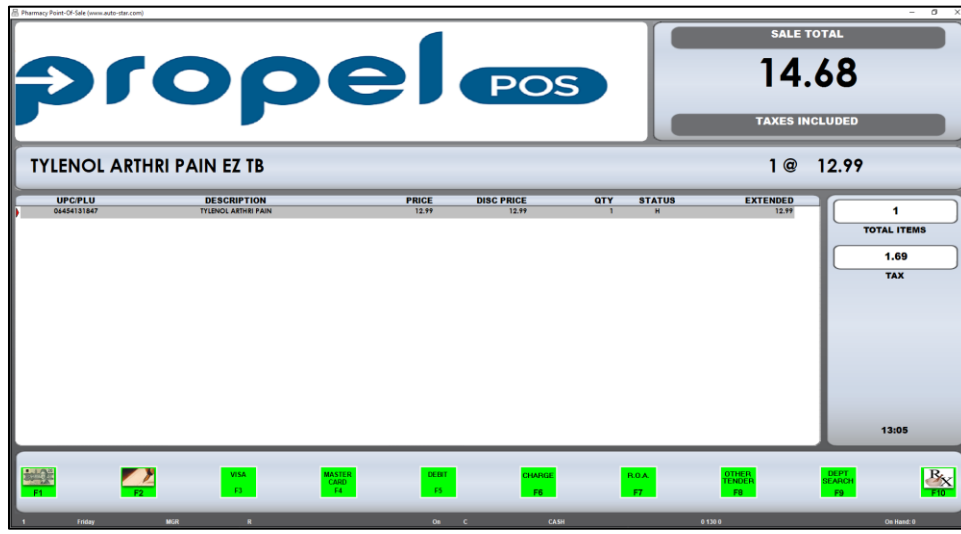
1. Scan the customers purchase into the Till.



If you typed the bar code, press the ENTER key on the keyboard to complete the entry.

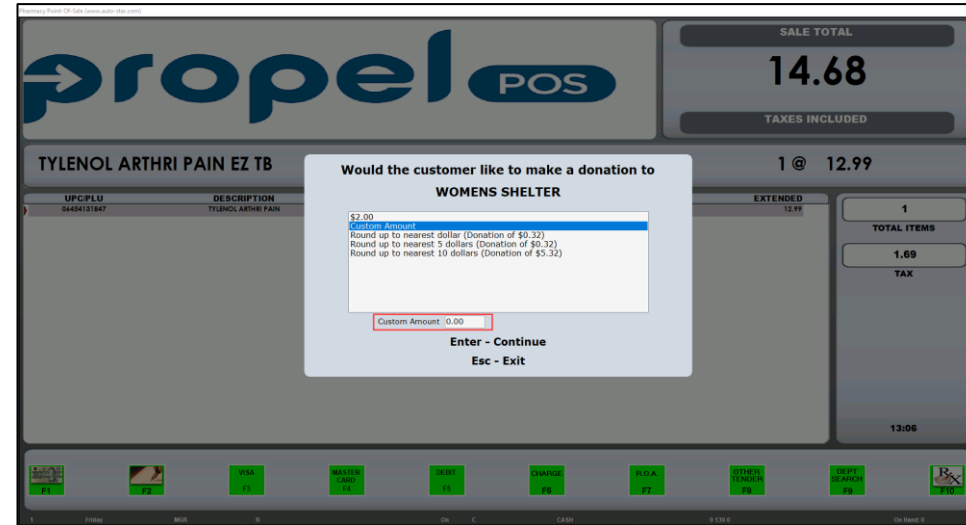
- 2. Press the cash **F1** key payment.
 - Be sure to tell the customer the total of the sale (e.g., in our example, the total amount owing with rounding is \$14.68).
 - The Till will automatically round up or down the total sale to the nearest five-cent increment.

3. If multiple donations are running at the same time, you may be prompted to highlight the desired charity and press **Enter**.

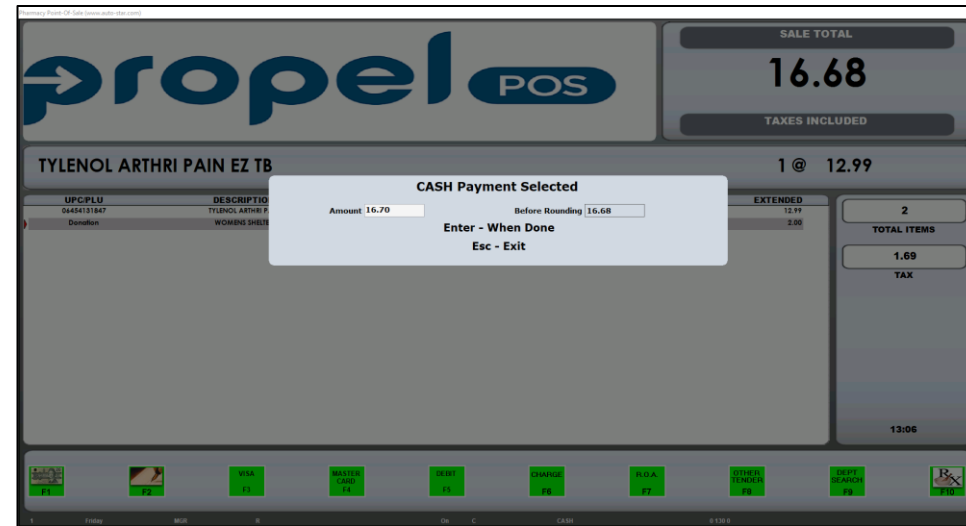


Till Application – Processing a Donation at the Till

- Select the amount that the customer would like to donate, and press **Enter**.
 - The Till may be set up as followed:
 - A set value i.e., \$2.00
 - A Custom Amount – if selected enter the Custom dollar amount at the bottom of the screen.
 - Round up to the nearest dollar.
 - Round up to the nearest \$5 dollars.
 - Round up to the nearest \$10 dollars.
- The Till screen will now include the value of the donation entered.
 - The donation will be included on the customer's receipt.
- Press Enter once selection is made.



- Type the **Amount** given to you by the customer.
 - The amount can be entered in three different ways:
 - It can include the decimal place followed by two zeros (e.g., 20.00).
 - It can include the decimal place and no zeros (e.g., 20.).
 - It can be entered with no decimal places and two zeros (e.g., 2000).
 - If you use any one of these three methods, the Till will accurately record the dollar amount (e.g., \$20.00).



- Press the **ENTER** key on your keyboard.
 - The **CHANGE DUE** value is the amount to be returned to the customer.
 - The **CHANGE DUE** will appear for a total of five (5) seconds.
 - The Till Receipt printer will print the customer receipt.
 - The change drawer will also open.
 - After five (5) seconds, the Till Screen will reset.

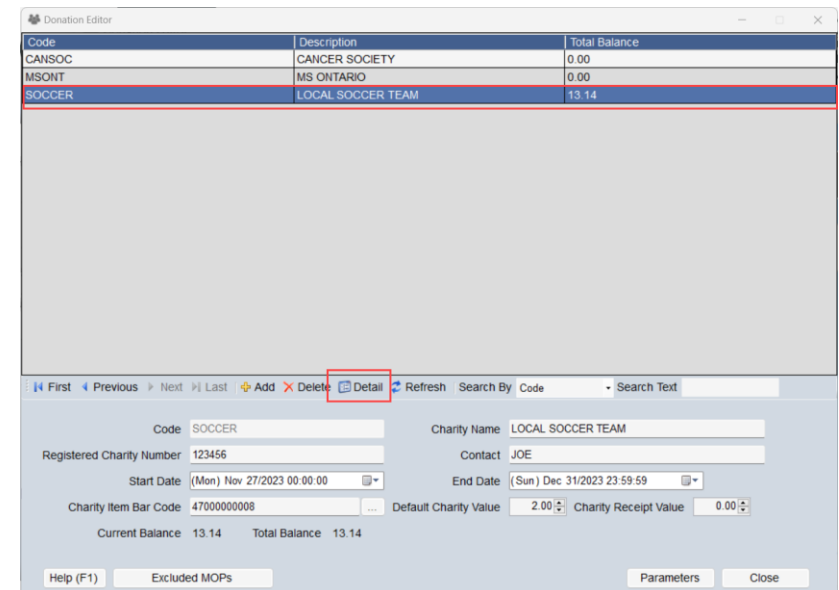
Associates: Generating Reports for a Donation Event

- You may also generate a report from the Donation Editor.
- This report will display all the transactions that contain a donation including a dollar value and totals for the date range of the current event.

- Click the **Associates** icon.
- The function buttons that appear are related to the Associates Application bar.



- Select the Charity you would like to generate a report for.
- Click the **Detail** button.



Associates: Generating Reports for a Donation Event

5. Click on the **Print** button.



If you have used this event for an older date range, you can select the Load History button to view all donations made from previous and current events.

6. From the preview screen, select the **Print** icon.

SOCCKER (LOCAL SOCCER TEAM) Donation Total: \$13.14 - Nov 27, 2023 12:00:00 to Dec 31, 2023 23:59:59

Transaction Date	Till #	Transaction #	Amount	Bar Code
Nov 27/2023 11:48:30	1	145	0.74	47000000008
Nov 27/2023 11:58:27	1	146	5.00	47000000008
Nov 27/2023 11:58:59	1	147	7.40	47000000008

Navigation: First Previous Next Last

Buttons: Load History **Print** Close

(Mon) Nov 27/2023

Donation Editor Report
SOCCER LOCAL SOCCER TEAM

Start Date: 11/27/2023 12:00:00 AM
 End Date: 12/31/2023 11:59:59 PM
 Contact: JOE
 Registered Charity Number: 123456

Transaction Date	Till #	Transaction #	Donation Amount	Bar Code
Nov 27/2023 11:48:30 AM	1	145	0.74	47000000008
Nov 27/2023 11:58:27 AM	1	146	5.00	47000000008
Nov 27/2023 11:58:59 AM	1	147	7.40	47000000008
Total Donation Amount			13.14	