How do I create a donated item in Acquisitions?

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Applies to

• WorldShare Acquisitions

Answer

1. Create a vendor for the name of the donor in Acquisitions > Vendors > New Vendor. Enter the name and any other details required and click Save.

2. Create a new Gift/Donated List in Orders > New Order. The Order Name can be the name of the donor so that it becomes a Gift/Donated List that can be added to in the future.

3. The order type can be Gift/Donation List.

4. It is possible to create a Gift/Donation Template for use in orders if required from.

5. Find the item to be added using Acquisitions > Discover Items and click Add to Order when found.

6. Locate the Gift/Donated List already created previously, use Add from the Action Column.

7. Click the Receive Item button but you will notice that the Barcode is greyed out. Select the Receive and Invoice drop-down list on the left and ensure that the Action drop-down is just Receive rather than Receive and Invoice.

8. Add the barcode and any other necessary information to the Item.

9. Next time and item is to be added to the Gift/Donated List it is just necessary to find the item and add to this handy Gift/Donated List that has been created to keep track of these items.

Additional information

• Watch a video on how to create an order that is a donated item

• Learn how to make a Template

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