Donation Parts

08/29/2024 10:57 am CDT

Overview

Have a donation campaign you would like to share with your customers? You can set this up at the brand level.

Creating Donation Parts

- 1. Go to Dashboard > Tools > Configuration > Add create the donation part
- 2. If the part is **Active** it will auto-add to any proposal. You can always uncheck the active box when the promotional campaign is over.
- 3. If **Is Option Selected** it will be checked on by default and the customer will have to uncheck it if they don't want to donate.



There is also a brand level report, **Donation Parts**, to show you what donation parts used in a date range. The Donation Parts report presents a table of donation parts purchased within the selected date range.

At the top, there are date fields for setting the range, a Refresh button for regenerating the report with the updated dates, and a Download button for getting a CSV formatted version of the report. For each part listed, there are links to the Contact and Invoice that they are tied to. The parts are grouped by type and beneath each group is a summary line.

Donation Parts Brand Report

The Donation Parts report presents a table of donation parts purchased within the selected date range.

At the top, there are date fields for setting the range, a Refresh button for regenerating the report with the updated dates, and a Download button for getting a CSV formatted version of the report. For each part listed, there are links to the Contact and Invoice that they are tied to. The parts are grouped by type and beneath each group is a summary line.

Donation Parts Report				After: 01/04/2017	Before: 1/31/2019	Refresh
Date	Contact	Invoice Number	Part		Quantity	Subtotal
2/23/2018	Dawn Jones	12560	Malaria No More		1	\$1.00
3/6/2018	<u>Tim Ryan</u>	12561	Malaria No More		1	\$1.00
3/6/2018	Lindsay Adcock	12562	Malaria No More		1	\$1.00
3/13/2018	Alix	12563	Malaria No More		1	\$1.00
4/13/2018	Paul Zuefeldt	12566	Malaria No More		1	\$1.00
4/20/2018	Jason Sponzilli	12568	Malaria No More		1	\$1.00
			Malaria No More		6	\$6.00