Standard Operating Procedure DONATION ORERS

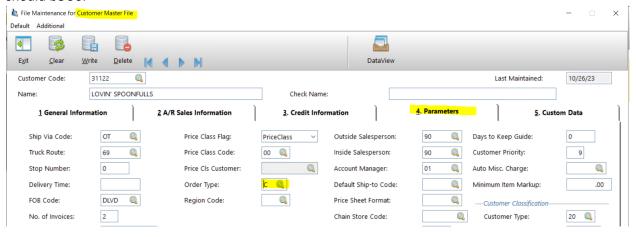
Dole & Bailey, Inc.

Implementation Date: 10/26/2023

• **PURPOSE:** For donation orders to be entered at \$0 as a sale, and the tracking will be done according to the IRS standards on separate accounts if the donations exceed \$250 per year

1. Account set up -

If an organization is expected to receive more than \$250 worth of donations in a year, that client needs to be set up as its own account in Provisions. Please have the organization fill out the D&B Donation Request Form found on the Employee Portal so we can keep the Federal Tax ID number on File. For proper Charitable Donation Account set up, in the Parameters Tab of Customer Master, under Customer Type, select C for Charitable Donations. The salesperson should be 90.



2. Order entry -

Whether you are utilizing the house donation account (18684) or a customer specific donation account, when entering lines on the order, enter the cost at \$0. (You will get a warning that the price is below cost on the line, this is ok to say YES to continue).

