Round Up Button

Overview

You now have the ability to present your customers with the option of donating to your store's selected charity by rounding up their sale with the **new Round Up button** which was added to the **Tender Options** area of POS. Donation **amounts** are controlled by a series of newly added **System Options**. You can choose the option to have sales only round up to the **nearest dollar**, or you can select the option that provides your customer with **3 Round Up choices** (to the nearest \$1, \$5, or \$10).

Round Up works as an extension of Misc Sale Lines, meaning you simply add your charity of choice as a Misc Sale Line and set it as your Round Up donation with a newly added checkbox.

Setup

In order to round up sales for charity, you must set the **System Options** that will determine the functionality of the **Round Up** feature when used at POS. Additionally, you must **create** or **update** an existing **Misc Sale Line** definition for your chosen charity with a **new checkbox** that will **activate** the **Round Up button**.

System Options

To set the System Options for **Round Ups**:

- 1. Navigate to Administrative > System Options.
- 2. Search or scroll down to the Round Up section.

	System Options		_	\times
	2↓			۹
~	Round Ups			
	Round Up Options	Do_Not_Show_Round_Up		
	Show Round Up Reminder	False		
~	Service Options			
	Require Permission to Pick Up a Service Job at Another S	Do_Not_Require		
	Show Cost On Job Details Email	Override		

- Round Up Options These options give the ability to round transactions up for charity.
 - **<u>Do Not Show Round Up</u>** Options for rounding up a transaction will **NOT** display at POS.
 - Round Up to the Nearest Dollar Rounds the transaction's total up to the nearest dollar.
 - Show Round Up Options Pops up a window with 3 Round Up choices (\$1, \$5, or \$10).

• Show Round Up Reminder – If set to True and Round Up Options are set to either

Round_Up_to_Nearest_Dollar or Show_Round_Up_Options, a Round Up reminder will appear at POS if a Round Up has not yet been added.

You have not chosen a Round Up for 'Test round up', do you want to round up now? 3. Make your selections and click **Save** to apply your changes.



Round Ups are set to **Do_Not_Show** by **default**. You must make a selection from the dropdown menu to see rounding at POS.

Setting the Misc Sale Line

To create your new Misc Sale Line:

1. Navigate to Administrative > Misc Sale Lines. The Misc Sale Line Definitions window will appear.

🖳 M	lisc Sale Line Definitions			3
Sort	Short Name	Description	Department	
1	Note			
2	EDGE Postcard Certificates	EDGE Postcard Offer Coupon		
3	Non Inventory	Non Inventory		
4	Cash Out	Misc Cash Out		
5	Adjustment	Account Adjustment		6
6	Shipping	Non Customer Shipping and Handling		н
				E
				6
	Edit Add C) Show Inactive Items Move Up	Move Down Save Order Print List Cancel	

- 2. Click Add and fill in the Short Name and Description as you normally would when adding a new Misc Sale Line.
- 3. Check the new Active Round Up checkbox. Checking this box will make your new charity the Round Up selection for POS transactions.

General Taxe	S
Short Name	WOUNDEDWARRIOR
Description	Wounded Warrior Fund
Department	
	Treat As Credit
	Show Taxable Checkbox At POS
[Active Round Up
	Inactive

Only one may be active at a time. Edge will issue a reminder message when you check this box:



4. Select a Save option to save your Misc Sale Line.



For more information on **adding Misc Sale Lines**, please visit the <u>Misc Sale Line</u> section of the EdgeUser knowledgebase.

Using Round Up at POS

Using the **Round Up** button at POS works just like any other sale at POS. First, you will **find the customer** and select the **associate**, as normal, then begin your transaction by adding your desired salelines.

Prior to accepting a payment method to complete the sale, you will click the **Round Up bu**tton located within the **Tender Options** area. What happens when you click this button is determined by your **System Options**.

Cash	Gift Cert	Credit Memo	Round Up
Check	Tender Card	House Account	1
Credit Card	Layaway	Offline	Del Line

If you selected the **Round_Up_To_The_Nearest_Dollar** option, the transaction will round up the sale to the **nearest dollar** automatically after clicking **Round Up**:

POINT OF S	SALE - Weimar,	Michael (001	-00039)											-	o ×
Associate	e 2 lou	uis, lowerca	ase (2)	Share							Why In			~	Park
customer	1 9001 00033				Find	Notes /	Contacts	Орро		Make Payment (4)	Sell Item	Sell Gift Certificate	Special Order	Repair Intake	Start Ove
	57	-			New Cust	Wish List	Appts	Quotes		Pick Up / Finish (1)	Misc Charge	Sell Tender Card	Appraisal Intake	Custom Job Intake	Open Drawer
17 2	3145 67	68552	874 1	1/2024	No Name	Ship				Cancel Order	Trade / Buy	Return / Adjust	No Sale Tracking	2/24/2025 9:10 AM	Receipts
ine	Item #	QTY							Description				Reta Disc 1	iil F %/\$ Ta	Price ax/Net
1 Mi	xed Goods		test												\$1.15
															\$0.08
														_	\$1.23
2 wc	OUNDEDWA	ARRIOR	Wounder	d Warrior F	und										\$0.77
0	Delete Line														
											- 1 6		<u>.</u>		
			_												
Cash	Gift Cert	Credit	Round	Tender		Amo	unt					Denne	Su	b Total	\$1.92
	Tender	House										Done	Sales	Tax 🕑	\$0.08
Check	Card	Account											-	Total	\$2.00
Credit	Lavaway	Offline	Del Line									Save to Wish Lis	at Te	ndered	\$0.00
Card	Layaway	Unline	DerLine											Due	\$2

If you selected the **Show Round Up Options** option, a window will appear allowing you to choose from one of 3 Round Up options:



Once you have made your selection, the **Misc Sale Line** with your charity will be added to your transaction with the **Round Up** amount. In the example below, we chose the **'Nearest \$10'** option:

Associate															
	1 •Ma	nager, *Fal	ke (1) 🔍 🤉	hare							Why In			~	Park
ustomer	-			Find	Notes /					Make Payment	Sell Item	Sell Gift Certificate	Special Order	Repair Intake	Start C
	1 Marco.			New Cust	Wish List					Pick Up / Finish	Misc Charge	Sell / Activate Card	Appraisal Intake	Custom Job Intake	Ope Draw
37 6	1216 969	57916	60 02/2	004 No Name	Ship					Cancel Order	Trade / Buy	Return / Adjust	No Sale Tracking	3/2/2025 8:44 PM	Recei
ne	ltem #	QTY						Description	'n				Retai Disc %	IIII	Price ax/Net
001	-120-03117		D	0.03ct tdw 14k	wg Diamon	d Ring w/Diamo	ond of I/	1/11					\$3	99.00	\$399.0
	Mor		to any											0.00%	\$25.3
														\$0.00	\$424.3
<u>)</u> Sp.	Order		ø	.18tdw 14ktt D	iamond Se	mi Mounting wit	th Rour	nd Channel Set Diamonds					Env. 1	<u> </u>	\$263.7
3 CH		~	Example	Charity											\$1.9
			Example	chanty											
D	elete														
	elete .ine												w.		
	elete ine												<u>·</u>		
	elete .ine				_								<u> </u>		
	elete line												<u> </u>		
Cash	elete ine Gift Cert	Store Credit	Round 1 Up 1	ender	Ато	Int						Done	Sub	Total	\$664.6
Cash	Gift Cert	Store Credit House	Round Up	ender	Ато	int						Done	Sub Sales 1	ə Total	\$664.6 \$25.3
Cash Check	Gift Cert Gift Cert Gift Reward Card	Store Credit House Account	Round Up	ender	Ато	int						Done	Sub Sales 1	Total Tax 2	\$664.6 \$25.3 \$690.0
Cash Check Credit	Gift Cert Gift Cert Gift Reward Card Layaway	Store Credit House Account	Round Up Del Line	ender	Ато	int						Done Save to Wish Lis	Sub Sales 1 Ten	Total Tax D Total dered	\$664.6 \$25.3 \$690.0 \$600.6



QuickBooks Consideration

For any stores that are integrated with **QuickBooks**, you must be sure to map your newly **added Misc Sale Line** to the appropriate **QuickBooks Account**.

General Accounts Inventor	y Repair Taxes Misc tem	s Stores		
D	Name	Description	G/L Account	
NSF	NSF	Returned check fees	Fee Income	
Barter Item	Bater tem	Item/Service in Exchange for Repair/Maintenance	Misc Expense	
Stone Purchase	Stone Purchase		Misc Expense	
Tax Adjustment	Tax Adjustment		Sales Tax Payable	
20% Coupon	20% Coupon	20% off single item	Misc Expense	
Gold Purchase	Gold Purchase		Cost of Goods Sold:COGS Non Invent	ory
Cash Out	Cash Out	Misc Cash Out	Misc Expense	
Inredeemed Gift Certificates	Unredeemed Gift Certificates	To clear unredeemed gft certificate balances.	Misc Expense	
Trade In	Trade In	Trade In Using Misc Button	Misc Expense	
Misc Jewelry Sale	Misc Jewelry Sale		Product Sales:Showcase Sales	
Mixed Goods	Mixed Goods		Product Sales: Mixed Goods	
WOUNDEDWARRIOR	WOUNDEDWARRIOR	Wounded Warrior Fund	Charitable Contribution	
hipping	Shipping	Shipping and Handling	Shipping Income	
Show Inactive Quick	Books® Account			

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For more information on **mapping Misc Sale Lines to QuickBooks**, please visit the <u>Mapping Edge</u> <u>with QuickBooks Accounts</u> article located in the **QuickBooks** section of the **EdgeUser knowledgebase**, and scroll down to **QuickBooks Misc Items Tab**.