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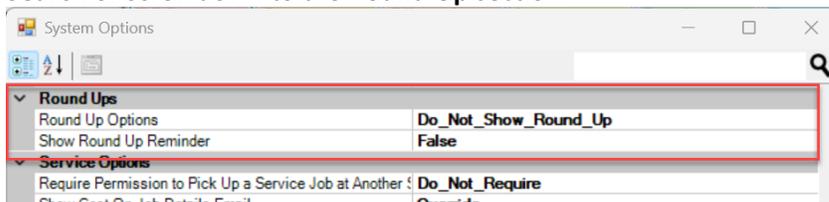
· <u>Round Up Options</u> – These options give the ability to **round transactions up** for charity**.**
   · <u>**Do Not Show Round Up**</u> – Options for rounding up a transaction will **NOT** display at POS.
   · <u>**Round Up to the Nearest Dollar**</u> – Rounds the transaction's total up to the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

· <u>**Show Round Up Reminder**</u> – 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.
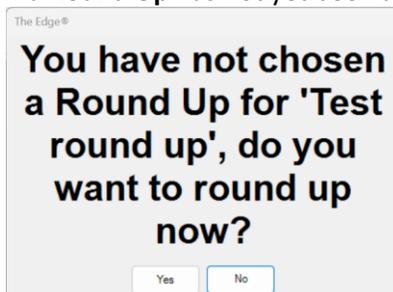
3. Make your selections and click **Save** to apply your changes.

> **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.
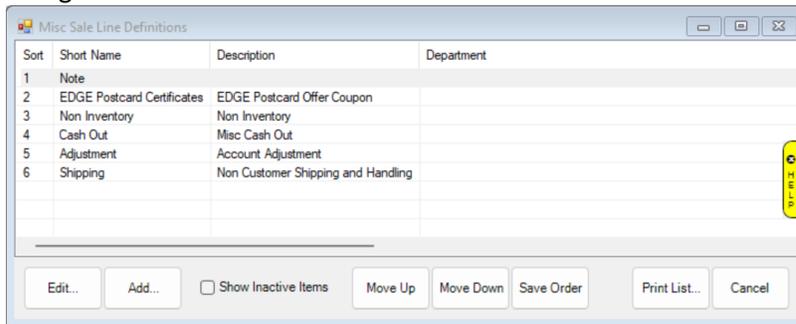
2. Click **Add** and fill in the **Short Name** and **Description** as you normally would when adding a new **Misc Sale Line**.

3. Check the new **Active Round Up** checkbox. Checking this box will make your new charity the **Round Up** selection for **PO**S transactions.

Only **one** may be active at a time. Edge will issue a **reminder** message when you check this box:
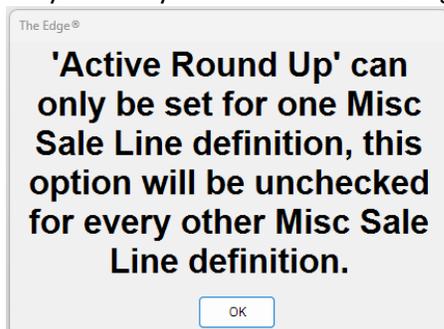
4. Select a **Save** option to save your **Misc Sale Line**.

> For more information on **adding Misc Sale Lines**, please visit the Misc Sale Line 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**.

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**:
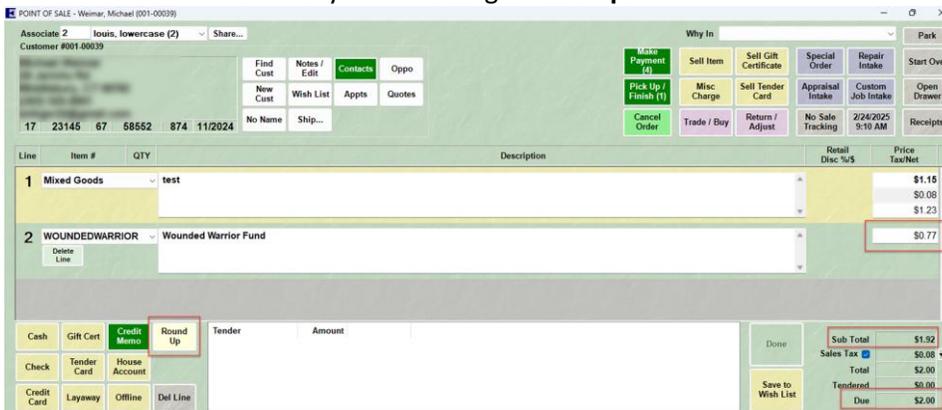
If you selected the **Show Round Up Options** option, a window will appear allowing you to choose from one of 3 Round Up options:
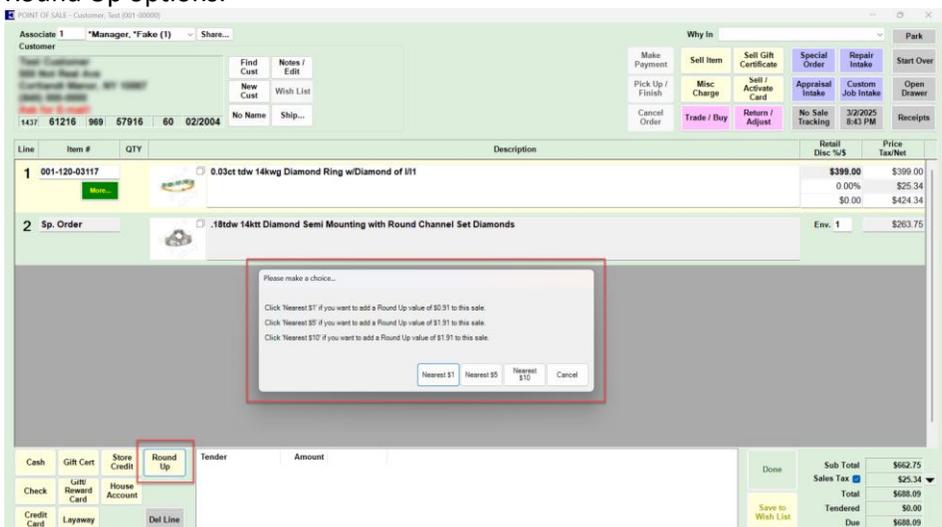
Once you have made your selection, the **Misc Sale Line** with your charity will be added to your transaction with the **Round Up** amount. In the example below, we chose the **'Nearest $10'** option:

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**.

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