

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**.

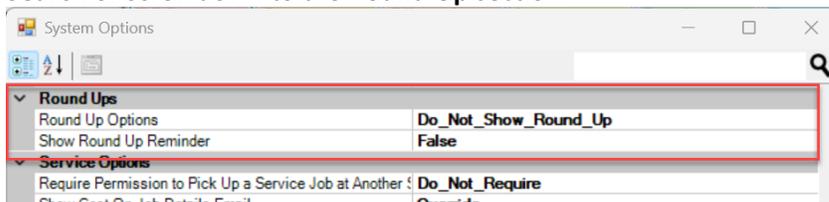
Setup

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**.

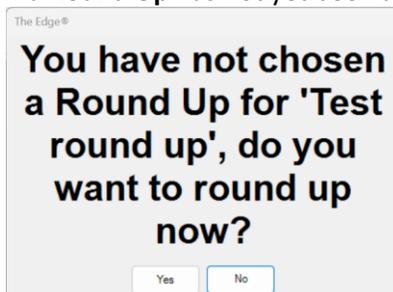
System Options

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

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



- **Round Up Options** – These options give the ability to **round transactions up** for charity.
 - **Do Not Show Round Up** – 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.



3. Make your selections and click **Save** to apply your changes.

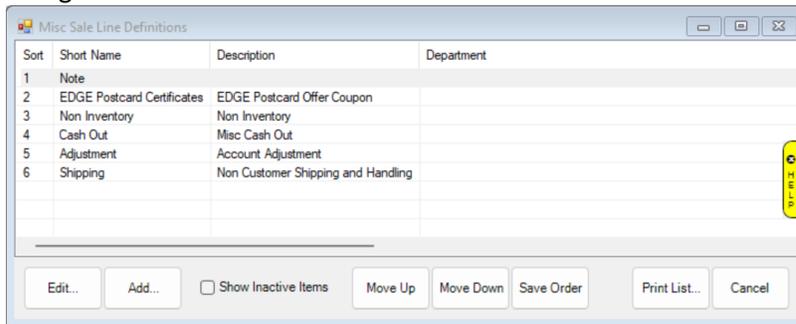


Round Ups are set to **Do_Not_Show** by **default**. You must make a selection from the dropdown menu to see rounding at POS.

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 **POS** transactions.

General Taxes

Short Name: WOUNDEDWARRIOR

Description: Wounded Warrior Fund

Department: Wounded Warrior Fund

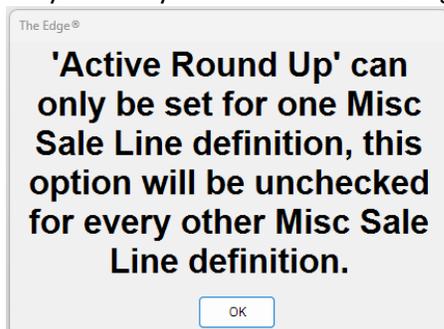
Treat As Credit

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 [Misc Sale Line](#) section of the EdgeUser knowledgebase.

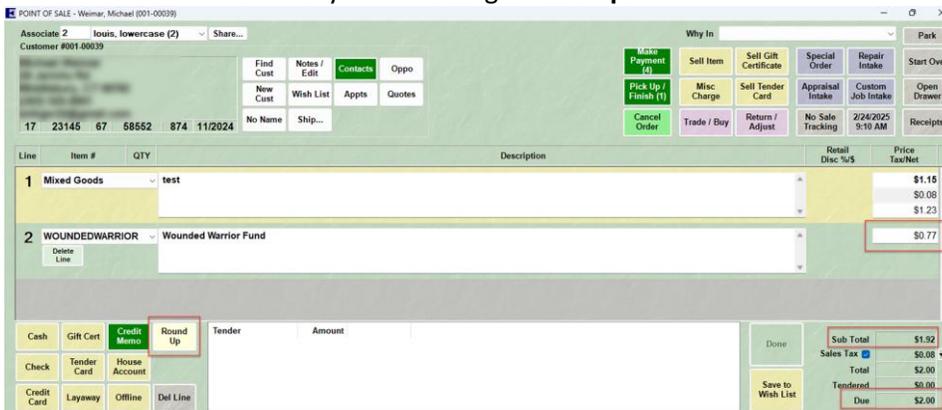
Using Round Up at POS

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.

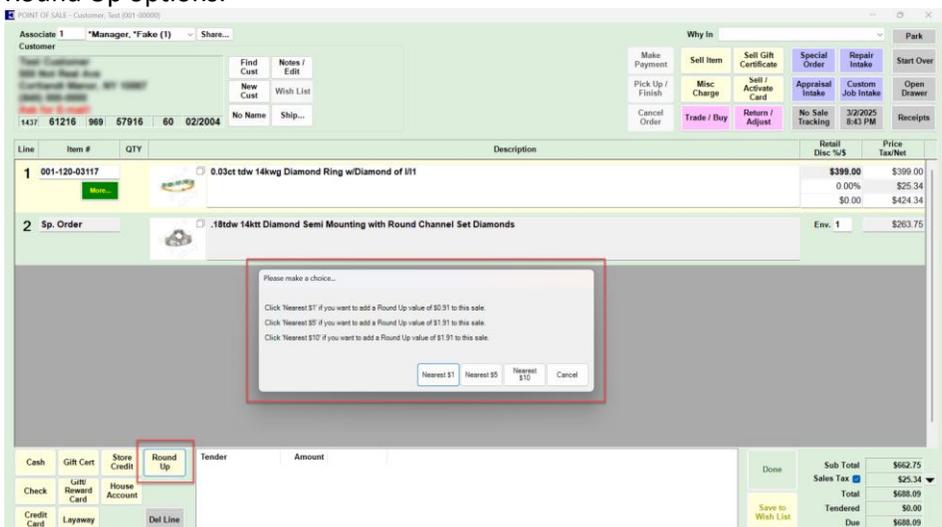
Prior to accepting a payment method to complete the sale, you will click the **Round Up** button located within the **Tender Options** area. What happens when you click this button is determined by your **System Options**.



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:

The screenshot shows a Point of Sale interface for 'POINT OF SALE - Customer: Text (001-00000)'. The transaction includes three lines: a diamond ring, a diamond mounting, and a charity line for 'Example Charity' with a value of \$1.91. The bottom right corner shows a summary table:

Sub Total	\$664.66
Sales Tax	\$25.34
Total	\$690.00
Tendered	\$0.00
Due	\$690.00

The receipt from EDGE Tech Shop shows the following details:

- Customer: Fake Customer, 123 Fake Street, Bismarck, ND 58102, fake@fake.com
- Transaction: 18ctw 14ktt Diamond Semi Mounting with Round Channel Set Diamonds
- Price: \$1,055.00
- Estimated tax: \$86.99
- Subtotal: \$1,171.99
- Less Deposit: -\$263.75
- Amount Due at pickup: \$868.24
- Charity Line: CHARITY Example Charity \$1.91
- Sub Total: \$664.66
- CT Sales Tax: \$25.34
- Total Today: \$690.00
- Cash Tendered: \$690.00
- Estimated Total due at pickup: \$868.24

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**.

The screenshot shows the 'QuickBooks® Setup' window with the 'General' tab selected. The 'Misc Items' section is expanded, and the 'WOUNDEDWARRIOR' item is highlighted. The mapping table is as follows:

ID	Name	Description	G/L Account
NSF	NSF	Returned check fees	Fee Income
Barter Item	Barter Item	Item/Service in Exchange for Repair/Maintenance	Mac Expense
Stone Purchase	Stone Purchase		Mac Expense
Tax Adjustment	Tax Adjustment		Sales Tax Payable
20% Coupon	20% Coupon	20% off single item	Mac Expense
Gift Purchase	Gift Purchase		Cost of Goods Sold COGS Non Inventory
Cash Out	Cash Out	Mac Cash Out	Mac Expense
Unredeemed Gift Certificates	Unredeemed Gift Certificates	To clear unredeemed gift certificate balances	Mac Expense
Trade In	Trade In	Trade In Using Mac Button	Mac 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
Shipping	Shipping	Shipping and Handling	Shipping Income



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**.