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# **WEBINARS**



*FREE ADVANCED TRAINING*



## **Encourage giving with Round up for Charity**

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Encourage giving with Round up for Charity



- Goals and purpose
- Checkout experience
- Pop-up window (Example)
- Set up and activate
- Add pre-existing charities
- Add new charities
- Activate more than one charity
- Receipt with a thank you note
- Learn more



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## Goals and purpose



- Encourage giving.
- Give back to the community.
- Help those in need.
- Customer participation is quick and easy.
- Show concern for charitable causes.



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## Checkout experience



- Voluntary
  - Cashier is prompted to ask the customer, but is not required to do so.
  - Customer can say yes or no.
- Can add more charity options.
- Receipt includes a thank you note.



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## Pop-up window (Example)

The screenshot shows a software interface with a 'Round up for charity' pop-up window. The background window is titled 'Invoice / Quote' and 'Checkout'. The pop-up window has a red header and asks: 'Round up the invoice total for charity? Ask the customer: Would you like to round up your invoice total to the nearest dollar and donate the additional amount charity?'. It shows a 'Donation Amount: \$ 0.73' and a list of charities with radio buttons: Smithville Fire Department (selected), American National Red Cross, Smithville High School Jazz Band Fund Drive, and Smithville Chamber of Commerce. At the bottom of the pop-up are 'Donate [F8]' and 'Skip' buttons. The background window shows a table with 'Amount DUE' of \$ 24.27 and a summary table with Subtotal \$ 22.89, Tax \$ 1.38, and Total \$ 24.27.

Amount Type	Amount
AMOUNT DUE	\$ 24.27

  

Subtotal \$	22.89
Tax \$	1.38
<b>Total \$</b>	<b>24.27</b>

- Multiple options
- Easy selection
- Automatically rounds up the amount
- Easy to skip



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## Set up and activate

To turn on the **Round Up for Charity** feature, follow these steps:

1. On the **File** menu, click **Setup**.
2. In the **Paladin Configuration** window, click the **Charity** tab.
3. In the **Charity Options** pane, select the **Enable Roundup for Charity** tab.
4. Click **Save**.

A screenshot of the 'Charity Options' pane in the software. A yellow arrow on the left points to the 'Enable Roundup for Charity' checkbox, which is checked. To the right, there is a label 'Number of active charities:' followed by a dropdown menu showing the number '4'. At the bottom right of the pane, there are two buttons: 'Reset' and 'Save'. The 'Save' button is highlighted with a yellow border, and a yellow arrow points up to it from below the screenshot.

Charity Options

Enable Roundup for Charity

Number of active charities: 4

Reset Save





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## Add pre-existing charities

On the **Charity** tab, you can add pre-defined charities and your own charity choices to the **Charities** list.

Two pre-defined charities are available:

- **American National Red Cross**
- **Children's Miracle Network Hospitals**

To add a pre-defined charity, follow these steps:

1. In the **Charities** pane, click **New**.
2. In the **Charity** list, select a pre-defined charity.
3. Click **Save**.

**Note:** You cannot make name or logo changes to a pre-defined charity.

The screenshot shows the 'Charities' interface. On the left, there is a table with columns 'Name', 'Part #', 'Dept ID', and 'Status'. Below the table is a 'New' button. On the right, there is a 'Charity' dropdown menu with a list of options: 'American National Red Cross', 'Enter a charity', 'American National Red Cross', and 'Children's Miracle Network Hospitals'. Below the dropdown is a 'Part #' field with a 'Logo' label. There is a red cross logo for the American Red Cross. Below the logo are 'Upload' and 'Remove' buttons. At the bottom right, there are 'Reset' and 'Save' buttons. A yellow arrow points to the 'New' button, and another yellow arrow points to the 'Charity' dropdown menu.



## Add new charities

To add a charity that is not pre-defined, follow these steps:

1. In the **Charities** pane, click **New**.
2. In the **Charity** box, enter the charity's name.
3. Optional: To upload a logo, click **Upload**, and then browse to the logo image.
  - Logos must use one of these image formats: PNG, BMP, GIF, TIF
  - JPEG logo images are not supported.
  - If you do not upload a logo, the default image will be a heart logo.
4. Click **Save**.

The screenshot shows a web application interface for managing charities. On the left, there is a table with columns for Name, Part #, Dept ID, and Status. Below the table is a 'New' button. On the right, there is a form for adding a new charity. The form includes a 'Charity' dropdown menu with 'Smithville Fire Department' selected, 'Part #' and 'Dept ID' input fields, a 'Logo' section with a red fire department logo and 'Upload', 'Remove', 'Reset', and 'Save' buttons. A yellow arrow points to the 'New' button, and another yellow arrow points to the 'Charity' form area.



### Activate more than one charity

To set the number of active charities:  
In the **Charity Options** window,  
Click **Save**.

Number of active charities:

Charity Options  
 Enable F...

Name	Part #	Dept ID	Status
Smithville Fire Department	CHARITY1	11002	Active
American National Red Cross	CHARITY4	11005	Active
Smithville High School Jazz Band Fund Drive	CHARITY2	11003	Inactive
Smithville Chamber of Commerce	CHARITY3	11004	Inactive

one (1) and four (4).

charity position in  
riority positions. These  
ng the up and down

It always be **Active**.

A charity will be active if it is in  
the **Charities** list.  
positions are active if they have  
arrows.

**Example:** If the number of active charities is set to 2, only the first two charities in the list will be active.



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## Receipt with a thank you note

When the purchase is completed, donation details and a thank you note will appear on the receipt.



CASH SALE			
ITEM	QTY	SALE/REG	EXT
1234	1.00	22.89	22.89
	EACH		
HAMMER			
CHARITY1	1.00	0.75	0.75
	DONATION		NONTAX
Smithville Fire Department			
Thank you for rounding up your total for charity.			
SUBTOTAL \$		23.00	
TAX \$		1.49	
<b>TOTAL \$</b>		<b>24.49</b>	
CASH		25.00	



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## Learn more

To learn more, see the following resources in our [Help Portal](#):

- [Inspire community giving with the Charity Round Up feature](#)
- [About Round Up for Charity](#)
  - [How to set up the Round Up for Charity feature](#)
  - [How to use the Round Up for Charity feature to collect donations](#)
  - [How to view charitable contribution totals in the Comparative Revenue Reports](#)

A recording of this webinar will be available at [portal.paladinpos.com/webinars](http://portal.paladinpos.com/webinars).



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