



# Round Up for Charity Promotes Philanthropy and Your Business

Tom Normandy

*Client Experience Specialist*

July 18, 2023

## ***WHAT YOU'LL LEARN***

- 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

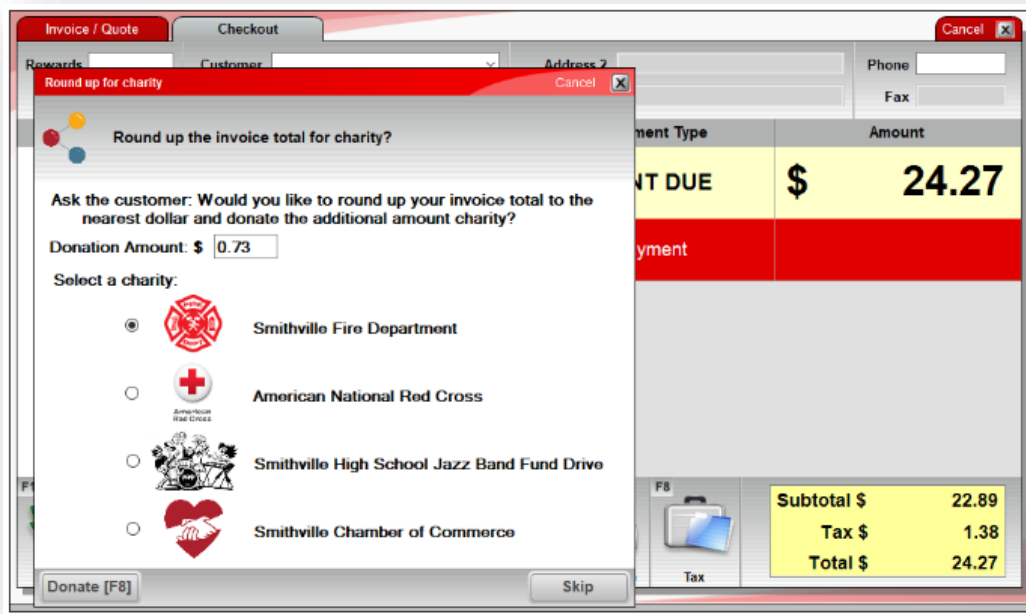
## Goals and Purpose



Round up for Charity:

- Encourages giving.
- Gives back to the community.
- Helps those in need.
- Shows concern for charitable causes.
- Customer participation is quick and easy.

# Round Up for Charity



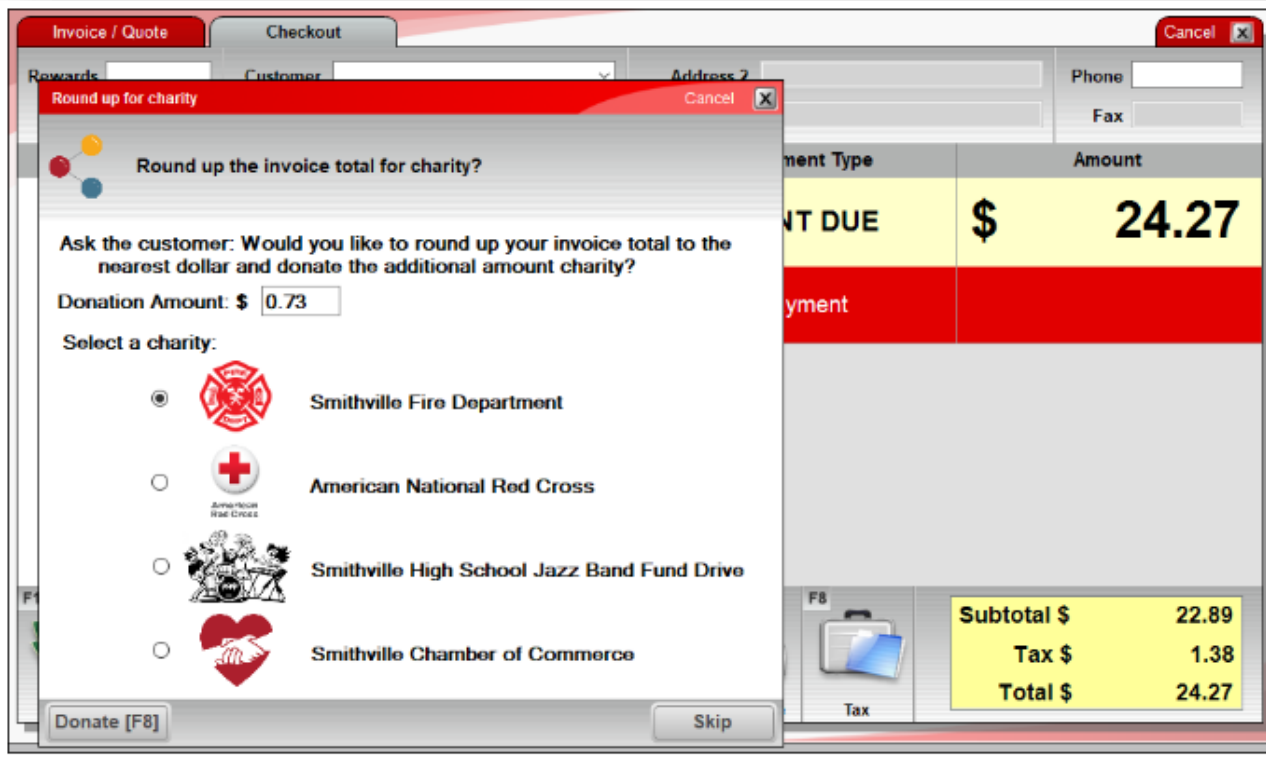
- Paladin's Round Up for Charity feature lets stores participate in local fundraising events with little effort.
- When this feature is set, a window appears during checkout and gives customers the option to round up their purchase to the next dollar amount and donate the difference to charity.

## Smooth checkout



- Giving is voluntary.
- Cashier is prompted to ask customers but is not required to do so.
- Customers choose whether to participate.
- Can add more charity options.
- Receipt includes a thank you note.

## Round Up for Charity window



Invoice / Quote

Checkout





Round up for charity

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?

Donation Amount: \$ 0.73

Select a charity:

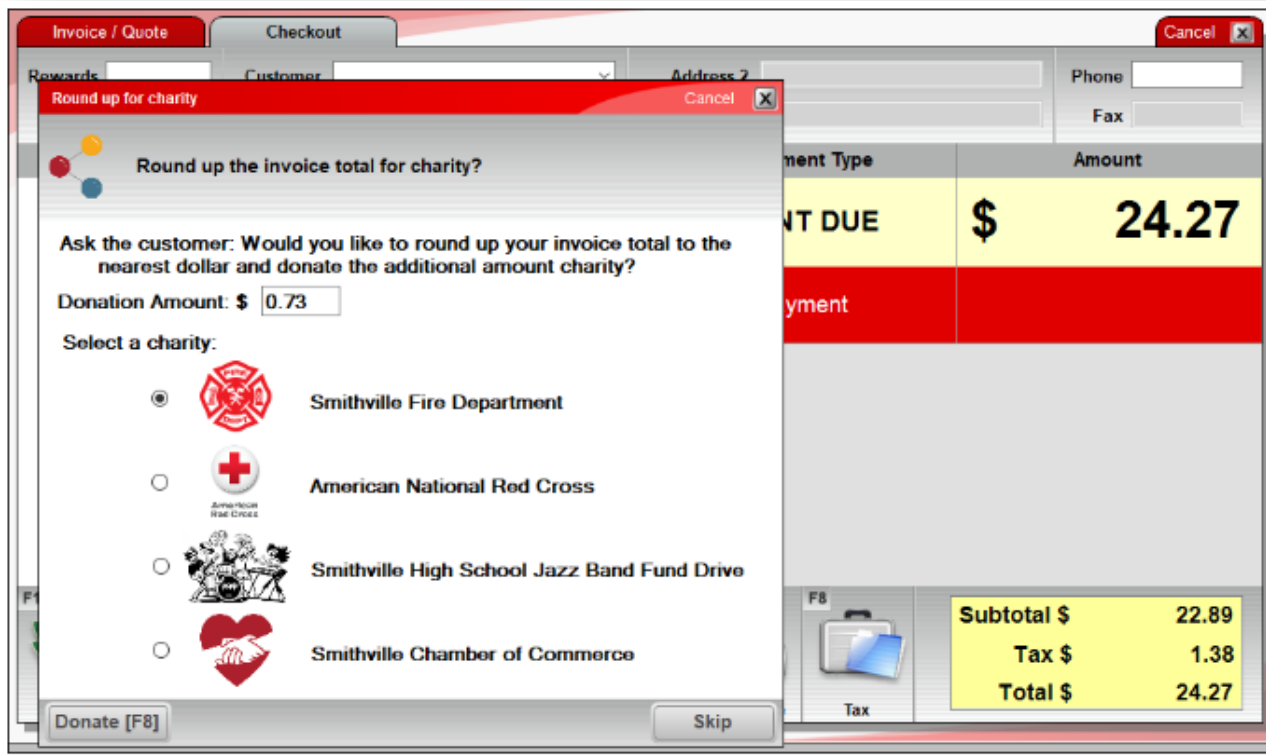
-  Smithville Fire Department
-  American National Red Cross
-  Smithville High School Jazz Band Fund Drive
-  Smithville Chamber of Commerce

Donate [F8] Skip

Item Type	Amount
AMOUNT DUE	\$ 24.27
Payment	
Subtotal \$	22.89
Tax \$	1.38
Total \$	24.27

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

## Round Up for Charity window



Invoice / Quote    Checkout    Cancel





Round up for charity    Cancel

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?

Donation Amount: \$

Select a charity:

-  Smithville Fire Department
-  American National Red Cross
-  Smithville High School Jazz Band Fund Drive
-  Smithville Chamber of Commerce


Donate [F8]    Skip

Item Type	Amount
AMOUNT DUE	\$ 24.27
Payment	

Subtotal \$	22.89
Tax \$	1.38
Total \$	24.27

- If the customer agrees to donate, select their preferred charity, then click **F8 Donate** to add the donation to the invoice and receipt.
- If the customer does not want to donate, click **Skip** or press **Enter**.
- When the **Round up for Charity** window closes, the checkout process continues.

## Set up and Activation



Charity Options

Enable Roundup for Charity

Number of active charities: 4

Reset Save

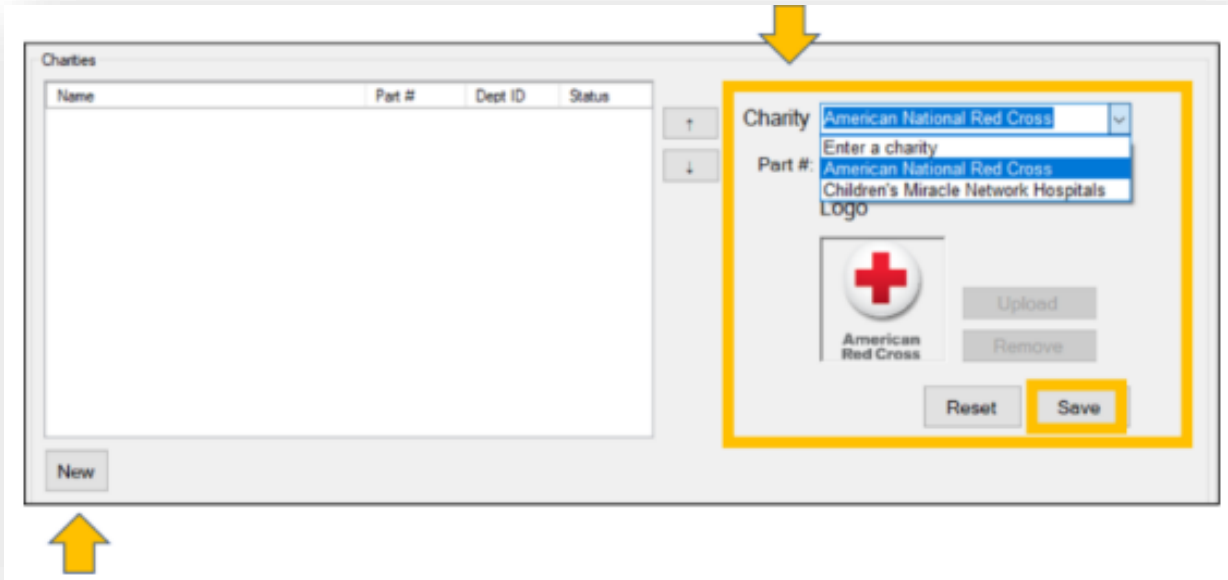
To turn on the **Round Up for Charity** feature:

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



## Add pre-existing charities

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

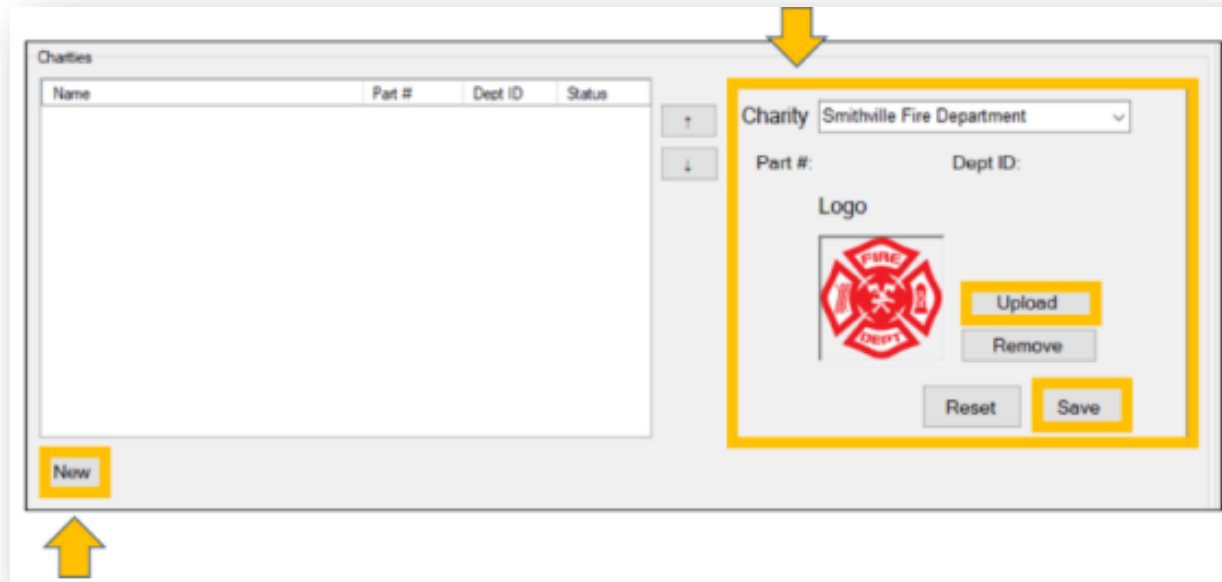


The screenshot displays the 'Charities' management interface. On the left, there is a table with columns for 'Name', 'Part #', 'Dept ID', and 'Status'. Below the table is a 'New' button. To the right of the table is a form for adding a new charity. The form includes a 'Charity' dropdown menu with 'American National Red Cross' selected, a 'Part #' dropdown menu with 'American National Red Cross' and 'Children's Miracle Network Hospitals Logo' as options, a logo upload area with a red cross icon and the text 'American Red Cross', and buttons for 'Upload', 'Remove', 'Reset', and 'Save'. A yellow arrow points to the 'New' button, and another yellow arrow points to the 'Charity' dropdown menu.

- 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.

## Add new charities

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



1. Select **File > Setup**.
2. In the **Charities** pane, click **New**.
3. In the **Charity** box, enter the charity's name.
4. Optional: To upload a logo, click Upload, and then browse to the logo image.
  - Logos must be PNG, BMP, GIF, TIF.
  - Maximum file size 450x10 pixels/1MB
  - JPEG logo images are not supported.
  - If you do not upload a logo, the default image will be a heart logo.
5. Click **Save**, then click **Close**.

## Activating charities



During the checkout process, in the **Round up for Charity** window, you can offer customers a choice of up to four charities.

To set the number of charity options that will appear:

1. In Paladin, from the main menu, select **File > Setup**.
2. Select the **Charity** tab.
3. In the **Charity Options** pane, in the **Number of active charities** list, select a number between one (1) and four (4).
4. Click **Save**, then click **Close**.

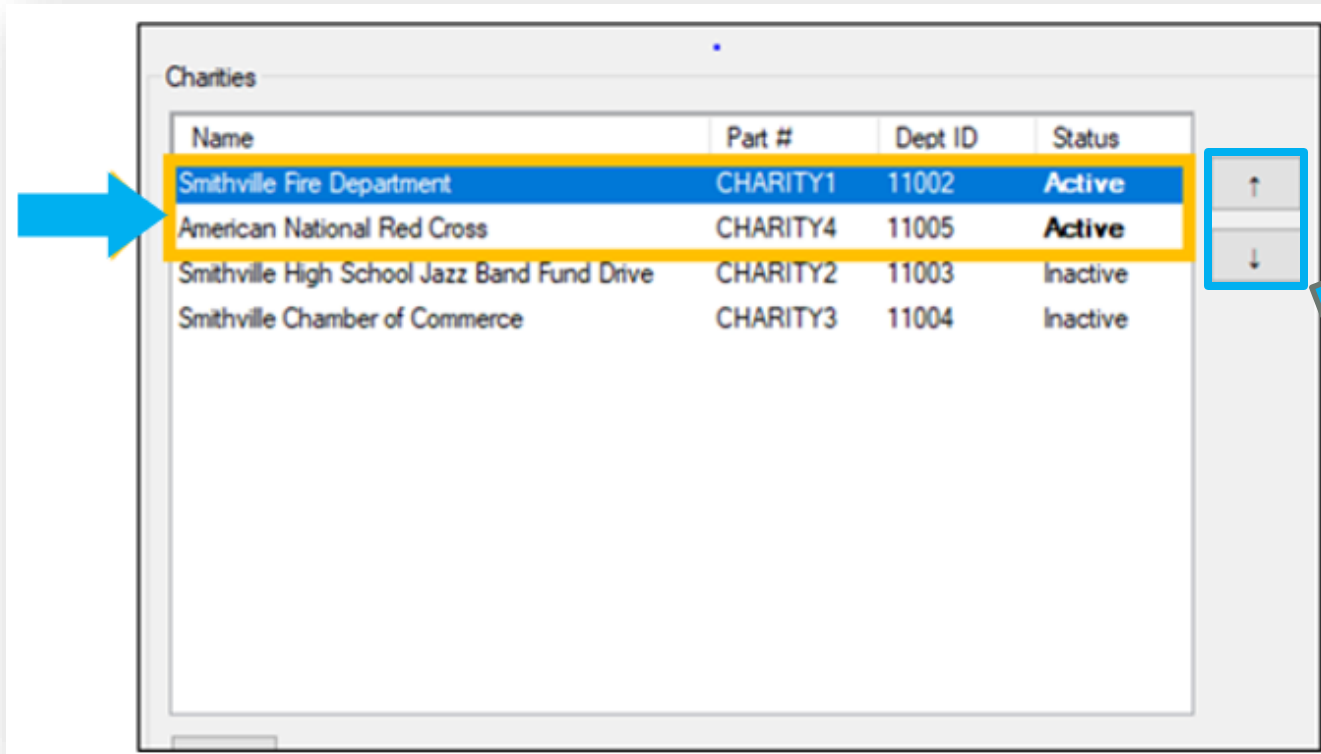
## Activating charities (cont'd)



The screenshot shows a form titled "Charity Options". It contains a checked checkbox labeled "Enable Roundup for Charity". To the right of the checkbox is a dropdown menu labeled "Number of active charities:" with the value "2" selected. Below the dropdown are two buttons: "Reset" and "Save". The "Save" button is highlighted with a yellow border. Two blue arrows point to the "Save" button: one from the right and one from the bottom.

- A charity will appear in the **Round up for Charity** window at checkout when it is in an **Active** charity position in the **Charities** list.
- The **Number of active charities** value determines the number of **Active** charity positions.
- These positions are always at the top of the **Charities** list. You can change a charity's position by using the up and down arrows.
- Example: If the **Number of active charities** is two (2), then the top two charities in the list will always be **Active**.

## Activating featured charities (cont'd)

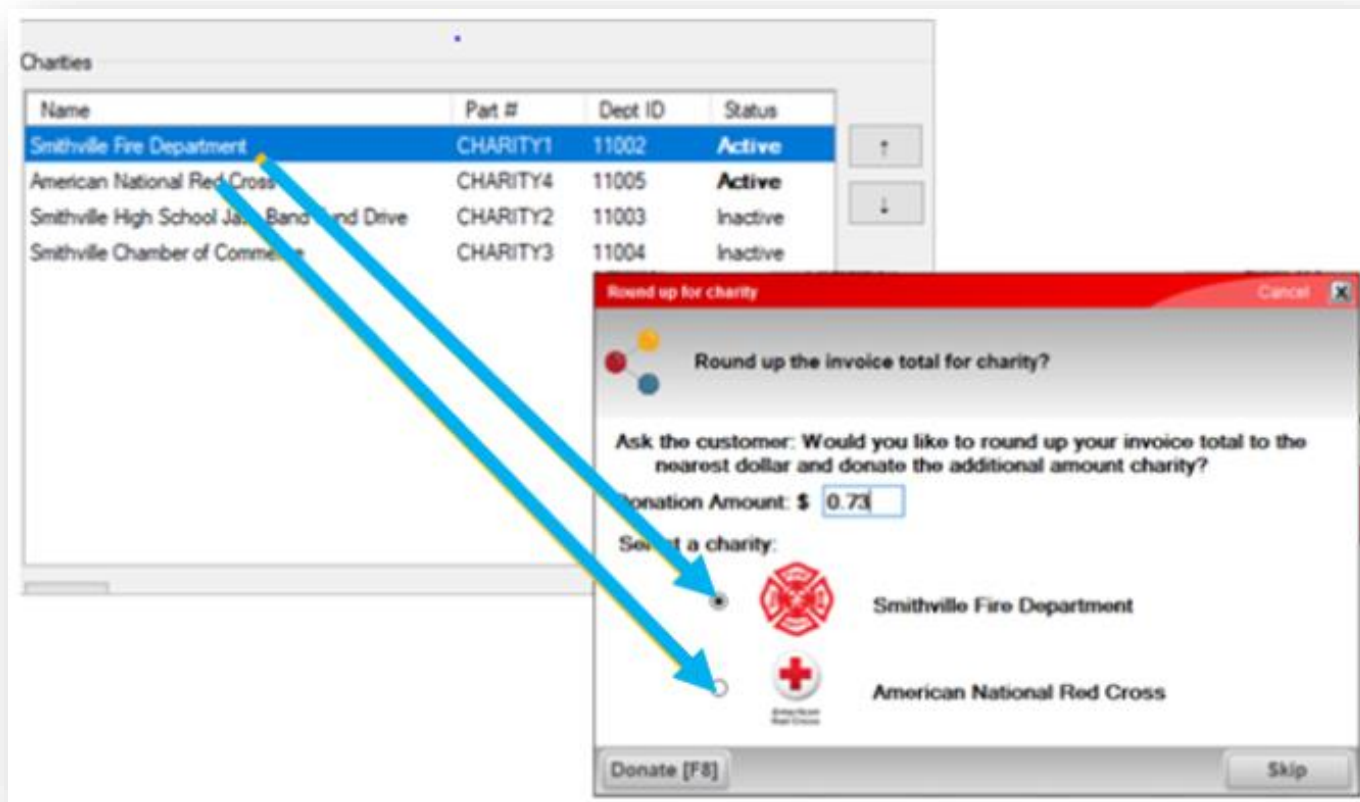


The screenshot shows a window titled "Charities" containing a table with four columns: Name, Part #, Dept ID, and Status. The table lists four charities. The first two rows are highlighted in blue, and the first two rows are also highlighted with a yellow border. A blue arrow points to the first row, and another blue arrow points to the up and down arrow controls on the right side of the table.

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

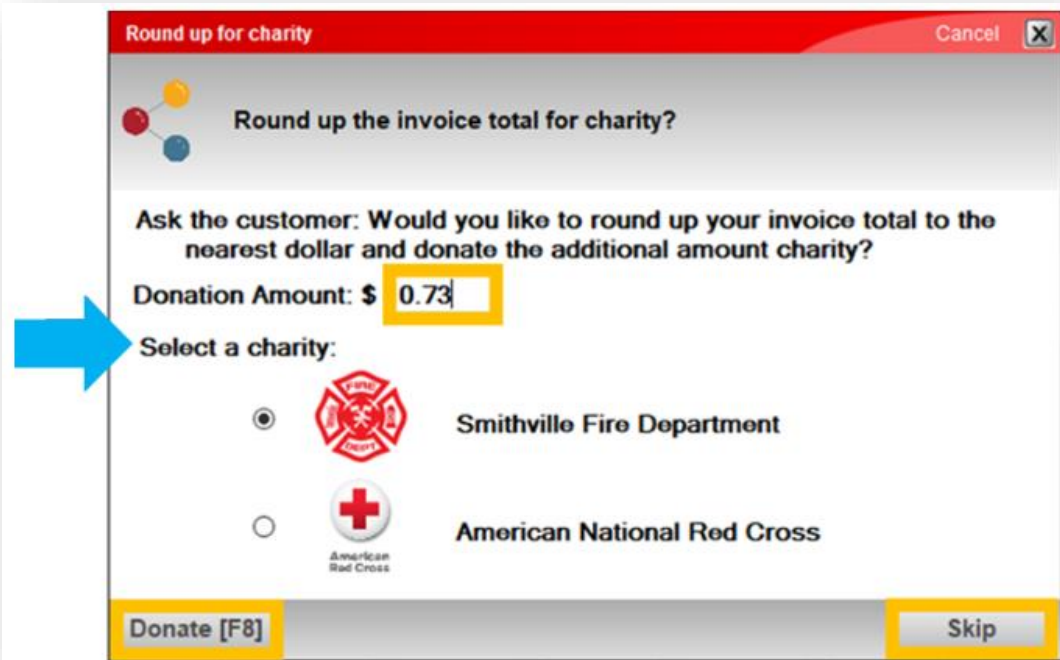
- To change a charity's **Status** from **Inactive** to **Active**, use the up arrow to move it into one of the **Active** positions.
- Use the arrows to move a charity into the **Active** positions to order the list.

## Activating featured charities (cont'd)



- In the **Round up for Charity** window, **Active** charities appear in the same order that they appear in the **Charities** list.

## How to use Round up for Charity




Round up for charity


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?

Donation Amount: \$ 0.73

Select a charity:

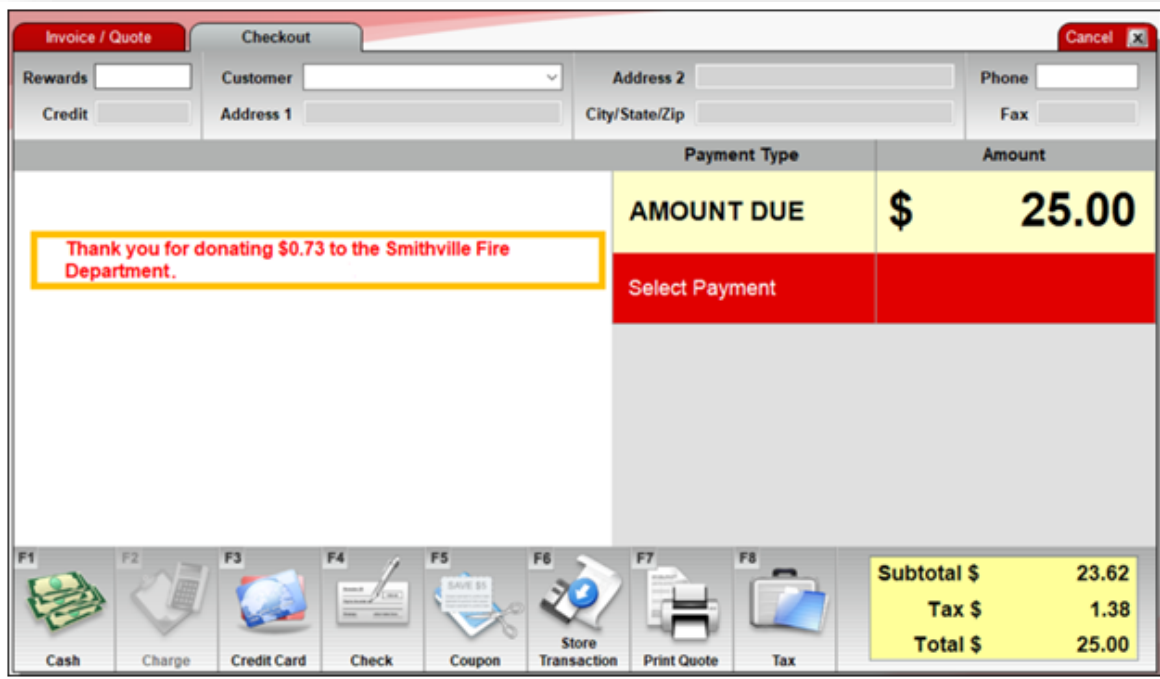
 Smithville Fire Department

 American National Red Cross

Donate [F8] Skip

1. Select the **Invoice/Quote** module.
2. Click **F8 Checkout - Round up for charity** window appears.
3. Ask the customer if they would like to round up their total and donate the additional amount to charity
  - If the customer says yes, select the charity choice and click **F8 Donate**.
  - If the customer wants to donate a different amount, in the **Donation Amount** box, enter the new amount, select the customer's charity choice, then click **F8 Donate**.
  - If the customer does not want to donate, click **Skip** or press **Enter**.

## How to use Round up for Charity (cont'd)



Payment Type	Amount
AMOUNT DUE	\$ 25.00
Select Payment	

Subtotal \$	23.62
Tax \$	1.38
Total \$	25.00

4. When a donation is made, after the Round up for charity window closes, a note appears in the Checkout tab.
5. In the Invoice/Quote tab, the donation appears as a charity invoice item.



# How to use Round up for Charity (cont'd)

- When the purchase is complete, the donation appears on the receipt.

Invoice / Quote **Checkout** Cancel

Rewards  Customer  Address 2  Phone   
 Credit  Address 1  City/State/Zip  Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1234	HAMMER	1	\$ 22.89	\$ 22.89
896	0		1234			22.89	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CHARITY1	Smithville Fire Department	1	\$ 0.73	\$ 0.73
0	0					0.00	

Thank you for rounding up your total for charity.

**NOTES**

F1 F2 F3 F4 F5 F6 F7 F8

Subtotal \$ 23.00  
 Tax \$ 1.49  
 Total \$ 24.49



CASH SALE

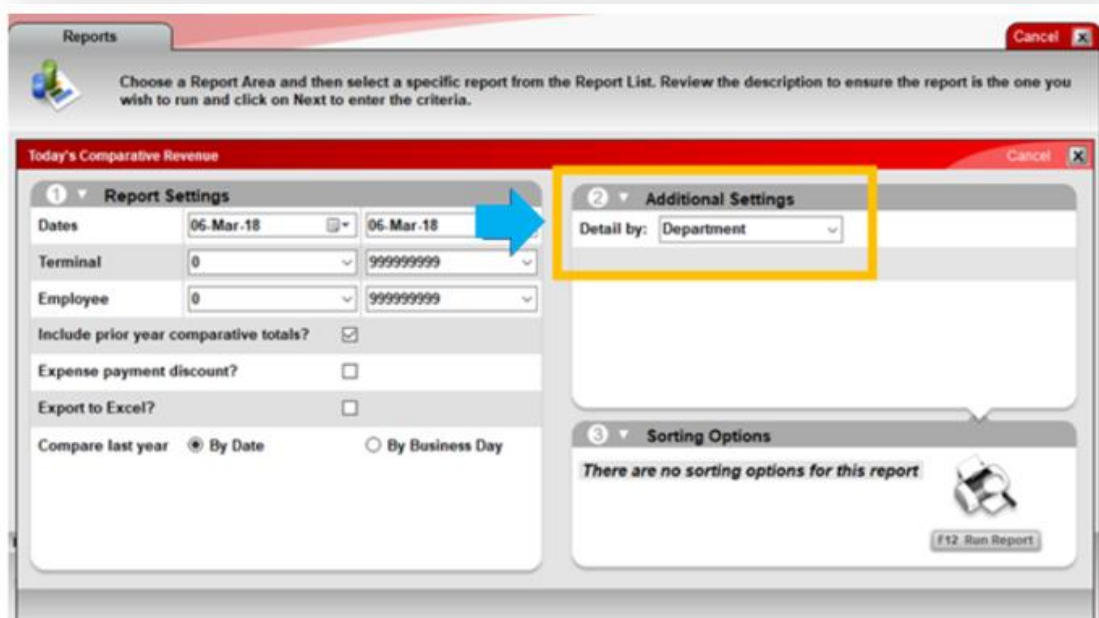
ITEM	QTY	SALE/REG	EXT
1234	1.00	22.89	22.89
	EACH		
HAMMER			
CHARITY1	1.00	0.75	0.75
	DONATION		NONTAX
Smithville Fire Department			

Thank you for rounding up your total for charity.

SUBTOTAL \$ 23.00  
 TAX \$ 1.49  
**TOTAL \$ 24.49**

CASH 25.00

# Charitable contributions on the Comparative Revenue Report



The screenshot shows a software interface for generating a report. The window title is "Today's Comparative Revenue". It is divided into three main sections:

- Report Settings:** Contains fields for "Dates" (06-Mar-18), "Terminal" (0), and "Employee" (0). It also has checkboxes for "Include prior year comparative totals?", "Expense payment discount?", and "Export to Excel?". At the bottom, there are radio buttons for "Compare last year" (selected as "By Date") and "By Business Day".
- Additional Settings:** A section highlighted with a yellow box, containing a dropdown menu for "Detail by:" set to "Department".
- Sorting Options:** A section with the text "There are no sorting options for this report" and a printer icon.

A blue arrow points to the second date field in the "Report Settings" section. A "Run Report" button is located at the bottom right of the window.

- Charitable contribution totals appear in the **Comparative Revenue Reports** when you itemize revenue by department. Each charity is automatically assigned a unique department number. To view revenue by department:
  1. In Paladin, on the top ribbon, select the **Reports** module.
  2. In the **Report Area** pane, select **Sales Analysis > Revenue**.
  3. In the **Report** list pane, select **Today's Comparative Revenue Report**.

## Charitable contributions on the Comparative Revenue Report (cont'd)

4. In the Choose **Report** pane, click **F12 Next**.
5. In the **Today's Comparative Revenue** window, in the **Additional Settings** pane, select **Department** from the **Detail** by list.
6. Click **F12 Run Report**.

A PDF file of the report opens showing charity totals itemized by their department number.

Note: For Ace Hardware stores, pre-defined charities will have an Ace Hardware part number and will not use the default **Charity<number>** scheme.

Paladin Data Corp      TODAY'S COMPARATIVE REVENUE      PAGE 1

SELECTION	BEGLINNE	ENLNE	THIS PERIOD			LAST YEAR			DATE STAMP		
EMPLOYEE	0	99999999	SEARCH BETW			SEARCH BETW			RAN ON 06-Mar-18		
TERMINAL	0	99999999	Tuesday 06-Mar-18			Monday 06-Mar-17			AT 18:03		
SHOW PRIOR YEAR COMPARATIVE TOTALS?	X		Tuesday 06-Mar-18			Monday 06-Mar-17			EMP 1		
DETAIL BY DEPARTMENT?	X										

REVENUE SOURCES							CASH SOURCES						
THIS PERIOD			LAST YEAR				THIS PERIOD			LAST YEAR			
SOURCE	REVENUE	% OF SALES	# OF INVS	REVENUE	% OF SALES	# OF INVS	SOURCE	CASH	% OF CASH	AMOUNT	% OF CASH	AMOUNT	% OF CASH
CASH	10686.07	99.9%	7	0.00	0%	0	CASH	10686.07	99.9%	0.00	0%	0.00	0%
CHARGE	0.00	0.0%	0	0.00	0%	0	CHG CARD	0.00	0.0%	0.00	0%	0.00	0%
CHG CARD	0.00	0.0%	0	0.00	0%	0	CHECK	0.00	0.0%	0.00	0%	0.00	0%
CHECK	0.00	0.0%	0	0.00	0%	0	ACH	13.89	0.1%	0.00	0%	0.00	0%
ACH	13.89	0.1%	1	0.00	0%	0	PAID OUT	0.00	0.0%	0.00	0%	0.00	0%
							CASHDROP	0.00	0.0%	0.00	0%	0.00	0%

LINE #	DEPT ID	DEPT NAME	NUM OF 2	SALES	REVENUE	MARGIN	NUMBER OF ITEMS	SALES	REVENUE	MARGIN
1	10	CLEANING SUPPLIE		294.00	798.00	63.2%	0	0.00	0.00	0.0%
2	14	PAINTS, FINISHES		2664.15	7616.75	62.4%	0	0.00	0.00	0.0%
3	10	WASH TOOLS & APP		160.00	1371.84	86.0%	0	0.00	0.00	0.0%
4	11002	Smithville Fire	1	144.36	144.36	0.0%	0	0.00	0.00	0.0%
5	11005	American Nationa	1	360.36	360.36	0.0%	0	0.00	0.00	0.0%

CUSTOMER COUNT      8      0

TAX      309.05

## Learn More

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

- [Round up for Charity](#)

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

## Next Webinar:

Get to Know Your Store and Inventory Better with  
Location Codes

August 8

9am PT

<https://portal.paladinpos.com/webinars/>



# *Expand Your Knowledge*

Stay relevant in retail:  
[paladinpointofsale.com/retailsience](https://paladinpointofsale.com/retailsience)

Self help at:  
[portal.paladinpos.com](https://portal.paladinpos.com)

Webinars available at:  
[portal.paladinpos.com/webinars](https://portal.paladinpos.com/webinars)

Follow us for Paladin news and updates:

