

Rounding Totals

There are currently two available options to have Final Totals rounded on the Finish screen.

The first Global method is available in v.12 and can be accessed by navigating in BackOffice to Administrator > System Setup and clicking the Taxes tab. The Least Common Unit (LCU) section deals with rounding the totals of ALL transactions, with Cash and Charge (credit) transactions being treated separately. Note that the Charge section only applies to pre-defined credit cards and will not work for credit cards that use a Custom Payment Method. Rounding is not available for custom payment methods in v.12.

The screenshot shows the 'System Setup Options' dialog box with the 'Taxes' tab selected. The 'Tax1' sub-tab is active. The 'Tax 1 Desc.' field is empty. The 'Tax 1 Rate' field contains the value '0'. The 'Tax Type' section has 'Percentage (%)' selected with a radio button, and 'Amount' is unselected. The 'Apply on Top of' field is empty. The 'Apply To Gratuity' checkbox is unchecked. The 'Accounting Code' field is empty. Below this, the 'Least Common Unit' section has three input fields: 'Cash' (empty), 'Charge' (empty), and 'Round Up' (empty). At the bottom, there are two checkboxes: 'VAT Environment' (unchecked) and 'Include VAT in Product Cost in Reports' (unchecked). The dialog box has a blue header bar with a globe icon on the left, a save icon in the center, and a 'Close Form' button on the right.

To setup Totals to round to a Least Common Unit:

1. In the Cash field, enter the smallest unit desired for cash payments. For example, an entry of 5 would cause all cash payments to be rounded to the nearest multiple of \$0.05.
2. In the Charge field, enter the smallest unit desired for credit card payments. If no rounding is required, enter 1.
3. In the Round Up field, select the number at which rounding up will take place. For example, an entry of 3 will cause totals ending in 1 or 2 to be rounded to 0, or totals ending in 3 or 4 to be rounded to 5. Note that the Round Up entry is dependant on the Least Common Unit entries in the Cash and Charge fields.
4. Close the form and save changes when finished.

The setup given in the examples above would cause all totals being paid in cash to round to the nearest multiple of \$0.05, rounding up if the final digit is either 3 or 4, and for any credit card payments to not be rounded at all.

In v.17 (exact version #?), functionality was introduced to allow separate rounding settings to be applied to each payment method, including custom payment methods. The global rounding settings described in the last section are still available, but will be overwritten when the selected payment method holds its own rounding rules. To set up rounding totals on a payment method:

1. Navigate in BackOffice to Administrator > Payment Method Setup.
2. Select the payment method for which you wish to create a rounding rule.
3. Select the More Info tab.

The screenshot shows the 'Methods of Payment' dialog box with the 'More Info' tab selected. The 'CASH' method is chosen. The 'Least Common Unit' and 'Round Up' fields are highlighted with a red box. The 'Currency Symbol' is set to '€'. The 'Cash Change Processing' dropdown is set to 'Provide change in the current payment method'. The 'Print Customer Authorization Slip' options are unchecked. The 'Third Party Reference' field is empty. The 'Active Record' checkbox is checked. The 'Edit', 'New', 'Cancel', 'Save', 'Find', and 'Exit' buttons are visible at the bottom.

Report Category	Default	
Exchange Rate	# of Decimals	% Emp Tip Surcharge (3=3%)
1	2	0
Least Common Unit	Round Up	Currency Symbol
0	0	€
Card Prefixes		
Cash Change Processing		
Provide change in the current payment method		
<input type="checkbox"/> Print Customer Authorization Slip with Transaction Receipt		
<input type="checkbox"/> ...and also when receipt is reprinted		
<input type="checkbox"/> Do not print Customer Authorization Slip		
Third Party Reference		
[Empty Field]		

4. In the Least Common Unit field, enter the smallest unit desired for payments made with the selected method. For example, an entry of 5 would round all payments to the closest multiple of \$0.05.
5. In the Round Up field, choose a number from which all totals will be rounded up from. Totals are rounded based on the entry in the Least Common Unit field. For example, an entry of 5 in the Least Common Unit field and 3 in the Round Up field would cause all totals ending in 3 or 4 to be rounded up to 5, and totals ending in 1 or 2 to be rounded to zero.