toast | **[me] marginedge**

Toast API Upgrade Steps

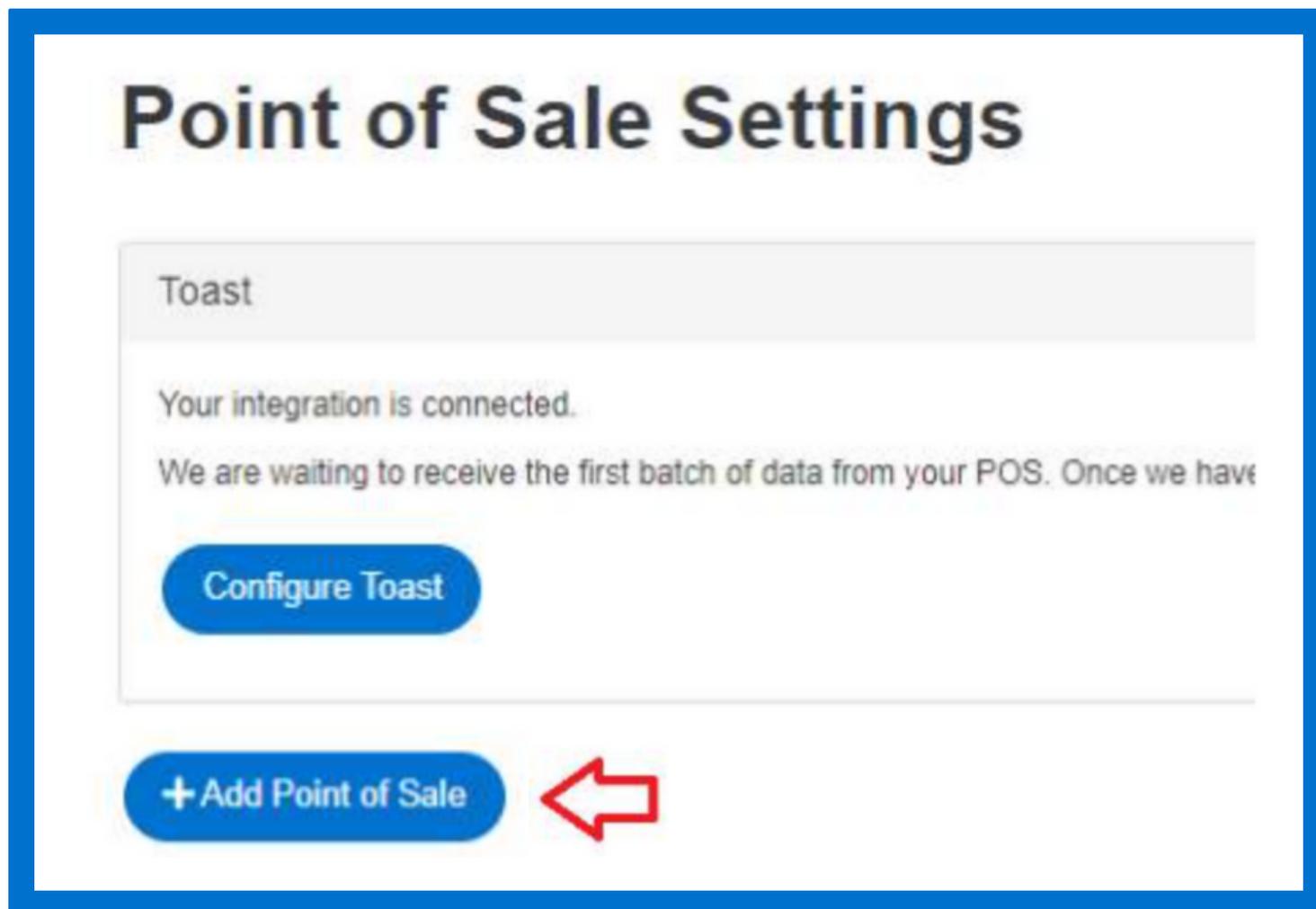## Scroll on through!

1.

Click on Setup in your side nav, then select Point of Sale from the dropdown menu and then click Add Point of Sale

Point of Sale Settings
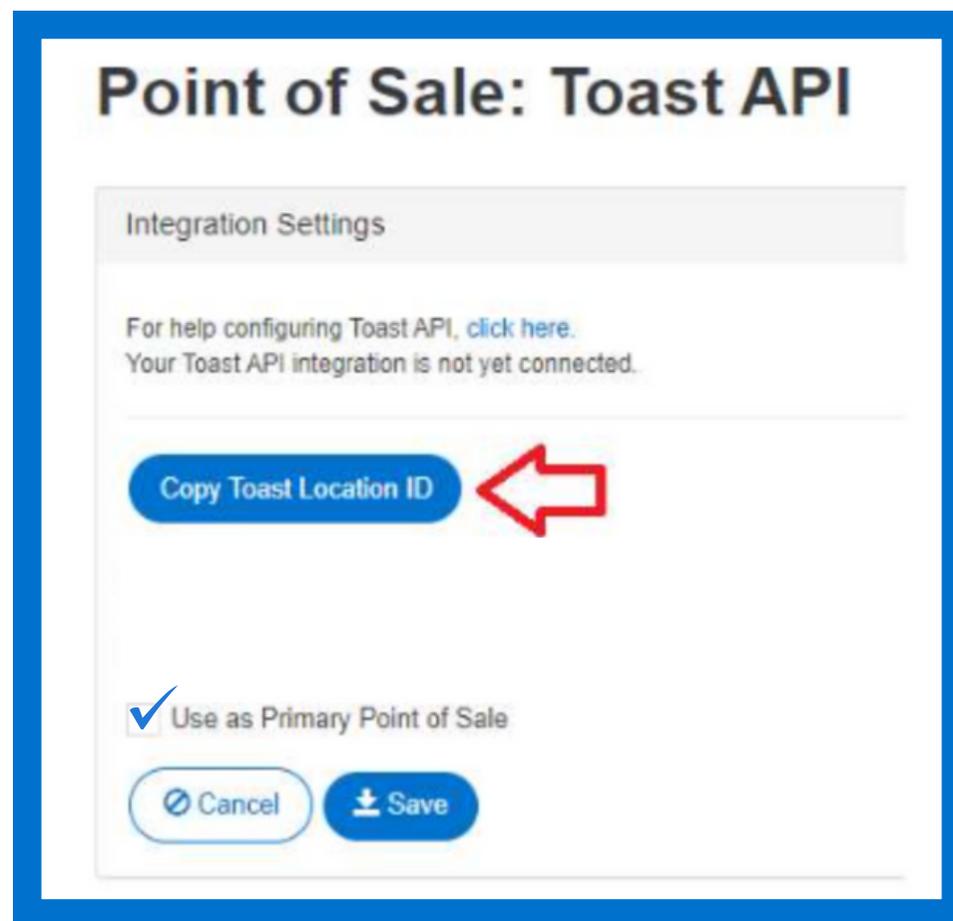
Toast

Your integration is connected.

We are waiting to receive the first batch of data from your POS. Once we have

Configure Toast

+ Add Point of Sale

2.

Type in Toast API in the search bar and then choose it from the dropdown list of choices

Integration Settings

Select your Point of Sale
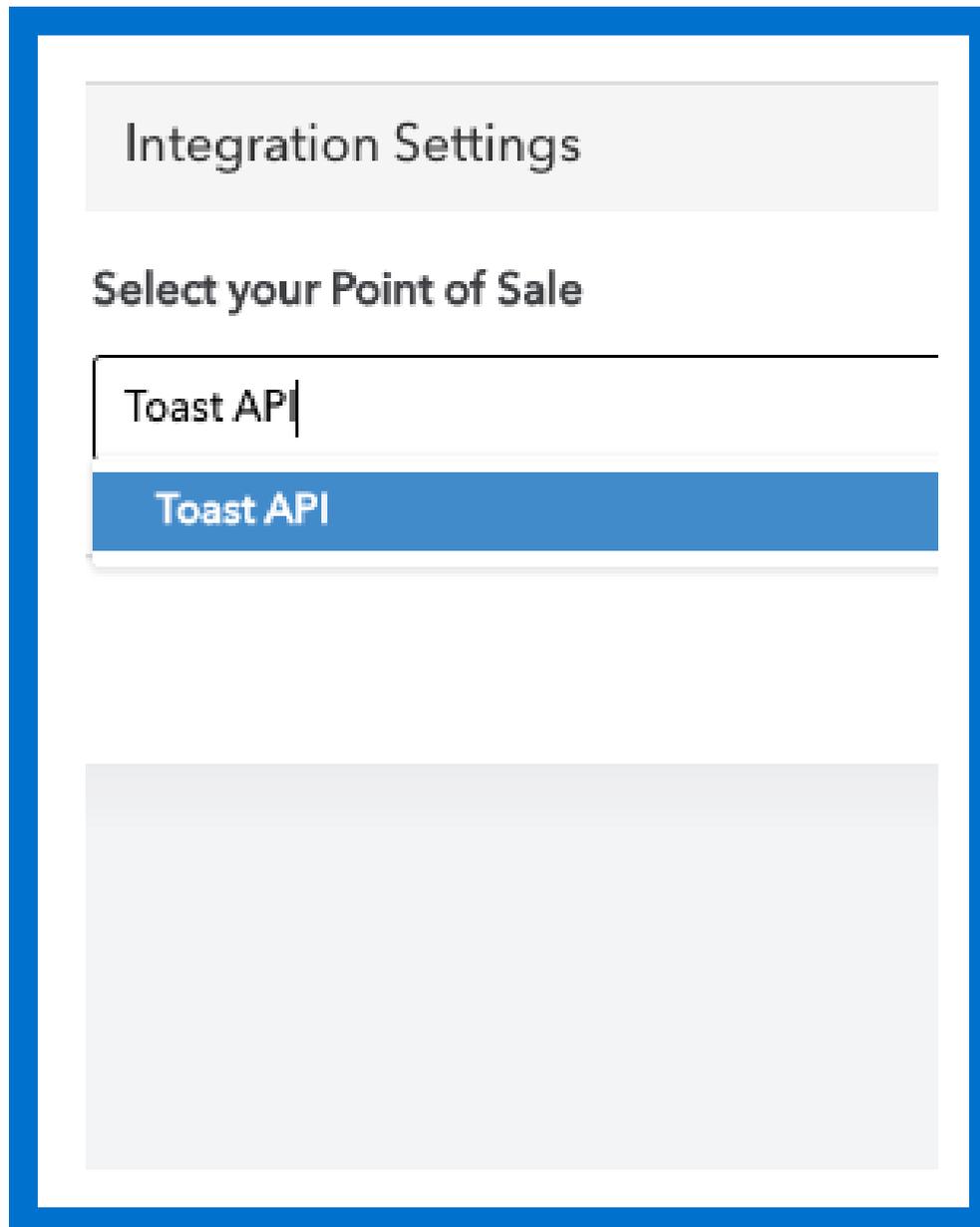
Toast API

Toast API

3.

Click Copy Toast Location ID button and make sure "Use as Primary Point of Sale" is checked
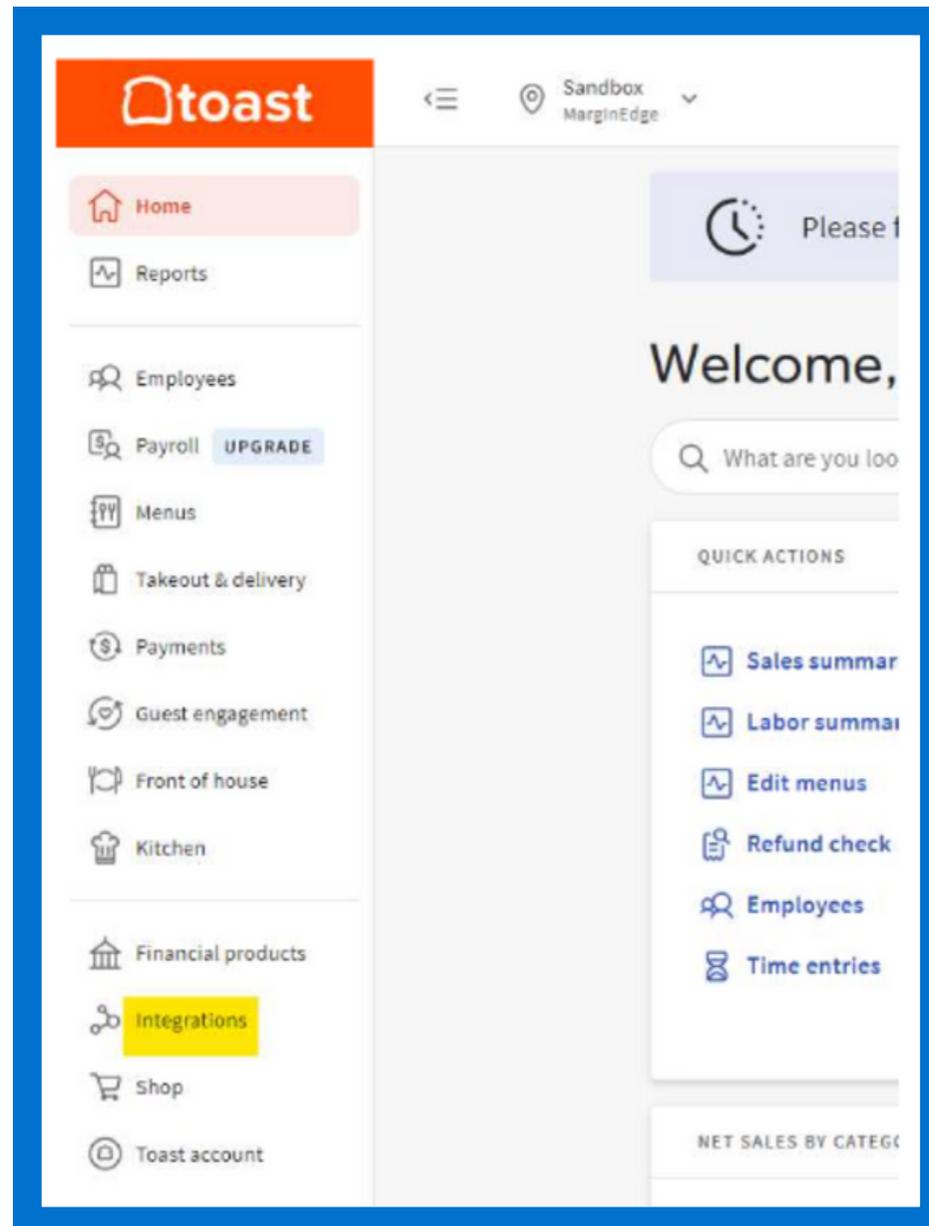
Point of Sale: Toast API

Integration Settings

For help configuring Toast API, click here.
Your Toast API integration is not yet connected.

Copy Toast Location ID

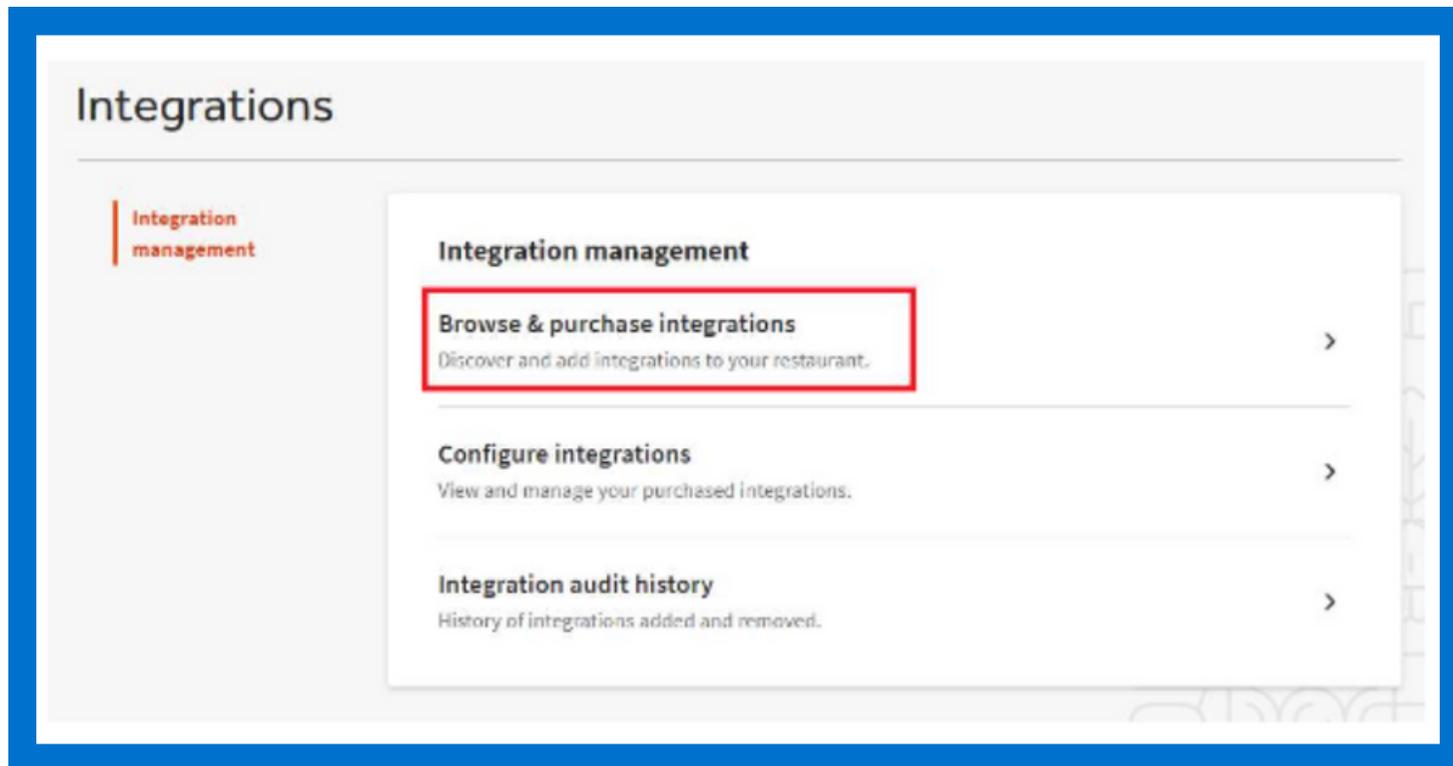✓ Use as Primary Point of Sale

⊘ Cancel   ± Save

4.

Open a new tab in your browser and log into your Toast account. Click on Integrations on the navigation sidebar

5.

Click on Browse & purchase integrations

Note: All Toast integrations (including MarginEdge integration) must go through their Partner Connect portal. Toast charges $25/month per location to access their Partner Connect portal. If you have not yet activated this function on your Toast account then you will be prompted to subscribe to the Partner Connect portal. You can view more info here.
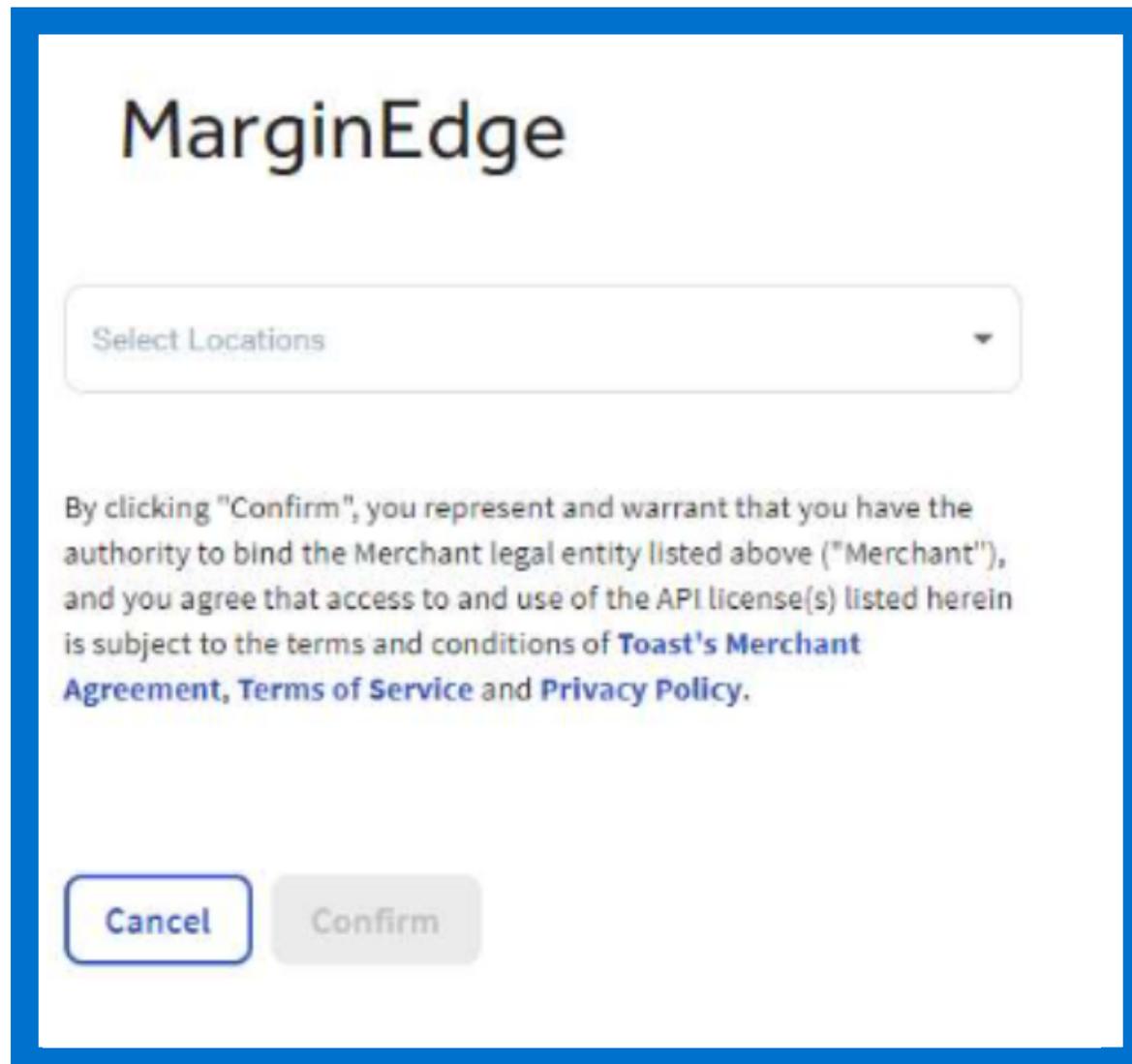
6.

Search for MarginEdge and click Add Now
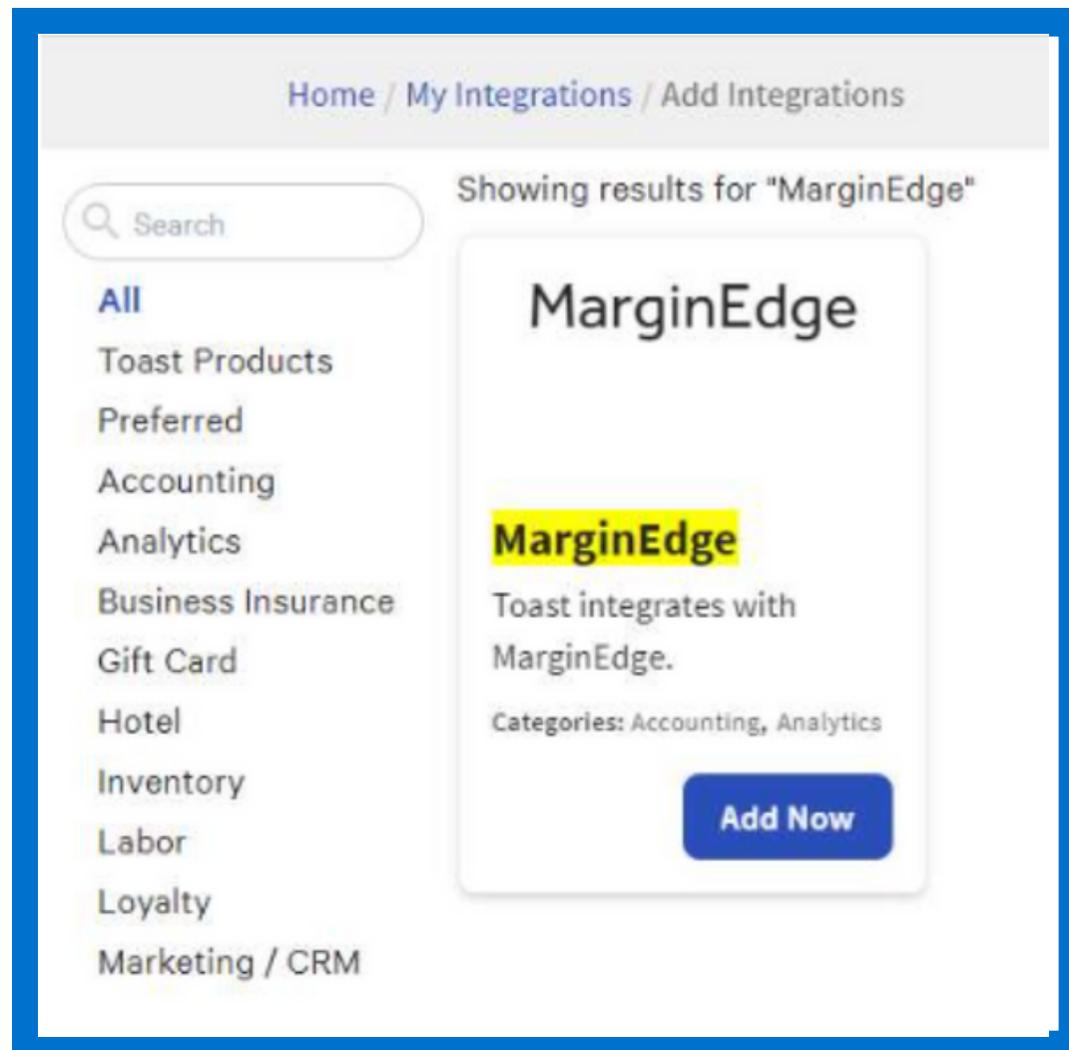
Note: If you do not see the 'Add Now' option, it's possible that you need to update your Toast subscription to the Partner Connect portal, as explained in the previous step. You can view more info here.

7.

If there are multiple locations in your Toast account, select the applicable ones and then click Confirm
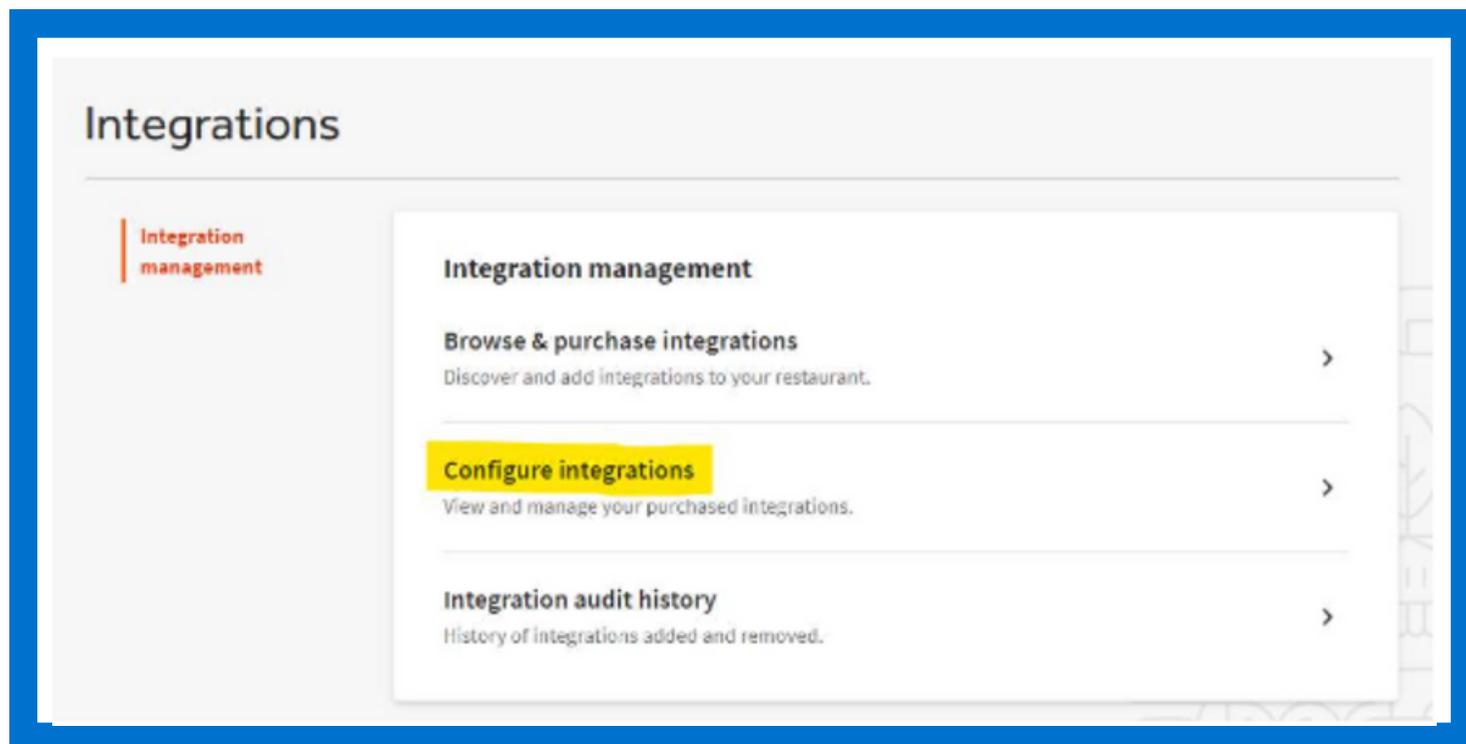
MarginEdge

Select Locations ▾

By clicking "Confirm", you represent and warrant that you have the authority to bind the Merchant legal entity listed above ("Merchant"), and you agree that access to and use of the API license(s) listed herein is subject to the terms and conditions of **Toast's Merchant Agreement, Terms of Service** and **Privacy Policy.**
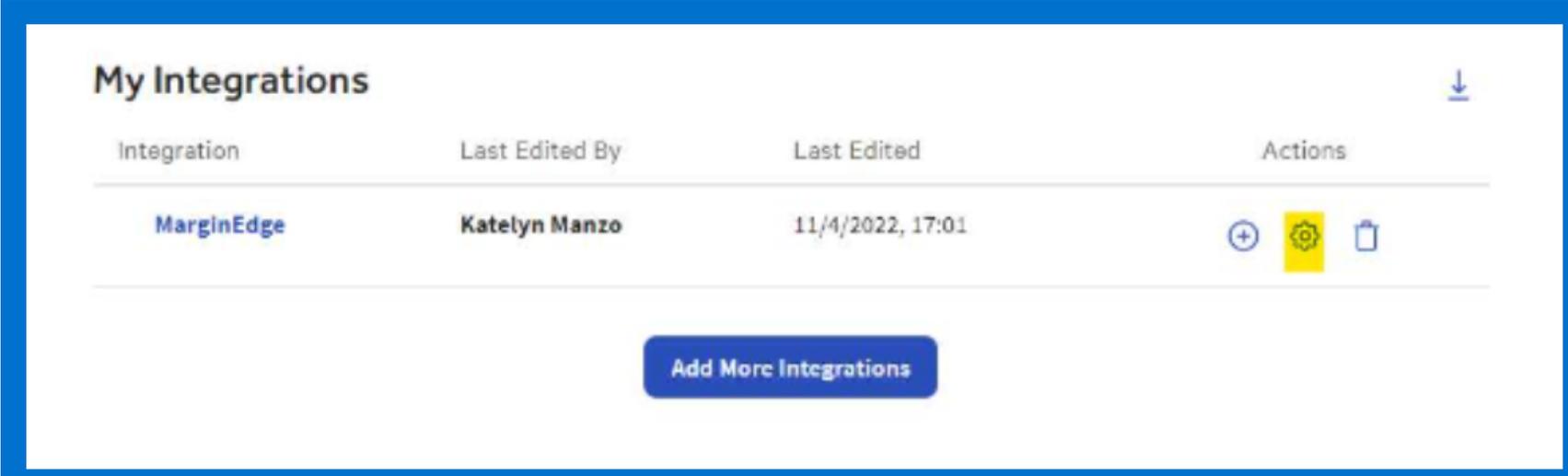
Cancel   Confirm

8.

Back on the Integrations page in your Toast account, click on Configure Integrations. You'll now land on My Integrations page

9.

Click on the cog icon next to MarginEdge (Below Actions)

My Integrations

Integration	Last Edited By	Last Edited	Actions
MarginEdge	Katelyn Manzo	11/4/2022, 17:01	⊕ ⚙ 🗑

Add More Integrations

10.

Paste the copied Toast Location ID (from step #3) into the Location ID field and click Apply

*Be mindful not to paste into the Group ID field
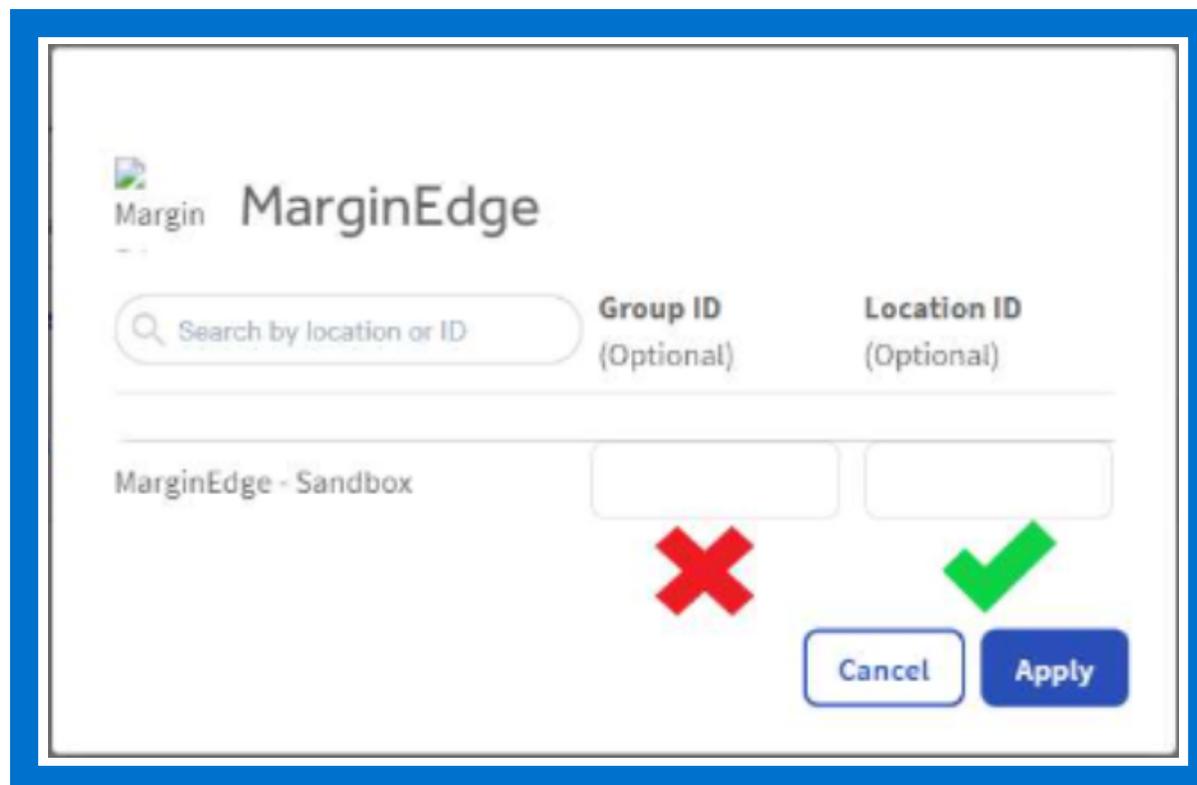
11.

Ditch Toast and return to the MarginEdge tab in your browser. Click Save in the Integrations Settings window

Point of Sale: Toast API

Integration Settings

For help configuring Toast API, click here.
Your Toast API integration is not yet connected.

Copy Toast Location ID

⊘ Cancel   ± Save
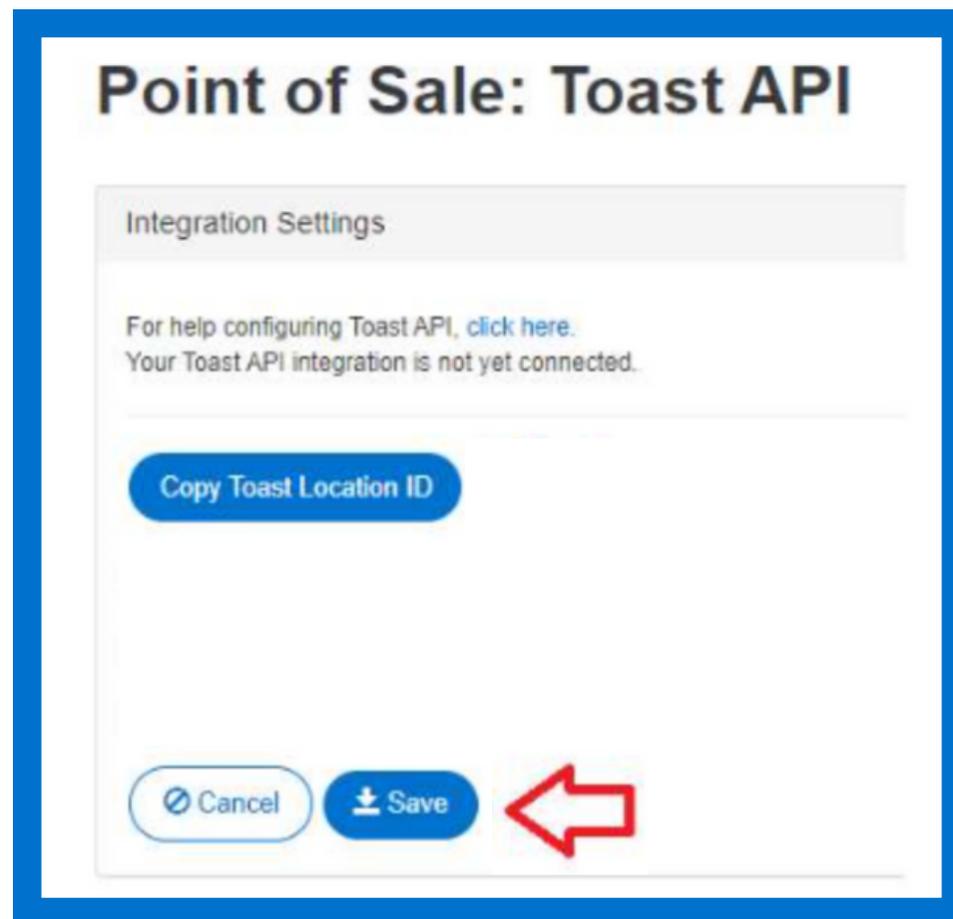
12.

Click on Labor in your side nav, then select Setup from the dropdown menu
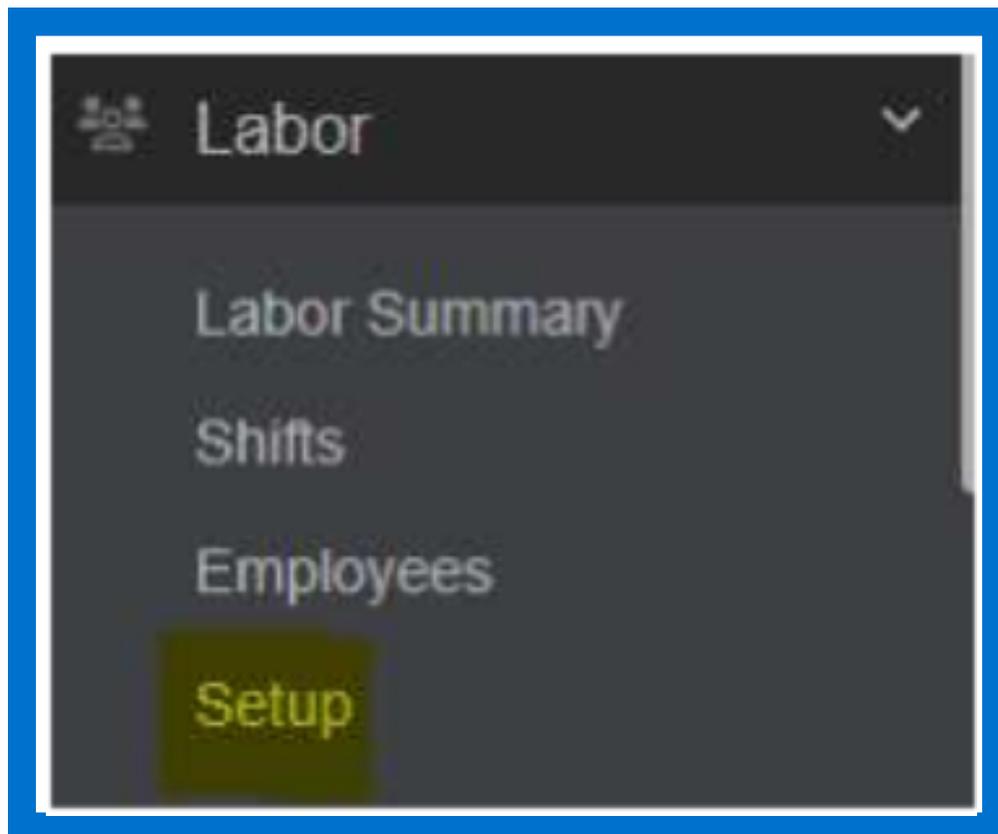
13.

Click on Manage Time Sheet Rules

Labor Setup

Pay Periods

Pay period configuration: **Bi-Weekly**

Manage Pay Periods

Job Titles

20 job titles mapped
51 job titles require category mapping

Manage Job Titles

Time Sheet Rules

Using **Custom** Overtime Rules

Manage Time Sheet Rules

14.

Select Set Custom Overtime Rules

Overtime Rules
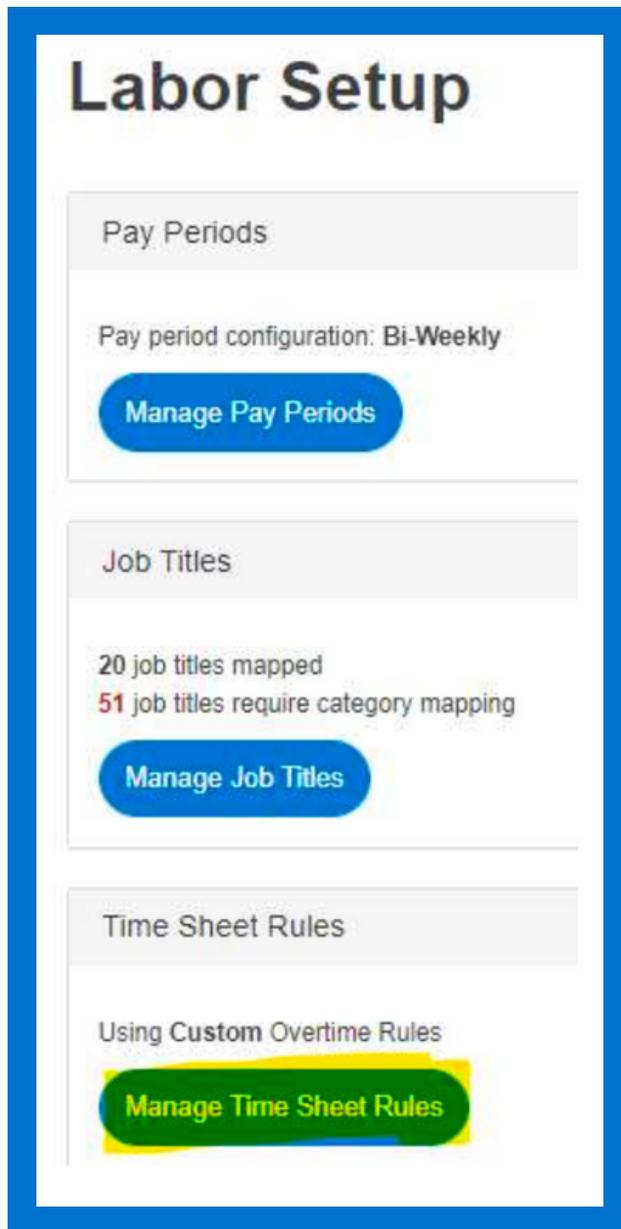
○ Use POS Overtime Rules

● Set Custom Overtime Rules

Weekly Overtime Rules

Workweek start day	Sunday ⌄
Workweek start time	12:30 AM 🕐
Maximum regular hours per week	40
Overtime rate multiplier	1.5
	☐ Consider seventh-worked day as overtime

Daily Overtime Rules

Maximum regular hours per day	
Maximum overtime hours per day	
Double time rate multiplier	

⊘ Cancel   ⬇ Save

15.

Fill out Weekly Overtime Rules

16.

If applicable, also fill out Daily Overtime Rules
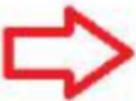
17.

Click Save

Overtime Rules

○ Use POS Overtime Rules
● Set Custom Overtime Rules

Weekly Overtime Rules

Workweek start day	Sunday ⌄
Workweek start time	12:30 AM ○
Maximum regular hours per week	40
Overtime rate multiplier	1.5
	☐ Consider seventh-worked day as overtime

Daily Overtime Rules

Maximum regular hours per day	
Maximum overtime hours per day	
Double time rate multiplier	

⊘ Cancel   ⬇ Save

18.

Send an email to your implementation manager. If you're not currently in onboarding, please notify help@marginedge.com so that we can finalize your integration.

You're done!

If you head back to Setup>Point of Sale, it should now look like this:

Point of Sale Settings (View Integration Notes - 0)

Toast API

Your integration is not yet connected.

Please ensure that you have enabled the MarginEdge integration in Toast and have added the Toast Location ID to the integration. For help with this please, click here.

We are waiting to receive the first batch of data from your POS. Once we have some data to work with, you can begin setting up MarginEdge to process your daily sales.

[Configure Toast API] [Export Data] [✉ Email Client] [⊘ Disconnect Toast API]

[+ Add Point of Sale]

Once we are notified, you should start seeing sales in 1-2 business days.