

Toast API Upgrade Steps

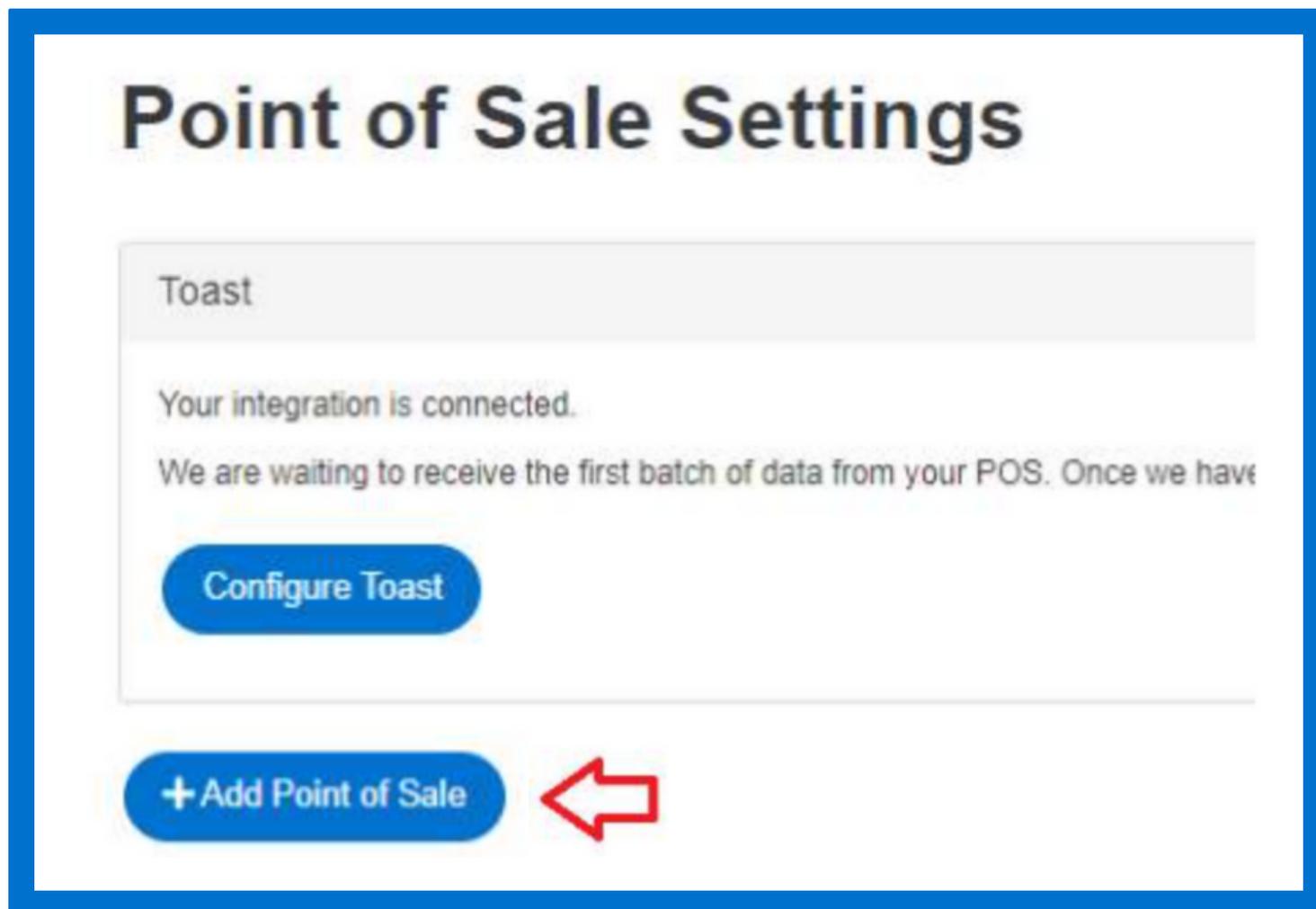
Scroll on through!



1.

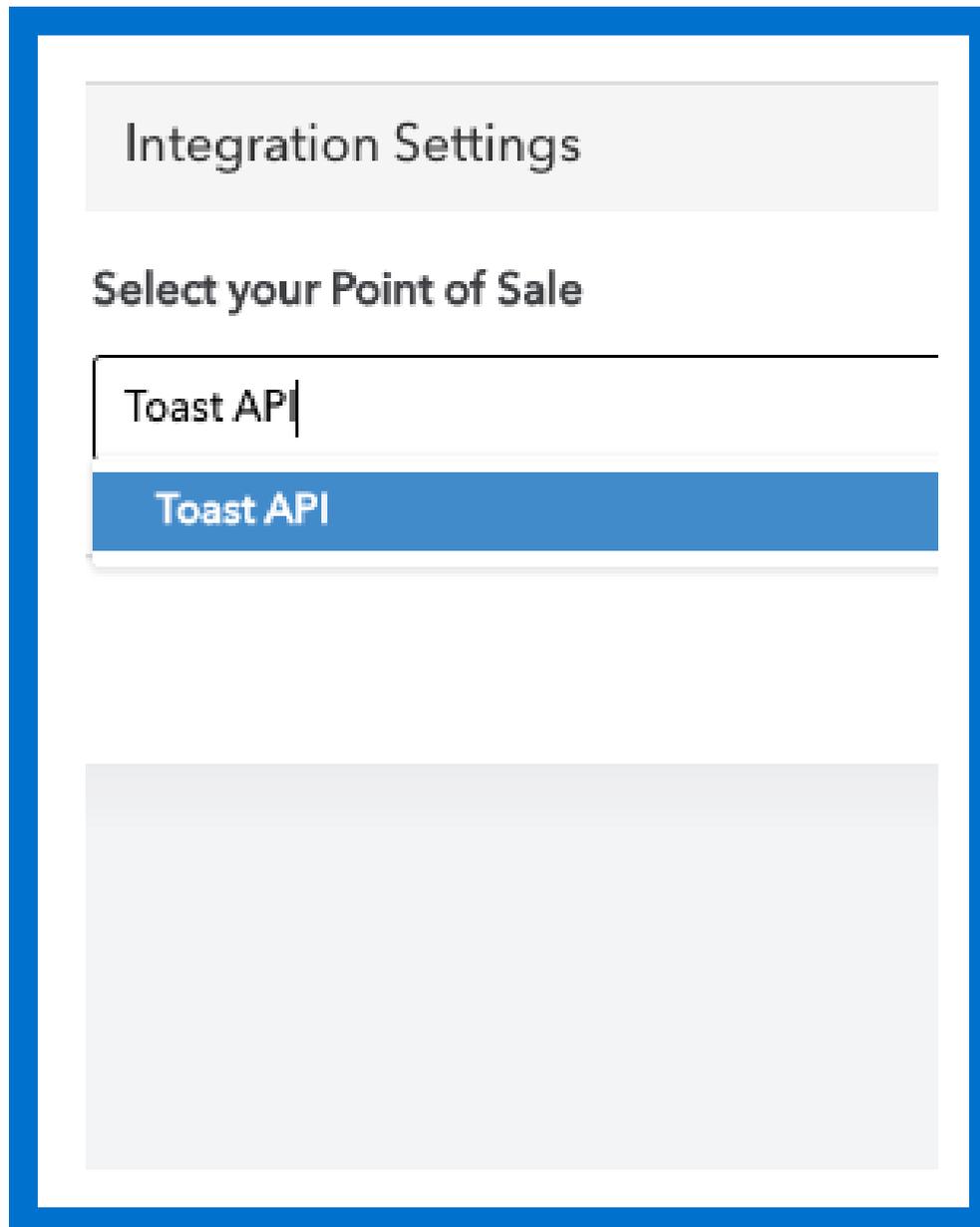
From your MarginEdge account...

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



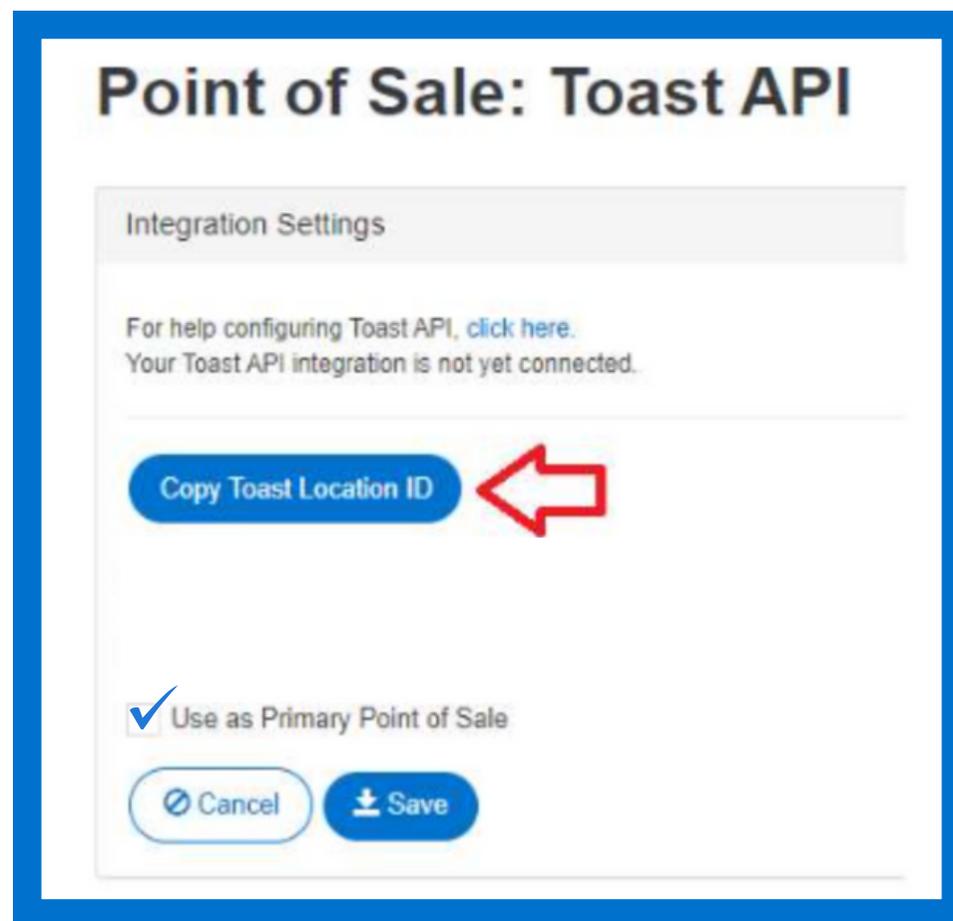
2.

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



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

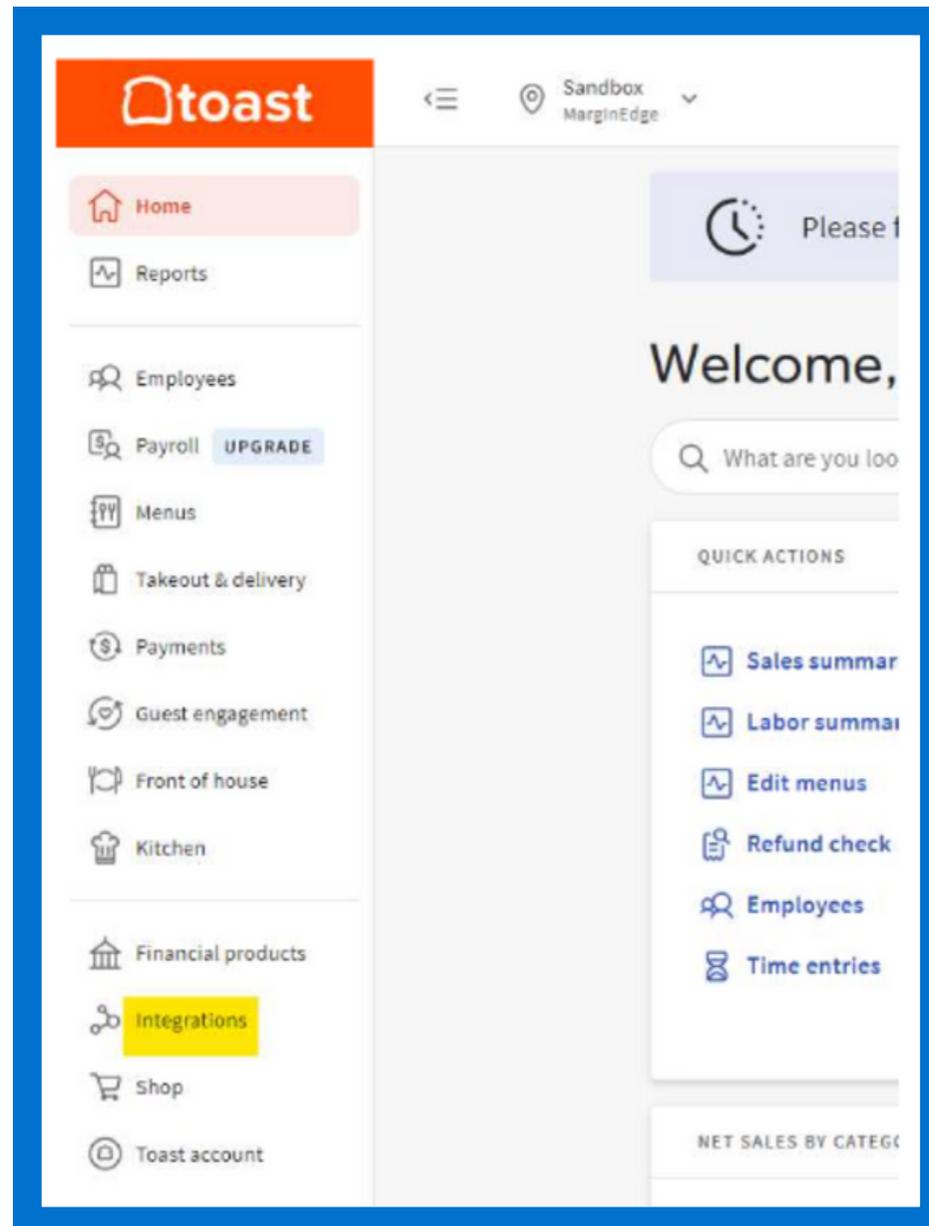
For help configuring Toast API, [click here](#).
Your Toast API integration is not yet connected.

Copy Toast Location ID ←

Use as Primary Point of Sale

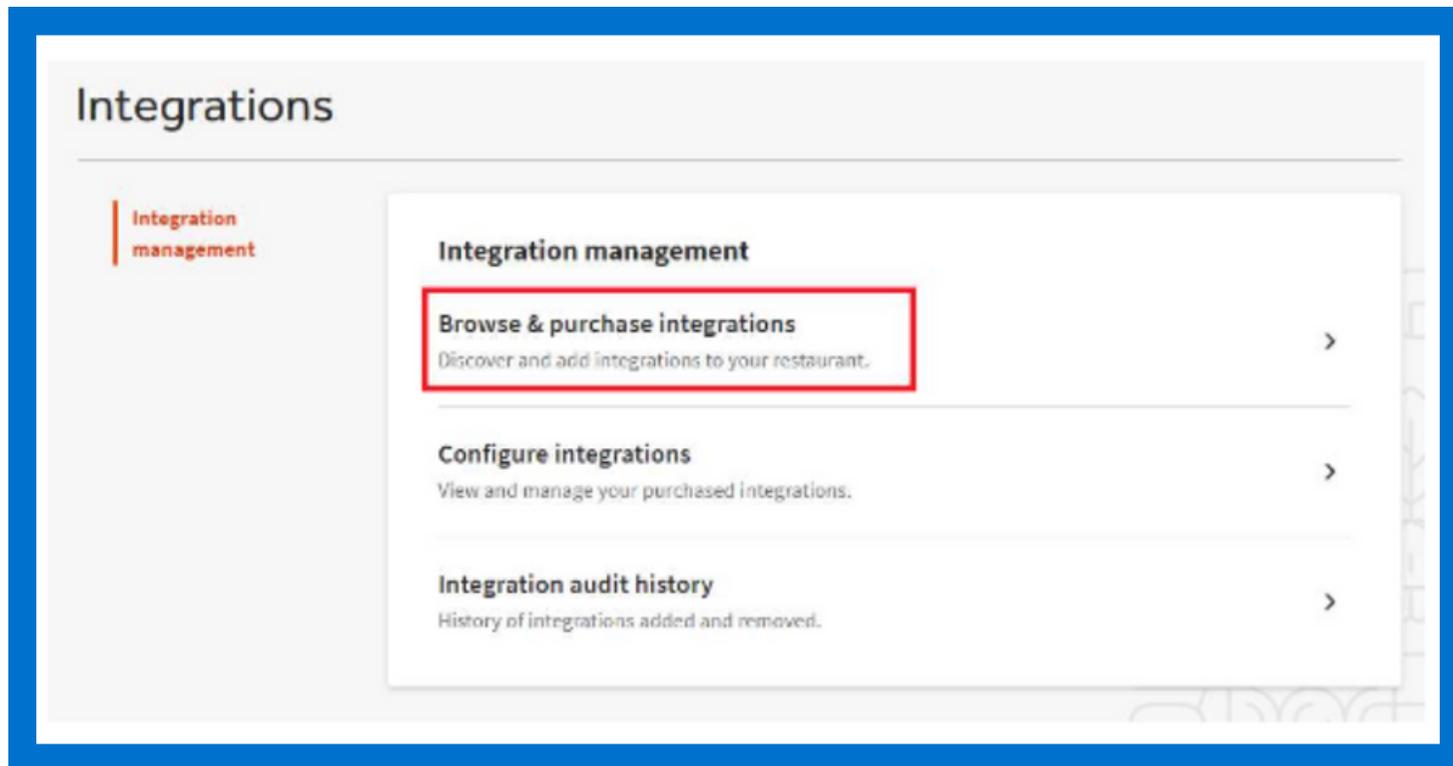
4.

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



5.

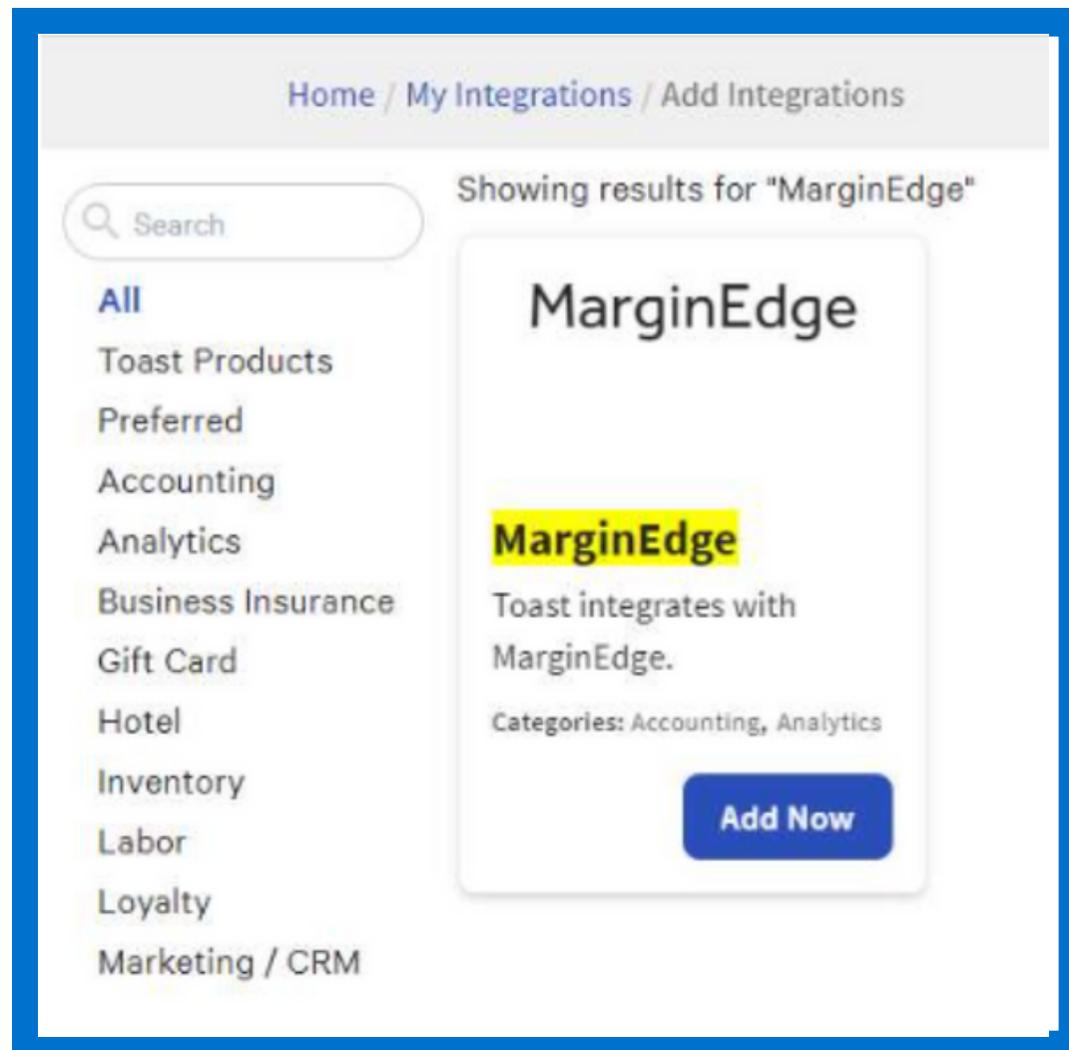
Click on Browse & purchase integrations



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.

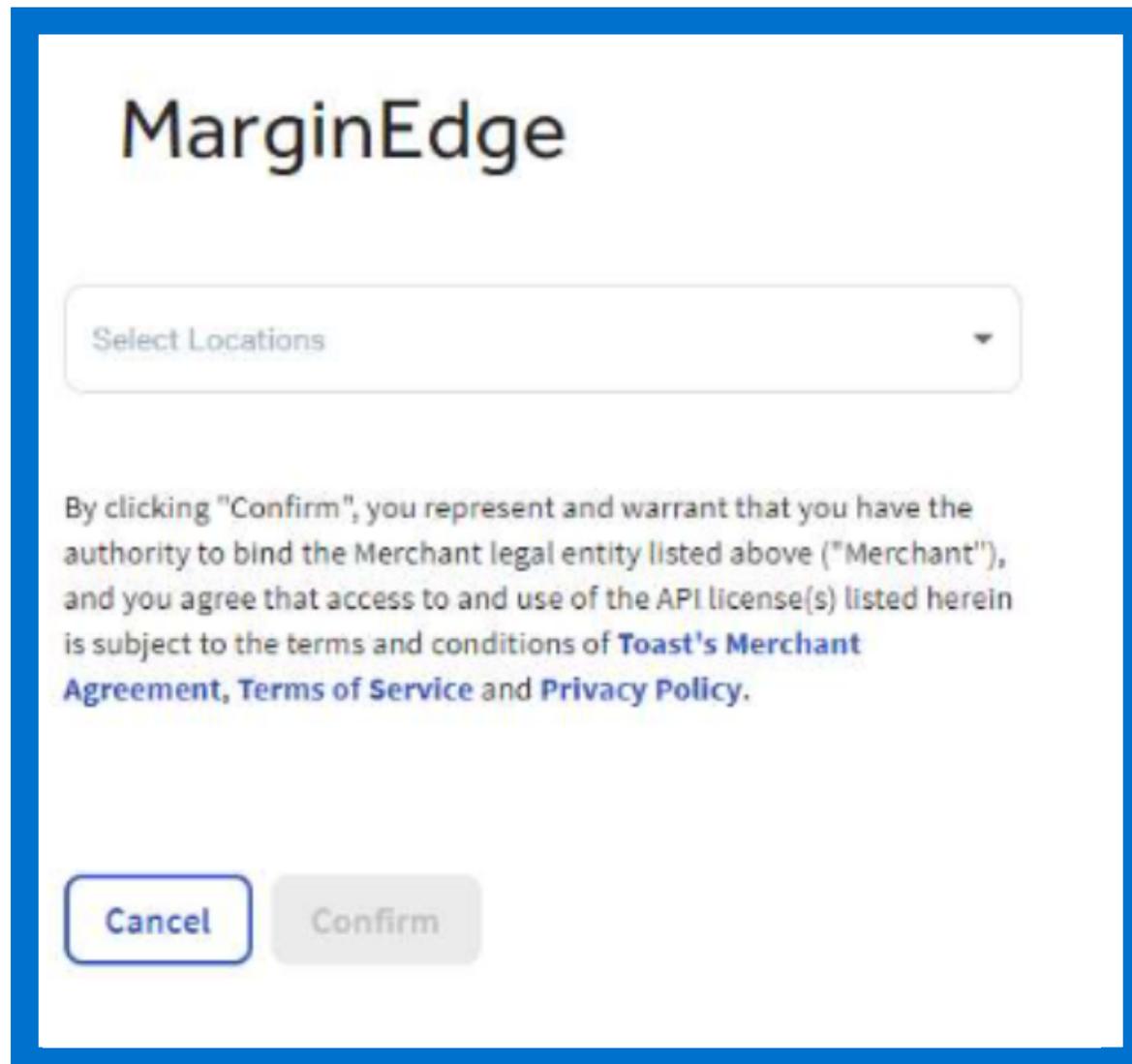
Search for MarginEdge and click Add Now



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

A screenshot of a confirmation dialog box titled "MarginEdge". The dialog has a white background and a blue border. At the top, the title "MarginEdge" is displayed in a large, dark font. Below the title is a dropdown menu with the text "Select Locations" and a small downward-pointing arrow on the right side. Underneath the dropdown is a paragraph of text: "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](#)." At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Confirm" on the right. The "Confirm" button is currently disabled and has a light gray background, while the "Cancel" button is active and has a white background with a blue border.

MarginEdge

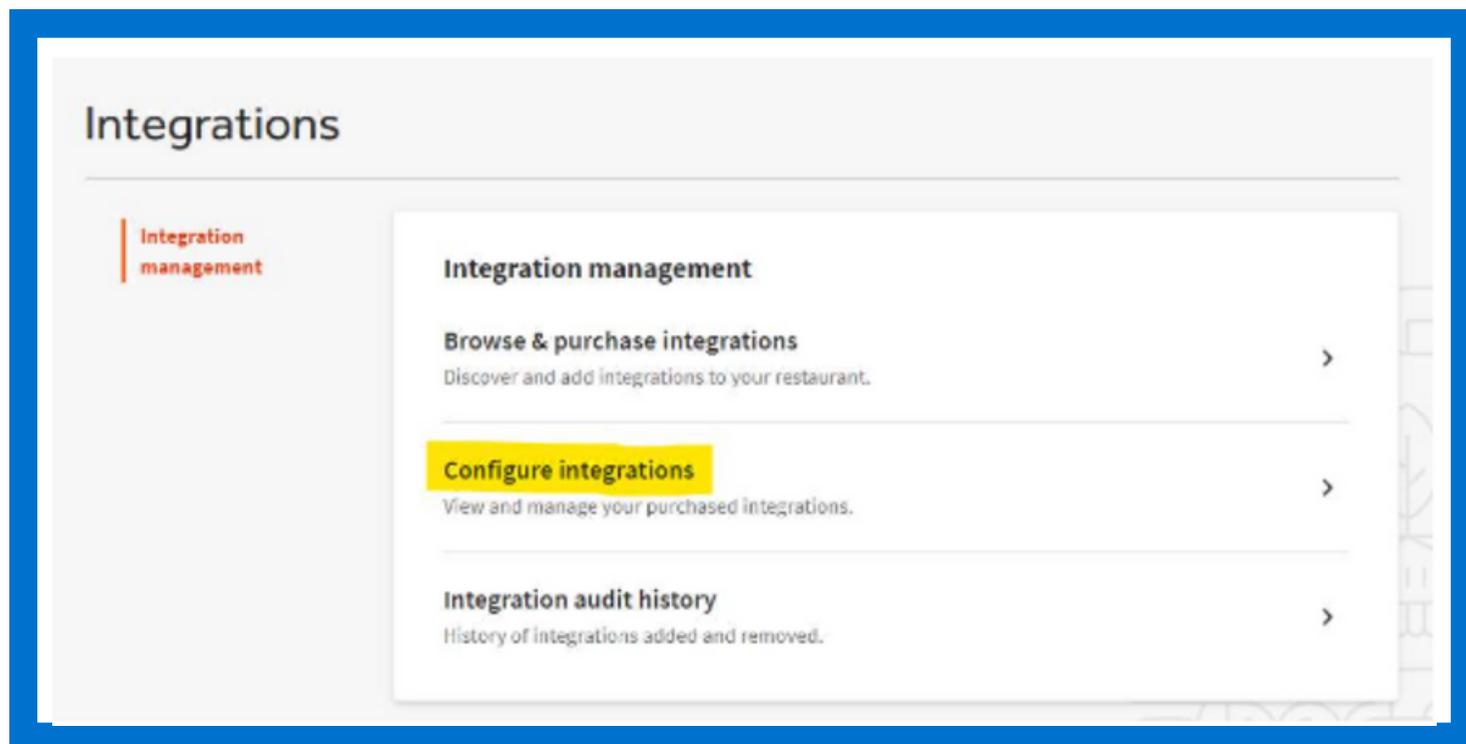
Select Locations

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

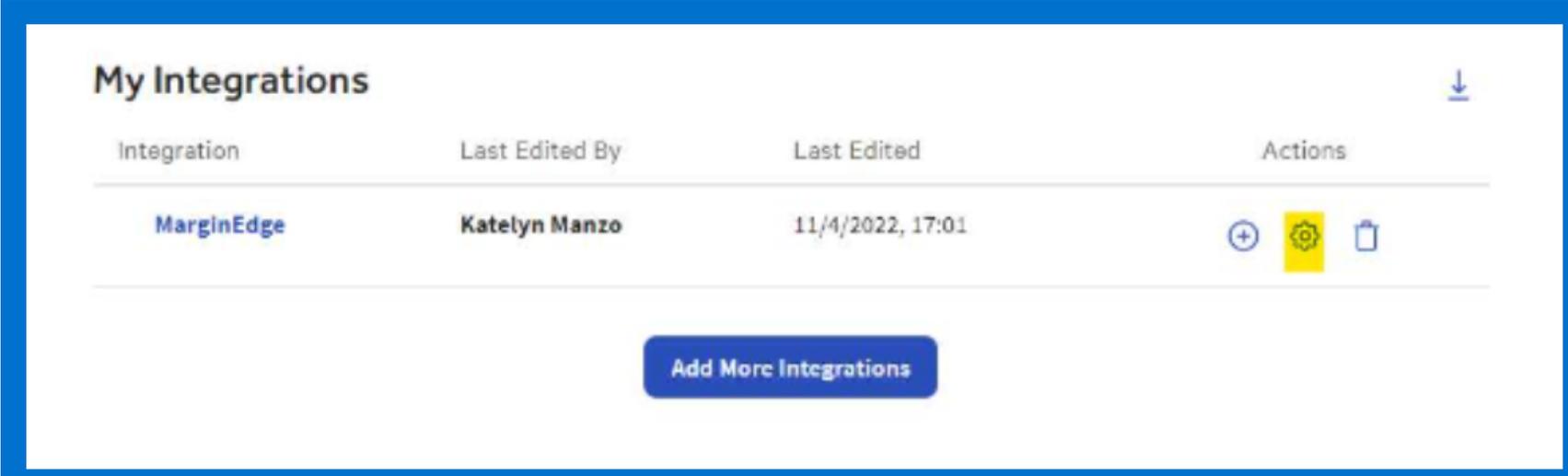
8.

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)



The screenshot displays a user interface titled "My Integrations" with a download icon in the top right corner. Below the title is a table with the following columns: "Integration", "Last Edited By", "Last Edited", and "Actions". The table contains one row for "MarginEdge", which was last edited by "Katelyn Manzo" on "11/4/2022, 17:01". The "Actions" column for this entry includes three icons: a plus sign, a cog (highlighted in yellow), and a trash can. Below the table is a blue button labeled "Add More Integrations".

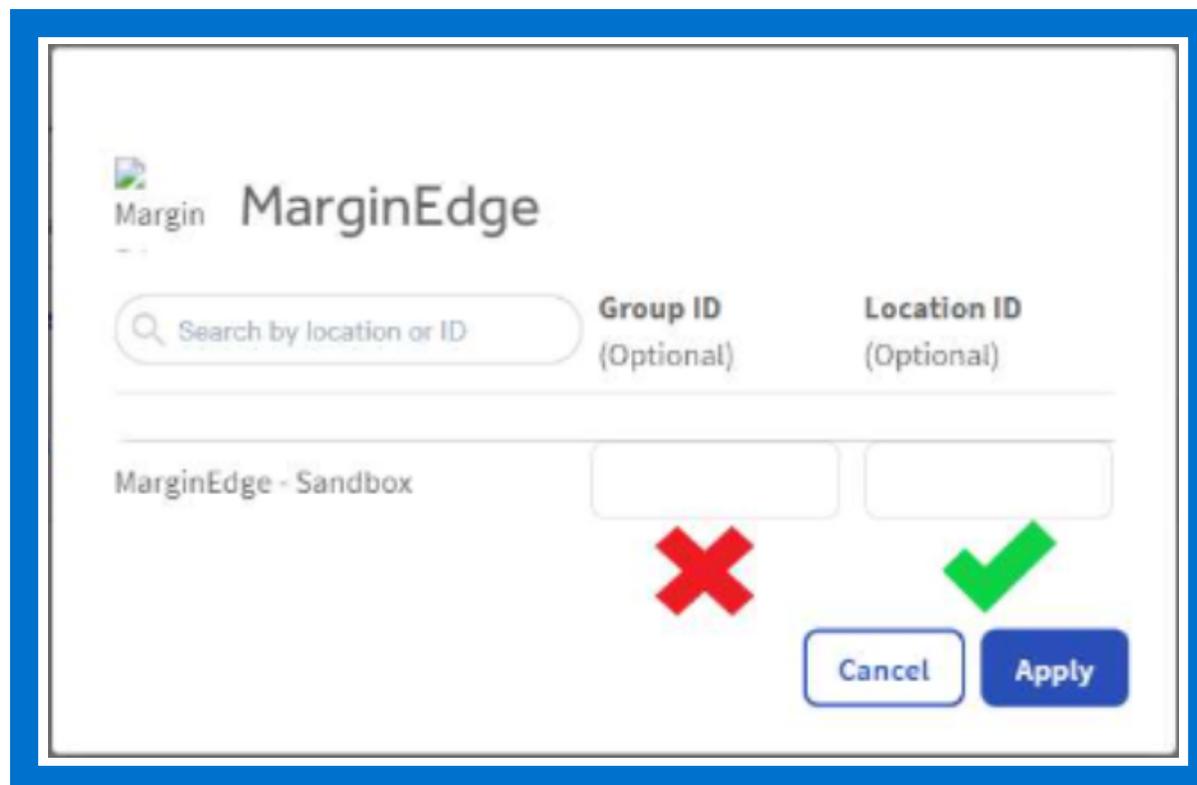
Integration	Last Edited By	Last Edited	Actions
MarginEdge	Katelyn Manzo	11/4/2022, 17:01	  

[Add More Integrations](#)

10.

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

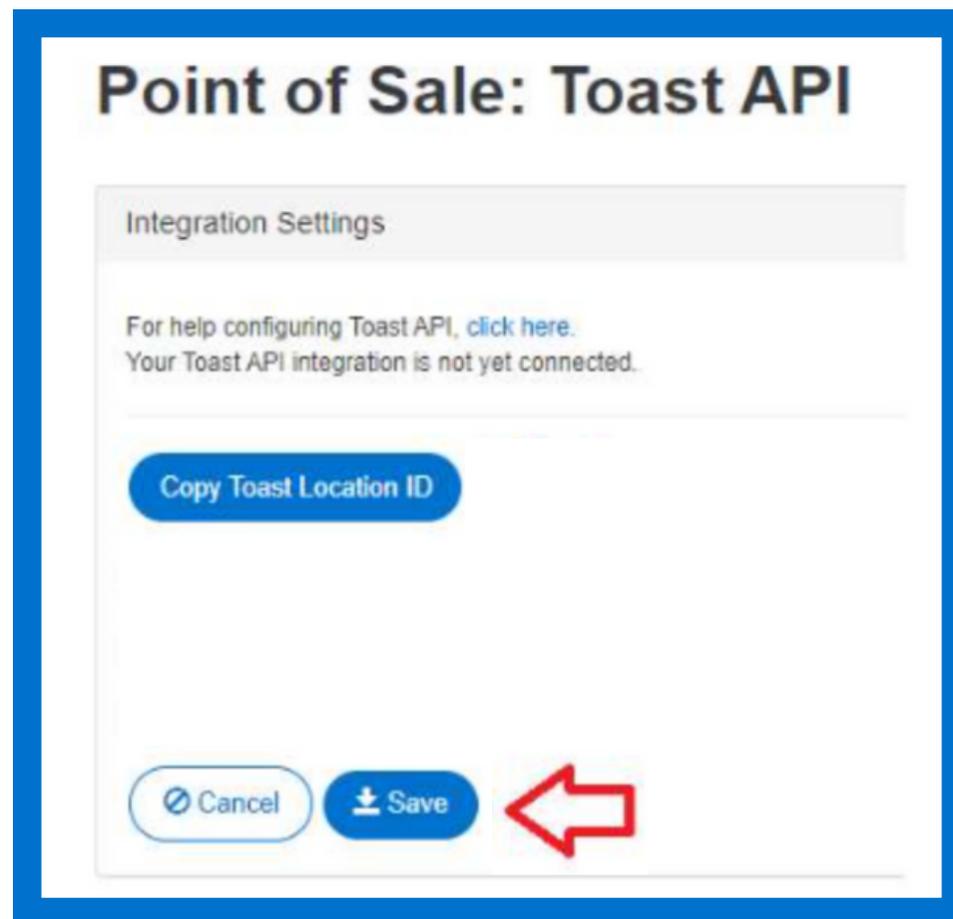
*Be mindful not to paste into the Group ID field



The screenshot shows the MarginEdge interface. At the top left, there is a logo and the text "Margin MarginEdge". Below this is a search bar with the placeholder text "Search by location or ID". To the right of the search bar are two input fields: "Group ID (Optional)" and "Location ID (Optional)". Below these fields, the text "MarginEdge - Sandbox" is visible. A red "X" is placed over the Group ID field, and a green checkmark is placed over the Location ID field. At the bottom right, there are two buttons: "Cancel" and "Apply". The "Apply" button is highlighted in blue.

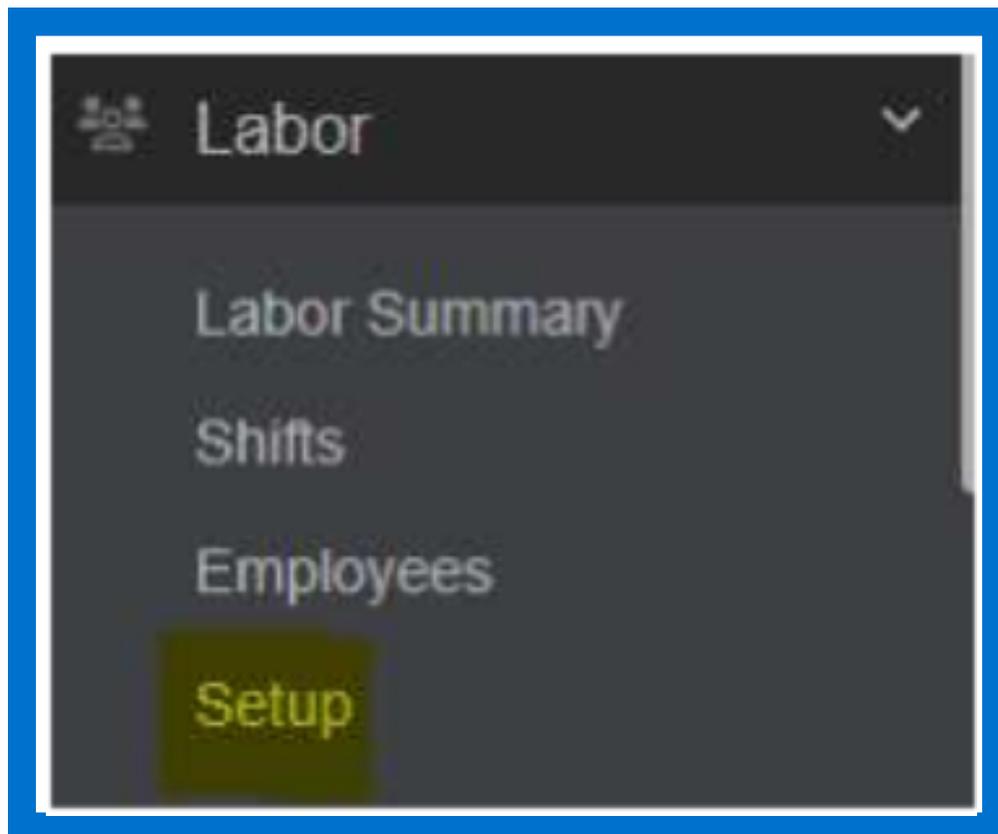
11.

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



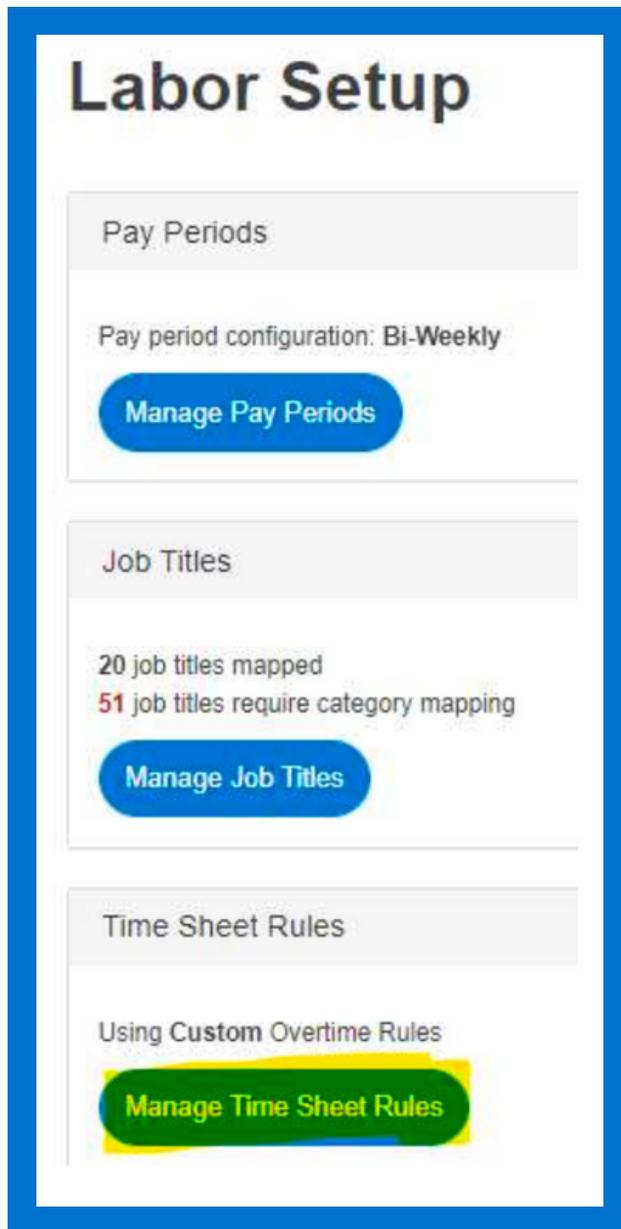
12.

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

Workweek start time

Maximum regular hours per week

Overtime rate multiplier

Consider seventh-worked day as overtime

Daily Overtime Rules

Maximum regular hours per day

Maximum overtime hours per day

Double time rate multiplier

15.

Fill out Weekly Overtime Rules

Overtime Rules

Use POS Overtime Rules

Set Custom Overtime Rules

Weekly Overtime Rules

 Workweek start day

Workweek start time

Maximum regular hours per week

Overtime rate multiplier

Consider seventh-worked day as overtime

Daily Overtime Rules

Maximum regular hours per day

Maximum overtime hours per day

Double time rate multiplier

16.

If applicable, also fill out Daily 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

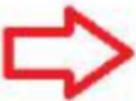
Consider seventh-worked day as overtime

Daily Overtime Rules

Maximum regular hours per day:

Maximum overtime hours per day:

Double time rate multiplier:



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:



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.