Toast API Upgrade Steps

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

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

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

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

☐ 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.

☐ 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.

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

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

☐ Click on the cog icon next to MarginEdge (below Actions)

☐ 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)

☐ Ditch Toast and return to the MarginEdge tab in your browser. Click Save in the Integrations Settings window (this should look familiar)

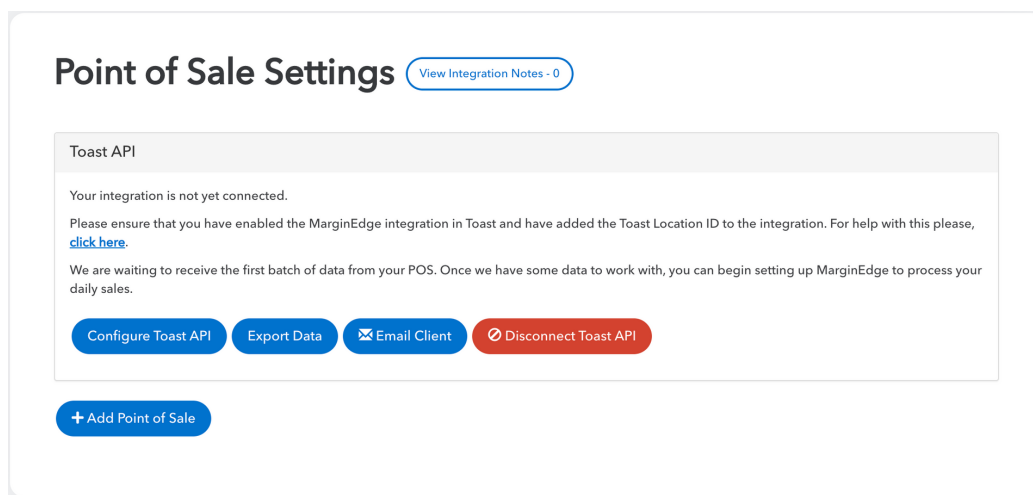☐ Click on Labor in your side nav, then select Setup from the dropdown menu

You're almost done... just a few more steps!

- [ ] Click on Manage Time Sheet Rules

- [ ] Select Set Custom Overtime Rules

- [ ] Fill out Weekly Overtime Rules

- [ ] If applicable, also fill out Daily Overtime Rules

- [ ] Click Save

- [ ] 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:

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