How Do I Subtotal my EBT Eligible Items in RetailEdge

Inventory Management · https://retailedge.com/docs/how-do-i-subtotal-my-ebt-eligible-items-in-retailedge

Sales Screen Subtotals

RetailEdge allows you to display up to three different Custom Subtotals on the sales screen. As you enter items, these subtotals are displayed to allow salespeople to know how much they need to apply to certain payment methods. For instance, you could have one custom subtotal for EBT/SNAP totals, one for Double Up Food Bucks and if you live in Vermont one for Crop Cash totals.

Note: This is different from subtotaling line items of on the sale, a feature that lets you group items on Quotes for a better customer presentation. Information on quote subtotaling can be found here.

Custom Subtotaling

This video with general information about the custom subtotaling feature.

Changing the Subtotal Names

This video describes how to name the custom subtotals labels might need to relabel the custom subtotal.

Configuring Payment Methods

Since these subtotals allow you to know what to charge to different payment methods like EBT, you will have to create a payment method and potentially reorder the payment method list.

Flag Item for Subtotals on Imports

If you are importing items from a vendor list, you can identify which items need subtotaling (i.e., EBT Items). You can see how to do this on this video.

Items flagged for subtotaling can also be filtered in reports to allow you to see all EBT items sold in a period.

EBT Terminals

All this creates a separate subtotal for the EBT eligible items on the Sales screen. You would then have to separately charge this amount on the standalone terminal and then take the remaining payment for any other applicable items.

Some users have found it easier when running transactions that contain both eligible and non-eligible items, particularly when eligibility changes the tax status, to ring the EBT eligible items in a separate transaction. Then create a separate transaction for non-EBT eligible items.

While RetailEdge has the ability to subtotal EBT eligible items, and create a separate subtotal, we do not currently integrate with EBT processing. You will still have to use a separate stand-alone terminal to process EBT transactions. You would have to contact your credit card processor to get this terminal, just make sure it is standalone and not intended for use with an integration.