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SETTING UP A PAYMENT TYPE SURCHARGE

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SETTING UP A PAYMENT TYPE SURCHARGE 1

ABOUT THIS DOCUMENT

In Shortcuts Fusion, you can set up a payment type surcharge in just a few easy steps.

The surcharge feature is fully customisable to suit your business needs. You can choose whether to apply a percentage or a fixed amount surcharge; you can even set up a surcharge that will only be applied when the sale total is less than a certain amount.

Once you set up a payment type surcharge, it will be automatically applied each time a client uses a particular payment method, which will save you time when processing transactions. For example, you could create a surcharge for a particular credit card company to help balance out their fees.

SETTING UP A PAYMENT TYPE SURCHARGE

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **sundry income** icon.
- 5 Click **new**.
- 6 Enter the name of the surcharge.
- 7 Click **done**.
- 8 Select **payment type surcharge** as the sundry type.
- 9 Tick the relevant box to create either a percentage surcharge or a fixed amount surcharge. Then enter the percentage or amount in the relevant field.

Sundry Income Setup

Sundry Income Active Display Inactive

Amex Surcharge

Description

Amount 0

Tax Rate <Exempt>

Sundry Type **Payment Type Surcharge**

Barcode 0004J

External Id

Surcharge

Percentage of sale surcharge 2 %

Fixed amount surcharge \$ 0

Only apply when sale total is less than \$ 0

New **Edit** **Save**

Sundry Income Name

Sundry Name

Amex Surcharge

Done **Cancel**

Done

A If you only want to apply this surcharge when the sale total is less than a certain amount, you can tick this box and enter the relevant value.

10 Select the relevant tax rate.

11 Click **save**.

12 Click **done**.

13 Next you'll need to associate this surcharge with the relevant payment type. Click on the **payment types** icon.

Sundry Income Setup

Sundry Income Active Display Inactive

Amex Surcharge

Description

Amount

Tax Rate **<Exempt>**

Sundry Type **Barcode** **External Id**

Surcharge

Percentage of sale surcharge %

Fixed amount surcharge

Only apply when sale total is less than

New **Edit** **Save**

Done

- 14 Select the payment type you want to apply the surcharge to.
- 15 Select the surcharge you wish to apply.
- 16 Click **save**.
- 17 Click **done**.

Sales

- Point Of Sale
- Payment Types**
- Discounts
- Receipt
- Sundry Income
- Expenses
- Gift Certificates
- Terminals
- Payment Processor

General

Region

Payment Types Setup

Payment Name

Amex 14

Display Inactive

Processor Setting

Card Identification AmEx

Description

American Express Credit Card

Club **Surcharge**

< Payment not for a Club > Amex Surcharge 15

Processor

< Payment is not associated with a processor >

New

Edit

Save 16

17

Done

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12:30 PM
Tue, 5 Jul '16

- Main
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