

Tips & Tricks

Adding a Surcharge When Customers Pay by Credit Card

We have had a few people ask how they can automatically add a surcharge to an Invoice when the Customer is paying by Credit Card.

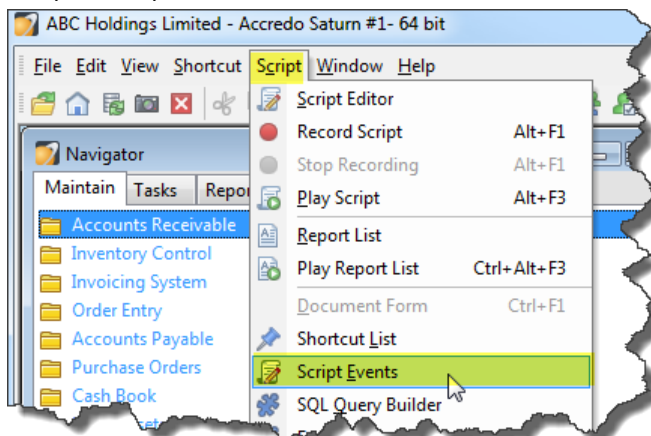
This can be achieved using a script that fires when an invoice is saved, where it checks for a **Credit Card** MEDIA TYPE in the Banking Lines, then calculates a SURCHARGE as a percentage of the GROSS AMOUNT and drops it into one of the Charges fields.


We have a sample script available which you can link to the **INInvoiceEntryForm.BeforeSave** Script Event. The script will prompt for a surcharge and add this into a Charge field called SURCHARGE.

If you already have a script linked to this event, you will need to get your existing script modified. Your QSP can assist with this.


Follow the instructions below to add the sample script to the **INInvoiceEntryForm.BeforeSave** Script Event.

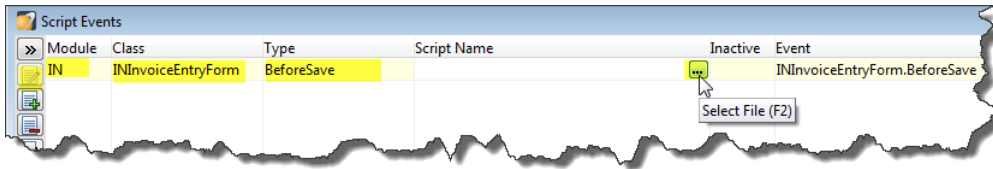
- 1 Go to [FTP://FTP.ACCREDO.CO.NZ/PUBLIC/DOWNLOADS/SCRIPTS](ftp://ftp.accredo.co.nz/public/downloads/scripts). Right-click **INInvoice_BeforeSave.pfs** and select **SAVE LINK AS...** Save the file.
- 2 Link the Script to the **INInvoiceEntryForm.BeforeSave** Script Event. Go to Main Menu > Script > Script Events.



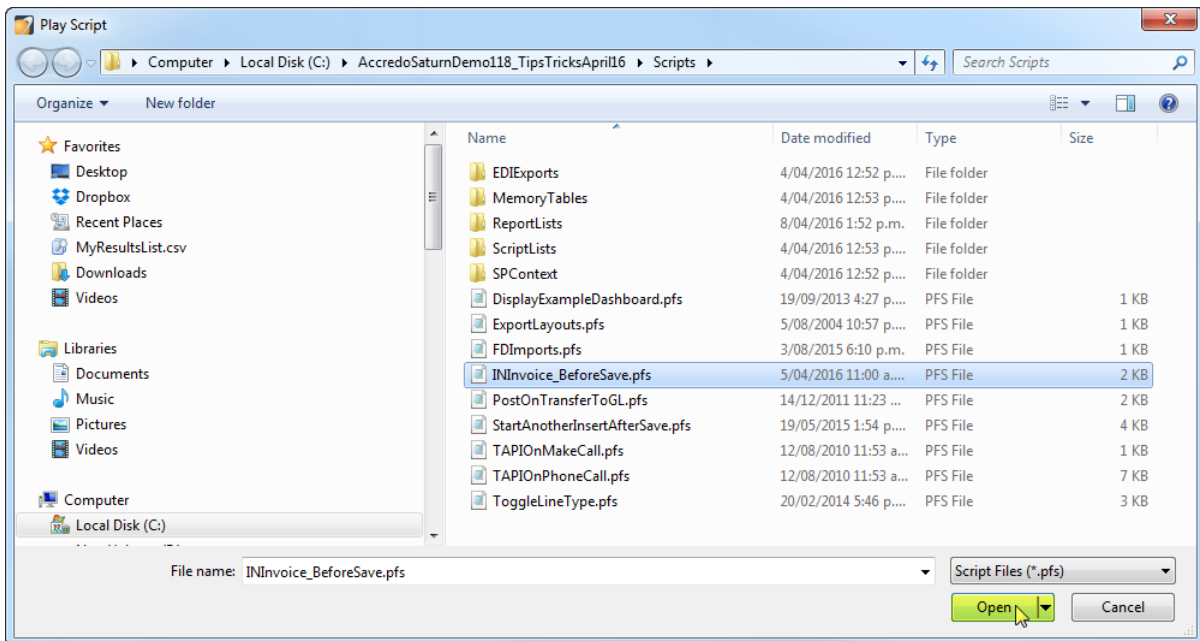
3 Click  **Edit** (F11).

Select the following: Module: **IN**, Class: **INInvoiceEntryForm**, Type: **BeforeSave**.

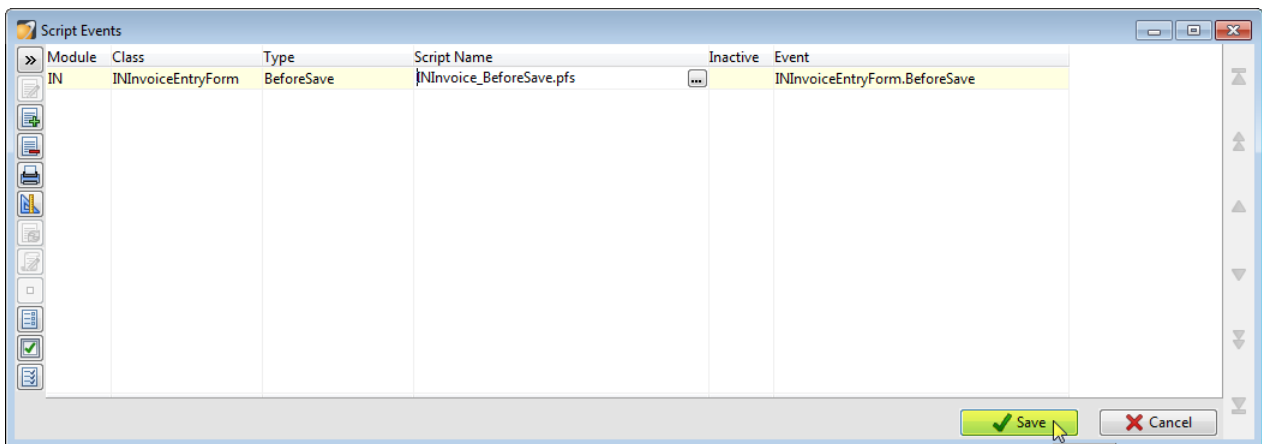
In the Script Name field, click  **Select File** (F2).



4 Find the file you saved previously. Click **Open** to select the script.



5 The script appears in the Script Name field. Click  **Save** (F9).



6 Go to Setup > Invoicing System > Charges to rename the Charge field Description. Change the Description field of a Charge field you are not using to **Surcharge** then move the cursor off the Description field. The change is automatically saved as this is live edit grid.

Code	Description	GST	Sales Group
1	Freight	1	CHARGE1
2	Insurance	1	CHARGE2
3	Surcharge	1	CHARGE3
4	Rounding	E	ROUNDING

7 Now, when you go to save an Invoice (that means Print, Save and Print Preview, Cash Sale, Save and Post Immediately, Print as Packing Slip, Number and Save, or Save) where the Banking Media is AMEX, DINERS,MCARD or VISA....

IN Enter Invoices - ASHENG - Asheng Engineering Ltd

Period: Sep 2015 Invoice ID: [] Customer Code: ASHENG Asheng Engineering Ltd NZD

Description	Charge	GST	Co...
Freight	1		
Insurance	1		
Surcharge	1		

Shipping

Shipper	Shipper Name	Reference	Quantity	Web Address

Banking

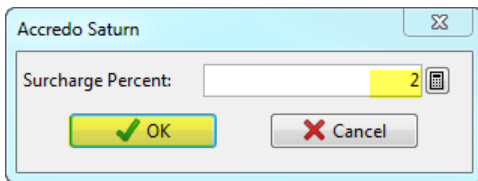
Media	Amount	Payer Name	Reference	Particulars
MCARD	\$920.00	Asheng Engineering Ltd		

Summary: Net \$800.00, Margin 24.0%, Charges \$0.00, Weight 33.00, GST \$120.00, Volume 1.30, Gross \$920.00

Buttons: Invoice List, Number and Save, Save, Cancel

... you will now be prompted for a Surcharge. The sample script has a default of **2%** and validation has been added so that only percentages between **0%** and **5%** is accepted.

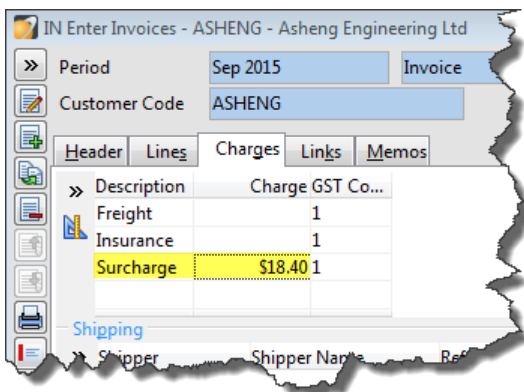
8 Press **OK** to accept the **2%**, or change the percentage then press **OK**.



Accredo Saturn

Surcharge Percent:

The Surcharge is calculated and added to the Surcharge Charge field and will be printed on the Invoice.



IN Enter Invoices - ASHENG - Asheng Engineering Ltd

Period: Sep 2015 Invoice

Customer Code: ASHENG

Header | Lines | **Charges** | Links | Memos

Description	Charge	GST	Co...
Freight		1	
Insurance		1	
Surcharge	\$18.40	1	

Shipping

Shipper Shipper Name Ref

NOTE: This is a sample script. If you wish to change default percentage you can open the script and change the Surcharge Percent number to any number less than or equal to **5**.

```
INInvoice_BeforeSave.pfs - Notepad
File Edit Format View Help
const SurchargeCode = "SURCHARGE"

Function IsCreditCardMedia(aMediaCode as String) as Boolean
  Dim Result as Boolean
  Result = aMediaCode = "AMEX" or aMediaCode = "DINERS" or aMediaCode = "MCARD" or _
  aMediaCode = "VISA"
  Return Result
End Function

Dim frmINInvoiceEntry1 as Object
frmINInvoiceEntry1 = GetTriggerObject

Dim Banking as Object
Banking = frmINInvoiceEntry1.Banking

' determine if this invoice is liable for surcharge
Banking.First
Do Until Banking.EOF or IsCreditCardMedia(Banking.MediaCode)
  Banking.Next
Loop

frmINInvoiceEntry1.Charge[SurchargeCode].ChargeEnteredAmount = 0 ' 0 to begin with
If not Banking.EOF Then ' there are credit card lines present
  prompt for surcharge
  Dim SChargePerc as Number
  Do
    SChargePerc = InputNumber("Surcharge Percent:", "", 2)
    If IsNull(SChargePerc) Then Abort("Cancelled", True)
    If SChargePerc < 0 Then
      MsgBox("surcharge percent must be a positive number")
      ' assume 0 value is OK
    ElseIf SChargePerc > 5 Then
      MsgBox("surcharge percent must be Less than or equal to 5%")
    End If
  Loop
End If
```

Alternatively, you can hard code the Surcharge Percentage based off the Banking Media Type. For example, you can set it so **DINERS** is charge **3%**, and **VISA** is charged **2%**. Your QSP can assist with this.