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PayFabric Credit Card Surcharges

Product Development - 2025-05-06 - PayFabric

Overview

PayFabric credit card surcharges are now integrated with SalesPad so that sales documents are automatically updated when PayFabric applies surcharges to payments. This global surcharge percent is set up within the Gateway profile in the PayFabric portal, and then it automatically applies to all credit card transactions processed with that PayFabric gateway.

These surcharges can be applied to the sales document in SalesPad in a few different ways depending on business needs: SalesPad can apply surcharges to the document's Misc Charge, or it can automatically create a new sales line to hold the surcharge. Each payment's surcharge percent and amount are also available in the PayFabric Payments grid in the Sales Document Payment screen for easy visibility of applied surcharges, and all surcharge handling is audited to the sales document.

SalesPad support for PayFabric surcharges is available as of SalesPad v5.5.12.

Settings

Two new global settings are available in the PayFabric setting category for configuring how PayFabric surcharges are applied to SalesPad sales documents:

Surcharge Handling - How to handle any surcharges added on PayFabric's end when a payment is processed. None will ignore surcharges. Add To Misc Charge will add the surcharge amount to the current Misc Charge amount. Create Sales Line will add the surcharge amount to a sales line on the document, which requires the Surcharge Item Number setting to be configured as well. All surcharge processing will be audited to the sales document. NOTE: The Misc Charge field must be configured as non-taxable in GP. (Default: None)

Surcharge Item Number - The item number to use for the PayFabric surcharge sales line. This requires the Surcharge Handling setting to be set to Create Sales Line. NOTE: This item must be set as non-taxable. (Default: Blank)

Surcharge Handling - None

This option does not handle surcharges, so PayFabric transactions will be handled as if the surcharge does not exist. This is the recommended selection for businesses that do not use PayFabric surcharges. Those who use PayFabric surcharges should enable one of the other options depending on how the business prefers to handle surcharges.

Surcharge Handling - Add To Misc Charge

Overview

When charging a payment for a sales document, any surcharges that are calculated by PayFabric will automatically appear in the Misc Charge field. If there is already a Misc Charge applied to the document, the new surcharge amount will be added to the existing Misc Charge value. If multiple payments are applied to the document, each with their own surcharge, then the Misc Charge value will be the cumulative total of these surcharges.

If a PayFabric payment on the document is voided, the Misc Charge value will be reduced based on the total surcharge amount of the original payment. If a PayFabric payment is credited for the full or partial amount, then the resulting surcharge amount will be reduced from the Misc Charge value. When crediting a payment, do not include the surcharge amount; this value will be calculated by PayFabric and applied by SalesPad appropriately.

When creating a return from a posted invoice, the Misc Charge portion that is PayFabric surcharges should not be included as part of the returned items. If the Misc Charge field contains more than just PayFabric surcharges, then any non-surcharge amount can still be chosen to add to the return. Surcharge credit will be calculated by PayFabric when crediting the payment, and SalesPad will automatically add that amount to the Misc Charge field on the return.

Example

If there is a 2% surcharge on an original payment of \$100.00, a surcharge amount of \$2 which will appear in the Misc Charge.

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If \$10 of that original payment should then be credited, SalesPad will prompt for a credit amount, which should be entered as \$10. Then PayFabric will calculate a surcharge credit of 20 cents, resulting in a new Misc Charge value of \$1.80.

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If instead of \$10, the full original payment should be credited, then enter \$100.00 for the credit prompt, not \$102.00. Do not include the surcharge amounts when crediting payments; PayFabric and SalesPad will handle the surcharge calculations.

Important Notes

The Misc Charge field has a GP setting that can make it a taxable field. This setting should be disabled when using the Add To Misc Charge option. If this GP setting cannot be disabled because the business needs this field to be taxed, then the Add To Misc Charge option should not be used for PayFabric surcharges; the Create Sales Line option should be used instead.

Surcharge Handling - Create Sales Line

Overview

When charging a payment for a sales document, if any surcharges are calculated by PayFabric, then SalesPad will automatically create a new sales line on the document with one quantity and a unit price that matches the surcharge amount. The item number for the sales line will be determined by the Surcharge Item Number

setting. This item should be a non-taxable item that is either a flat fee or misc charge type item.

If multiple PayFabric payments are applied to the document, then the unit price of the surcharge line will be the sum of the surcharges for each payment. If a user partially credits a payment, then the surcharge line's unit price will be adjusted accordingly. If all payments are voided or fully credited, then the surcharge line will be automatically removed from the sales document.

Similar to the Add To Misc Charge option, when users credit the partial or full amount of a payment, they should not include any surcharge amounts. These values will be automatically calculated by PayFabric and updated in SalesPad.

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When creating a return from a posted invoice, surcharge lines should not be included with the returned items. These lines will be created as applicable on the return upon crediting the PayFabric payment.

Important Notes

This option requires the Surcharge Handling setting to be used in conjunction with the Surcharge Item Number setting. If the Surcharge Item Number setting is not set to a valid item number, then SalesPad will not handle surcharges properly. This item must also be non-taxable, and it is recommended that it is a flat fee or misc charge type item.