PayFabric Credit Card Surcharges

Product Development - 2026-01-21 - 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 5.6.11.

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)

Posted Invoice Surcharge Handling - How to handle surcharges on posted invoices. 'Create Customer A/R Invoice' will create a customer A/R invoice where the transaction amount field is the surcharge amount. Additional fields can be set using the Customer A/R Surcharge Invoice Fields setting. 'Create Sales Invoice' will create a new sales invoice for the customer which will use the Surcharge Handling setting to determine how the surcharge is added to the document. Additional fields can be set using the Surcharge Sales Invoice Fields setting. (Default: Create Customer A/R Invoice)

Customer AR Surcharge Invoice Fields - Use to set additional field values on the customer A/R surcharge invoice. (Default: Blank)

Surcharge Sales Invoice Fields - Use to set additional field values on the surcharge sales invoice. (Default: Blank)

Customer AR Surcharge Invoice Pre Save Script- A C# script that executes before the Customer A/R Surcharge Invoice is saved.

Surcharge Sales Invoice Pre Save Script - A C# script that executes before the Surcharge Sales Invoice is saved.

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

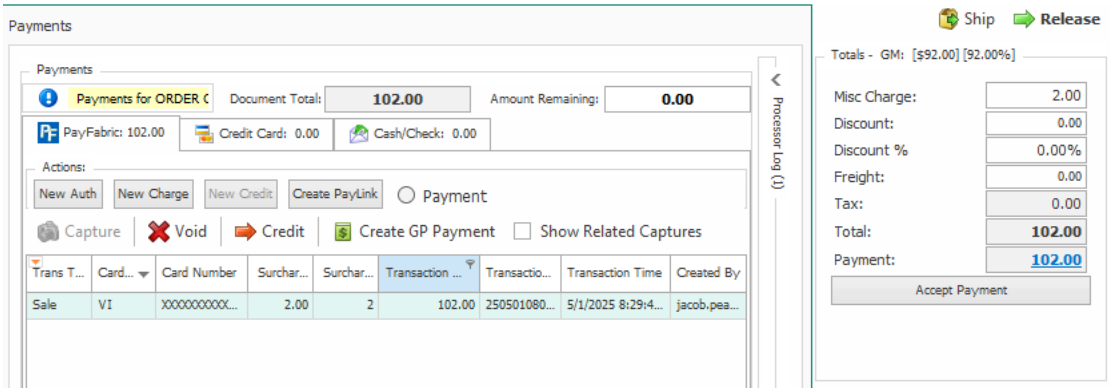
When charging a payment for a sales document, any surcharges that are calculated by PayFabric will automatically appear in the Misc Charge field. If there is already a Misc Charge applied to the document, the new surcharge amount will be added to the existing Misc Charge value. If multiple payments are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

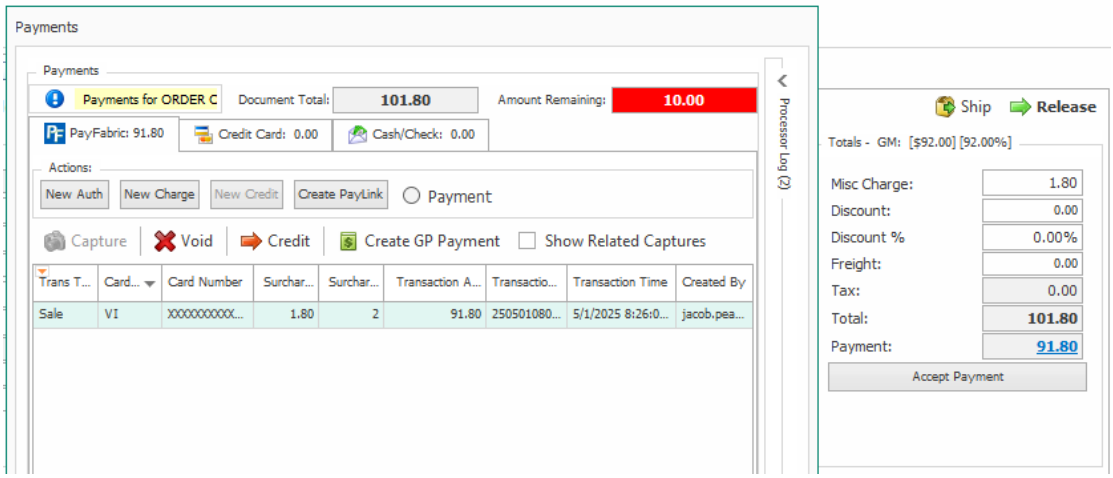
When creating a return from a posted invoice, the Misc Charge portion that is PayFabric surcharges should not be included as part of the returned items. If the Misc Charge field contains more than just PayFabric surcharges, then any non-surcharge amount can still be chosen to add to the return. Surcharge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



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.



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.

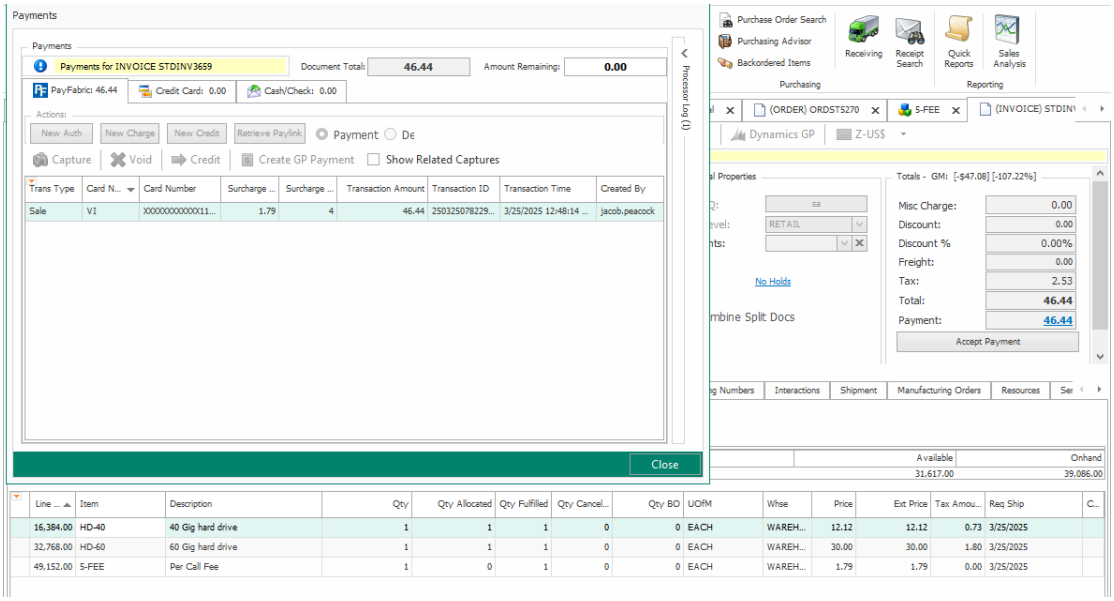
Surcharge Handling - Create Sales Line

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.



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.

PayLinks

Overview

PayLink credit card surcharges are now integrated with SalesPad so that sales documents are automatically updated when the PayLink is retrieved. This can be handled in two different ways. If the document is still open, the surcharge will be handled the same way as a non-PayLink payment, using the same settings listed near the

top of this documentation. If the document is a posted invoice, SalesPad can create a new Sales Invoice or a Customer A/R Invoice for the surcharge amount based on settings.

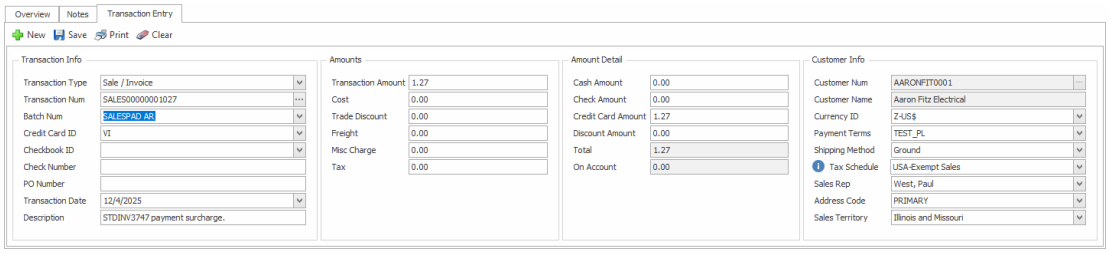
Open Documents

Retrieving a PayLink with a surcharge value on an open document is treated like a regular payment. The surcharge value will either be added to the misc charge field or it will create a new sales line. The previous Surcharge Handling sections of this documentation cover which settings are relevant for these scenarios.

Posted Invoices

Retrieving a PayLink with a surcharge value on a posted document always starts with creating a cash receipt with the amount set to the invoice's total. The cash receipt is applied to the posted invoice and must be posted in GP in order for the invoice to be marked as paid. The remaining amount (i.e. the surcharge amount) is then handled in one of two different ways depending on the Posted Invoice Surcharge Handling setting.

Posted Invoice Surcharge Handling - Create A/R Transaction



By default, the retrieved surcharge value will create a customer A/R transaction. The customer PO number on the original invoice will be copied to the Customer Purchase Order field on the A/R transaction, and the transaction description field will include the original invoice's number. The surcharge amount will be set in the Transaction Amount field as well as the Credit Card Amount field (to indicate that it is paid by credit card) and the Total field. The Credit Card ID field will be populated based on the PayFabric Credit Card mapping setting. This value should match the credit card ID field used on the cash receipt.

In addition to these default field mappings, the Customer Surcharge Invoice Fields setting can be used to assign the A/R transaction to a specific batch and assign a specific tax schedule to the A/R transaction. If these values are blank in the setting, the batch will be set to "SALESPAD AR" and the tax schedule will be selected based on the invoice's ship to address's tax schedule.

Any additional fields and customizations can be handled through scripting using the Customer AR Surcharge Invoice Pre Save script.

Posted Invoice Surcharge Handling - Create Sales Invoice

If the Posted Invoice Surcharge Handling setting is set to Create Sales Invoice then a new sales invoice will be created for the customer. The invoice will have a Total value equal to the surcharge amount. If the Surcharge Handling setting is set to Misc Charge, then the value will be added to the Misc Charge field; if it is set to Sales Line, then a sales line will be created with the item number from the Surcharge Item Number setting. From there, a PayFabric transaction will be created on the document for the document's total, which will also generate the GP payment. The master number and customer PO number from the posted invoice will be copied to this new document. Throughout this process, audit logs will be created to keep track of the changes.

In addition to these default field mappings, the Surcharge Sales Invoice Fields setting can be used to define which Invoice Doc ID should be used, which sales batch the document should start in upon creation, and whether or not the posted invoice's UDFs should be copied over to the surcharge invoice. If these values are not set, then the Doc ID will be set to match the original invoice, the batch will be set to the first queue in workflow for that document ID, and UDFs will not be copied.

Any additional fields or customizations can be handled through scripting using the Surcharge Sales Invoice Pre Save script.

This invoice document must be posted in GP for the surcharge to be recorded as paid.