



Payment Surcharge for Magento 2

Online Version

An online version of this user manual can be found [here](#).

Demo Store

A demo store is available to trial the settings of this extension:

- Frontend: surchargepayment.demo-m2.fooman.co.nz
- Backend: surchargepayment.demo-m2.fooman.co.nz/admin

User: demo

Password: demo123

Quick Links

This User Manual is structured in the following sections:

[Install + Set Up \(User Manual\)](#)

2

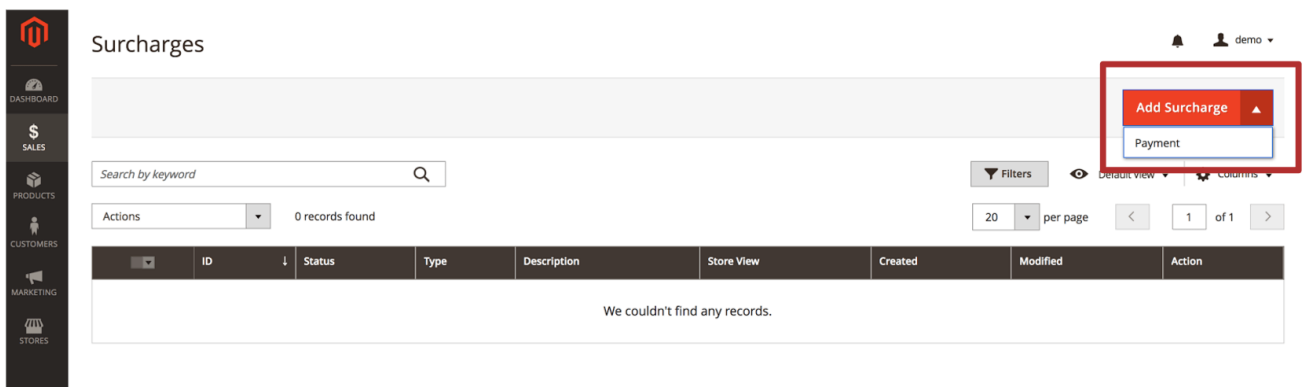
Install + Set Up (User Manual)

We indicate which features are available on which version of Fooman Payment Surcharge in the following way: (v1.0.0+).

Add Surcharge - Payment

Head to **Sales > Surcharges** to configure your surcharge settings.

Click on the “Add Surcharge” dropdown button and select “Payment” to create a new surcharge based on payment method.



You can add as many different surcharges as you need based on your store's payment methods - including credit cards, Paypal, Stripe, bank transfer, check, Afterpay and more.

Please check your individual credit card contract/agreement to confirm whether you are permitted to charge a surcharge for credit card payments. It varies from country to country and from payment provider to payment provider.

Adding different surcharges for different credit card types (e.g. 5% for AMEX but only 3% for Visa/Mastercard) is on our roadmap for future development.

Customer Emails and Pdf Documents (v1.0.0+)

Surcharges will be automatically added to customer emails and pdfs generated by Magento (including pdfs generated using [Fooman Pdf Customiser](#)).

General Settings

General Settings

Description *

Status * ▼

Store * ▲

Description (1.0.0+)

Enter the surcharge description (for internal use) - e.g. '3% surcharge on credit card payments'.

Status (1.0.0+)

When set to "Active", the payment surcharge will be enabled.

Store (1.0.0+)

Choose which store the surcharge should be applied to.

Tax Rate * ▼

Amounts are ▼

Tax Rate (2.0.0+)

Choose which store the tax rate should be applied to the surcharge amount.

Amounts Are (3.1.2+)

Ability to specify if the surcharge amount is inclusive or exclusive of tax. When utilising tax inclusive amounts we suggest also enabling Magento's cross border mode if you are selling in multiple tax areas to avoid 0.01 differences.

Apply Group Filter

No



Groups

NOT LOGGED IN

General

Wholesale

Retailer

Apply Country Filter

No



Address

Billing Address



Countries

Afghanistan

Åland Islands

Albania

Algeria

American Samoa

Andorra

Angola

Anguilla

Antarctica

Antigua & Barbuda

Apply Group Filter (3.0.5+)

When set to Yes the surcharge will only apply to the specified customer groups below.

Group (3.0.5+)

Works in conjunction with the above Apply Group Filter setting. Choose the customer groups for which the surcharge should be applicable - for example Wholesale customers.

Apply Country Filter (3.1.1+)

When set to Yes the surcharge will only apply to the specified countries below.

Address (3.1.1+)

Which address type should be considered for the country choice.

Countries (3.1.1+)

Choose the countries for which the surcharge should be applicable.

Payment Settings

← Back

Save

Payment Settings

Payment methods *

Credit Card (Braintree)
Credit Card Direct Post (Authorize.net)
Offline Payment Methods
Bank Transfer Payment
Cash On Delivery
Check / Money order
No Payment Information Required
Purchase Order
PayPal
Credit Card (payflowpro)

Surcharge Calculation Mode *

Surcharge % *

Surcharge Fixed Cost *

Order Minimum (v3.0.5+)

If set only apply the Surcharge to orders with an amount above and equal this value.

Order Maximum (v3.0.5+)

If set only apply the Surcharge to orders with an amount below and equal this value.

Payment Methods (1.0.0+)

Control-click to select the payment methods you wish to apply the surcharge to. This list is

automatically populated with all installed payment methods.

Surcharge Calculation Mode (1.0.0+)

Choose your preferred surcharge calculation mode:

- Fixed: Charge the same surcharge amount for all transactions (e.g. \$5)
- Percent: Charge a variable surcharge amount as a % of the order subtotal (e.g. 3%)
- Fixed + Percent: Charge a combination of a fixed and % surcharge amount (e.g. \$5 + 3%)
- Maximum of Fixed or Percent: The higher of either the Fixed Surcharge (\$5) or Percent Surcharge (3%, if this is more than \$5)

All surcharges will be applied in the base currency of your store.

Surcharge % (1.0.0+)

Enter the percentage that you wish to charge – eg. 2.5 (don't add the % symbol).

Surcharge Fixed Cost (1.0.0+)

Enter the fixed surcharge cost you wish to charge – eg. 10 (don't add any currency symbols).

Click “save” to add the new surcharge.

Tax Display Settings

The display of the surcharges can be configured alongside Magento's default Tax settings under **Stores > Configuration > Sales > Tax** for both the shopping cart display, as well as once an order is placed.

Shopping Cart Display Settings

Display Prices [store view]	Excluding Tax	☒ Use system value
Display Subtotal [store view]	Excluding Tax	☒ Use system value
Display Shipping Amount [store view]	Excluding Tax	☒ Use system value
Display Surcharge Amount [store view]	Excluding Tax	☐ Use system value
Include Tax In Order Total [store view]	No	☒ Use system value
Display Full Tax Summary [store view]	No	☒ Use system value
Display Zero Tax Subtotal [store view]	No	☒ Use system value
Display Zero Surcharge [store view]	No	☐ Use system value

Orders, Invoices, Credit Memos Display Settings

Display Prices [store view]	Excluding Tax	☒ Use system value
Display Subtotal [store view]	Excluding Tax	☒ Use system value
Display Shipping Amount [store view]	Excluding Tax	☒ Use system value
Display Surcharge Amount [store view]	Excluding Tax	☐ Use system value
Include Tax In Order Total [store view]	No	☒ Use system value
Display Full Tax Summary [store view]	No	☒ Use system value
Display Zero Tax Subtotal [store view]	No	☒ Use system value
Display Zero Surcharge [store view]	No	☐ Use system value

Display Surcharge Amount (2.1.0+)

Choose your preferred tax display mode:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

Display Zero Surcharge (2.1.0+)

Display the Surcharge if it's value is 0.00.

Click “save” to apply the settings.

Checkout Preview

The display of a surcharge preview for payment methods can be configured under **Stores > Configuration > Sales >Sales > Surcharge**

Configuration Q

Scope: Default Config ?

GENERAL

CATALOG

SECURITY

CUSTOMERS

SALES

Sales

General

Checkout Totals Sort Order

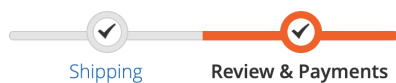
Surcharge

Surcharge Preview
[store view] Yes ☐ Use system value

Title Format
[store view] {TITLE} {AMOUNT}

Surcharge Preview (3.4.0+)

Set to "Yes" to enable calculating the actual expected cost when selecting a payment method. This will update the payment methods title in the checkout Review & Payments step.

[Sign In](#)

Payment Method

☐ Check / Money order \$5.00

☐ Purchase Order \$10.00

☐ Bank Transfer Payment

Order Summary

Cart Subtotal \$100.00

Shipping \$100.00
Flat Rate - Fixed

Order Total \$200.00

20 Items in Cart

Title Format (3.4.0+)

The following place holders can be used:

{TITLE} - the current payment method title

{AMOUNT} - the calculated amount for the surcharge

{DESCRIPTION} - the surcharge description. If multiple payment surcharges would apply their descriptions are merged together.

Tips for using surcharges

There is no one right way to use surcharges. Every store is different, and you know your customers best. Read our tips on [how to use surcharges without turning your customers off](#).

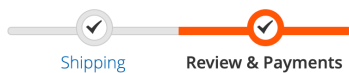
Where will my payment surcharges be displayed?

Fooman Surcharge has fully integrated Magento 2 display.

Remember to give your surcharge a descriptive label, so your customer can easily identify what the additional charge is for and the value they are getting out of this charge. Payment surcharges are not displayed on the product page.

Surcharges will be shown the following places:

Checkout



Payment Method

☐ Check / Money order☐ Cash On Delivery☐ Bank Transfer Payment☐ Purchase Order[Apply Discount Code](#) ▾

Order Summary

Cart Subtotal	99,90 €
Shipping	50,00 €
Flat Rate - Fixed	
Customs Fee - Orders Outside EU	5,00 €

Order Total **154,90 €**

10 Item in Cart ▾

Ship To:

Test User
123 Test Street
Test City, Arkansas 12345
Vereinigste Staaten
[123467](#)

Shipping Method:

Flat Rate - Fixed

Print Order page - Magento 2 Order, Invoice and Credit Memo Totals

Order Totals

Subtotal	€829.20
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Shipping & Handling	€15.00
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International Shipping Insurance (2.9%)	€24.48
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Grand Total	€868.68
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My Account Order View page

[My Account](#)**My Orders**[My Downloadable Products](#)[My Wish List](#)[Address Book](#)[Account Information](#)[Stored Payment Methods](#)[My Product Reviews](#)[Newsletter Subscriptions](#)[Compare Products](#)

You have no items to compare.

[Recently Ordered](#)☐ Simple Product 126[Add to Cart](#)[View All](#)[My Wish List](#)

You have no items in your wish list.

Order # 000000001

PENDING

11. August 2020

[Reorder](#)[Print Order](#)

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Simple Product 126	product_dynamic_126	9,99 €	Ordered: 10	99,90 €
Subtotal				99,90 €
Shipping & Handling				50,00 €
Customs Fee - Orders Outside EU				5,00 €
Grand Total				154,90 €

Order Information

Shipping Address

Test User
123 Test Street
Test City, Arkansas, 12345
Vereinigte Staaten
T: [123467](#)

Shipping Method

Flat Rate - Fixed

Billing Address

Test User
123 Test Street
Test City, Arkansas, 12345
Vereinigte Staaten
T: [123467](#)

Payment Method

Check / Money order

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Magento 2 customer sales emails



Test Order,

Thank you for your order from Main Website Store. Once your package ships we will send you a tracking number.

If you have questions about your order, you can email us at support@example.com.

Your Order #0000000004

Placed on Aug 24, 2020, 12:34:23 AM

Billing Info

Test Order
Testing Street
Test City, Auckland, 12345
New Zealand
T: 1234

Shipping Info

Test Order
Testing Street
Test City, Auckland, 12345
New Zealand
T: 1234

Payment Method

Check / Money order

Shipping Method

Flat Rate - Fixed

Items	Qty	Price
Simple Product 1 SKU: product_dynamic_1	2	\$14.44
Simple Product 2 SKU: product_dynamic_2	4	\$491.24
Subtotal		\$505.68
Shipping & Handling		\$30.00
Shipping Insurance for Orders over \$500		\$18.71
Grand Total		\$554.39

Pdfs generated by Magento 2

Fooman Surcharge is also compatible out-of-the-box with [Fooman Pdf Customiser](#) PDF's.

Invoice # 000000001
Order # 000000001
Order Date: 09.02.2017

Sold to:

Test User
123 Test Street
Test City, Arkansas, 12345
Vereinigte Staaten
T: 123467

Ship to:

Test User
123 Test Street
Test City, Arkansas, 12345
Vereinigte Staaten
T: 123467

Payment Method:

Check / Money order

Shipping Method:

Flat Rate - Fixed

(Total Shipping Charges 50,00 €)

Products	SKU	Price	Qty	Tax	Subtotal
Simple Product 126	product_dynamic_1	9,99 €	10	0,00 €	99,90 €
26					

Subtotal: 99,90 €

Shipping & Handling: 50,00 €

Customs Fee - Orders Outside EU: 5,00 €

Grand Total: 154,90 €

Reporting Any Issues/Bugs

We are proud of our quality extension code - it's been widely tested and we stand by it 100%. If something does happen and you think you might be experiencing an issue or bug, please contact us via support@fooman.co.nz and we will help you out.