



Product Fees 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: productfees.demo-m2.fooman.co.nz
- Backend: productfees.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 Product Surcharge in the following way: (v1.0.0+).

Add Surcharge - Product

Configuring a product surcharge requires two steps:

- Define the type of surcharge in general
- Set the amount on a per product level

Step 1 - Define Product Surcharge in general

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

Click on the “Add Surcharge” dropdown button and select “Product” to create a new product based surcharge. You can add as many different surcharges as you like based on your store's requirements.

The screenshot displays the Magento 2.3.2 Admin Panel's 'Surcharges' section. On the left is a sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, and Stores. The main area is titled 'Surcharges' and features a search bar, a table with one record, and an 'Add Surcharge' dropdown menu. The table has columns: ID, Status, Type, Description, Store View, Created, Modified, and Action. The record shows a 'Product Surcharge' for 'Recycling Fee'. The footer includes the Magento logo, copyright notice, and version information.

ID	Status	Type	Description	Store View	Created	Modified	Action
1	Enabled	Product Surcharge	Recycling Fee	All Store Views	Oct 24, 2019 4:49:13 AM	Oct 24, 2019 4:49:13 AM	Select

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 *	Recycling Fee
Status *	Active ▼
Store *	All Store Views ▼

Description (1.0.0+)

Enter the surcharge description - e.g. 'Recycling Fee'.

Status (1.0.0+)

When set to “Active”, the product surcharge will be enabled.

Store (1.0.0+)

Choose which store the surcharge should be applied to.

Tax Rate *	None ▼
Amounts are	Exclusive of Tax ▼

Tax Rate (1.0.0+)

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

Amounts Are (1.0.0+)

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

Groups

NOT LOGGED IN

General

Wholesale

Retailer

Apply Country Filter

Address

Billing Address



Countries

Afghanistan

Åland Islands

Albania

Algeria

American Samoa

Andorra

Angola

Anguilla

Antarctica

Antigua & Barbuda

Apply Group Filter (1.0.0+)

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

Group (1.0.0+)

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 (1.0.0+)

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

Address (1.0.0+)

Which address type should be considered for the country choice.

Countries (1.0.0+)

Choose the countries for which the surcharge should be applicable.

Based On

Subtotal

Shipping

Based On (1.0.0+)

Choose to base the surcharge calculation on:

- Subtotal
- Shipping cost
- Subtotal + shipping

Product Settings

← Back

Save

SURCHARGE

General

Product Surcharge

Product Surcharge Settings

Type *

Maximum
SurchargeMaximum Times
Applied

Product Surcharge Type (1.0.0+)

Product Surcharge Settings

Type *

✓ Per Order
Per Product
Per ItemMaximum
SurchargeMaximum Times
Applied

Choose your preferred surcharge calculation mode:

- Per Order: This surcharge is only charged once per order, if multiple would apply the maximum is taken
- Per Product: This surcharge is charged once per product in the cart (each line item), useful for example for set up costs
- Per Item: Each item in the cart gets added the surcharge

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

Maximum Surcharge (2.1.0+)

If set the maximum amount in your base currency that would get applied. Useful for Per Product and Per Item types where you want to limit the maximum amount that would get added. For example with Per Item with SKU A and Product Surcharge set to 5 with a Maximum Surcharge set to 12 the following would get calculated for the cart.

1 x SKU A = 5

2 x SKU A = 10

3 x SKU A = 12

4 x SKU A = 12

...

Maximum Times Applied (2.1.0+)

If set the maximum number of times a Per Item or Per Product surcharge that would get applied. For example with Per Item with SKU A and Product Surcharge set to 5 with a Maximum Times Applied set to 2 the following would get calculated for the cart.

1 x SKU A = 5

2 x SKU A = 10

3 x SKU A = 10

4 x SKU A = 10

...

Step 2 - Define Product Surcharge per product

The product surcharges can be configured for simple, virtual and downloadable products. Open the product under **Catalog > Products** and open the Advanced Pricing section.

Simple Product 1

Store View:

All Store Views ▼

?

Enable Product

[website]

Yes

Attribute Set

Attribute Set 2

Product Name *

[store view]

Simple Product 1

SKU *

[global]

product_dynamic_1

Price *

[global]

€ 9.99

Advanced Pricing

Tax Class

[website]

Taxable Goods ▼

On the advanced pricing screen find the Product Surcharge section:

Advanced Pricing

Special Price
[global]

Special Price From
[website]



 To



Cost
[global]

Customer Group Price

Website	Customer Group	Quantity *	Price
Add			

Product Surcharge

Linked Surcharge	Type	Amount *	
Recycling Fee [Product Surcharge] ▼	Product ▼	€ 9.8000	
Add			

Under Linked Surcharge select the one you previously set up. Type will be "Product" - unless you have other Fooman Surcharge extensions installed, in which case they can be selected to override their fixed amount value and or can be used to exclude this product from the calculation.

Enter the amount for this product. Close this window via "Done" and "Save" the product.

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 its value is 0.00.

Click “save” to apply the settings.

Modify other Fooman Surcharges

If Fooman Product Surcharge is installed alongside other Fooman Surcharge extensions it provides product based modifications of configured surcharges.

The following types are available

- **Product**
the standard product surcharge - no interaction with other Fooman extensions and Amount is used
- **Exclude Product**
the product's value or weight is excluded from calculations
(enter any amount - it is not used)
- **Include Product**
the product's weight is included in calculations (Weight Surcharge only)
(enter any amount - it is not used)
- **Single item in cart cancels**
the linked surcharge will no longer apply for the cart if this product is present
(enter any amount - it is not used)
- **Only cancel if all items cancel**
the linked surcharge will only be removed from the cart if all products cancel
(enter any amount - it is not used)

Product Surcharge	Linked Surcharge	Type	Amount *
	Payment Discount [Payment Surcharge]	Product ✓ Exclude Product - Include Product - Single item in cart cancels - Only cancel if all items cancel	\$

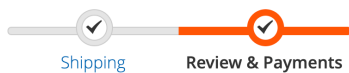
Where will my product surcharges be displayed?

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. Surcharges are not displayed on the product page. If needed, you should include information about any surcharges in your web copy.

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

Shipping & Handling €15.00

International Shipping Insurance (2.9%) €24.48

Grand Total €868.68

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

[Search Terms](#)[Privacy and Cookie Policy](#)[Advanced Search](#)[Contact Us](#) Enter your email address[Subscribe](#)

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 €

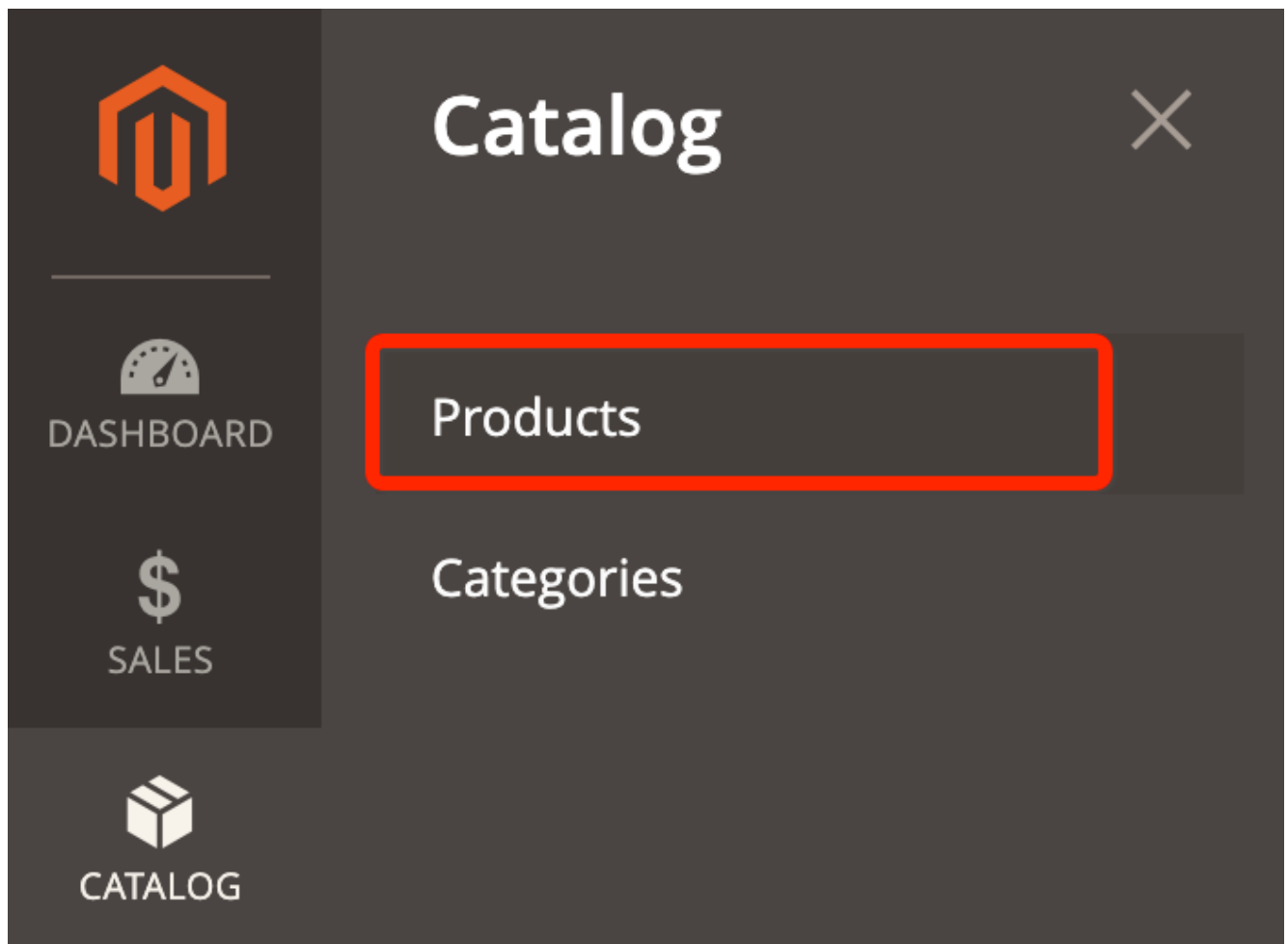
Shipping & Handling: 50,00 €

Customs Fee - Orders Outside EU: 5,00 €

Grand Total: 154,90 €

Setting Product Fees for multiple products

Fooman Product Fees can be set/updated via Magento's Mass Product Attribute functionality (available from **v3.1.0+**). You will find this functionality under **Catalog > Products**



Select the products you wish to update, then choose the Action "Update attributes":

Search by keyword

Actions

Delete

Change status

Update attributes

Assign Inventory Source

Unassign Inventory Source

Transfer Inventory To Source

1200 records found (4 selected)

	Type
	Simple Product
	Simple Product
☒ 3 Simple Product 3	Simple Product
☒ 4 Simple Product 4	Simple Product

Locate Product Fees and configure the fees as required.

Product Fees [global]	Linked Surcharge	Enable	Type	Amount
	Bulky Item Handling Fee	☐	Product	
	Product Set Up Fee	☒	Product	15
	☒ Change			

Please note that you will first need to tick the "Change" tickbox before any changes will be applied. Please also note that each applicable fee will need to be set to enabled. All fees not enabled will no longer apply to the selected products even if they were previously configured.

Newer Magento versions update the product attributes asynchronously and you will see the following message:



DASHBOARD

SALES

CATALOG

CUSTOMERS

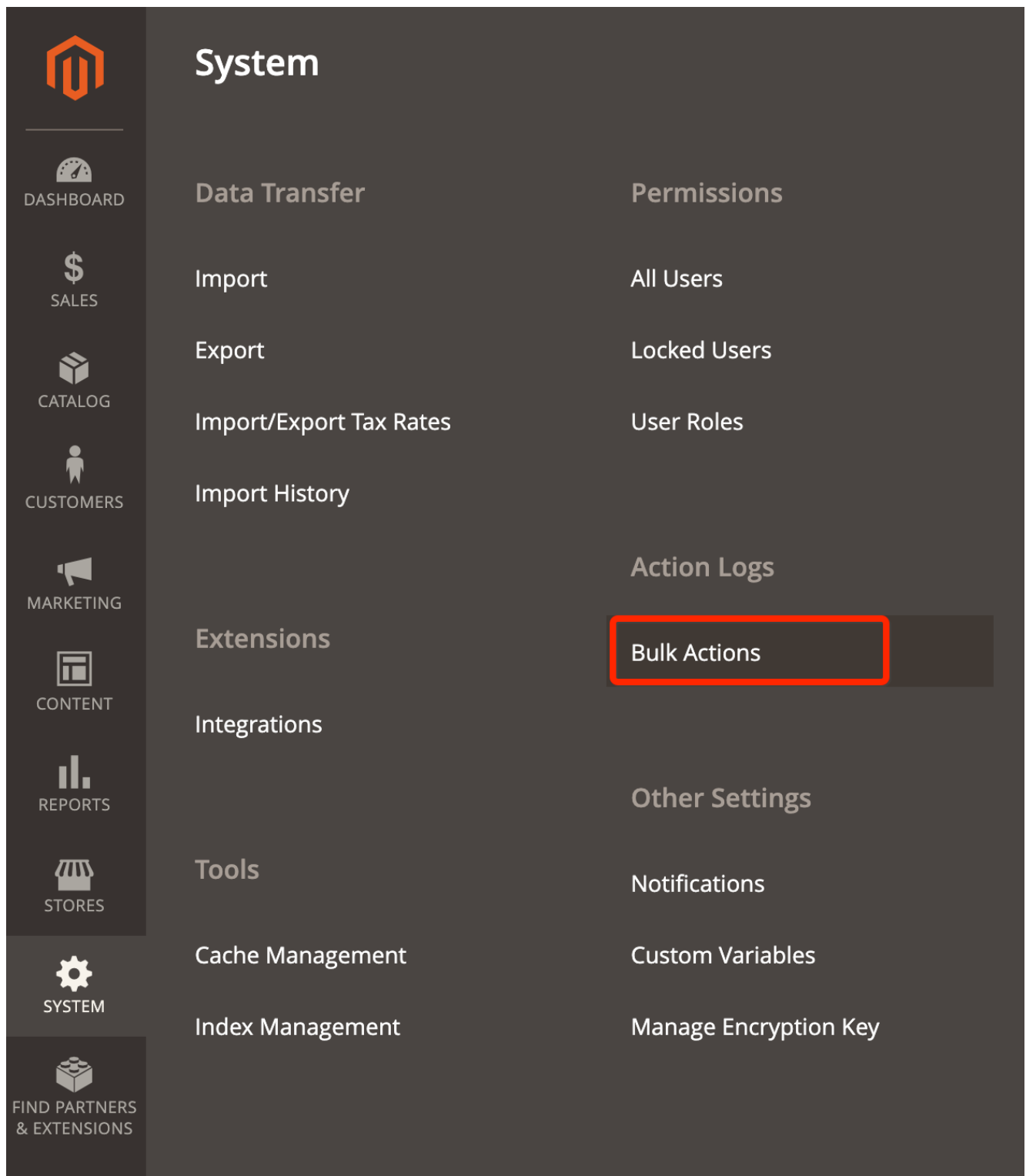
Task "Update attributes for 4 selected products": 1 item(s) have been scheduled for update.

Products

✓

Message is added to queue

The update will be performed in the background via Magento's cron / queuing mechanism depending on your system's configuration. You can track its progress via **System > Action Logs > Bulk Actions**



Importing Product Fees from CSV

From version v3.7.0 onwards it is possible to set/update product fees using Magento's csv import functionality.

Example

The following Fees & Surcharges have been set up prior to executing the import.

☐ ▼	ID ↓	Status	Type	Description
☐	1	Enabled	Payment Surcharge	Payment Fee
☐	2	Enabled	Payment Surcharge	Second Fee
☐	3	Enabled	Product Fee	Bulky Item Handling Fee
☐	4	Disabled	Product Fee	Setup Fee

Please note the Payment Surcharges have been set up using our separate Payment Surcharge extension.

Using the Import functionality available under **System > Import** choose Product import then upload your csv file.



DASHBOARD



SALES



CATALOG



CUSTOMERS



MARKETING



CONTENT



REPORTS



STORES



SYSTEM

System

Data Transfer

Import

Export

Import/Export Tax Rates

Import History

Services

Commerce Services Connector

Extensions

Integrations

Your csv file should contain at a minimum a sku column as well as a column `fooman_productsurcharge_mods` when updating existing products.

The content of the column `fooman_productsurcharge_mods` will get processed in the following manner:

1. The cell content will get split at each comma (,) to allow multiple fees and surcharges to be set per product
2. Each entry from step 1 is then split at the equal sign (=)
3. The first part references an existing Fee or Surcharge based on the description
4. The second part sets the amount for the product fee

5. Optional when Product Fees is installed along side other Fooman Surcharge extensions additional product based calculation modes can be configured as the third part. The following entries are possible:
 - Exclude Product (excludes product from calculation when in default include mode)
 - Include Product (includes product from calculation when in default exclude mode)
 - Single item in cart cancels (item cancels the surcharge)
 - Only cancel if all items cancel (if all items in the cart cancel the surcharge is not applied)

In the below example csv file the following would happen

```
sku,fooman_productsurcharge_mods
product_1,Bulky Item Handling Fee=22
product_2,"Bulky Item Handling Fee=22.00,Setup Fee=33.49"
product_3,"Test=50,Payment Fee==Exclude Product"
```

For `product_1` the amount for the Bulky Item Handling Fee will be set to 22.00 (all currency amounts are in the base currency). Any pre-existing other product fees (Setup Fee) would be removed.

For `product_2` the amount for the Bulky Item Handling Fee will be set to 22.00 and the Setup Fee to 33.49.

For `product_3` the entry `Test = 50` will get ignored as there is no pre-existing Fee or Surcharge with the description `Test`. This product will get excluded from the Payment Fee calculation.

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.