



Surcharge for Magento 1

Online Version

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

Quick Links

This User Manual is structured in the following sections:

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Install + Set Up (User Manual)

Click on **System > Configuration > Fooman Surcharge** to get started.

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

Fooman Surcharge adds the following new setting groups to this section:

- [All Surcharges Settings](#)
- [Credit Card Surcharges](#)
- [Payment Surcharges](#)
- [Enforce Minimum Order Amount](#)
- [Small Order Fee](#)
- [Customer Group Surcharges](#)
- [Country Fee](#)
- [Region Fee](#)
- [Surcharge on Shipping Method](#)
- [Surcharge on Products](#)

How to Enter Surcharge Amounts

All amounts can be entered as a positive amount (surcharge) or a negative amount (discount) – eg. 5 or -5

Amounts should be entered:

- Without any symbols - eg. 5 not \$5 or 5%
- Using a full stop as a separator – eg. 5.50 not 5,50

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

Customer Emails and Pdf Documents (v1.0.0+)

Surcharge details will be automatically added to customer emails and pdfs generated by Magento (including pdfs generated using Fooman Pdf Customiser).

Surcharge Sort Order in Checkout Total (v3.0.1+)

Under System > Configuration > Sales, you can change where the surcharge shows in the checkout totals sort order.

2. Set up Tax Settings in Magento backend

If you want to apply tax to surcharges, you need to configure this under **System > Configuration > Tax** before configuring the main Fooman Surcharge settings.

If you do not want to apply tax to surcharges, you don't need to do anything.

The screenshot displays the 'Tax' configuration page in the Magento backend. It is divided into two main sections: 'Tax Classes' and 'Calculation Settings'.

Tax Classes:

- Tax Class for Shipping:** Set to 'None'.
- Tax Class For Surcharge:** Set to 'None'. This option is highlighted with a red box.

Calculation Settings:

- Tax Calculation Method Based On:** Set to 'Total'.
- Tax Calculation Based On:** Set to 'Shipping Address'.
- Catalog Prices:** Set to 'Excluding Tax'. A note below indicates: 'Whether catalog prices entered by admin include tax.'
- Shipping Prices:** Set to 'Excluding Tax'. A note below indicates: 'Whether shipping amounts entered by admin or obtained from gateways include tax.'
- Surcharge Prices:** Set to 'Excluding Tax'. This option is highlighted with a red box.
- Apply Customer Tax:** Set to 'Before Discount'.

Tax Class for Surcharge (v1.1.7+)

Choose which tax class you want to apply to surcharges (if any):

- Dominant tax rate (this will tally up all existing tax rates of products in the basket, and assign the dominant tax rate to the surcharge)
- The other options will populate automatically using the tax rates you have configured on your Magento store

Surcharge Prices (v1.1.7+)

Set whether the surcharge amounts entered during set up should include or exclude tax. This setting only has effect when "Tax Class for Surcharge" (above) is applied.

Example 1: 'Fixed Transaction Cost' surcharge of \$10 and tax rate of 10%:

- Including tax: Surcharge = \$9.09, surcharge tax = \$0.91, giving a total of \$10
- Excluding tax: Surcharge = \$10, surcharge tax = \$1, giving a total of \$11

Example 2: 'Payment Surcharge %' of 2.5% on a purchase amount of \$100, with a tax rate of 10%:

- Including tax: Surcharge = \$2.27, surcharge tax = \$0.23, giving a total of \$2.50
- Excluding tax: Surcharge = \$2.50, surcharge tax = \$0.25, giving a total of \$2.75

Shopping Cart Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Display Surcharge Prices	Excluding Tax	[STORE VIEW]
Include Tax In Grand Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

Orders, Invoices, Creditmemos Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Display Surcharge Prices	Excluding Tax	[STORE VIEW]
Include Tax In Grand Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

Display Surcharge Prices (v2.0.8+)

Set whether surcharges should be displayed:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

Configure this for:

- Shopping Cart Display Settings

- Orders, Invoices, Credit Memos Display Setting

3. All Surcharges Settings

Go to **System > Configuration > Fooman Surcharge**.

All Surcharges

For detailed instructions please refer to the Surcharge User Manual [here](#).

Calculate Surcharge On

Display Surcharge in Payment Information Step

Subtotal

Shipping

Subtotal Incl. Tax

Shipping Incl. Tax

Tax

Exclude Discount

Grand Total (overrides all other settings)

▲ Applies to all surcharges.

Yes

[STORE VIEW]

[STORE VIEW]

Calculate Surcharge On (v2.0.7+)

Choose how your surcharges will be calculated. These settings apply to all surcharges.

Control-click to select the variables which you would like the surcharge or discount to be calculated on:

- Subtotal: The order subtotal, excluding tax or shipping
- Shipping: The total shipping cost, excluding any shipping tax
- Subtotal Incl. Tax: The order subtotal, including tax but excluding shipping
- Shipping Incl. Tax: The total shipping cost, including any shipping tax
- Tax: The total tax amount on the order and shipping
- Exclude discount: Exclude any discount from the calculation
- Grand Total: The grand total (this option overrides all options above and cannot be selected together with these variables)

Display Surcharge in Payment Information Step (v3.0.13+)

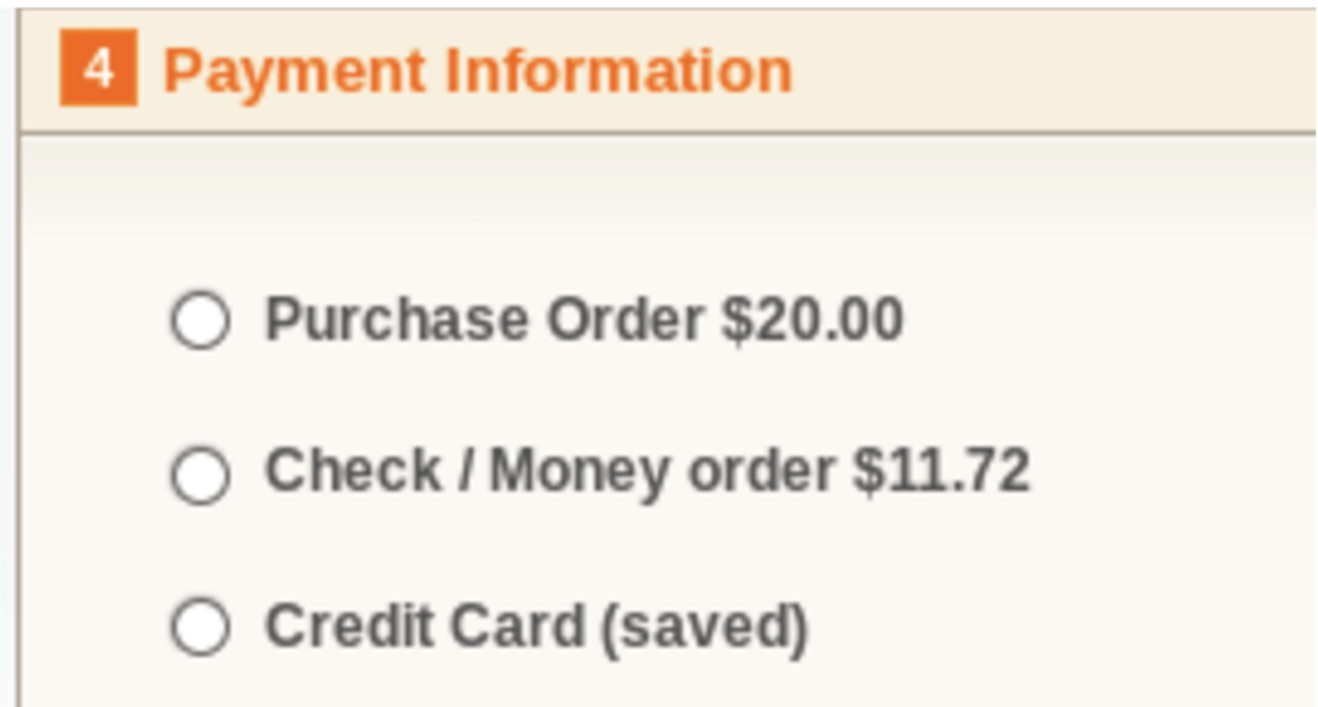
When set to “Yes”, this setting will adjust the title of the payment method during checkout to indicate how much using the payment method would add to the order. Surcharge amounts will be calculated automatically. You can enter free text and use the following {} commands:

- {TITLE} – enters the payment method title
- {AMOUNT} – enters the surcharge amount (calculated automatically based on the payment method and order amount)
- {DESCRIPTION} – enters the surcharge description that you set yourself in the below sections of this User Manual)

For example, using the commands

{TITLE} {AMOUNT}

gives the following at checkout:



4 Payment Information

☐ Purchase Order \$20.00

☐ Check / Money order \$11.72

☐ Credit Card (saved)

4. Credit Card Surcharges

With these settings, you can add a surcharge for credit card payments. To set up two separate surcharge settings for different credit card types, use the different setting groups in “Credit Card Surcharge” and “Credit Card Surcharge 2”.

A credit card surcharge can only be applied if your store uses a payment solution where customers enter credit card details on your website, rather than an external payment solution.

Please check your credit card contractual agreement to check whether you are permitted to apply a payment surcharge, as this varies from country to country and from payment provider to payment provider.

If applying different surcharge amounts to different credit cards type, we recommend including in an appropriate place in your store the respective charges for different credit card types, so your customers won't be surprised by any surcharge.

Frontend Example:

2.5% credit card surcharge (all card types)

5 Order Review			
Product Name	Price	Qty	Subtotal
ECCO Womens Golf Flexor Golf Shoe	\$159.99	1	\$159.99
Shoe Size 3			
Subtotal			\$159.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$13.20
Credit card surcharge 2.5%			\$4.45
Grand Total			\$182.64
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings:

Credit Card Surcharge		
Enable Credit Card Surcharge	Yes	[STORE VIEW]
Credit Card Types	American Express Visa MasterCard Discover JCB Switch/Maestro Solo Other	[STORE VIEW]
Payment Surcharge Type	Percent	[STORE VIEW]
Fixed Transaction Cost		[STORE VIEW]
Credit Card Surcharge %	2.5	[STORE VIEW]
Surcharge Description	Credit card surcharge 2.5%	[STORE VIEW]
Apply Group Filter	No	[STORE VIEW]
Only for Customer Groups	Not Logged In General Wholesale Retailer QAAAA	[STORE VIEW]

Enable Credit Card Surcharge (v1.0.0+)

When set to Yes, credit card surcharges will be enabled.

Credit Card Types (v1.0.0+)

Control-click to select as many credit card types that you wish to apply the surcharge to.

Payment Surcharge Type (v2.0.3+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Credit Card Surcharge % field is added to the calculation base (refer to settings for "All Surcharges")
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Credit Card Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Credit Card Surcharge %

Fixed Transaction Cost (v2.0.3+)

Enter the fixed transaction cost you wish to charge - eg. 10 (remember not to add any currency symbols).

Credit Card Surcharge % (v1.0.0+)

Enter the percentage that you wish to charge – eg. 2.5 (remember not to add the % symbol).

Surcharge Description (v1.0.0+)

Enter the surcharge description that will be visible to the customer – eg. “Credit card surcharge 2.5%”.

Apply Group Filter (v2.2.4+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.2.4+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

5. Payment Surcharges

Add a surcharge or discount based on payment method. To set up five separate surcharge settings for different payment types.

Frontend Example

\$10 purchase order handling fee

5 Order Review			
Product Name	Price	Qty	Subtotal
ECCO Womens Golf Flexor Golf Shoe	\$159.99	1	\$159.99
Shoe Size 3			
Subtotal			\$159.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$13.20
Purchase Order Handling Fee			\$10.00
Grand Total			\$188.19
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings:

Payment Surcharge	
Enable Payment Surcharge	Yes [STORE VIEW]
Payment Methods	Credit Card (saved) [STORE VIEW] Check / Money order (+3.5%) No Payment Information Required Purchase Order (+\$10) Google Checkout Credit Card (Authorize.net) PayPal Express Checkout PayPal Direct Payment PayPal Website Payments Standard PayPal Express Checkout Payflow Edition
Payment Surcharge Type	Fixed [STORE VIEW]
Fixed Transaction Cost	10 [STORE VIEW]
Payment Surcharge %	[STORE VIEW]
Surcharge Description	Purchase Order Handling Fee [STORE VIEW]
Apply Group Filter	No [STORE VIEW]
Only for Customer Groups	Not Logged In [STORE VIEW] General Wholesale Retailer QAAAA

Enable Payment Surcharge (v1.0.0+)

When set to Yes, payment type surcharges will be enabled.

Payment Methods (v1.0.0+)

Control-click to select as many payment types that you wish to apply the surcharge to.

Payment Surcharge Type (v1.1.7+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment Surcharge % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Fixed Transaction Cost (v2.0.3+)

Enter the fixed transaction cost you wish to charge – eg. 10 (remember not to add any

currency symbols).

Payment Surcharge % (v1.0.0+)

Enter the percentage that you wish to charge – eg. 2.5 (remember not to add the % symbol).

Surcharge Description (v1.0.0+)

Enter the surcharge description that will be visible to the customer – eg. “Paypal fee”.

Apply Group Filter (v2.2.4+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.2.4+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

Minimum		[STORE VIEW]
Maximum		[STORE VIEW]
Apply Country Filter	No	[STORE VIEW]
Countries	Antarctica Antigua and Barbuda Argentina Armenia Aruba Australia Austria Azerbaijan Bahamas Bahrain	[STORE VIEW]

Minimum (v3.0.1+)

Enter the minimum order amount needed for the surcharge to apply – eg. 20.

Enter the amount without any currency symbols. The amount will be in your store's base currency. This setting is available for “Payment Method” and “Payment Method 2” only.

Maximum (v3.0.1+)

Enter the maximum order amount for the surcharge to apply – eg. 300.

Enter the amount without any currency symbols. The amount will be in your store's base currency. This setting is available for “Payment Method” and “Payment Method 2” only.

Apply Country Filter (v3.0.1+)

Set to “Yes” to apply the surcharge only to customers from certain countries, or to exclude customers from certain countries from the surcharge. Choose to apply or exclude the surcharge based on either shipping address or billing address. This setting is available for “Payment Method” and “Payment Method 2” only.

Countries (v3.0.1+)

Control-click to select as many countries as you wish to apply this payment surcharge type to. This setting is available for “Payment Method” and “Payment Method 2” only.

6. Enforce Minimum Order Amount

Enforce a minimum order amount, by adding a surcharge to any order which does not reach the specified minimum order amount.

The minimum order surcharge amount is always:

Surcharge = Minimum Order Amount - Actual Order Amount

Important: This feature is incompatible with the standard Magento “Minimum Order Amount” feature. You should not use both features together.

Frontend Example

Minimum order amount of \$100 enforced

5 Order Review			
Product Name	Price	Qty	Subtotal
Steven by Steve Madden Pryme Pump Shoe Size 5	\$69.99	1	\$69.99
Subtotal			\$69.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$5.77
Minimum Order Fee - \$100			\$19.24
Grand Total			\$100.00
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Enforce Minimum Amount

Minimum Order Amount

Surcharge Description

Apply Group Filter

Only for Customer Groups

Yes

▲ Enabling Enforce Minimum Order Amount will add a fee which is the difference between current order amount and the specified minimum order amount.

100

Minimum Order Fee - \$100

No

Not Logged In

General

Wholesale

Retailer

QAAAA

[STORE VIEW]

[STORE VIEW]

[STORE VIEW]

[STORE VIEW]

[STORE VIEW]

Enforce Minimum Amount (v1.0.0+)

When set to Yes, a minimum order surcharge will be enforced.

Minimum Order Amount (v1.0.0+)

Enter the minimum amount an order has to reach. The surcharge will be applied to any order below this amount.

Surcharge Description (v1.0.0+)

Enter the surcharge description that will be visible to the customer – eg. “Minimum Order Fee - \$100”.

Apply Group Filter (v2.1.3+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.0.5+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

7. Small Order Fee

Add a fee to small orders below a specified amount.

Frontend Example

\$50 small order fee – applies to all orders under \$500

5 Order Review			
Product Name	Price	Qty	Subtotal
Chair	\$129.99	1	\$129.99
Subtotal			\$129.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$10.72
Small Order Fee (applies to all orders under \$500)			\$50.00
Grand Total			\$195.71
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Small Order Fee	
Enable Small Order Fee	No ▲ Enabling Small Order Fee will add a fee whenever the order is below the specified minimum order amount. [STORE VIEW]
Minimum Amount	▲ Add small order fee if order is below this amount. [STORE VIEW]
Based On	Value [STORE VIEW]
Payment Surcharge Type	Fixed [STORE VIEW]
Fixed Transaction Cost	[STORE VIEW]
Payment Surcharge %	[STORE VIEW]
Fee Description	[STORE VIEW]
Apply Group Filter	No [STORE VIEW]
Only for Customer Groups	Not Logged In General Wholesale Retailer [STORE VIEW]

Enable Small Order Fee (v1.0.0+)

When this setting is set to Yes, a small order fee will be enabled.

Minimum Amount (v1.0.0+)

Enter the minimum amount an order has to reach. A fee will be applied to any order below this amount.

Based On (v2.2.1+)

Choose to apply the small order fee based on the order value, total number of items, or number of products.

Payment Surcharge Type (v2.3.1+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment Surcharge % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Fixed Transaction Cost (v1.0.0+)

Enter the small order fee that you wish to charge as a fixed transaction cost – eg. 50 (remember not to add any currency symbols).

Payment Surcharge % (v2.3.1+)

Enter the percentage that you wish to charge – eg. 2.5 (remember not to add the % symbol).

Fee Description (v1.0.0+)

Enter the surcharge description that will be visible to the customer – eg. “Small order fee”.

Apply Group Filter (v2.1.3+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.0.5+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

8. Customer Group Surcharges

Apply a surcharge or discount to a particular customer group.

Frontend Example

5% Wholesaler Handling Fee

5 Order Review			
Product Name	Price	Qty	Subtotal
Chair	\$129.99	100	\$12,999.00
Subtotal			\$12,999.00
Shipping & Handling (Flat Rate - Fixed)			\$500.00
Tax			\$1,072.42
5% Wholesaler Handling Fee			\$728.57
Grand Total			\$15,299.99

Forgot an Item? [Edit Your Cart](#)

Place Order

Backend Settings

Customer Group Surcharge	
Enable Customer Group Surcharge	Yes [STORE VIEW]
Customer Group	Not Logged In [STORE VIEW] General Wholesale Retailer QAAAA ▲ No Selection equals none.
Payment Surcharge Type	Percent [STORE VIEW]
Fixed Transaction Cost	[STORE VIEW]
Payment Surcharge %	5 [STORE VIEW]
Surcharge Description	5% Wholesaler Handling Fee [STORE VIEW]

Enable Customer Group Surcharge (v1.0.0+)

When set to Yes, a small order fee will be enabled.

Customer Group (v1.0.0+)

Control-click to select as many customer types that you wish to apply the surcharge or discount to.

Payment Surcharge Type (v2.0.0+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment Surcharge % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Payment Surcharge % (v1.0.0+)

Enter the surcharge or discount percentage – eg. 5 for surcharges, or -5 for discounts (remember not to add the % symbol).

Fixed Transaction Cost (v2.2.1+)

Enter the fixed transaction cost that you wish to charge or offer as a discount – eg. 15 for surcharges, or -15 for discounts (remember not to add any currency symbols).

Surcharge Description (v1.0.0+)

Enter the surcharge description that will be visible to the customer – eg. “10% loyalty discount” or “Wholesaler handling fee”.

9. Country Fee

Add a surcharge or discount based on the country of origin of an order (based on either billing or shipping address). Two different country based surcharges from are available from v3.0+.

Frontend Example

\$9.99 fee for orders outside of the European Union

5 Order Review			
Product Name	Price	Qty	Subtotal
Steven by Steve Madden Pryme Pump	\$69.99	1	\$69.99
Shoe Size 5			
Subtotal			\$69.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$5.77
\$9.99 Fee - Orders outside the European Union			\$9.99
Grand Total			\$90.75
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Country Fee	
Enable Country Fee	Yes [STORE VIEW] ▲ Enabling Country Fee will add a fee when the chosen billing or shipping address is in this country.
Based on	Shipping Address [STORE VIEW]
Countries	Turks and Caicos Islands Tuvalu U.S. Minor Outlying Islands U.S. Virgin Islands Uganda Ukraine United Arab Emirates United Kingdom United States Uruguay [STORE VIEW] ▲ Add a surcharge if the above address matches a country chosen here.
Payment Surcharge Type	Fixed [STORE VIEW]

Enable Country Fee (v2.2.1+)

When set to Yes, a country fee will be enabled.

Based On (v2.2.1+)

Choose to apply the country fee based on either shipping address or billing address.

Countries (v2.2.1+)

Control-click to select as many countries you wish to apply the surcharge to.

Payment Surcharge Type (v2.2.1+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Fixed Transaction Cost	9.99	[STORE VIEW]
Payment Surcharge %		[STORE VIEW]
Surcharge Description	\$9.99 Fee - Orders outside the European Union	[STORE VIEW]
Apply Group Filter	No	[STORE VIEW]
Only for Customer Groups	Not Logged In General Wholesale Retailer QAAAA	[STORE VIEW]

Payment Surcharge % (v2.2.1+)

Enter the percentage that you wish to charge – eg. 5 (remember not to add the % symbol).

Fixed Transaction Cost (v2.2.1+)

Enter the fixed transaction cost you wish to charge - eg. 5 (remember not to add any currency symbols).

Surcharge Description (v2.2.1+)

Enter the surcharge description that will be visible to the customer – eg. “Surcharge for orders

outside the EU”.

Apply Group Filter (v2.2.1+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.2.1+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

10. Region Fee

Add a surcharge or discount based on the region of an order (based on either billing or shipping address).

Frontend Example

\$5 fee for orders outside mainland USA

5 Order Review			
Product Name	Price	Qty	Subtotal
Steven by Steve Madden Pryme Pump	\$69.99	1	\$69.99
Shoe Size 5			
Subtotal			\$69.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$5.77
Fee for orders outside of mainland USA			\$5.00
Grand Total			\$85.76
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Region Fee	
Enable Region Fee	Yes [STORE VIEW] ▲ Enabling Region Fee will add a fee when the chosen billing or shipping address is in this region.
Based on	Shipping Address [STORE VIEW]
Regions	Florida Georgia Guam Hawaii Idaho Illinois Indiana Iowa Kansas Kentucky [STORE VIEW] ▲ Add a surcharge if the above address matches a region chosen here.
Payment Surcharge Type	Fixed [STORE VIEW]

Enable Region Fee (v2.2.1+)

When set to Yes, a region fee will be enabled.

Based On (v2.2.1+)

Choose to apply the region fee based on either shipping address or billing address.

Regions (v2.2.1+)

Control-click to select as many regions you wish to apply the surcharge to. You may include regions in different countries.

Payment Surcharge Type (v2.2.1+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment Surcharge % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Fixed Transaction Cost	5	[STORE VIEW]
Surcharge Description	Fee for orders outside of mainland USA	[STORE VIEW]
Payment Surcharge %		[STORE VIEW]
Apply Group Filter	No	[STORE VIEW]
Only for Customer Groups	Not Logged In General Wholesale Retailer QAAAA	[STORE VIEW]

Payment Surcharge % (v2.2.1+)

Enter the percentage that you wish to charge – eg. 5 (remember not to add the % symbol).

Fixed Transaction Cost (v2.2.1+)

Enter the fixed transaction cost you wish to charge - eg. 5 (remember not to add any currency symbols).

Surcharge Description (v2.2.1+)

Enter the surcharge description that will be visible to the customer – eg. “Surcharge for states

outside mainland USA”.

Apply Group Filter (v2.2.1+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups. When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.2.1+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

11. Surcharge on Shipping Method

Add an additional fee based on the shipping method chosen - for example, an additional handling fee or mandatory insurance for a particular shipping method. This allows you to charge more accurate shipping prices based on your actual shipping cost for each product.

Frontend Example

\$2 shipping handling surcharge

5 Order Review			
Product Name	Price	Qty	Subtotal
Steven by Steve Madden Pryme Pump Shoe Size 5	\$69.99	1	\$69.99
Subtotal			\$69.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Tax			\$5.77
Shipping Handling Surcharge			\$2.00
Grand Total			\$82.76
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Surcharge on Shipping Method	
Enable Surcharge on Shipping Method	No [STORE VIEW]
Calculate Surcharge On	Use Global Setting [STORE VIEW]
Shipping Methods	Flat Rate [STORE VIEW] Fixed Free Shipping Free Best Way Table Rate DHL Express
Payment Surcharge Type	Fixed [STORE VIEW]

Enable Surcharge on Shipping Method (v2.2.12+)

When set to Yes, a shipping method surcharge will be enabled.

Calculate Surcharge On (v3.0.26+)

Choose to use the global Fooman Surcharge setting (the “Calculate surcharge on” setting in the [All Surcharges Settings](#) section), or to calculate the surcharge on the shipping cost only.

Shipping Methods (v2.2.12+)

Control-click to select as many shipping methods you wish to apply the surcharge to.

Payment Surcharge Type (v2.2.12+)

Choose your preferred calculation model:

- Fixed: The amount in the Fixed Transaction Cost field
- Percent: The percentage in the Payment Surcharge % field is added to the calculation base (refer to settings for “All Surcharges”)
- Fixed + Percent: The sum of both the Fixed Transaction Cost and Payment Surcharge %
- Fixed Minimum: The higher of either the Fixed Transaction Cost or Payment Surcharge %

Fixed Transaction Cost		[STORE VIEW]
Payment Surcharge %		[STORE VIEW]
Surcharge Description		[STORE VIEW]
Apply Group Filter	No	[STORE VIEW]
Only for Customer Groups	Not Logged In General Wholesale Retailer	[STORE VIEW]

Fixed Transaction Cost (v2.2.12+)

Enter the fixed transaction cost you wish to charge - eg. 2 (remember not to add any currency symbols).

Surcharge Description (v2.2.12+)

Enter the surcharge description that will be visible to the customer – eg. “Express delivery premium”.

Apply Group Filter (v2.2.12+)

When set to Yes, you can choose to apply the surcharge only to particular customer groups.

When set to No, the surcharge will be applied to all customer groups.

Only for Customer Groups (v2.2.12+)

If you have set “Apply Group Filter” (above) to Yes, use this setting to choose which customer groups the surcharge will apply to. Control-click to select as many customer types you wish to apply the surcharge to.

12. Surcharge on Products

Add a surcharge or discount based on product type – for example, add an item handling or packaging charge to particular products (where you do not want to apply a global surcharge or discount).

The surcharge can be applied on a per order, per product or per item level.

Frontend Example

\$50 secure packaging fee for orders containing breakable items

5 Order Review			
Product Name	Price	Qty	Subtotal
HTC Touch Diamond	\$692.84	1	\$692.84
Subtotal			\$692.84
Shipping & Handling (Flat Rate - Fixed)			\$5.00
Secure Packaging Fee - Breakable Item			\$50.00
Grand Total Excl. Tax			\$747.84
Tax			\$57.16
Grand Total Incl. Tax			\$805.00
Forgot an Item? Edit Your Cart			
Place Order			

Backend Settings

Surcharge on Products		
Enable Surcharge on Products	Yes	[STORE VIEW]
Payment Surcharge Type	Per Order	[STORE VIEW]
Surcharge Description	Secure Packaging Fee - Breakable Item	[STORE VIEW]

Enable Surcharge on Products (v2.3.1+)

When set to Yes, a product surcharge will be enabled.

Payment Surcharge Type (v2.3.1+)

Choose your preferred surcharge type. If you select “per order” and have set up multiple product surcharges, then only the highest surcharge will be applied.

Surcharge Description (v2.3.1+)

Enter the surcharge description that will be visible to the customer – eg. “Secure Packaging Fee - Breakable Item”.

You also need to configure the surcharge individually for each product you wish to apply the surcharge to. Go to **Catalog > Manage Products**, and within the individual product select Prices.

Prices

Price *

750.00

[USD]

Cost

[USD]

Tier Price

Website	Customer Group	Qty	Price	Action
				+ Add Tier

Special Price

[USD]

Special Price From Date

Special Price To Date

Is product available for purchase with Google Checkout

No

Apply MAP

Use config

Display Actual Price

Use config

Manufacturer's Suggested Retail Price

[USD]

Product Surcharge

[USD]

Exclude from Surcharge

No

No Surcharge On Order

No

Product Surcharge (v2.3.1+)

Enter the surcharge you wish to charge - eg. 50 (remember not to add any currency symbols). Only a fixed price surcharge is possible.

Note: The **Exclude from Surcharge** and **No Surcharge On Order** settings (both v3.0.10+) allow you to exclude individual products from having surcharges applied. Refer to [All Surcharge Settings](#) for details.

Exclude individual products from surcharges

If you want to configure any individual products to be excluded from surcharges, go to **Catalog > Manage Products**, and within the individual product select **Prices**.

Prices

Price *

750.00

[USD]

Cost

[USD]

Tier Price

Website	Customer Group	Qty	Price	Action
				+ Add Tier

Special Price

[USD]

Special Price From Date

Special Price To Date

Is product available for purchase with Google Checkout

No

Apply MAP

Use config

Display Actual Price

Use config

Manufacturer's Suggested Retail Price

[USD]

Product Surcharge

[USD]

Exclude from Surcharge

No

No Surcharge On Order

No

Exclude from Surcharge (v3.0.10+)

When set to “Yes”, this product will be excluded from all surcharge calculations you have set up, except any fixed cost surcharges which will apply regardless (eg. \$5 credit card fee).

No Surcharge On Order (v3.0.10+)

When set to “Yes”, when this product is added to the cart, all surcharges will be removed and no surcharge will apply to the order (not even fixed price surcharges).

How do I enter surcharge amounts?

All amounts can be entered as a positive amount (surcharge) or a negative amount (discount) -€" eg. 5 or -5. Amounts should be entered:

- Without any symbols - eg. 5 not \$5 or 5%
- Using a full stop/period sign "." as a separator -€" eg. 5.50 not 5,50

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

Tips for using surcharges

There is no one right way to use surcharges. Every store is different, and you know your customers best. [Check out our blog post](#) for some of our tips on how to use surcharges the right way.

Compatibility & Workarounds

Surcharge is fully multi store capable and can be configured differently for each store.

Can I use Surcharge on Magento Enterprise?

Currently there is no officially supported Enterprise version. Other customers have successfully used the community edition with Magento Enterprise - it's just that this has not yet been fully tested by us, and any Enterprise specific features won't be supported.

Rest assured that our extensions include a 30 day money back guarantee, so feel free to test out the extension on your own development site. If it doesn't work as intended, just let us know and we will refund your purchase.

Is the extension compatible with Magento's default one page checkout?

Yes.

Will Surcharge work with my one step type checkout?

Unfortunately there are a lot of extensions out there which replace the checkout. In our experience the ones we have come across tend to take away too much functionality, i.e. replacing Magento's default without adequately covering what Magento does. If your checkout extension ticks the following boxes chances are good that Surcharge will work out of the box:

1. Upon switching of the payment method the review section reloads
2. Upon switching the credit card type the review section reloads (required if you want to surcharge based on credit card type)
3. Custom Totals are displayed (if the extension also offers an Enterprise version this is a good sign)
4. Custom Totals are displayed using their configured block
5. Settings are honoured (tax inclusive vs tax exclusive settings for the totals are often ignored - see **System > Configuration > Tax**)
6. Authorize.net Directpost is supported (without hacking it)
7. Original layout handles for the checkout steps are honoured
8. Totals sort order is honoured (**System > Configuration > Sales**)

The changes are made in the checkout extension, which is beyond the control of our code which is well-tested against the default Magento checkouts.

Rest assured that our extensions include a 30-day money back guarantee, so feel free to test out the extension on your own development site. If it doesn't work as intended, just let us know and we will refund your purchase.

Is the extension compatible with One Step Checkout by onestepcheckout.com?

Generally yes.

However there is one scenario where Fooman Surcharge and One Step Checkout are not compatible: When using an onsite payment method and applying a surcharge based on credit card type (ie +3% for American Express) - due to the reduced number of checkout steps with One Step Checkout, there is a risk that this surcharge will not be displayed to the customer before the payment is made.

There are no further known incompatibilities.

In order to display surcharge amounts as tax inclusive (when using a taxable surcharge and wanting to display a tax inclusive subtotal on checkout), please use the following workaround when installing Fooman Surcharge:

1. Copy the following file to your own theme folder:

app>design>frontend>base>default>template>onestepcheckout>summary.phtml

2. Around line 93, look for this code:

```
elseif($code == 'grand_total') {  
    $total_name = $this->__('Grand total');  
}
```

3. Add the following code after the code above:

```
elseif($code == 'fooman_surcharge') {  
    $total_name = $total->getTitle();  
    if($checkoutHelper->settings['display_tax_included']) {  
        $fooman_tax = $total->getAddress()->getFoomanSurchargeTaxAmount();  
        $value += $fooman_tax;  
    }  
}
```

Is the extension compatible with MageClub One Step Checkout?

No. Because MageClub One Step Checkout does not recalculate payment totals on change, this means that surcharges will not be displayed.

Is the extension compatible with Paypal, PayPal Express Checkout and PayPal Website Payments Standard?

Yes, if using the payment method code as included in a default Magento install.

Is the extension compatible with Paypal Plus?

Unfortunately Surcharge is not compatible with the last version of Paypal Plus that we tested.

Is the extension compatible with Checkout by Amazon or AmazonPayments (both Creativestyle) ?

No for AmazonPayments.

Yes for Checkout by Amazon. Please use the below workaround when installing Foومان Surcharge with Checkout By Amazon:

1. Edit the following file:

/app/code/community/Creativestyle/CheckoutByAmazon/controllers/CheckoutController.php

2. Look for the following code:

```
foreach ($order->getItemsCollection() as $item) {
    $productId = $this->_getProductId($item);
    if (!$productId) continue;
    $product = Mage::getModel('catalog/product')->load($productId);
    $amazonItem = Mage::getModel('checkoutbyamazon/api_model_checkout_purchaseItem', array(
        'MerchantItemId' => $item->getId(),
        'SKU' => Mage::helper('checkoutbyamazon')->sanitizeSku(
```

```

$item->getSku()),
                'Title' => $item->getName(),
                'UnitPrice' => array('Amount' => Mage::helper('checkout
byamazon')->
>sanitizePrice($item->getBasePriceInclTax())),
                'Quantity' => round($item->getQtyOrdered())
            ));
        $amazonItem->setItemTax($this->_getAmazonPrice($item->getBaseTax
Amount()));
        $itemList->addItem($amazonItem);
        unset($product);
    }

```

3. Directly after the code above, add the following code:

```

if ($order->getBaseFoomanSurchargeAmount() != 0) {
    $amazonItem = Mage::getModel('checkoutbyamazon/api_model_checkout
t_purchaseItem', array(
        'MerchantItemId' => 'surcharge',
        'SKU' => Mage::helper('checkoutbyamazon')->sanitizeSku($ord
er->getFoomanSurchargeDescription()),
        'Title' => $order->getFoomanSurchargeDescription(),
        'UnitPrice' => array(
            'Amount' => Mage::helper('checkoutbyamazon')->sanitizePr
ice($order->getBaseFoomanSurchargeAmount()+$order->getBaseFoomanSurcha
rgeTaxAmount())),
            'Quantity' => 1
        )
    );
    $amazonItem->setItemTax($this->_getAmazonPrice($order->getBaseFo
omanSurchargeTaxAmount()));
    $itemList->addItem($amazonItem);
}

```

Is the extension compatible with Google Checkout?

Google Checkout is currently not supported.

Is the extension compatible with MultiSafepay?

Yes. Please use the following workaround when installing Fooman Surcharge:

1. In: /app/code/community/Mage/Msp/Model/Payment.php find: //End shipping line item

2. Add this straight after it:

```
if ($this->getOrder()->getFoomanSurchargeAmount() != 0) {
    $surcharge_amount_final = number_format(
        $this->getOrder()->getBaseFoomanSurchargeAmount() + $this->ge
tOrder()->getBaseFoomanSurchargeTaxAmount(), 4, '.', ''
    );
    $c_item = new MspItem(
        $this->getOrder()->getFoomanSurchargeDescription(),
        $this->getOrder()->getFoomanSurchargeDescription(),
        1,
        $surcharge_amount_final,
        'KG',
        0
    );
    $c_item->SetMerchantItemId('Surcharge');
    $surcharge_tax_id = 'none';
    if ($this->getOrder()->getBaseFoomanSurchargeTaxAmount()) {
        $surcharge_tax_id = $shipping_tax_id; //uses the same as shi
pping adjust if necessary
    }
    $c_item->SetTaxTableSelector($surcharge_tax_id);
    $this->api->cart->AddItem($c_item);
}
```

Is the extension compatible with Cart2Quote?

Yes - [Cart2Quote](#) is compatible out of the box with Fooman Surcharge. Surcharges are integrated into the total blocks of Cart2Quote. For more information, please visit the [Cart2Quote blog post](#).

Is the extension compatible with the Paymill extension?

No.

Is the extension compatible with GoMage Light Checkout?

Fooman Surcharge v2.2.10+ is compatible with GoMage Light Checkout v5.1+.

There is a workaround if you want to use the giftwrap feature of GoMage Light Checkout together with Fooman Surcharge (this workaround is limited to GoMage Light Checkout v5.1+ only, not other versions):

1. Edit /app/code/local/GoMage/Checkout/etc/config.xml
2. Remove:

```
<order_invoice>
  <totals>
    <gomage_gift_wrap>
<class>gomage_checkout/order_invoice_total_giftwrap</class>
    <after>subtotal,shipping</after>
    <before>grand_total</before>
    </gomage_gift_wrap>
  </totals>
</order_invoice>
<order_creditmemo>
  <totals>
    <gomage_gift_wrap>
<class>gomage_checkout/order_creditmemo_total_giftwrap</class>
    </gomage_gift_wrap>
  </totals>
</order_creditmemo>
<quote>
  <totals>
    <gomage_gift_wrap>
<class>gomage_checkout/quote_giftwrap</class>
    <after>subtotal,shipping</after>
    <before>grand_total</before>
<renderer>gomage_checkout/checkout_giftwrap</renderer>
<admin_renderer>gomage_checkout/adminhtml_sales_order_create_totals_g
iftwrap</admin_renderer>
    </gomage_gift_wrap>
  </totals>
</quote>
```

Is the extension compatible with Sage Pay Suite Pro (ebizmarts)?

Yes.

Is the extension compatible with iDEAL (Dutch payment processor)?

Yes. There is one additional step to perform when installing Fooman Surcharge, so that iDEAL can recognise that a surcharge has been applied:

1. Edit the following file: app/code/core/Mage/Ideal/Model/Basic.php
2. Add the following code at line 160:

```
if ($order->getBaseFoomanSurchargeAmount() > 0) {  
    $fields = array_merge($fields, array(  
        "itemNumber".$i => $order->getFoomanSurchargeDescription(),  
        "itemDescription".$i => '',  
        "itemQuantity".$i => 1,  
        "itemPrice".$i => -$order->getBaseFoomanSurchargeAmount()*100  
    ));  
    $i++;  
}
```

Are there any other known extension or payment method conflicts?

While Fooman Surcharge works with most other Magento extensions and payment methods, there are unlimited possible combinations and it is impossible to test them all. The ones that don't work out of the box are most often the ones that look at the individual cart items instead of charging the grand total of the order while neglecting custom totals. In most cases this can be fixed with a small code change in the payment method. Workarounds are provided for the following extensions:

- iDEAL (Dutch payment processor)
- One Step Checkout (by onestepcheckout.com)
- GoMage Light Checkout
- MultiSafepay

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.