

Misc. Fee Setup & Workflow


When you pass a processing fee through to customers, you'll use a Miscellaneous Fee in the DMS to:

- Itemize the fee on Service & Part receipts
- Record a debit, capturing why the additional funds were collected
- Add an accounting line steering this portion of the payment to the desired G/L account

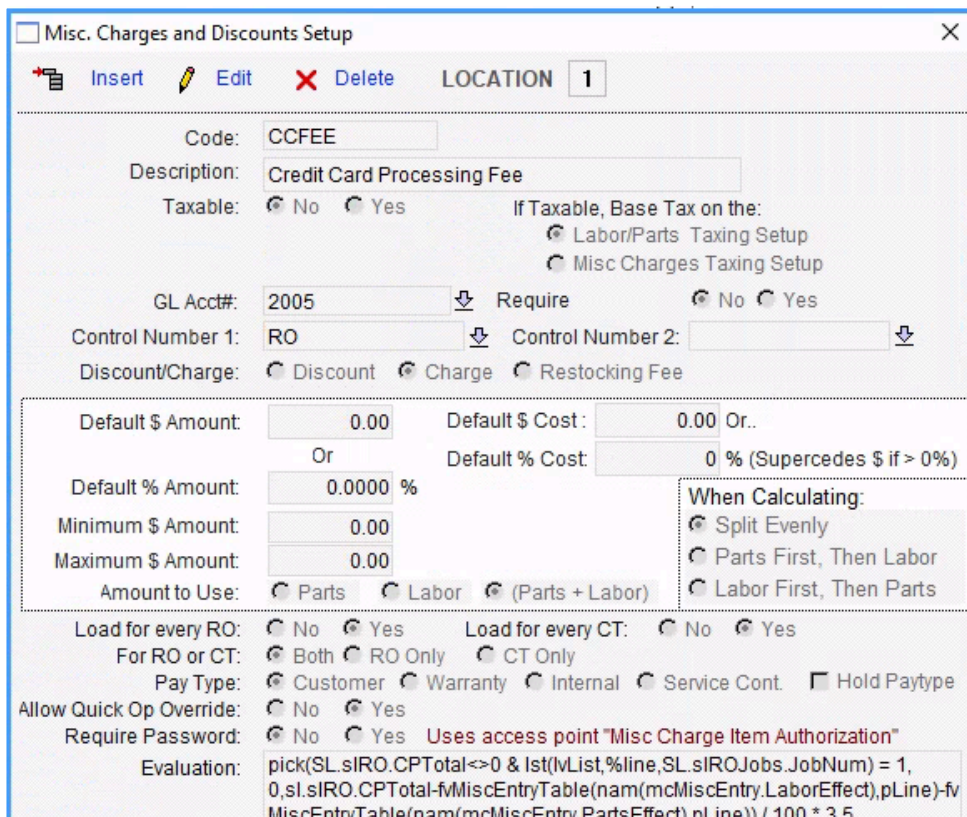
Setup

Processing Fees are unique in that they apply *on top of* all other fees & taxes. The code below will force it to do that – just replace “3.0” with the percentage you wish to pass through to customers. Do not put a percent sign (%) at the end.

```
pick(SL.sIRO.CPTotal<>0 & Ist(IvList,%line,SL.sIROJobs.JobNum) = 1,  
0,sl.sIRO.CPTotal-fvMiscEntryTable(nam(mcMiscEntry.LaborEffect),pLine)-  
fvMiscEntryTable(nam(mcMiscEntry.PartsEffect),pLine)) / 100 * 3.0
```

 This code overrides the *default amount* field.

Then, copy/paste the code into the *Evaluation* field of your Miscellaneous Fee:



Misc. Charges and Discounts Setup

Insert Edit Delete LOCATION 1

Code: CCFEE
Description: Credit Card Processing Fee
Taxable: No Yes
If Taxable, Base Tax on the:
 Labor/Parts Taxing Setup
 Misc Charges Taxing Setup
GL Acct#: 2005 Require No Yes
Control Number 1: RO Control Number 2:
Discount/Charge: Discount Charge Restocking Fee

Default \$ Amount: 0.00 Default \$ Cost: 0.00 Or..
Or Default % Cost: 0 % (Supercedes \$ if > 0%)
Default % Amount: 0.0000 %
Minimum \$ Amount: 0.00
Maximum \$ Amount: 0.00
Amount to Use: Parts Labor (Parts + Labor)
When Calculating:
 Split Evenly
 Parts First, Then Labor
 Labor First, Then Parts

Load for every RO: No Yes Load for every CT: No Yes
For RO or CT: Both RO Only CT Only
Pay Type: Customer Warranty Internal Service Cont. Hold Paytype
Allow Quick Op Override: No Yes
Require Password: No Yes Uses access point "Misc Charge Item Authorization"
Evaluation: pick(SL.sIRO.CPTotal<>0 & Ist(IvList,%line,SL.sIROJobs.JobNum) = 1, 0,sl.sIRO.CPTotal-fvMiscEntryTable(nam(mcMiscEntry.LaborEffect),pLine)-fvMiscEntryTable(nam(mcMiscEntry.PartsEffect),pLine)) / 100 * 3.5

Workflow

To add the Misc. Fee to Repair Orders & Counter Tickets, there are a few strategies:

1. Add it manually after payment

The cashier adds it after they take a credit card payment. They can do so from the Totals window and the Counter Ticket window.

2. Automatically add when ROs & Counter Tickets are created

This requires cashiers to *remove* it when the customer pays with a method not subject to the processing fee. Some additional setup is required:

- a. On the Misc. Charge, pick *Yes* for *Load for every RO & CT*
- b. Under your Payments Settings, there's a setting that ensures you're not double-charging the processing fee. Enter the code for this Misc. Charge here:

Misc. Charge Code Added by DMS ⓘ

Save