

TECH-2u Page | 1 of 2

Category	Technical
Course	POS Config.
Version	1.1
Client	Generic
Software	2.18.6.39

Hints and Tips

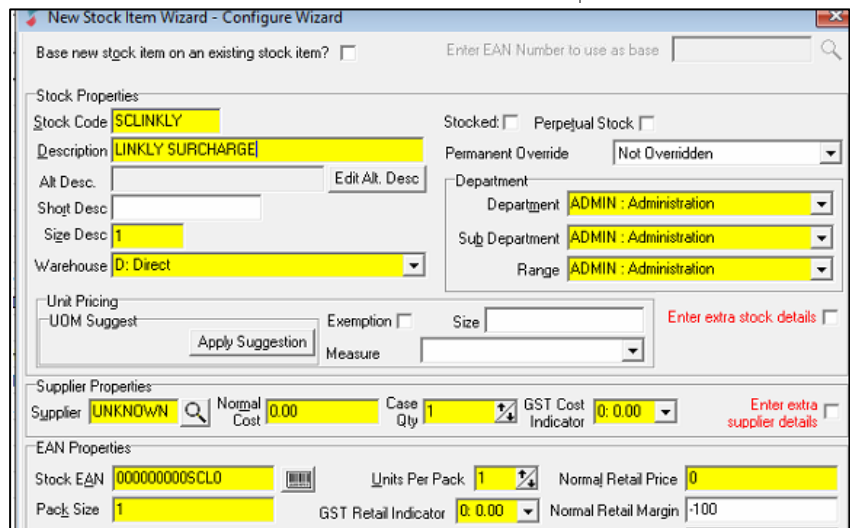
- ✓ Contact the Linkly Support Team if you're not sure if the software on your terminal supports surcharging.
- ✓ Each terminal in your store needs to have the surcharge enabled. Do this manually on each POS lane.
 - Alternatively, the surcharge can be pushed to all terminals via a registry file update. Contact Surefire Support for instructions your I.T department can action, or to raise a chargeable CR to set and distribute the update to all terminals.
- ✓ A surcharge is an additional amount added on top of the final EFTPOS purchase amount. You can only pass on what it costs your business to process that specific type of payment.
- ✓ Refer to the latest information from the ACCC to understand the rules for charging a surcharge.
- ✓ If you want to set the same surcharge for all payment types, it must not be more than the lowest surcharge you would set for a single payment type.
- ✓ The surcharge gets calculated off the total transaction amount. This means that when the transaction includes items which attract GST, the surcharge is calculated off the GST-inclusive price.
 - GST is apportioned on the surcharge, based on the total taxable amount relative to the overall purchase amount.

Configure a Credit Card Surcharge

You can configure POS to add a transaction-based surcharge, through a Linkly surcharge-compatible terminal.

Procedure to Configure Surcharge Through Linkly Terminals

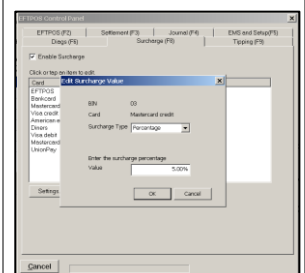
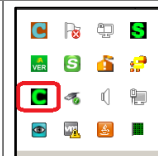
1. Create a generic stock record for capturing the surcharge in the sales daily.dat files.
 - *Set cost, retail, and GST to 0.00, and use an admin type department.*
 - *Whilst there is no specific report for surcharge collected, this EAN will report in sales reports, GST collected report (as applicable), and the Transaction Journal.*
 - *The EAN is entered at step 3.*



2. Complete the following steps to activate and specify the surcharge on the Linkly terminal.
 - a. On the POS Lane, double-click the **EFTPOS Icon [C]** in the System Tray.
 - b. On the Linkly Client GUI, click **Ctrl Panel...**
 - c. Click the **Surcharge** tab.
 - d. Click the **Enable Surcharge** check box.
 - e. Click the card you want to add a surcharge for.
 - f. Select the required Surcharge Value option:

To set a surcharge:	then:
The same amount for every customer	Select Fixed . Type the amount in cents (no decimals).
Based on a percentage of the transaction	Select Percentage . Type the amount.

 - *I.e. a fixed amount of 100 = \$1.00. You can set between 0.01% and 99.99%.*
 - g. Click **OK** to save.
 - h. Repeat for any other cards, as required.
 - i. Exit back and **Close** the GUI.



Hints and Tips

- ✓ NOTE: the top section of the Credit Card Surcharge section is not used, now that it's handled via Linkly. This will be removed in a future release.
- ✓ If you're a Head Officer user, the saved POS configuration is transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
- ✓ The POS configuration is applied to the registers when **File Transfer/POS Import** next runs (usually every few minutes).
- ✓ There isn't a specific report on credit card surcharge income. You can run the Department Details report for the surcharge stock code/s.
- ✓ POS only applies a surcharge when the card is presented on the EFTPOS terminal (PINPad). All messaging and approval is done through the terminal.
 - If the customer presses Cancel, the transaction will return to the POS payment screen to select an alternative tender.
 - If no surcharge is available, the terminal will complete the EFTPOS payment without prompting about a surcharge.
- ✓ Surcharge showing on the receipt:

Description	Total \$
LARGE STRAWBERRIES	25.00
RC02	
SUB TOTAL (Inc GST)	\$25.00
EFTPOS Surcharge	\$1.25
TOTAL (Inc GST)	\$26.25
1 Item	
Paid by EFTPOS	\$26.25
12345678 12345678 DEBIT CARD	
531355 222 Savings	
PURCHASE SAUD 25.00	
SURCHARGE SAUD 1.25	
TOTAL EFT SAUD 26.25	
EXPIRES .90	
RRN 300079100	
TRANS. APPROVED	

3. Complete the following steps to set the surcharge options:
 - a. From the HOS/BOS System menu, select **Location Setup**.
 - b. If a Head Office user, select the Location that you want to define.
 - c. *You'll be defining the configuration for all stores at and below the level that you select.*
 - d. Double-click the **Configure** icon.
 - e. Click the **Tender | Surcharge** tab.



In the Linkly Surcharge section:

Note: The top Credit Card Surcharge section is never used, now that Surcharge is via Linkly.

- f. In **EAN associated with this surcharge**, type the EAN you created in step 1.
- g. In **Surcharge Description**, type the text to print on the customer receipt next to the surcharge amount, and show in the backend daily.dat reports.

Note: The daily.dat displays it as [Surcharge – your Description] i.e. Surcharge – Mastercard.
- h. Click **Save**.
- i. Click **Yes** to continue
- j. Click **OK**.
- k. Click **Close** to exit Location Setup screen.

The screenshot shows the 'Surefire POS System Configuration v2.18.6.39' window. The 'Credit Card Surcharge' section is active, with a checkbox for 'Enable Card Surcharge' checked. Below it is a table with columns: DynaKey Pos, EAN, Card Name, Add Surcharge, Surcharge %, and Charge If Below \$. The table contains 7 rows, all with '0.00' in the last two columns. Below the table is a 'Linkly Surcharge' section with a note: 'Note: Linkly Surcharge is enabled and configured in the Linkly Control Panel under the 'Surcharge' section.' There are input fields for 'EAN associated with this surcharge' and 'Surcharge Description'.

