

Upgrade Information

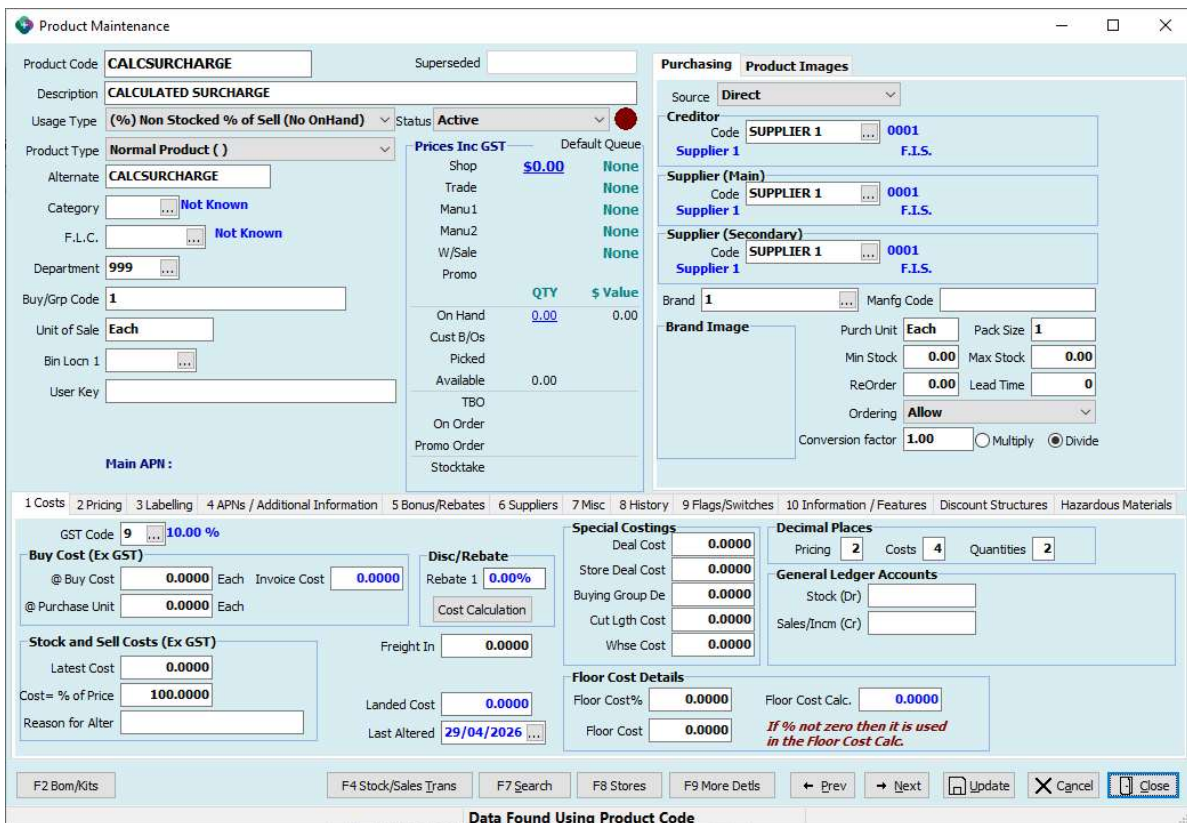
Release: June 2026

Calculated Surcharges

The Calculated Surcharge feature automatically adds a surcharge line to your point-of-sale documents. The surcharge is calculated as a percentage of the document value and is fully managed by the system – it recalculates automatically whenever you make changes to the document.

Product Setup

Before enabling the feature, you must create a dedicated product in the Product Master for the surcharge line



Important: The surcharge product must not be configured as part of contracts, kit products, package products, quantity price breaks, or alternate units of measure. It must exist as a standalone product only.

Each store can have its own surcharge product code, allowing store-specific GL posting.

How the Surcharge is Calculated

Formula

Surcharge (Ex GST) = Surcharge % × Eligible Line Total (Ex GST, after discounts)

GST on Surcharge = Surcharge (Ex GST) × Weighted Average GST Rate

What is the "Eligible Line Total"?

The eligible line total includes all product lines on the document except:

- The surcharge line itself
- Products in excluded departments
- Products in excluded FLCs
- Lines with zero or negative quantity

GST Handling

GST on the surcharge is calculated proportionally based on the GST mix of the underlying product lines:

- If all products have 10% GST, the surcharge gets 10% GST
- If all products are GST-free, the surcharge gets zero GST
- If the document has a mix, the surcharge GST is weighted proportionally

Surcharge Line Behaviour in the Grid

The surcharge line appears as the last row on the document and has these characteristics:

- Displayed in grey italic text to distinguish it from regular product lines
- The description column appears as a blue underlined link – click it to view the calculation breakdown
- **Not editable** – the columns cannot be edited, but the cursor can land on the row so the operator can press DEL to remove it. Once removed, the system will not re-add the surcharge for the rest of the document session; entering the surcharge product code again resumes automatic management.
- **Not affected by global discounts** – the surcharge line is excluded from document-wide discount operations
- **Adjustment notes** – even in Yes - Auto mode the surcharge is never added automatically to an adjustment note (refund/credit). The operator must enter the surcharge product code manually if a surcharge line is required, which prevents a refund being silently increased by an automatic surcharge. Once entered manually, the line is maintained the same as on any other document.

The screenshot shows a 'Point of Sale' window titled 'Tax Invoice'. At the top right, a large red box displays the total amount of \$17.34. Below this, a summary shows 'Ex GST 15.78' and 'GST 1.56'. The main grid contains two rows:

Product Code	Description	Qty	Price Inc	Uom	Dsc %	Req'd	Extension	%
5659131	12V BRUSHLESS ROTARY HAMMER & HAMMER	1	17.16	Each		29-04-26	17.16	I
CALCSURCHARGE	<u>CALCULATED SURCHARGE</u>	1	0.18	Each		29-04-26	0.18	K

The surcharge row is highlighted in yellow and its description is underlined in blue. The window also shows customer information (000001, Cash Sales), date (29/04/2026), and a 'Bin=1' label.

Viewing the Calculation Breakdown

You can view a detailed breakdown of how the surcharge was calculated by clicking on the surcharge line's description in the document grid. The description appears as a blue underlined link.

Clicking it opens the Surcharge Calculation Breakdown window, which shows:

- Every product line on the document with its value (ex GST) and GST amount
- Each line's department and FLC
- Whether each line is Included or Excluded (with the reason – department or FLC)
- The calculated surcharge contribution for each included line
- The GST on each line's surcharge contribution
- Totals showing the eligible base, total surcharge, and total surcharge GST

Product	Description	Department	F.L.C.	Value (Ex GST)	GST	Surcharge	Surcharge GST	Status
5659131	12V BRUSHLESS ROTARY HAMMER	001	1	15.6000	1.56	0.16	0.02	Included
	Eligible Total			15.6000	1.56			
	Surcharge (1.00%)			0.1600	0.02	0.16	0.02	Total: 0.18

Setup Guide

Navigate to POS Setup → Client (System) → Options tab. You will find the Calculated Surcharge group box containing all configuration settings.

The screenshot shows the 'Point of Sale' software interface. The 'Options' tab is selected, and the 'Calculated Surcharge' group box is highlighted with a red border. The configuration options are as follows:

- Enable Calculated Surcharge: **Yes**
- Surcharge Product Code: **CALCSURCHARGE**
- Percentage: **1**
- Only Debtor Accounts: **No**
- Delivery Only: **No**
- Include COD Customers: **No**
- Exclude Departments (pipe separated): **016|002**
- Exclude FLCs (pipe separated):

At the bottom of the window, there are buttons for 'F3 Search', 'Reload', 'Apply', 'Save', and 'Close'.

Configuration Settings

Setting	Description
Enable Calculated Surcharge	Master switch. Set to No to disable the feature completely, Yes - Auto to have the surcharge line added and maintained automatically on eligible documents, or Yes - Manual to leave automatic addition off and require the operator to enter the surcharge product code on each document. Once a line has been entered in manual mode, the system still recalculates its value as the document changes.
Surcharge Product Code	The product code to use for the surcharge line. This must match a product you have created in the Product Master.
Percentage	The surcharge percentage to apply. For example, enter 10 for a 10% surcharge.
Account Types	Restricts which customer types are eligible for the automatic surcharge. Choose All accounts to apply to every customer, Debtor Accounts Only to limit automatic addition to debtor (account) customers, or Cash Customers Only to limit it to cash sale customers. This setting replaces the previous separate "Include COD Customers" option.
Delivery Only	When set to Yes, the surcharge is only applied when a delivery-type product is present on the document.
Exclude Departments	A pipe-separated list of department codes to exclude from the surcharge calculation. Example: 10 20 30
Exclude FLCs	A pipe-separated list of FLC codes to exclude from the surcharge calculation. Example: HARDWARE PAINT