

Payment Fee for Magento 2

User Guide

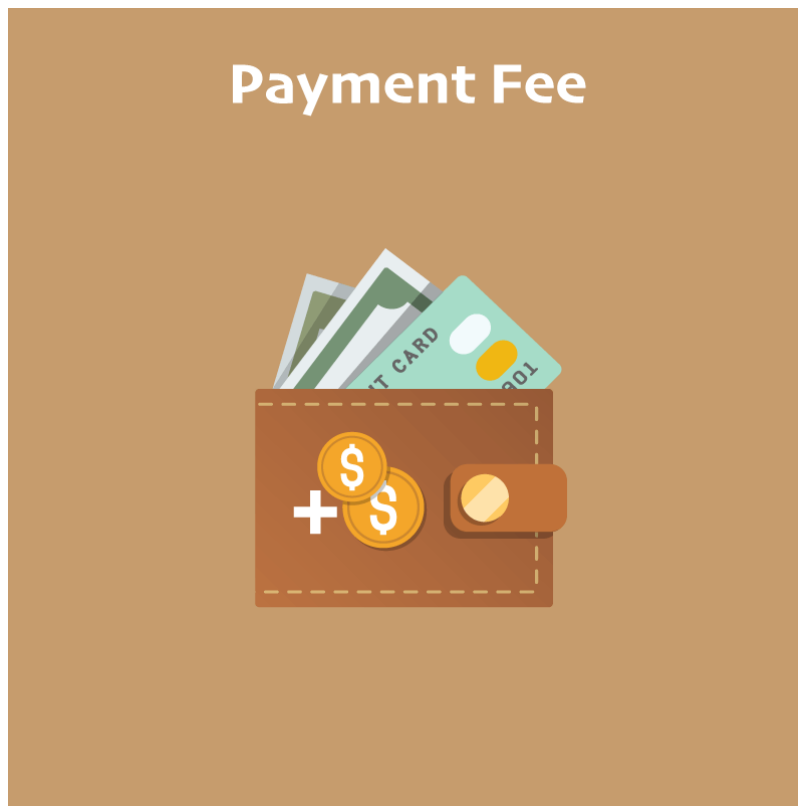


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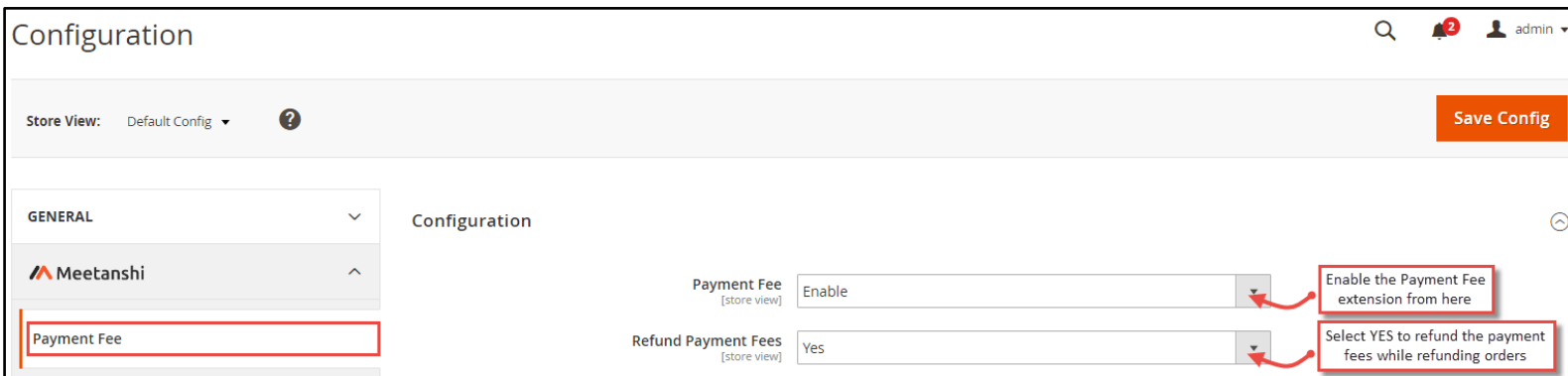
1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/PaymentSurcharge
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/PaymentSurcharge via FTP.
- Login to your SSH and run below commands step by step:
 - php bin/magento setup:upgrade
 - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
 - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
 - php bin/magento cache:flush

2. Configuration

For configuring the extension, login to Magento 2, move to **Stores** → **Configuration** → **Payment Fees** where you can find various settings to enable the extension.

- **Payment Fee:** Enable the Payment Fee extension from here.
- **Refund Payment Fees:** Set YES to refund the fees while refunding orders.



The screenshot shows the Magento 2 Configuration page for the Payment Fee extension. The 'GENERAL' tab is selected, and the 'Payment Fee' section is expanded. The 'Payment Fee' dropdown is set to 'Enable', and the 'Refund Payment Fees' dropdown is set to 'Yes'. Red boxes highlight these settings with arrows pointing to callout text: 'Enable the Payment Fee extension from here' and 'Select YES to refund the payment fees while refunding orders'. A 'Save Config' button is visible in the top right corner.

3. Tax Settings

From here, you can configure tax settings to add tax on payment fees.

- **Apply Tax for Payment Fees:** Select YES to apply tax on payment fees.
- **Set Tax Class for Payment Fees:** Select the tax class for payment fees.
- **Display Payment Fees:** Select how you want to display payment fees with the tax on the frontend.



The screenshot shows the Magento 2 Tax Settings page. The 'Apply Tax for Payment Fees' dropdown is set to 'Yes', the 'Set Tax Class for Payment Fees' dropdown is set to 'Taxable Goods', and the 'Display Payment Fees' dropdown is set to 'Including and Excluding Tax'. Red boxes highlight these settings with arrows pointing to callout text: 'Set YES to apply tax on payment fees', 'Select tax class for the payment fees', and 'Select display option for payment fees'.

- **Assign Tax Class to Products**

Once you have selected the tax class to apply on payment fees, make sure to assign the same tax class to the products. It will then calculate tax on payment fee.

Woodland Import Black Leather Belt 🔍 🔔 6 👤 admin

Store View: All Store Views ? ← Back Add Attribute Save

Enable Product [website] Yes

Attribute Set

Product Name * [store view]

SKU * [global]

Price * [global]
[Advanced Pricing](#)

Tax Class [website] ⌵

Quantity [global]
[Advanced Inventory](#)

Stock Status [global] ⌵

Make sure to assign the same tax class as selected in the "Set Tax Class for Payment Fee" under the "Tax Settings" to the products, to calculate tax on payment fee

4. Manage Payment Fees

The extension facilitates a backend grid where all the payment fee details are saved. Go to **Sales** → **Manage Payment Fees** to see the list of already created and saved payment fees. Any new payment fee can be added by clicking the “**Add New Fee**” button. Admin can activate or deactivate any payment fees for Magento 2 store from here.

Manage Payment Fees

All the added and saved payment fees enlisted here

Payment-Fee

Click to add new fee
→
Add New Fee

Search

Reset Filter

Actions

2 records found

20 per page

1 of 1

▾	ID	Fee Name	Fee Amount	Fee Type	Payment Methods	Store View	Customer Groups	Status
Any ▾								▾
<input type="checkbox"/>	2	COD charges	10.00	Percent	Offline - Cash On Delivery	Main Website Main Website Store Default Store View	NOT LOGGED IN General Wholesale Retailer	Active
<input type="checkbox"/>	1	Offline Payment Fee	5.00	Percent	Offline - Check / Money order	All Store Views	NOT LOGGED IN General Wholesale Retailer	Inactive

5. Add New Fee

On click of the “**Add New Fee**” button from “**Manage Payment Fees**”, you can see the following settings to add a new payment fee.

- **Fee Title:** Add payment fee title.
- **Status:** Set the status to enable to activate the payment fee.
- **Amount:** Add the fee amount.
- **Fee Type:** Select the fee type from the dropdown.
- **Payment Methods:** Select the payment methods to apply fee on.
 - **Store View:** Select the store view.
 - **Customer Groups:** Select the customer groups to enable payment fees for.

New Fee

 1  Payment-Fee

[← Back to register or connect an account](#)

[Reset](#)

[Save and Continue Edit](#)

[Save Fee](#)

PAYMENT FEE INFORMATION

Fee Info 

Payment Fee Information

Fee Title * Fee on COD

Add payment fee title

Status * Enabled

Select to enable this fee

Amount * 10

Add fee amount

Fee Type * Percent

Select fee type

Payment Methods *
Amazon Pay
Credit Card (Braintree)
Credit Card Direct Post (Authorize.net)
Offline - Bank Transfer Payment
Offline - Cash On Delivery
Offline - Check / Money order
Offline - No Payment Information Required
Offline - Purchase Order
PayPal (Braintree)
Paypal - Credit Card

Select payment methods to apply fee on

Store View *
All Store Views

Main Website

Main Website Store

Default Store View

Select the store view

Customer Groups *
NOT LOGGED IN

General

Wholesale

Retailer

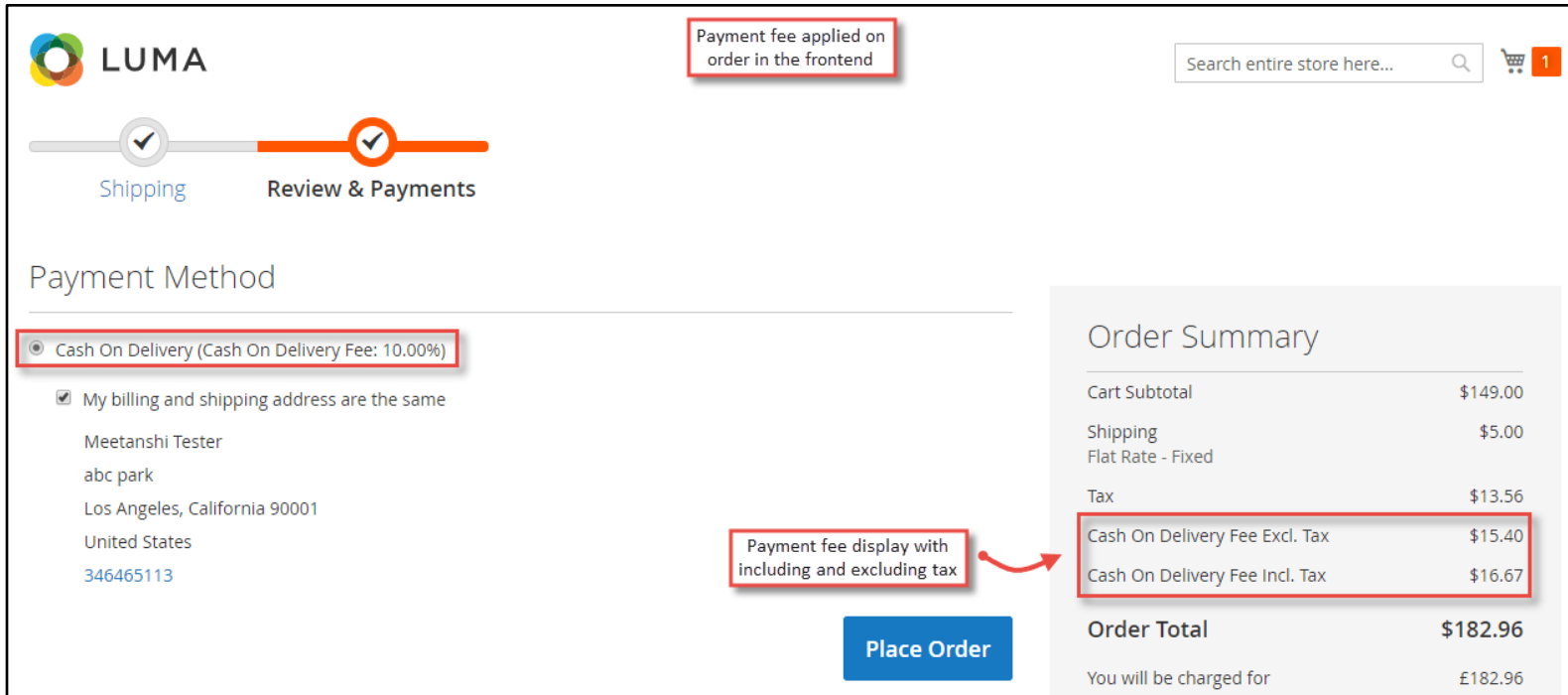
Select customer groups to enable payment fee for

6. Payment Fee in Frontend

Once configured, the payment fee gets applied on the order in frontend.

- **Payment Fee Applied on Order in Checkout Page**

Customers can see the payment fee applied on order on the checkout page in frontend. Here, the Cash on Delivery payment method is selected and hence its fee is charged and added to the order total. Also, tax is applied on the payment fees based on the settings and it's displayed based on the selected option.



The screenshot shows the checkout page for 'LUMA'. The progress bar indicates that 'Review & Payments' is the current step. Under 'Payment Method', 'Cash On Delivery (Cash On Delivery Fee: 10.00%)' is selected. A checkbox for 'My billing and shipping address are the same' is checked, and the shipping address is displayed. The 'Order Summary' on the right lists the cart subtotal, shipping, tax, and the cash on delivery fee, both excluding and including tax. A 'Place Order' button is visible at the bottom.

Payment fee applied on order in the frontend

Search entire store here...

Shipping **Review & Payments**

Payment Method

Cash On Delivery (Cash On Delivery Fee: 10.00%)

My billing and shipping address are the same

Meetanshi Tester
abc park
Los Angeles, California 90001
United States
346465113

Payment fee display with including and excluding tax

Place Order

Order Summary

Cart Subtotal	\$149.00
Shipping Flat Rate - Fixed	\$5.00
Tax	\$13.56
Cash On Delivery Fee Excl. Tax	\$15.40
Cash On Delivery Fee Incl. Tax	\$16.67
Order Total	\$182.96
You will be charged for	£182.96

- **Payment Fee in My Account**

The extension also displays the payment fee details in order view section under “**My Account**”, as shown below.

My Account

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

Billing Agreements

My Product Reviews

Newsletter Subscriptions

Order # 000000009

PENDING

January 21, 2020

Payment fee details in customer's My Account section in frontend

[Reorder](#) [Print Order](#)

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Woodland Import Black Leather Belt	Woodland Import Black Leather Belt	\$149.00	Ordered: 1	\$149.00
				Subtotal
				\$149.00
				Shipping & Handling
				\$5.00
				Grand Total
				\$182.96
				Tax
				\$13.56
				Cash On Delivery Fee Excl. Tax
				\$15.40
				Cash On Delivery Fee Incl. Tax
				\$16.67
				Grand Total to be Charged
				£182.96

Compare Products

You have no items to compare.

Recently Ordered

Woodland Import Black Leather Belt

[Add to Cart](#) [View All](#)

Order Information

Shipping Address	Shipping Method	Billing Address	Payment Method
Meetanshi Tester abc park Los Angeles, California, 90001 United States T: 346465113	Flat Rate - Fixed	Meetanshi Tester abc park Los Angeles, California, 90001 United States T: 346465113	Cash On Delivery (Cash On Delivery Fee: 10.00%)

7. Payment Fee in Order View Backend

After the successful order, payment fee details can also be seen in the **Sales → Orders → Order View** in the backend.

#000000009 ← Back Cancel Send Email Hold Invoice Ship Reorder Edit

Payment Fee details in order view backend

Payment & Shipping Method

Payment Information

Cash On Delivery (Cash On Delivery Fee: 10.00%)
The order was placed using USD.

Shipping & Handling Information

Flat Rate - Fixed £5.00 [\$5.00]

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Woodland Import Black Leather Belt <small>SKU: Woodland Import Black Leather Belt</small>	Ordered	£149.00 [\$149.00]	£149.00 [\$149.00]	Ordered 1	£149.00 [\$149.00]	£12.29 [\$12.29]	8.25%	£0.00 [\$0.00]	£161.29 [\$161.29]

Order Total

Notes for this Order

Status: Pending

Comment:

Notify Customer by Email
 Visible on Storefront

Submit Comment

Order Totals

Subtotal	£149.00 [\$149.00]
Shipping & Handling	£5.00 [\$5.00]
Tax	£13.56 [\$13.56]
Cash On Delivery Fee Excl. Tax	£15.40 [\$15.40]
Cash On Delivery Fee Incl. Tax	£16.67 [\$16.67]
Grand Total	£182.96 [\$182.96]
Total Paid	£0.00 [\$0.00]
Total Refunded	£0.00 [\$0.00]
Total Due	£182.96 [\$182.96]