



Stripe Surcharge

Set-Up & User Guide

PULSE®

Stripe Surcharge Overview

The surcharge feature allows practices to pass on credit card processing fees to pet owners.

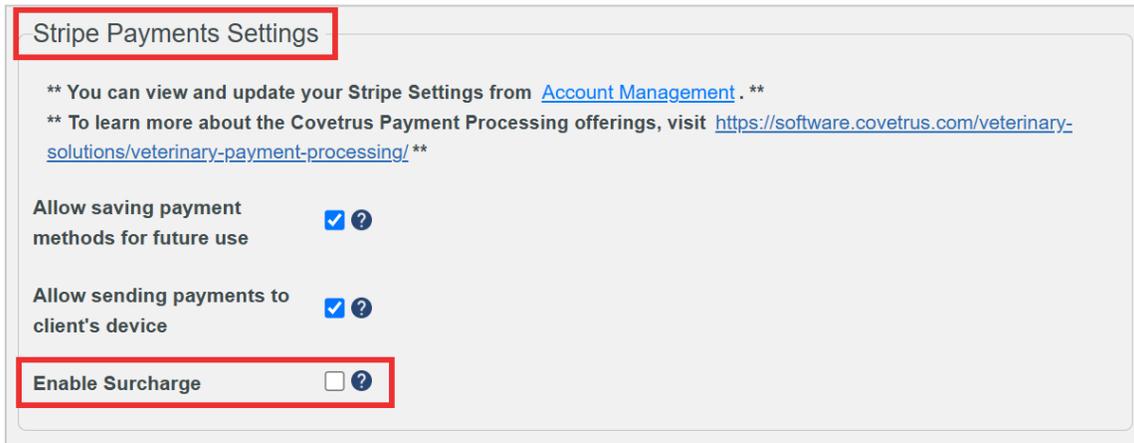
When this option is enabled, a calculated payment processing fee is added to the total invoice cost.

Credit card surcharges may be restricted or prohibited in some states. Before enabling this feature, please review the relevant laws in your state to ensure compliance.

Merchants are required to notify Mastercard 30 days prior to the start of surcharging. To notify Mastercard, visit <https://www.mastercard.us/en-us/surcharge-disclosure-webform.html> and complete the form.

Enabling the Surcharge Feature

- To enable the Surcharge feature, go to **Settings > Billing > Payments > Stripe Payments Settings**.
- Ensure the option for **Enable Surcharge** is checked.



Stripe Payments Settings

** You can view and update your Stripe Settings from [Account Management](#) . **

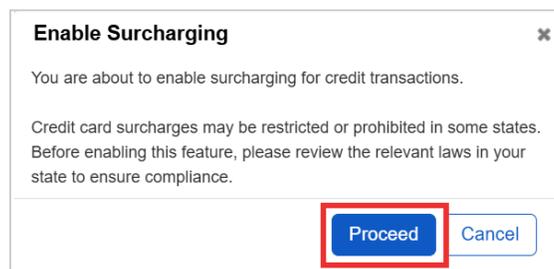
** To learn more about the Covetrus Payment Processing offerings, visit <https://software.covetrus.com/veterinary-solutions/veterinary-payment-processing/> **

Allow saving payment methods for future use ?

Allow sending payments to client's device ?

Enable Surcharge ?

- A message will appear, alerting the user to check relevant local laws before proceeding.
- Click **Proceed**, to enable the surcharge.



Enable Surcharging

You are about to enable surcharging for credit transactions.

Credit card surcharges may be restricted or prohibited in some states. Before enabling this feature, please review the relevant laws in your state to ensure compliance.

Proceed Cancel

STRIPE SURCHARGE SET-UP & USER GUIDE

- A new field will appear after enabling the surcharge, where the **Surcharge Percentage Fee** is entered as a **whole number**.



Enable Surcharge ?

Surcharge Percentage Fee



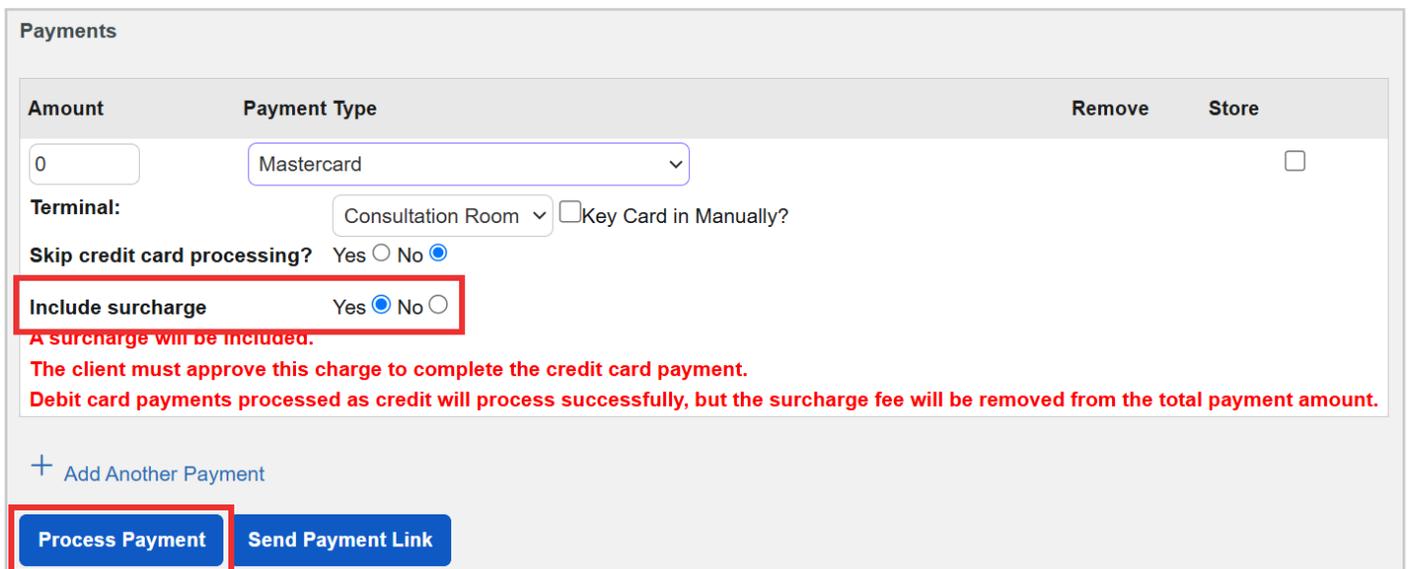
The maximum surcharge rate is 3%. The system will disregard additional surcharge values above 3%.

- When complete, **save** the changes.

Processing a Card with a Surcharge

To process a credit card with a surcharge, within the Payments section choose the correct terminal, payment type and enter the payment amount.

- Ensure the **Include Surcharge** button is selected.
- Then click **Process Payment**.



Payments

| Amount | Payment Type | Remove | Store |
|--------------------------------|--------------|--------|--------------------------|
| <input type="text" value="0"/> | Mastercard | | <input type="checkbox"/> |

Terminal: Key Card in Manually?

Skip credit card processing? Yes No

Include surcharge Yes No

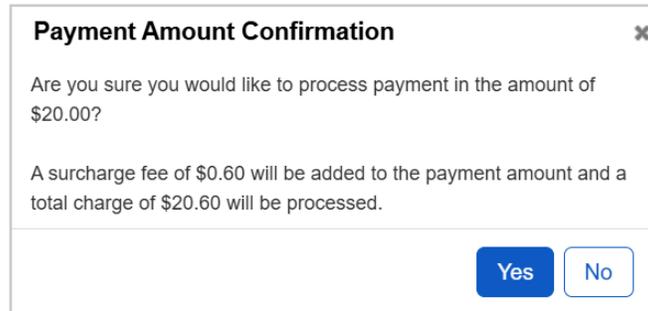
A surcharge will be included.
The client must approve this charge to complete the credit card payment.
Debit card payments processed as credit will process successfully, but the surcharge fee will be removed from the total payment amount.

+ Add Another Payment

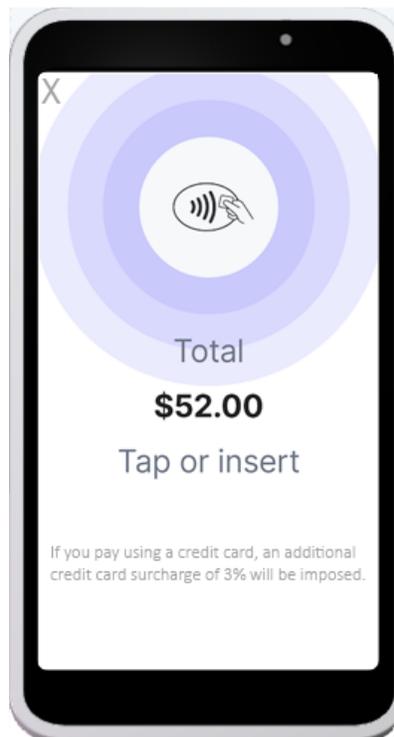
Process Payment Send Payment Link

STRIPE SURCHARGE SET-UP & USER GUIDE

- A Payment Amount Confirmation dialog will display the amount of the payment, the surcharge, and the total amount to be processed.



- If you'd like to waive the surcharge for a client, click **No** to return to the payments section where you can select to not include the surcharge. To proceed click **Yes**.
- The Stripe reader will prompt the customer to **tap or swipe their card** and display surcharge notification at the bottom of the card reader.



- If the client does not wish to accept the charges, they will simply click on the **X** in the upper left corner of the Stripe device screen.



When proceeding with the payment, the client acknowledges that they are accepting the surcharge, and the total amount will be processed.

STRIPE SURCHARGE SET-UP & USER GUIDE

- After the payment is approved the device will display the surcharge amount added to the total price of the invoice.
- The surcharge will be included on the receipt printed from within Pulse along with the payment type, the last 4 digits of the credit card, and the transaction ID.

| Return Items | |   |
|------------------------------|--|---|
| Practice | Erin's Zoo (demo site) DZ | |
| Receipt Number | 846 | |
| Payment Entry Date | 11/27/2024 2:18 PM | |
| Description | Payment on 11/27/2024 for services rendered by Erin's Zoo (demo site) DZ | |
| Amount Paid | \$108.15 (Transaction Amount \$105.00 + Surcharge Amount \$3.15) | |
| Payment | Discover \$105.00 Payment detail/Refund | |
| | Surcharge Amount: \$3.15 | |
| | Total Amount: \$108.15 | |
| | Last 4 of Credit Card: 9969 | |
| Transaction Id | pi_3QPqI4IEHp17O2Te1KAPy63G | |
| Cashier | Christmas F. | |

Refund with Surcharge

Voiding a Payment with a Refund

Voided payments will return the total invoice amount including the surcharge.

Partial Surcharge Refund with Returned Items

The prorated surcharge amount is included in the refund amount. For example, with a 3% surcharge, a \$30 surcharge was applied to a \$1000 invoice for a total payment of \$1030. A \$100 item was returned, the total refund amount is \$103 which includes \$3 surcharge.

If the returned item(s) amount is less than the invoice's balance, the refund amount will not include surcharge.

- This is done by using the **Return Items** option which allows Pulse to calculate the pro-rated surcharge amount accordingly.

STRIPE SURCHARGE SET-UP & USER GUIDE

[Return Items](#)  

Receipt Number 97

Payment Entry Date 12/10/2024 6:12 PM

Description Payment on 12/10/2024 for services rendered by Farm Veterinary

Amount Paid **\$476.87** (Transaction Amount \$462.99 + Surcharge Amount \$13.88)

Payment Visa \$462.99 [Payment detail/Refund](#)

Surcharge Amount: \$13.88

Total Amount: \$476.87

Last 4 of Credit Card: 9969

Transaction Id pi_3QUaiglWDSYOecFX19CCCDQj

- To do this enter the **return quantity** and **return notes** then click **Calculate Refund Amount**.

Return Transaction

Refund Payment to Credit on Account

Return Notes

Instructions:

- Enter return notes above (required).
- Enter the return quantity for each item. Leave zero in quantity for items that are not being returned.
- Click "Calculate Refund Amount" at the bottom. The monetary amount to be returned will be displayed at the bottom.
- If you need to return quantity back to inventory, check off the box to return to inventory.
- Verify all is correct and press "Process Return"

| Patient | Description | Date | Price | Return Quantity | Return to Inventory | Quantity | Sub-Total | Tax | Total |
|---|---|------------|----------|--------------------------------|---------------------|----------|-------------------|--------|-------------------|
| Waffle | Professional Services 1 | 11/20/2024 | \$572.99 | <input type="text" value="0"/> | | 1 | \$572.99 | \$0.00 | \$572.99 |
| | | | | | | | \$572.99 | | \$572.99 |
| Balance carried over at the time of purchase | | | | | | | (\$100.00) | | (\$100.00) |
| Amount to return: \$0.00 | | | | | | | \$472.99 | | \$472.99 |

Calculate Refund Amount **Process Return**

- The amount to return will display in red below the charges including the calculated surcharge fee.
- When ready click **Process Return** and click **Yes** on the confirmation message.

STRIPE SURCHARGE SET-UP & USER GUIDE

| Patient | Description | Date | Price | Return Quantity | Return to Inventory | Quantity | Sub-Total | Tax | Total |
|---------|---|------------|--------|--------------------------------|---------------------|----------|------------|--------|------------|
| Waffle | Professional Services 1 | 11/20/2024 | \$0.00 | <input type="text" value="1"/> | | 1 | \$0.00 | \$0.00 | \$0.00 |
| | | | | | | | \$0.00 | | \$0.00 |
| | | | | | | | (\$100.00) | | (\$100.00) |
| | | | | | | | \$0.00 | | \$0.00 |

Balance carried over at the time of purchase (\$100.00) (\$100.00)

Amount to return: \$586.87 (includes surcharge fee of \$13.88) \$0.00 \$0.00

[Calculate Refund Amount](#) [Process Return](#)

- The return transaction will then be displayed within the client's payment history.
- The refund amount will be applied as credit to customer's account.