Credit Card Surcharge for TDO Payments

1014 TDOKB3 August 29, 2025 TDO software 3.85K

Overview

Users can add an optional credit card surcharge to help offset processing costs by selecting a fixed percentage and also choosing when to apply it. The surcharge amount is automatically calculated in the Receive Payment window and clearly itemized in the patient ledger and the receipt. Please see the attention notice below and verify local rules before enabling.

Attention:

Surcharging regulations vary by state and are also subject to card brand rules. While our software provides tools that allow you to add a surcharge, it is **your responsibility as the merchant** to ensure compliance with all applicable laws and card network requirements.

We strongly recommend that you consult with your **merchant services provider** and/or a qualified legal advisor before enabling surcharges in your system.

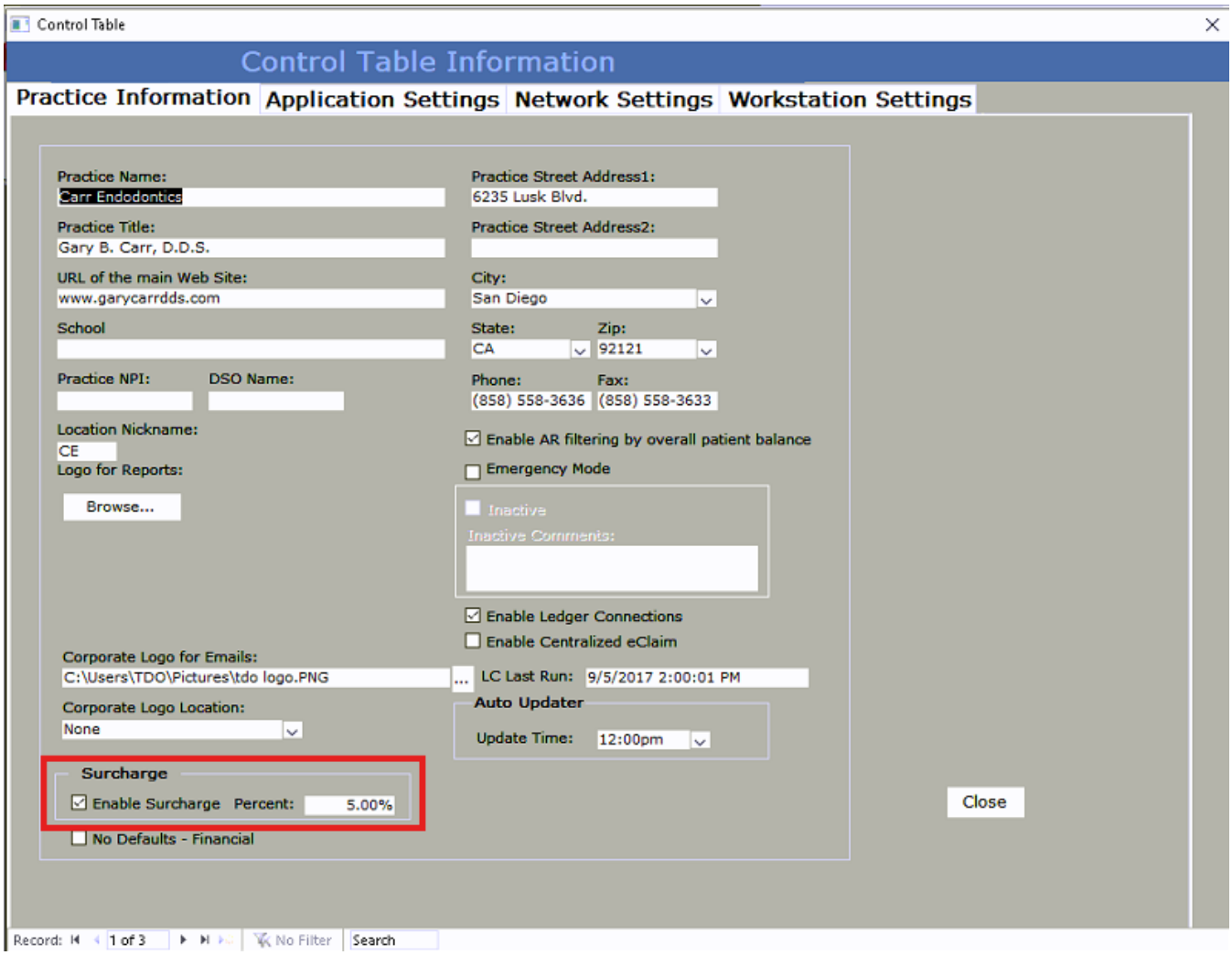
Requirements

TDO Payments

TDO-12 version 12.482c or higher

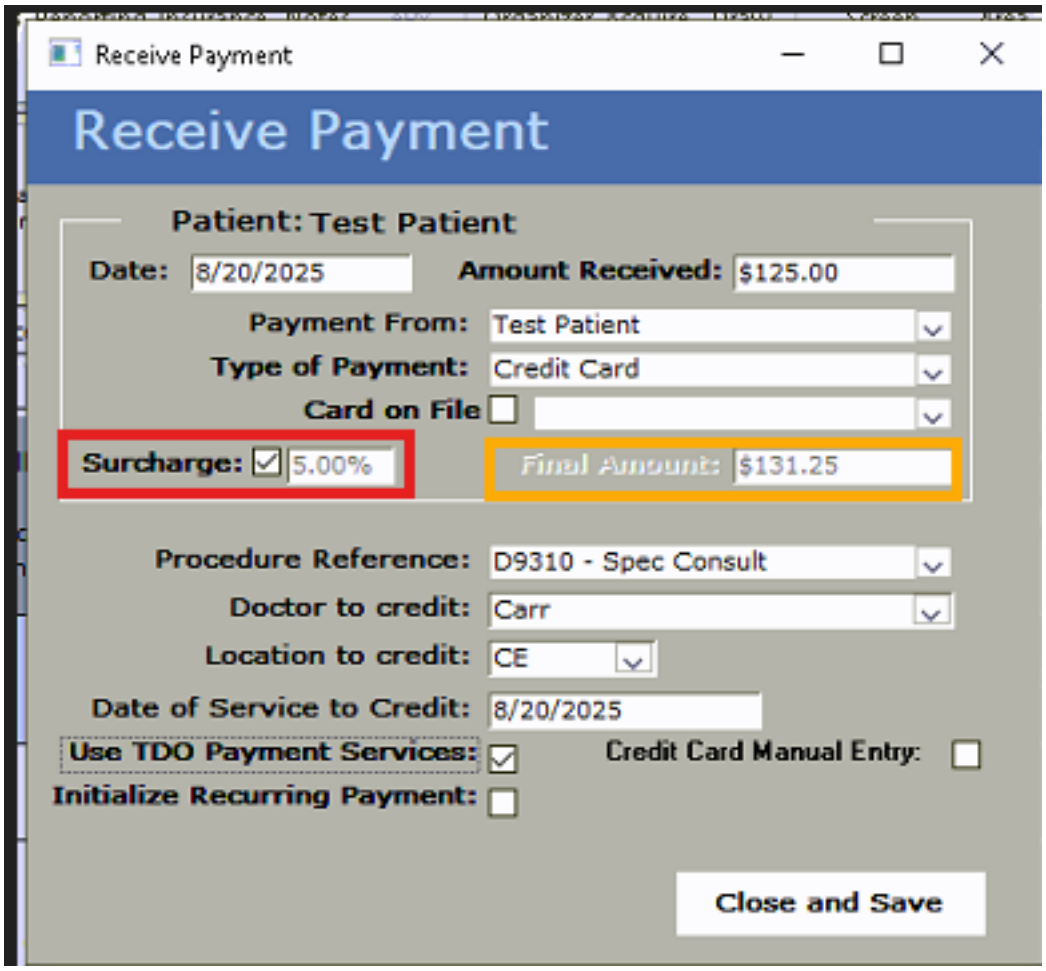
Configuration

Go to Setup > Site Configuration > Edit Control Table to enable/disable surcharge or adjust the percentage.



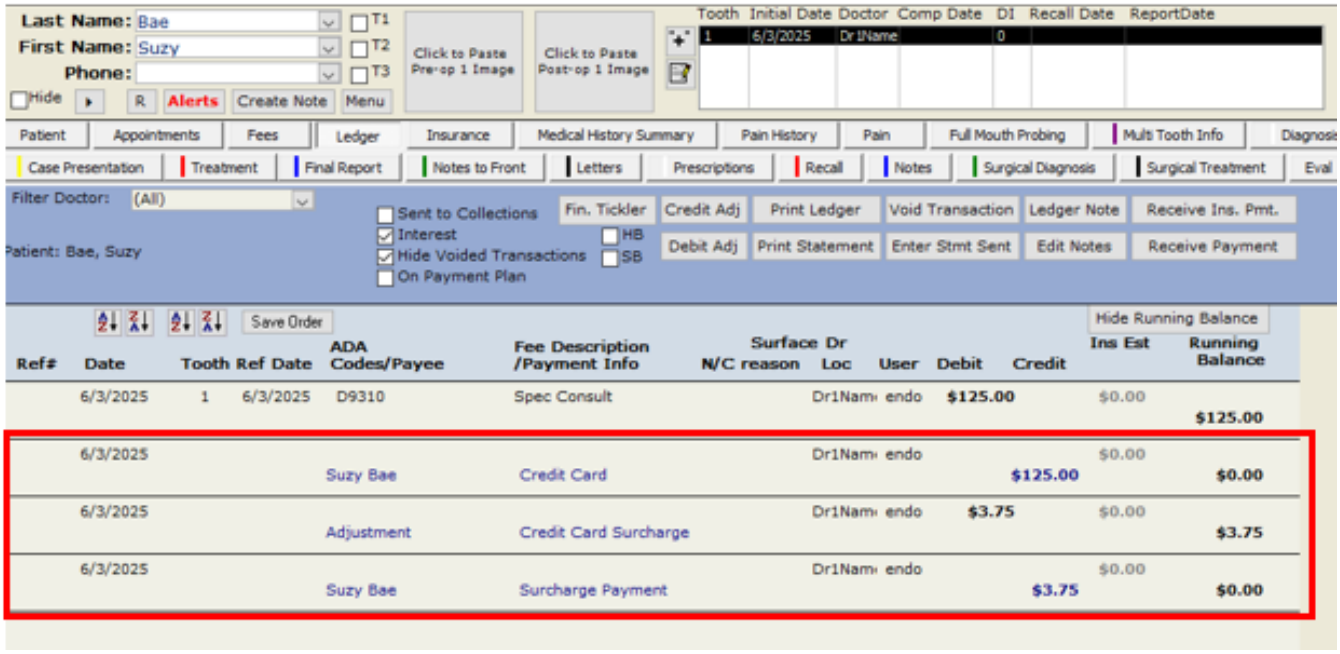
Receiving Payment

The Receive Payments window from the patient ledger will now show a box for surcharge and automatically calculate the final amount.
The box for surcharge will be enabled by default if surcharge is enabled in the Control Table.
The percentage and final amount box is not editable from the Receive Payment window.



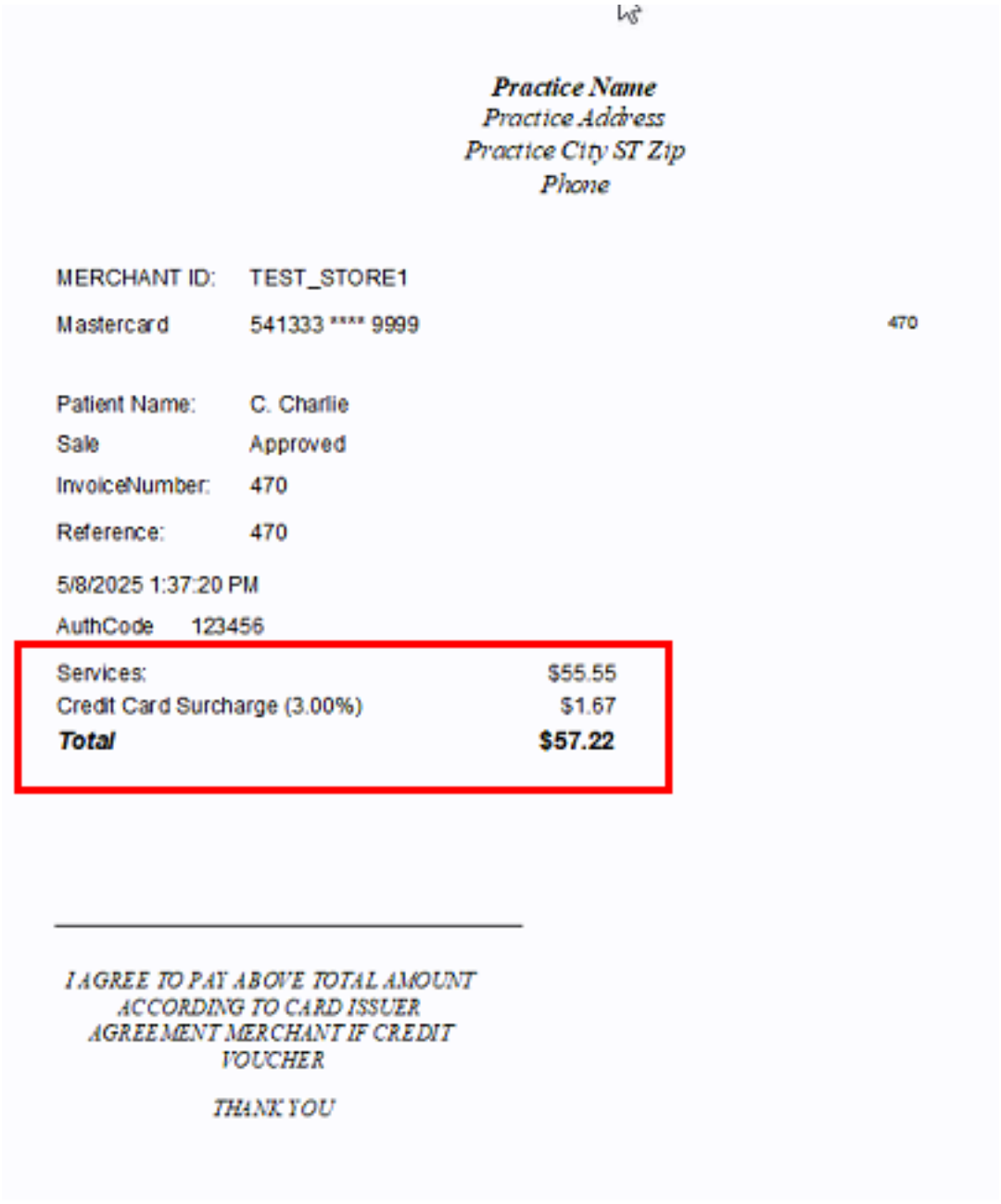
Ledger

Transactions with a surcharge will automatically itemize in the patient ledger and include three rows.



Receipt

The receipt will include the surcharge percentage and the surcharge fee for the transaction.



Practice Name
Practice Address
Practice City ST Zip
Phone

MERCHANT ID: TEST_STORE1
Mastercard 541333 **** 9999 470

Patient Name: C. Charlie
Sale Approved
InvoiceNumber: 470
Reference: 470

5/8/2025 1:37:20 PM
AuthCode 123456

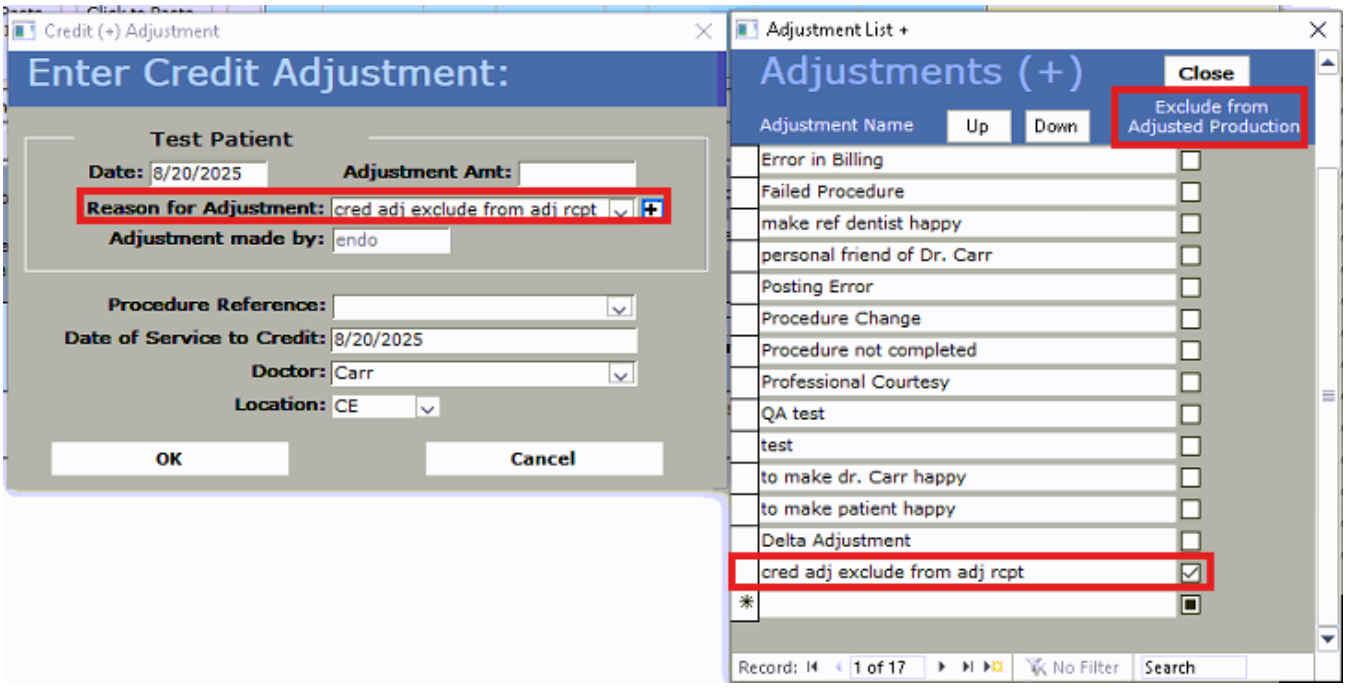
Services:	$55.55
Credit Card Surcharge (3.00%)	$1.67
Total	**$57.22**

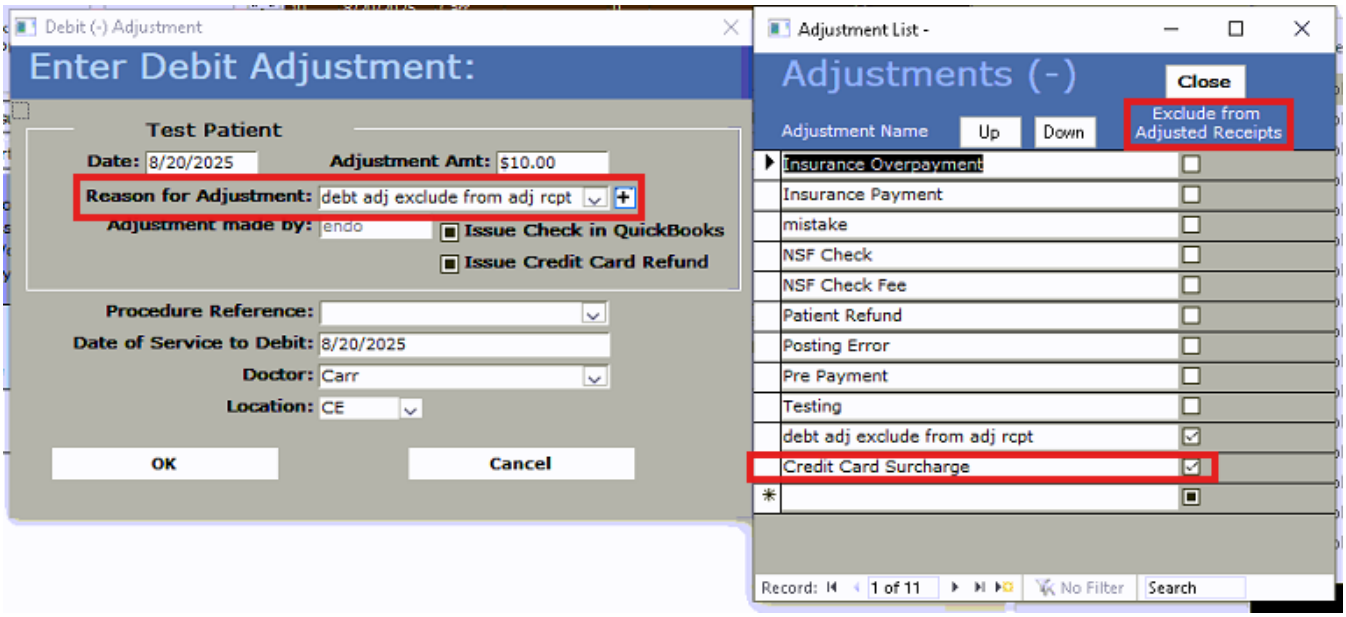
I AGREE TO PAY ABOVE TOTAL AMOUNT ACCORDING TO CARD ISSUER AGREEMENT MERCHANT IF CREDIT VOUCHER

THANK YOU

Credit Adjustment & Debit Adjustment Exclusions

Reason for Adjustments can now be customized so that a specific reason can be excluded from affecting Adjusted Receipts in the financial reports.





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