Pass Fees to Purchaser

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*Fiserv (formerly CardConnect)

When choosing to accept credit card payments, a fee is charged per transaction to the organization. Fees passed and paid by the purchaser are found in the **Transaction** section of the Revenue Report. The collected funds help to offset the fees reflected in the **Adjustment/Fees** column of the Batch Report.

Note: Transaction fees cannot be adjusted once a purchase has been made within a campaign. Transaction fee only refunds cannot be done.

IMPORTANT: Typically, a refund will reflect on the purchaser's card statement within 5 - 7 banking days. <u>Credit card fees are not returned to the organization during a</u> <u>refund; however, when the purchaser opts to pay the credit card fees, those fees will</u> <u>be refunded for the full purchase price + fees to the user.</u>

Transaction fees

Transaction fees can be passed on when users place an order through the**Home** page or when settling their balance through their **Pay** page or **Checkout.**

- Order form: Tickets, instant items, and donations are made in an order form.
- **Checkout and Pay page:** Donate, silent, raffle, instant buy, vote, and live Items purchased outside of an order form.

Select options

- 1. From the **Dashboard** > **Payments** container, click the **More** button ("...").
- 2. Click Settings.
- 3. From **Transaction Fees**, choose how both the order form and checkout and the **Pay** page transaction fees will be covered.
 - Paid by Organization: The organization absorbs all transaction fees.
 - Paid by Purchaser: Users pay all transaction fees.
 - **Optional for Purchaser:** Users have the option to pay.

Transaction Fees When choosing to accept credit card pa be passed on when supporters place an in the Admin view via Users > Checkout.	syments, there is a fee per transaction charged to the organization. The transaction fee: order through the Home page, settle their account using self checkout via the Pay pag Learn More
Order Form [©]	Paid by Organization
	Applies to the order form accessed by clicking the button on the Home page and customized within the Design Center.
Checkout and Pay Page	Paid by Organization Paid by Purchaser Optional for Purchaser

Processing fee

When fees are passed, the **Processing Fee** field is visible. The rate determined by the organization will apply to all transactions, regardless of the card brand. The default is 3.5% but can be adjusted. Our current rates charged to organizations are 3.5% for Mastercard, Visa, and Discover transactions, **and** 3.95% for American Express transactions. Please note that, prior to selecting the processing fee to pass on to your donors,

The user is charged a slightly higher fee, the **Effective Rate**, which is the percentage a user pays to cover the cost associated with the purchase AND the processing fees. Adjusting the processing fee updates the effective rate. Users see the effective rate percent applied when fees are passed to ensure the full purchase or donation amount is received.'

In the Admin New Vid Osers > Checkoo	t. Learn More	
Order Form 🤨	Paid by Organization 🔻	
	Applies to the order form accessed by clicking the button on the Home page and customized within the Design Center.	
Checkout and Pay Page 😣	Paid by Purchaser 👻	
	Applies to self checkout via the Pay page and in the Admin view via Users > Checkout.	
Processing Fee (%)	35	
	Effective Rate: 3.627 % Effective rate is the percentage your donor pays to cover the cost associated with the	

Fee per attendee

When GiveSmart ticketing is activated and fees are pass from an order form, there is an option to pass on a fee per attendee. On newly created campaign sites, the fee per attendee defaults to \$0.00. The fee per attendee is subject to an effective rate.

- 1. Adjust the order form section to either Paid by Purchaser or Optional for Purchaser.
- 2. Set the **Transaction Fee.**

Trar Pleas purch	e indicate th ases paid fo	Fees ne percentag or by credit o	ge to use for the card.	e processing fee	that will apply t
Proc	essing Fee	(%) required			

3. Enter Fee per Attendee. Decimals can be used.

4. Click Ok. 5. When you've finishe	Fee per Attendee Please indicate the per attendee amount to processing fees will apply. Fee Per Attendee 0.00 ed, click Save.	o charge a ticket purchaser. Transaction
Tip: To pass the transaction	n fees only, leave Fee per A	Attendee at the default of \$0.00.
Reason to mod Adjust the default 3.5% proce user is charged a slightly hig (the merchant account) char the transaction.	ify the process essing fee to receive the fu her amount. This is a Give rges 3.5% on the total tran	sing fee Ill amount of the purchase or donation. The Smart feature, not a Fiserv feature. Fiserv saction, regardless of what is included in
Processing Fee (%) required		3.5 Effective Rate: 3.627 % Effective rate is the percentage your donor pays to cover the cost associated with the purchase AND the processing fees.
Visit Batch Report to learn m Below is an example of a \$10 optional or paid by the purch	nore. 0 purchase or donation w haser. \$100 <u>+ 3.627% effective rate</u> \$103.627 (Charged to CC) \$103.627 (processed through M <u>- 3.5% (processing fee)</u> \$100 paid to the Organization	ith a 3.5% Processing Fee. Fees are set to be erchant Account)
Tip: Set the processing fee Rate adjusts to 4.112%, whic	to 3.95% to capture the fu ch applies to all credit card	ll amount at a variable rate. The Effective d purchases.

How optional for purchaser appears

On ticket orders

When an available ticket is selected within an **Order Form**, a checkbox appears in the **Order Summary**. The default is for the purchaser to pay the fees, and it will see it added to their total, but the box can be unchecked, which will update their total.

Note: If transaction fees are Optional for Purchaser, the option to add the fees to a remaining balance is bypassed and purchasers will pay their balance without fees added.

See examples below of the **Order Summary**.

		order oorning	
Tickets		Tickets	
Individual	\$20	Individual	\$2
Price: \$20		Price: \$20	
Qty: 1		Qty: 1	
Attendees per Ticket: 1		Attendees per Ticket: 1	
1 Attendee		1 Attendee	
		۲	
Sirsten Primozic			
		Extras	
Fees		Extras	
Fees Transaction Fees	\$2.28	Extras Fees Transaction Fees	\$0.0
Fees Transaction Fees I will pay the fees	\$2.28	Extras Fees Transaction Fees	\$0.0
Fees Transaction Fees I will pay the fees By paying the transaction fee, yo	\$2.28	Extras Fees Transaction Fees I will pay the fees By paying the transaction fee, y	\$0.0
Fees Transaction Fees I will pay the fees By paying the transaction fee, yo money goes to your organization	\$2.28	Extras Fees Transaction Fees I will pay the fees By paying the transaction fee, y money goes to your organization	\$0.0 ou ensure mor n's mission.
Fees Transaction Fees I will pay the fees By paying the transaction fee, you money goes to your organization	\$2.28	Extras Fees Transaction Fees I will pay the fees By paying the transaction fee, y money goes to your organization Have a discount code? Click he	\$0.0 ou ensure mon n's mission. re to enter it.

For all other orders

Users pay from their **Pay** page and choose to include the fees in their total.

See examples below of the **Pay** page.

Selected

