

Surcharges

23/10/2024 9:55 am BST

The Surcharges screen is used to apply surcharges to a client's account.

Details

The 'Surcharges' screen can be accessed via the Accounts Screen. This screen consists of three tabs which facilitate the surcharging of Clients: 'List Items', 'On Date Range' and 'Monetary'.

Select	Date	InvoiceNo	Description	Surgeon	Qty	Net	VAT	Total	Discount/Credit	Running Balance
<input type="checkbox"/>	29/07/2024 12:53	1015463	Injection site	T Pointer (TPoint...	1.00	4.17	0.83	5.00	0.00	771.23
<input type="checkbox"/>	25/07/2024 12:53	1015463	Dog Health Check & Vaccination ...	T Pointer (TPoint...	1.00	50.00	10.00	60.00	0.00	766.23

List Items tab

This tab is used to surcharge particular items from an invoice number by a percentage.

Surcharging an item

1. Select the item/s you wish to surcharge by placing a tick in the 'Select' column/s.
2. Enter a **Date**, **VAT Code**, **Percentage figure** and a **Description** for the Surcharge.
3. Select the **'Apply'** button to submit the Surcharge.
4. The surcharge transaction will be added to the Client's Account.

Select	Date	InvoiceNo	Description	Surgeon	Qty	Net	VAT	Total	Discount/Credit	Running Balance	Patient	Type
<input checked="" type="checkbox"/>	31/01/2022 13:12	1011673	ACP TABS 10MG 500 (newbatch ...)	Swift User1(Swift1)	10.00	16.81	3.36	20.17	0.00	9,543.03	Bella	Treatment

On Date Range tab

This tab is used to surcharge particular items between a specified date range.

Surcharging an item (between specified dates)

1. Specify your date range using the Dates from and to fields.

2. **Select the item/s you wish to surcharge** by placing a tick in the 'Select' column/s.
3. Enter a **Date**, **VAT Code**, **Percentage figure** and a **Description** for the Surcharge.
4. Select the **'Apply'** button to submit the Surcharge.
5. The surcharge transaction will be added to the Client's Account.

Select	Date	InvoiceNo	Description	Surgeon	Qty	Net	VAT	Total	Discount
<input checked="" type="checkbox"/>	13/09/2024 09:17	1015538	Castrate Cat	T Pointer	1.00	45.68	9.14	54.82	0.00
	09/10/2024	1015559	09/10/2024 16:03	Surcharge - Late payment		0.00	1.00	9.13	1.83

Monetary tab

This tab allows you to surcharge a Client's Account by a monetary value.

Surcharges can be applied by a manual value entered by the user or by a pre-defined value. Pre-defined surcharges can be configured by system administrators. Adding pre-defined surcharges is detailed in '[Accounts Libraries](#)

Manual Surcharges

1. Enter a **Date**, **Description** and **Surcharge Amount**.
2. Select the **'Apply'** button.
3. The surcharge transaction will be added to the Clients Account.

Ins	Date	InvoiceNo	Payment ID	ItemDate	Description	Surgeon	Received	Qty	Net	VAT	Total
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Pre-defined Surcharges

1. Select the **'Pre-Defined Surcharge'** option.
2. **Select a pre-defined surcharge** from the drop-down list.
3. Enter a **Description** for the Surcharge and submit the Surcharge to the Clients account by selecting the **'Apply'** button.

4. The Surcharge transaction will be added to the Clients Account.

List Items

On Date Range

Monetary

Surcharge Properties

Date:08/08/2024

Manual Surcharge

Pre Defined Surcharge

30 Day Surcharge

Gross:5.00

Net:4.17

VAT:0.83

VAT Rate:T1 (20.0)

Description:30 Day Surcharge

Invoice:

Apply