

Customer Order Credit Card Fee Process (SyteLine)

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1. Purpose

The purpose of this process is to outline how customer service representatives apply a Credit Card Fee to applicable customer orders in SyteLine. This process establishes standardized steps to calculate and add a 3% credit card fee as a separate order line based on the total order value, ensuring billing accuracy and compliance with company policy.

2. Scope

This process applies to:

- All Customer Service personnel
- All Customers with credit terms = Credit Card
- All orders requiring a credit card processing fee

3. Definitions

Credit Card Fee – A processing fee charged to the customer for paying an order by credit card, calculated at 3% of the total order value.

Order Value – The total dollar amount of all product lines on the customer order, excluding taxes and freight unless otherwise specified by company policy.

SyteLine – The company’s ERP system used for sales order entry, invoicing, and customer account management.

4. Responsibilities

4.1 Customer Service Representative

- Identify orders requiring a credit card fee placed by customers with Credit Card terms
- Calculate the credit card fee
- Add the fee as a separate order line in SyteLine
- Verify calculations and order totals
- Communicate charges to the customer

4.2 Customer Service Supervisor / Manager

- Ensure team members are trained on this process
- Review orders for compliance and accuracy
- Approve any exceptions or corrections
- Address customer disputes related to fees to Customer Service through the discrepancy process.

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5. Credit Card Fee Requirements

5.1 When to Apply the Credit Card Fee

A credit card fee must be added when:

- Customer payment terms are Credit Card
- Customer is not exempt from credit card fees per contract or agreement

5.2 Fee Calculation

- Credit card fee rate: 3% (0.03)
- Fee is calculated on the total order value at time of entry

Formula:

Total Order Value × 0.03 = Credit Card Fee

- Round according to standard currency rules (two decimal places)

6. Procedure – Adding Credit Card Fee in SyteLine

6.1 Review Order

- Open the customer sales order in SyteLine
- Confirm all product lines, quantities, and pricing are complete

6.2 Calculate the Fee

- Identify the total order value
- Multiply total order value by 3%
- Confirm calculation, Add Credit Card Fee order line at the 3% value for Price

6.3 Add Credit Card Fee Order Line

- Insert a new order line
- Enter the designated **Credit Card Fee** item number
- Enter quantity as 1
- Enter the calculated fee amount as the unit price
- Confirm extended price matches the calculated fee
- Save Customer Order line

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6.4 Verify Order Totals

- Review the updated order to ensure:
 - Credit card fee line is visible and correct
 - Total order value reflects the added fee

8. Documentation and Recordkeeping

- Credit card fees must be documented directly on the Customer Order Line
- Any exceptions or overrides must be noted in order notes
- Records must comply with company document retention policies

9. Training

- All customer service team members must be trained on this process
- Training includes:
 - Fee calculation
 - SyteLine order line entry
 - Customer communication expectations
- Refresher training will be provided as needed

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