

Payments, Taxes & Pricing

Configure payment methods, tax templates, discounts, coupons, surcharges, and cash-versus-non-cash pricing.

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1. Payment Methods

Create, edit, show, or hide the tender types employees use at checkout.

1. Payment Methods

How to create a payment method

Create a payment method for each tender type employees must be able to select at checkout, such as cash, credit card, financing, or another accepted method.

Create the method

1. Open **Settings > Payment Methods**.
2. Select **Create** or **New Payment Method**.
3. Enter a clear name with at least four characters.
4. Choose whether the method should be visible or hidden.
5. Save the payment method.
6. Confirm it appears where employees select payment at checkout.

Naming tips

- Use the name employees already use for the tender.
- Avoid duplicate or nearly identical names.
- Do not use a card-processor name unless that is how the tender should be reported.

How to edit, hide, or retire a payment method

Keep old payment methods available for historical reporting while preventing employees from selecting them for new transactions.

Edit a payment method

1. Open **Settings > Payment Methods**.
2. Select the method to edit.
3. Correct the name or visibility setting.
4. Save the changes.

Hide an old method

Set the payment method to **Hidden** when it should no longer appear at checkout. Hiding is usually safer than deleting because past transactions can continue to reference the original method.

Before changing a method used by an integration, confirm that the processor or accounting workflow does not depend on its existing name.

2. Tax Templates

Create reusable percentage or fixed tax and fee templates.

How to create a tax or fee template

Create reusable tax templates for percentage-based taxes or fixed charges that can be applied to eligible sales and items.

Create the template

1. Open **Settings > Tax**.
2. Select **Create New Tax Template**.
3. Enter a clear template name.
4. Enter a short receipt symbol of up to five characters.
5. Choose **Percentage** or **Fixed amount**.
6. Enter the rate or amount.
7. Review the example calculation.
8. Choose whether the template should apply automatically where assigned.
9. Save the template.

A percentage changes with the taxable amount. A fixed template adds the same amount each time it is applied.

How to review automatic tax application and calculations

Review a tax template before using it so employees and customers see the expected charge.

Check the calculation

1. Open the tax template.
2. Confirm whether it uses a percentage or fixed amount.
3. Review the rate, amount, name, and receipt symbol.
4. Use the displayed example to check the expected charge.
5. Confirm which products or transaction workflows use the template.

Automatic application

When **Apply automatically** is enabled, the template starts selected wherever it has been assigned. When disabled, it remains available but an employee must select it when appropriate.

Tax rules vary by jurisdiction and product type. RepairNest POS provides configuration tools, but the business is responsible for choosing and applying legally correct rates and fees.

3. Discounts and Coupons

Configure reusable discounts, coupon codes, redemption limits, and availability.

How to create a reusable discount

Create a reusable discount when employees need a consistent percentage or fixed reduction at checkout.

Create the discount

1. Open **Settings > Discounts**.
2. Select **Create Discount**.
3. Enter a clear name.
4. Choose **Percentage** or **Fixed amount** and enter the value.
5. Choose where it applies: the subtotal, all products, a group, or a specific product.
6. Configure automatic application and expiration when applicable.
7. Review the example savings.
8. Save the discount.

Use a name that tells employees why the discount exists, such as “10% Loyalty Discount” instead of a generic name.

How to create a coupon code and set redemption limits

Coupons connect a customer-facing code with a configured discount and control when or how often the offer can be used.

Create the coupon

1. Open **Settings > Coupons**.
2. Select **Create Coupon**.
3. Enter the coupon code employees or customers will use.
4. Select the discount connected to the coupon.
5. Choose single use, limited use, or unlimited use.
6. For limited use, enter the maximum number of redemptions.
7. Enter the business cost when applicable.
8. Set the start and expiration date and time.
9. Add a description, then save.

Before publishing a code

- Test the code with an eligible transaction.
- Confirm the start and expiration times use the intended location time zone.
- Make the redemption limit clear in customer-facing advertising.

How to review, edit, or expire discounts and coupons

Review active promotions regularly so outdated discounts or coupon codes do not remain available longer than intended.

Review a promotion

1. Open **Settings > Discounts** or **Settings > Coupons**.
2. Select the record to review.
3. Confirm its value, eligible target, automatic behavior, redemption limit, and availability dates.
4. Correct the configuration or set an appropriate expiration.
5. Save the changes.

Protect profitability

- Avoid overlapping automatic discounts unless stacking is intentional.
- Confirm fixed discounts cannot exceed the eligible sale amount in normal use.
- Retire codes that have been publicly exposed beyond their intended campaign.
- Review reports to understand redemption and business cost.

4. Surcharges

Create percentage or fixed additional charges and define their profit treatment.

How to create a percentage or fixed surcharge

Create a surcharge for an additional transaction charge such as a convenience fee or other supported business charge.

Create the surcharge

1. Open **Settings > Surcharge**.
2. Select **New Surcharge**.
3. Enter a name and short symbol.
4. Choose **Percentage** or **Fixed**.
5. Enter the percentage or amount.
6. Configure how much of the charge is treated as profit.
7. Save the surcharge.

Use a clear customer-facing name. A percentage changes with the sale amount, while a fixed surcharge adds the same amount whenever it is applied.

How surcharge profit settings affect reporting

A surcharge can contain revenue that the business keeps and an amount intended to cover another cost. Profit settings tell RepairNest POS how much of the charge should count as profit.

Configure profit treatment

1. Open the surcharge.
2. Choose percentage-based or fixed profit treatment.
3. Enter the profit percentage or amount.
4. Review the surcharge value and profit value together.
5. Save the changes.

Example

If a charge is collected partly to cover a processing or service cost, counting the entire charge as profit may overstate performance. Configure only the portion the business intends to treat as profit.

Surcharge rules, disclosure requirements, and card-network restrictions vary. Confirm legal and processor requirements before charging customers.

5. Cash Discount and Dual Pricing

Configure supported cash-versus-non-cash pricing programs.

How to configure a cash discount

Cash Discount settings define the adjustment offered for eligible cash payments in supported configurations.

Configure the program

1. Open **Settings > Cash Discount**.
2. Select **Edit** and complete any required authorization step.
3. Enter the program name.
4. Choose a percentage or fixed adjustment.
5. Enter the percentage or amount.
6. Review how the adjustment is applied and whether taxes or debit payments are included.
7. Select **Update**.
8. Test both a cash and non-cash checkout.

Some options are controlled by the configured program or integration and may not be editable from this page.

How to review Cash Discount or Dual Pricing before going live

Before using Cash Discount or Dual Pricing with customers, verify the complete checkout and receipt experience.

Pre-launch checklist

- Confirm the program is enabled for the correct location.
- Verify the percentage or fixed amount.
- Confirm which tender types are treated as cash.
- Review how tax is calculated with the adjustment.
- Test cash, credit, and debit transactions when supported.
- Confirm prices and adjustments are clearly shown at the register and on receipts.
- Train employees to explain the pricing difference accurately.

Cash Discount and Dual Pricing programs may be subject to laws, disclosure rules, and payment-processor requirements. Obtain appropriate guidance before enabling the program.

Payments, Taxes & Pricing overview

Payments, Taxes & Pricing settings define how RepairNest POS accepts money, calculates taxes and fees, applies promotions, and presents cash-versus-non-cash pricing.

What this book covers

- **Payment Methods:** Create tender types and control whether they are visible at checkout.
- **Tax Templates:** Configure reusable percentage or fixed taxes and fees.
- **Discounts and Coupons:** Build promotions, eligible targets, codes, redemption limits, and availability dates.
- **Surcharges:** Configure additional charges and the portion counted as profit.
- **Cash Discount and Dual Pricing:** Configure and test supported cash-versus-non-cash programs.

Before changing financial settings

Test changes with a controlled transaction before using them with customers. Tax, surcharge, cash-discount, and dual-pricing rules vary by jurisdiction and processor, so the business is responsible for confirming compliance and disclosure requirements.

Some sections appear only when the related RepairNest POS module or payment integration is enabled.