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# Custom Fees

Feature Documentation

# About Custom Fees

Custom Fees allow brands to apply add-on fees to certain qualifying baskets at selected stores. Examples of fees that can be created and enabled include Service Fees or Packaging Fees. For flexibility, a brand can set any desired fee label while creating the fee.

Using the Dashboard, it is possible to create a fee, provide a label and tooltip to show the end consumer, and choose qualification criteria to trigger the fee. Fee amounts and taxability can be configured for each store at the time of enablement. Brands can also enable and disable fees for many or all stores at once. Once enabled, customers with qualifying baskets will see the fees on their baskets and order summaries. Fees charged to end consumers will be transmitted to Point-of-Sale.

Custom Fees apply to direct orders placed via Olo front-ends and the Olo Ordering API. Fees do not apply to Rails orders, except for orders placed via Google Food Ordering.

## Triggers

Fees are triggered by a combination of vendor (store location) and handoff mode (e.g. pickup, Dispatch). For example, if a given vendor enables a 5%-of-subtotal fee for Dispatch orders, any Dispatch basket at that vendor will be shown a 5% fee. The total amount of fees are included in the overall basket total shown and billed to end consumers. Fees can also be triggered by all handoff modes at a given vendor.

## Fee Types

Current available fee types include:

- % of Subtotal
- Flat Amount

### **% of Subtotal**

The fee is assessed as a % of the end consumer's basket subtotal. The percentage is configured during fee enablement in Dashboard Settings.

### **Flat Amount**

The fee is a flat amount. The amount is configured during fee enablement in Dashboard Settings.

# Managing Fees for Brands

To create and view existing Custom Fees for a brand, a Dashboard Manager must have Brand Manager permission. Custom Fees must also be enabled for each brand by a Customer Success Manager. Contact Olo if you are unable to locate Custom Fees in the Brand or Settings sections of Dashboard.

## Simple Enablement Workflow

Creating and enabling Custom Fees for vendors is a two-step process:

- First, a fee is created in the Custom Fees Configuration Center under the Brand tab.
- Then, the fee is enabled for one or multiple vendors in the Custom Fees Enablement Center under the Settings tab. The amount and taxability flag should be set on this page prior to enablement.

Follow the screenshots and steps below to configure a fee and enable it on vendors.

## Simple Disablement Workflow

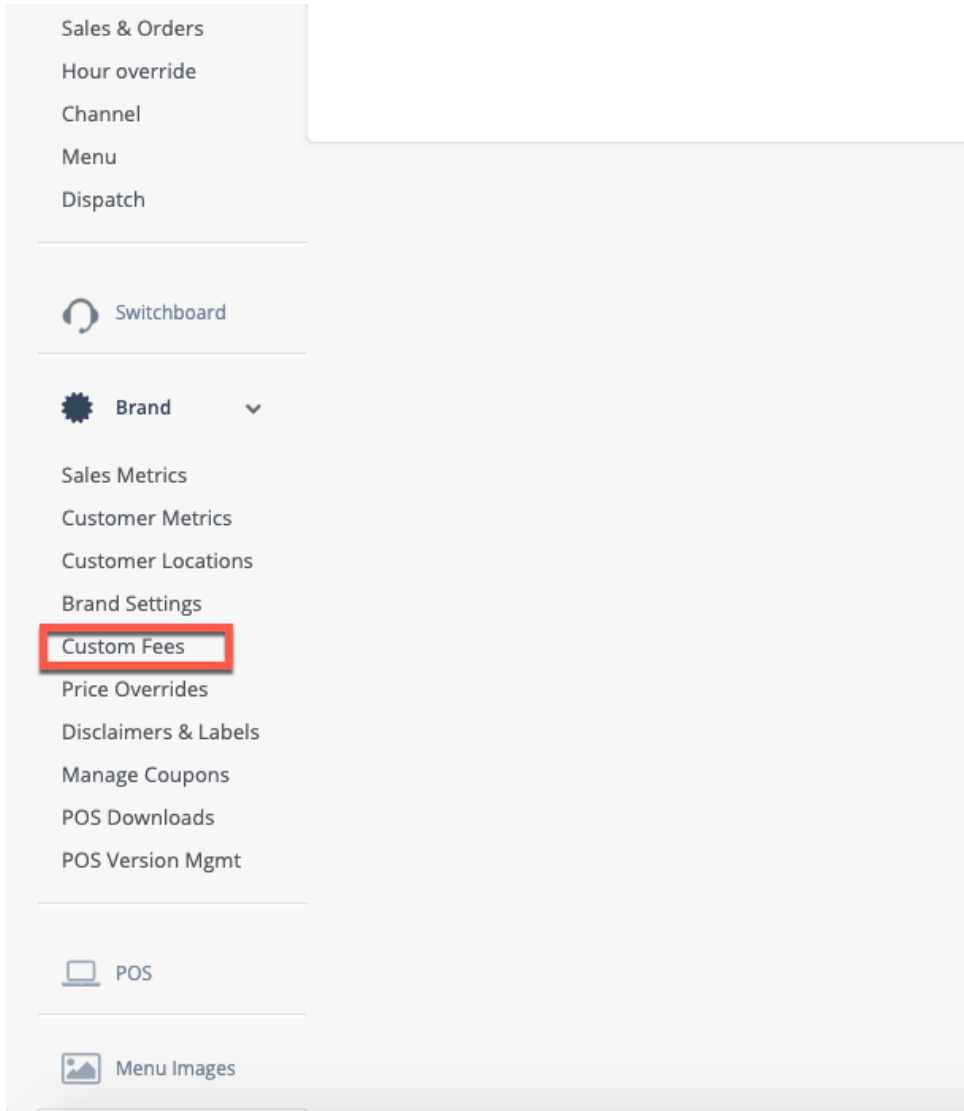
Custom Fee disablement and deletion also follows a two-step process:

- First, disable the fee in the Custom Fees Enablement Center.
- Then, delete the fee in Custom Fees Configuration Center. This action should only be performed if it is no longer desired to show a fee as available for enablement in Custom Fees Enablement Center.

## View Existing Fees in Custom Fees Configuration Center

Users with Brand Manager permission can navigate to Brand > Custom Fees to view existing fees.

1: Navigate to Custom Fees Configuration Center found under the 'Brand' section along the left hand menu



## 2: View existing Custom Fees on Custom Fees Configuration Page under Brand tab

### Custom Fees

Custom fees allow you to charge miscellaneous fees to end users, such as a service or packaging fee.

[+ New fee](#)

4 fees

Internal Label ▾	Handoff Mode	Customer Facing Label	Customer Facing Note	Fee Type	Count Enabled
<input type="checkbox"/> <a href="#">Xpient Custom Fee</a>	Pickup	Customer Label	customerDescription	Flat Fee	1 / 152
<input type="checkbox"/> <a href="#">Test Toast Custom Fee</a>	Pickup	Test Toast Custom Fee	Test Toast Custom Fee... ⓘ	Percentage	0 / 152

# Create a New Fee

Brand Managers can navigate to Brand > Custom Fees and then click “New Fee” to create a new Custom Fee. To create and save a new fee, enter all required fields and click “Save.” POS reference IDs must be specified for fees to be applied to baskets.

## 3: Create a New Fee from Custom Fees Configuration Page

### Custom Fees

Custom fees allow you to charge miscellaneous fees to end users, such as a service or packaging fee.

[+ New fee](#)

4 fees

Internal Label	Handoff Mode	Customer Facing Label	Customer Facing Note	Fee Type	Count Enabled
<input type="checkbox"/> <a href="#">Xpjent Custom Fee</a>	Pickup	Customer Label	customerDescription	Fiat Fee	1 / 152
<input type="checkbox"/> <a href="#">Test Toast Custom Fee</a>	Pickup	Test Toast Custom Fee	Test Toast Custom Fee...	Percentage	0 / 152

## 4: Configure a New Fee

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### Custom Fees

Provide details for this new custom fee.

Internal Name	Customer Facing Label	
Internal Note		
Handoff Mode Pickup	Fee Type Percentage	
Note: Fee amounts/percentages are assigned at the store level.		
POS System	Vendor Count	POS Reference ID
Aloha	8	Value
Brink	7	Value
CBS	3	Value
Expo	5	Value
MicroSale	1	Value
Micro	2	Value

[Cancel](#) [✓ Create Fee](#)

## Brand-level Fee Attributes

Fees can carry the following attributes:

- Customer facing label
  - Required text
  - Use case: The name of the fee to show to end consumers. Featured as a string in Ordering API /baskets responses for websites and apps to display as a label for the line item
  - Example: Service Fee
- Internal name

- Required text
  - Use case: Featured as a label for internal management purposes
  - Example: Service Fee (Fall/Winter)
- Customer facing note
  - Optional text
  - Use case: Featured as a tooltip describing the fee to end users in UIs
  - Example: The Service Fee is kept by the restaurant and enables us to provide you with high quality service and packaging so your food arrives in excellent shape. Always remember to tip your delivery driver!
- Fee type
  - Required selection
  - Use case: Used by Olo to calculate the fee when applicable to the basket
  - Options: percentage of subtotal | flat amount
- Handoff Mode
  - Required selection
  - Use case: Used by Olo to determine if the fee should be applied to a given basket.
  - Example: All Orders | Dispatch Orders | Curbside Orders | etc.
- POS ID
  - Required POS ID
  - Use case: Transmitted to the vendor's POS as the item ID for the fee
  - Example: 12345
  - For SSOS, enter a fake POS ID since the UI currently requires one. Note that the fee details are not transmitted to SSOS at this time.

## Delete a Fee

Fees cannot be restored. Deletions are final. Clicking the trash button and confirming the prompt will result in deletion of a fee.

5: Click the checkbox next to the fee name to delete it in the Custom Fee Configuration Center

### Custom Fees

Custom fees allow you to charge miscellaneous fees to end users, such as a service or packaging fee.

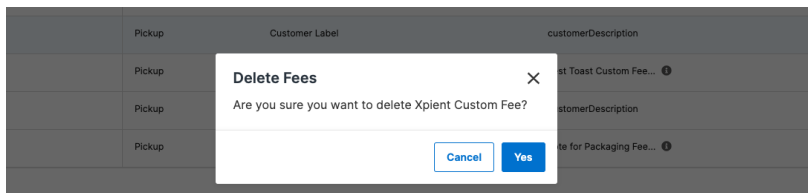
+ New fee

Delete Fee

1 fee selected

Internal Label ▾	Handoff Mode	Customer Facing Label	Customer Facing Note	Fee Type	Count Enabled
<input checked="" type="checkbox"/> Xplent Custom Fee	Pickup	Customer Label	customerDescription	Flat Fee	1 / 152
<input type="checkbox"/> Test Toast Custom Fee	Pickup	Test Toast Custom Fee	Test Toast Custom Fee... ⓘ	Percentage	0 / 152

## 6: Confirm deletion of a fee in Custom Fee Configuration Center



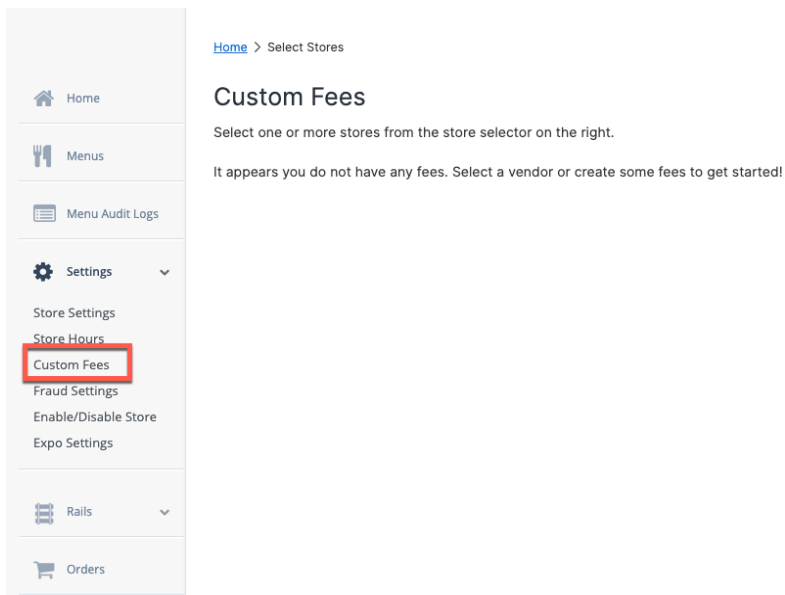
# Managing Fees for Vendors

## View Available Fees

### Vendor Selection

To view fees that are available for enablement, navigate to the Custom Fees Enablement Center under the Settings tab.

## 7: Navigate to Custom Fees in Settings tab



## Summary Page

On the Custom Fees Enablement Center page, all fees available for enablement and disablement are shown. The status of each fee on the selected vendors is also displayed.

## 8: Custom Fees Enablement Center

### Custom Fees

Custom fees allow you to charge miscellaneous fees to end users, such as a service or packaging fee. Custom fees are not applied to Rails orders.

[Change Store Selection >](#)

4 fees

Internal Facing Label	Amount	Fee Type	POS ID	Status	Action
<a href="#">Xpient Custom Fee</a>	\$0.00	Flat Fee		Disabled	<a href="#">Action</a> ▾
<a href="#">Test Toast Custom Fee</a>	0.00%	Percentage		Disabled	<a href="#">Action</a> ▾

## Viewing Custom Fees for Multiple Vendors in Enablement Center

The table will show a value of "Mixed" if the selected vendors do not share certain values. Any changes to amounts, taxability, or enabled/disabled status will update all of the selected vendors.

## Edit Fee Values and Taxability

Clicking the fee name launches a screen where an amount and taxable flag can be set prior to fee enablement. These values can also be changed for fees that are already enabled.

In cases where Olo reads tax amounts from POS, the Taxable flag will impact the estimated tax shown on the basket prior to basket validation and checkout. The final tax from POS will override the estimated tax on checkout. This is the case for most customers.

If the vendor POS does not provide final tax to Olo, then the Taxable flag will be used to calculate final tax. This is uncommon, but consult your CSM and POS Specialist to confirm which scenario is the case for your brand.

## 9: Edit Custom Fee Amounts and Taxable Status

**Edit - Packaging Fee** ✕

Internal Facing Label: Packaging Fee  
Customer Label: Packaging Fee v2

Product Pricing  
\$0.00 %

Taxable   
Toggling this setting on this item will be taxed on the local tax rate.

[Cancel](#) [Save](#)



# Enable/Disable

## Enable/Disable Fees

Under the "Action" heading, fees can be enabled or disabled by choosing the "Action" button next to the desired fee and then selecting Enable or Disable. A confirmation message will be shown to confirm.

### 10: Enable or Disable a fee in Custom Fee Enablement Center

#### Custom Fees

Custom fees allow you to charge miscellaneous fees to end users, such as a service or packaging fee. Custom fees are not applied to Rails orders.

Change Store Selection >

4 fees

Internal Facing Label	Amount	Fee Type	POS ID	Status	Action
<a href="#">Xplant Custom Fee</a>	\$0.00	Flat Fee		Disabled	Action ^
<a href="#">Test Toast Custom Fee</a>	0.00%	Percentage		Disabled	Action v

Enable  
Disable

### 11: Confirm Enablement or Disablement in Custom Fee Enablement Center

The screenshot shows the 'Custom Fees' page with a confirmation dialog box titled 'Enable Fee'. The dialog asks, 'Are you sure you want to enable Dispatch Service Fee - Northwest Market?' and has 'No' and 'Yes' buttons. The background table lists several fees, including 'Dispatch Service Fee' and 'Service Fee Pilot', all currently disabled.

Handoff mode	Internal label	Customer facing label	Amount	Fee type	POS ID	Status	Edit	Action
Dispatch	Dispatch Service Fee			Percentage	Mixed	Disabled		Action v
Dispatch	Dispatch Service Fee			Percentage	2345	Disabled		Action v
Dispatch	Service Fee Pilot			Percentage	Mixed	Disabled		Action v
All Orders	Bag Tax - Chicago stores ONLY	Bag Tax	\$0.00	Flat Fee	Mixed	Disabled		Action v

## Testing Fees

When enabling a new custom fee for the first time, it is considered a best practice to add the fee to a lab vendor and place test orders to confirm that the fee is working as expected. Review both the customer experience and the lab vendor POS to assure that fee details are transmitted properly before enabling it at any live vendors.

# POS Integration

Custom Fees are typically transmitted to POS as items on the check. Below is a breakdown of POS applications currently supported:

- Aloha
- Brink
- Micros (RES, 3700)
- Xpient
- A1
- Positouch
- Toast
- Focus POS
- NCR Silver & NCR Silver Pro
- Revel
- Symphony
- SSOS
- Xenial
- Olo Cloud Generic (available for developers)
- Squirrel's Olo Cloud

Consult with your POS Technical Specialist if you have questions about Custom Fees and how they work with your POS application.

## White Label UI

In Q4 2019, the Olo white label user interfaces will be updated to show Custom Fees to consumers. The implementations are in progress and the below mockups are not final.

### Desktop

Between 6th & 7th St Modify Order

Order Details		Amount
1 x Ch...	Estimated Tax	\$3.00
	Delivery Fee <small>This is paid to the couriers.</small>	\$3.00
Mayo...	Service Fee <small>This is to ensure amazing customer service and food!</small>	\$6.00
Subtot		(1 x \$7.99) = \$7.99
Estimated Taxes & Fees <span style="font-size: 0.8em;">i</span>		\$0.71
<b>Total</b>		<b>\$8.70</b>

## Mobile Web/Responsive

Stuffed  
1 Customize Right/Left  
[+8 more choices](#)

**Foosburgers Rewards**

Estimated Tax	\$3.00
Delivery Fee <small>This is paid to the couriers.</small>	\$3.00
Service Fee <small>This is to ensure amazing customer service and food!</small>	\$6.00
Subtotal	\$0.00
Estimated Taxes & Fees <span style="font-size: 0.8em;">i</span>	\$10.00
Tip	\$5.00

**Place Order \$45.00**

## For Brands With Custom Front-ends

To get started with integrating Custom Fees to your front ends, visit the Ordering API documentation in the Developer Portal. Custom fees can be found in the baskets and orders

resources.

## FAQ

### **Will Custom Fees be compatible with Rails orders?**

Custom Fees are compatible with Google Food Ordering. Rails marketplaces do not use Custom Fees.

### **What is the difference between this feature and the Rails price markup feature?**

Custom Fees allow brands to assess a single, order-level fee for direct orders only. The Rails Markup feature will allow brands to mark up menu prices for Rails orders on a per marketplace basis.

### **Will Olo white-label websites and mobile apps be updated to show customers the Custom Fees on their baskets and during checkout?**

Yes, the Olo desktop and mobile websites currently display Custom Fees to end users. The mobile app will be updated in the first half of 2020.

### **What about Switchboard? Will call center agents be able to see Custom Fees and inform callers about them?**

Yes, the Switchboard application has been updated to show custom fees.

### **If I built a custom front end using Olo's Ordering API, will I need to update it to show Custom Fees? What if I don't?**

Yes, prior to enabling Custom Fees in production, partners will want to update their front ends to include the fees on the basket and at checkout. They will also want to review order confirmation emails and test with POS integration. A sample rollout plan might look like:

- Create Custom Fees in Dashboard on Sandbox
- Enable Custom Fees on a Sandbox lab vendor

- Test custom front end on Sandbox lab vendor
- Deploy item to POS on production
- Test on POS lab vendor in Sandbox (can be done in tandem with step 3 above)
- Create Custom Fees in Dashboard on Production
- Enable Custom Fees on a Production lab vendor
- Test custom front end on Production lab vendor
- Deploy item to POS system wide on production
- Enable Custom Fees on all desired Production vendors

If you don't update your UI to include the fee elements, your basket will function, but the totals shown to the guest won't add up to the total.

**Will I be able to configure different fees for different use cases? For example, I want all orders to include a \$0.07 bag tax but also charge a \$2.00 Service Fee for Dispatch orders.**

Yes, each basket will be able to include as many fees as are appropriate for the basket based on the basket's conditions. For example, if a Dispatch basket is placed at a vendor that has enabled a \$2 Dispatch Service Fee and a \$0.07 bag tax, the user will see \$2 and \$0.07 fees on their basket.

**I have Dispatch and would like to use Custom Fees to cover the excess expense of the Dispatch quoted delivery fee. Can I do that? For example, Dispatch quotes a dynamic delivery fee of \$8.25 for the order. I would like to charge the end consumer a Fixed Delivery fee of \$2.99 plus a Custom Fee of \$5.26 ( $\$8.25 - \$2.99 = \$5.26$ ).**

No, this is not a supported fee type with the initial version of Custom Fees.

# Changelog

**V5: 10.26.2021**

**Changed by: Jenn Thomas**

Updated supported POS section for all POSs that are currently supported

**V4: 1.27.2021**

**Change by: Kevin Chapin**

Updated screenshots to prevent confusion on capabilities

**v3: 4.1.2020**

**Change by: Kenneth Marks**

Added Toast as supported POS application

Updated screenshots and descriptions to reflect changes to the configuration user interface

**v2: 1.23.2020**

**Change by: Kenneth Marks**

Added Positouch as a supported POS application

**v1: 11.6.19**

**Change by: Kenneth Marks**

Initial documentation draft complete