Surcharge Setup

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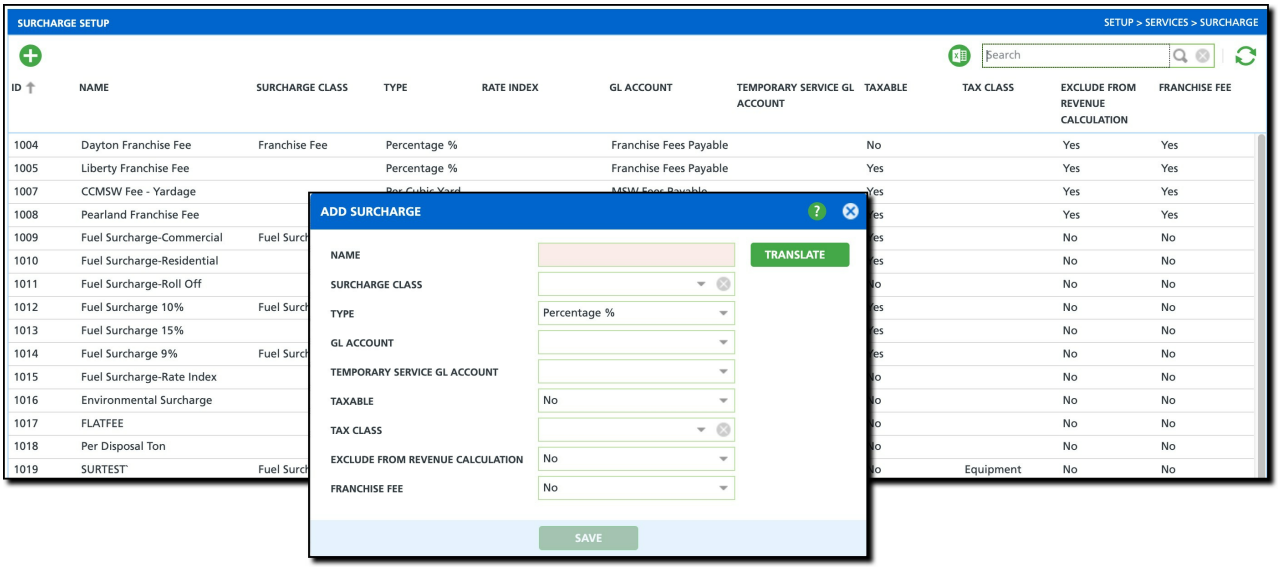
Pathway: *Setup > Services > Surcharge*

This article explains how to set up surcharges that can later be added to a surcharge group for application on a site's invoice. Surcharges are additional fees applied to services and are included on a site's invoice through a surcharge group, which is a collection of surcharges applied to an account, and the service code.

For a surcharge to be applied to a site's invoice, it must be enabled for the site's assigned service code and included in the site's assigned surcharge group. Follow the setup below to ensure surcharges are applied correctly.



Permission Requirements

The following permissions are required to add surcharges:

Permission ID	Permission Name
118	Setup \ Services

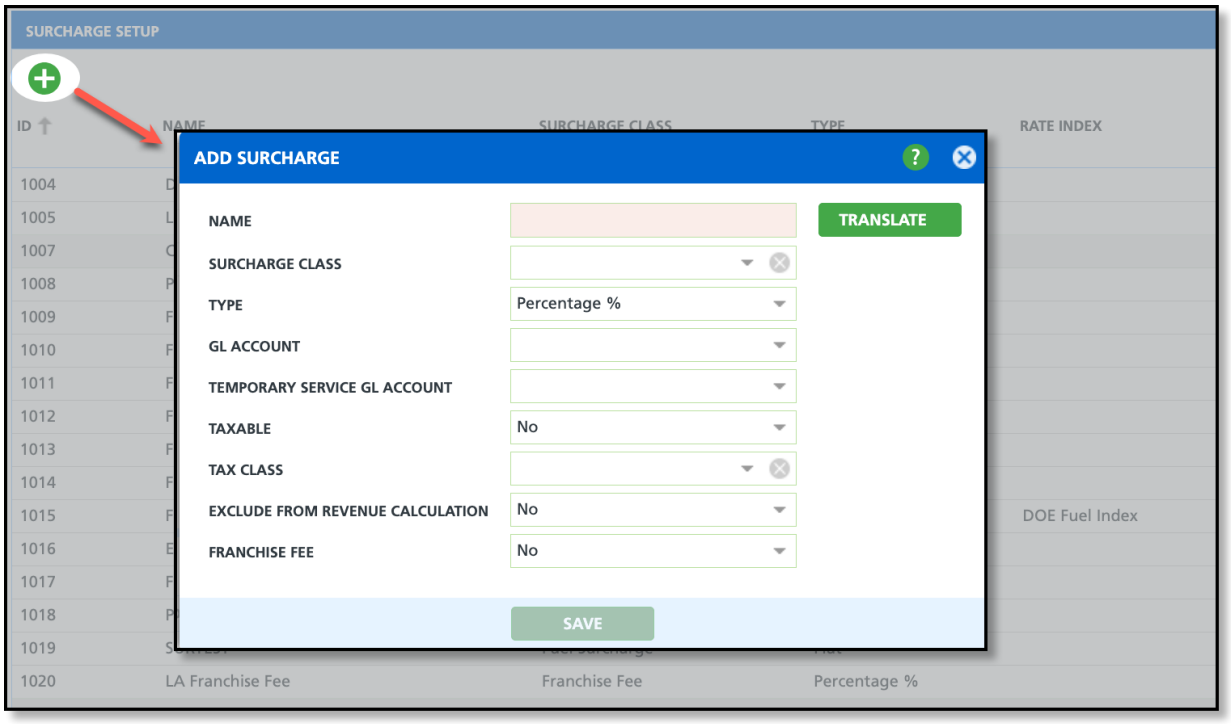
Field Descriptions

Fields	Descriptions
Name	The name of the surcharge.
Surcharge Class	Groups the surcharge into a class. When a surcharge is applied to a service, the assigned class will be displayed with it in a separate column/field.
Type	Select a **Type** to determine how the surcharge is calculated, such as a percentage of the charge or a flat fee applied during billing.

Rate Index	This field will only appear if a Rate Index option is selected in the *Type* field. Rate index pricing must be established for this to apply. Refer to the Fuel Rate Index Surcharge article as an example of a rate index surcharge.
GL Account	Displays a drop down list of GL accounts. If applicable, select the GL account that applies to the surcharge. More information about GL accounts can be reviewed here: GL Account Setup and Overview.
Temporary Service GL Account	If revenue from temporary services is tracked at the surcharge level, select the corresponding GL account it should be tracked under.
Taxable	Indicates if the surcharge is taxable. • 'No' - surcharge is not taxable. • 'Yes' - surcharge amount is included in tax calculations during billing. • 'Tax Class' - taxed through the Tax Class identified in the Tax Class field.
Tax Class	Required field if 'Tax Class' is selected from the Taxable field.
Exclude From Revenue Calculation	Indicates if the Surcharge should be excluded from company's revenue calculations.
Franchise Fee	Indicates if the Surcharge is a Franchise Fee.

Add a Surcharge

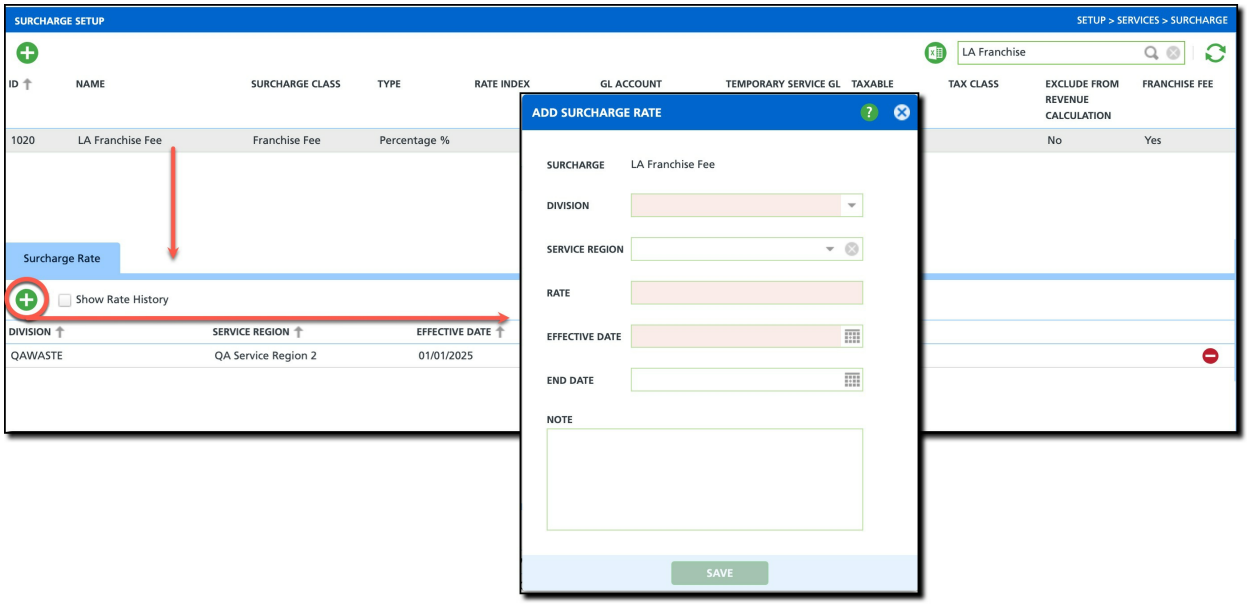
Add a new surcharge and define its core settings, including how the surcharge is calculated, GL tracking, and taxability. Surcharge rates are configured separately, allowing the same surcharge to be used across multiple divisions and service regions where rates may differ.



1. Click the **Add icon** from the Surcharge Setup screen. This will display the Add Surcharge popup editor.
2. Enter a **Name** for the new surcharge.
3. Select a **Surcharge Class** if one applies.
4. Select a **Type** to determine how the surcharge fee is calculated.
5. Select the **GL Account** the surcharge will be tracked under.
6. Select if the surcharge is **taxable** and the Tax Class if one applies.
7. If the surcharge should be **excluded from revenue calculations**, select No here.
8. If a the surcharge is not part of a **franchise fee**, select No here.

Add a Surcharge Rate

Once a surcharge is created, its rates can be applied by division, service region, and effective dates. Since surcharge rates may vary across divisions and service regions, there is no need to create duplicate surcharges, instead, rates can be set up within a single surcharge specific to each division or region they apply.



1. Click on a surcharge from the upper grid to display the **Surcharge Rate tab** in the lower grid.
2. Select the **Add** icon to open the **Add Surcharge Rate** popup editor. Confirm the surcharge displayed is the correct before proceeding.
3. Select a **Division** from the drop down list.
4. If the rate applies to a specific service region, select the **Service Region**. Otherwise, leave blank and the rate will apply to all service regions within the division.
5. Enter the **Rate.**
6. Enter the **Effective Date** for the rate. If the rate is temporary and an end date is known, enter an **End Date**; otherwise, leave the End Date field blank and the rate will remain active.
7. Add a **Note** if one applies and click **Save** when finished.

Surcharge Group Setup

Pathway: *Setup > Services > Surcharge Group*

Once surcharges and their rates are created, add them to a Surcharge Group so they can be assigned to a site and included in billing.

Service Code Setup

Pathway: *Setup > Services > Service Code*

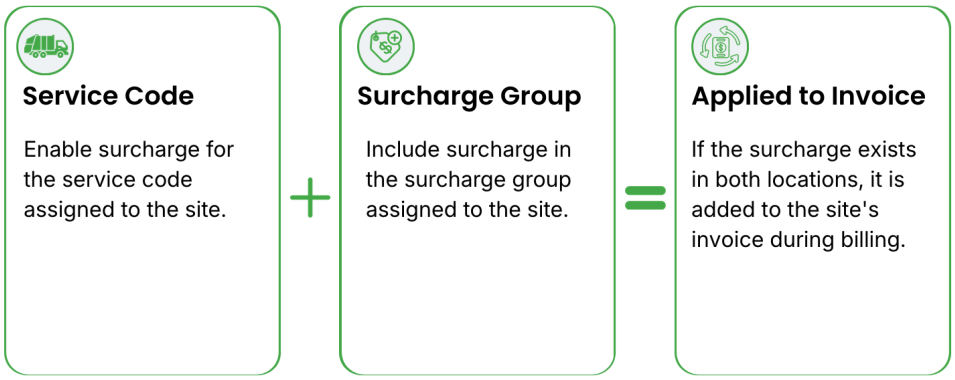
Surcharges are individually assigned to Service Codes, while Surcharge Groups are assigned to sites. For a surcharge to be applied during billing, the surcharge must exist in both places: it must be included in the Site's assigned Surcharge Group and also be assigned to the Service Code associated with the Site's active service. If a surcharge is assigned to the Service Code but not included in the Surcharge Group, or vice versa, it will not be applied during billing.

How the Setup Works Together

A Service Code can have multiple surcharges assigned, while each Site is assigned a single Surcharge Group. This structure allows Service Codes to define the full set of possible surcharges for a service, while Surcharge Groups control which of those surcharges are eligible for a given Site.

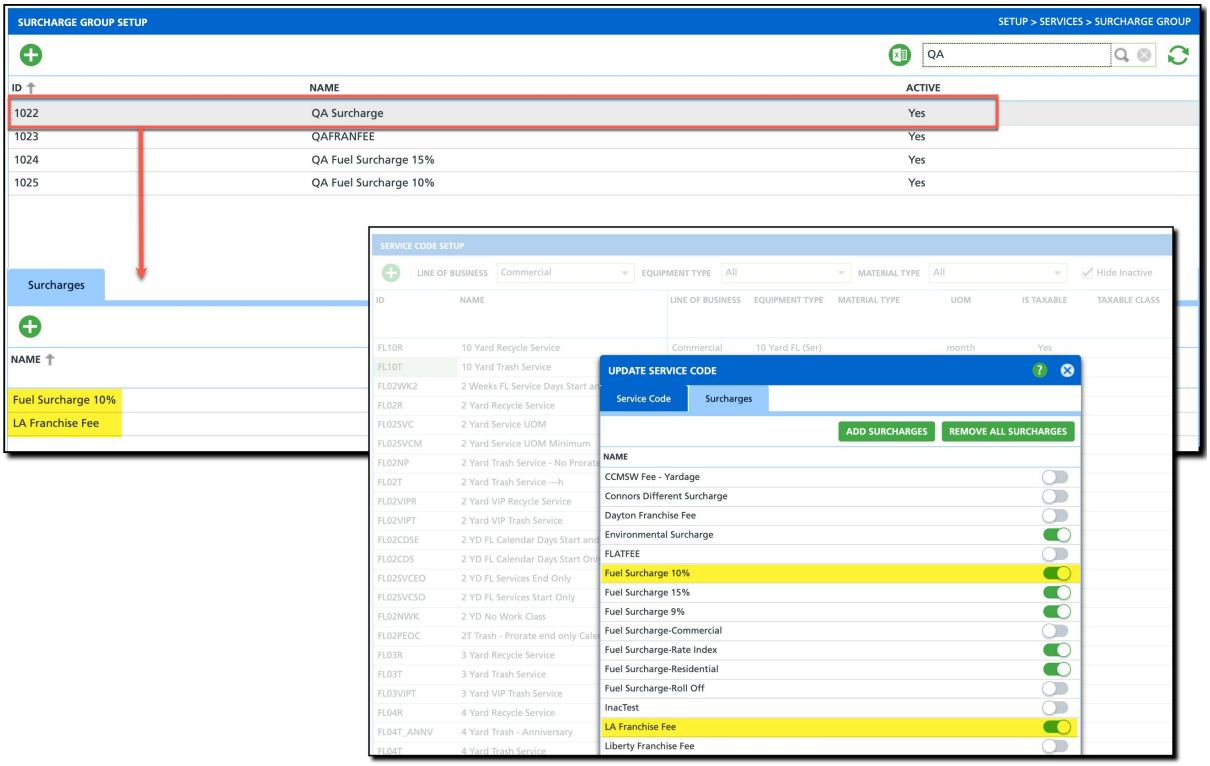
How Invoicing Works

During billing, a surcharge is only applied when it is both assigned to the Service Code and included in the Site's assigned Surcharge Group. If a surcharge exists on the Service Code but is not part of the Site's Surcharge Group (or vice versa), it will not be applied.



Example Scenario (Setup)

In the example below, the 10 Yard Front Load Service Code includes multiple surcharges; however, only two of those surcharges are included in the QA Surcharge Group. When the Site is billed, only the surcharges that are assigned to both the Service Code and the QA Surcharge Group will be applied.



Example Scenario (Final Application)

Following from the example above, the site is assigned the*QA Surcharge*, Surcharge Group. It also is receiving a service using the *10 Yard Trash Service*, service code. When billed, only the surcharges found within the *QA Surcharge* group that have a matching surcharge on the service code are included.

Related Articles

Surcharge Group
Fuel Rate Index Surcharge