

Surcharge Setup

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This article explains how to set up surcharges and surcharge groups. Surcharges are additional fees applied to services, and they are assigned to an account’s billing setup (if applicable) through a Surcharge Group—a collection of surcharges that apply to an account.

Add Surcharge

Pathway: [Setup](#) > [Services](#) > [Surcharge](#)

The screenshot displays the 'SURCHARGE SETUP' interface. At the top, there is a search bar and a refresh icon. Below is a table with columns: ID, NAME, SURCHARGE CLASS, TYPE, RATE INDEX, GL ACCOUNT, TEMPORARY SERVICE GL ACCOUNT, TAXABLE, TAX CLASS, EXCLUDE FROM REVENUE CALCULATION, and FRANCHISE FEE. The table lists various surcharges such as 'Dayton Franchise Fee', 'Liberty Franchise Fee', 'CCMSW Fee - Yardage', etc. An 'ADD SURCHARGE' modal form is overlaid on the table, containing fields for NAME, SURCHARGE CLASS, TYPE (set to 'Percentage %'), GL ACCOUNT, TEMPORARY SERVICE GL ACCOUNT, TAXABLE (set to 'No'), TAX CLASS, EXCLUDE FROM REVENUE CALCULATION (set to 'No'), and FRANCHISE FEE (set to 'No'). A 'SAVE' button is at the bottom of the modal.

Permission(s)

The following permissions are required to add surcharges:

Permission ID	Permission Name
118	Setup \ Services

Add Surcharge: Field Descriptions

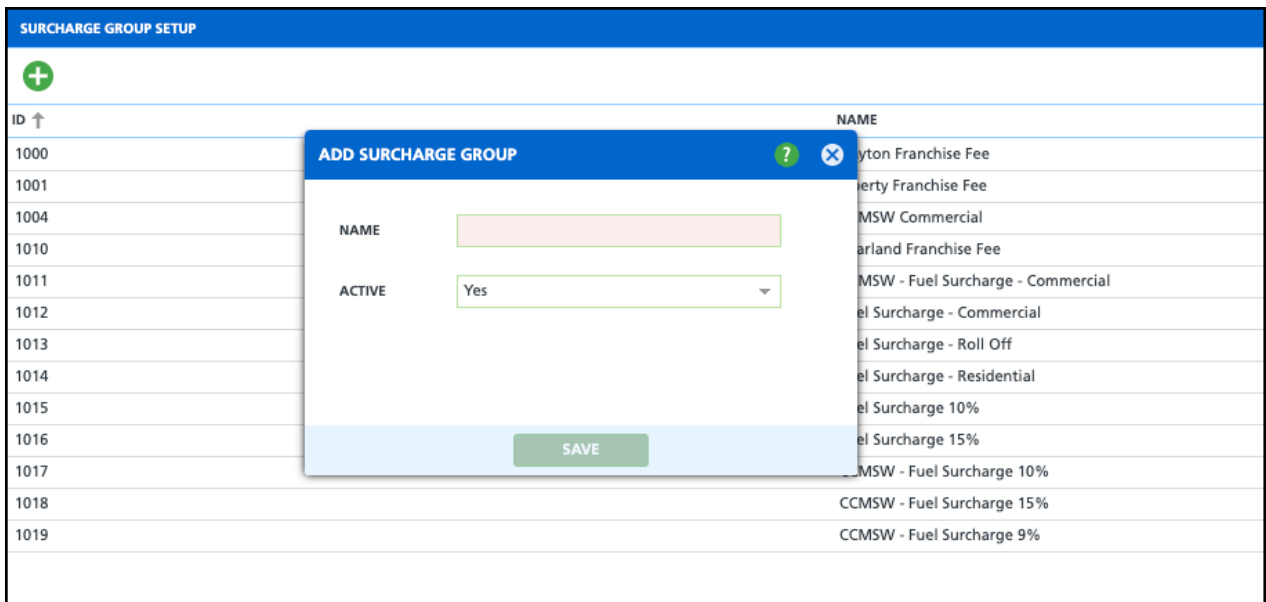
Fields	Descriptions
Name	The name of the surcharge.
Surcharge Class	Groups the surcharge into a class. When a surcharge is applied to a service, the assigned class will be displayed with it in a separate column/field.
Type	Select a Type from the list of options to identify the calculation method for the surcharge.
GL Account	Specifies the GL Account used to track revenue streams associated with the surcharge.

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. <ul style="list-style-type: none"> '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 Surcharge Group

Pathway: Setup > Services > Surcharge Group

A Surcharge Group is a grouping of surcharges that are assigned to an account. Surcharges can not be independently assigned to an account and must be added to a group - a single surcharge can be shared across multiple surcharge groups.



Permissions

The following permission(s) are required to add and remove surcharges to a surcharge group:

Permission ID	Permission Name
118	Setup \ Services

Add a Surcharge Group - Field Descriptions

Fields	Descriptions
Name	The Name of the surcharge group. If a surcharge group is specific to a division, or class type, consider a naming method that identifies the surcharge group's purpose.
Active	Controls availability of a surcharge group for selection and use. <ul style="list-style-type: none"> • Yes - Available • No - Not available

Add/Remove Surcharges to a Group

The screenshot shows the 'SURCHARGE GROUP SETUP' interface. At the top, there is a search bar and a refresh icon. Below is a table with columns 'ID', 'NAME', and 'ACTIVE'. The table lists various surcharge groups, with 'Fuel Surcharge - Residential' (ID 1014) highlighted in green. A red arrow points from this row down to the 'Surcharges' tab. In the 'Surcharges' tab, there is a list of surcharges with an 'Add' button (green '+') and a 'Remove' button (red '-') for each item.

ID	NAME	ACTIVE
1000	Dayton Franchise Fee	Yes
1001	Liberty Franchise Fee	Yes
1004	CCMSW Commercial	Yes
1010	Pearland Franchise Fee	Yes
1011	CCMSW - Fuel Surcharge - Commercial	Yes
1012	Fuel Surcharge - Commercial	Yes
1013	Fuel Surcharge - Roll Off	Yes
1014	Fuel Surcharge - Residential	Yes
1015	Fuel Surcharge 10%	Yes
1016	Fuel Surcharge \ Environmental	Yes
1017	CCMSW - Fuel Surcharge 10%	Yes
1018	CCMSW - Fuel Surcharge 15%	Yes
1019	CCMSW - Fuel Surcharge 9%	Yes
1020	MULTIPLE FEES	Yes

Add a Surcharge

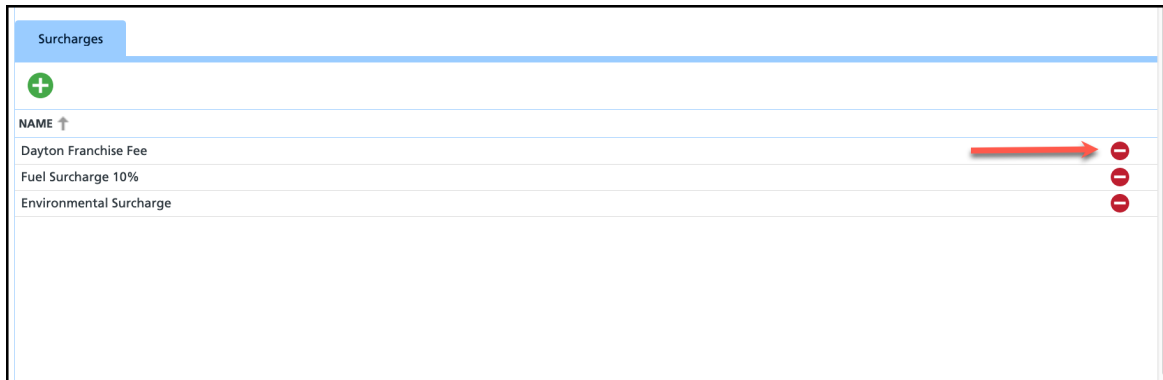
The screenshot shows the 'Surcharges' tab with the 'Add Surcharge' popup window open. The popup window has a title bar 'ADD SURCHARGE' and a list of surcharges with green '+' icons next to them. A red arrow points from the 'Add' button in the 'Surcharges' tab to the 'Add Surcharge' popup window.

NAME	Action
Dayton Franchise Fee	+
Liberty Franchise Fee	+
CCMSW Fee - Yardage	+
Pearland Franchise Fee	+
Fuel Surcharge-Commercial	+
Fuel Surcharge-Residential	+
Fuel Surcharge-Roll Off	+
Fuel Surcharge 15%	+
Fuel Surcharge 9%	+
Fuel Surcharge-Rate Index	+

1. Select a surcharge group from the upper grid.
2. In the Surcharges tab, click on the green '+' add icon. This will display the Add Surcharge popup window.

3. Select the green '+' add icon for each surcharge you would like to add to the surcharge group.
4. Close the window when finished.

Remove a Surcharge



1. Select the Surcharge Group to display all surcharges.
2. Select the surcharges the group should include.
 - Add: select the + icon for the surcharge.
 - Remove: select the - icon for the surcharge.