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 are assigned to a site's billing setup (if applicable) through a Surcharge Group—a collection of surcharges that apply to an account.

Add Surcharge

Pathway: *Setup > Services > Surcharge*

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.

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.
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 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
95	Setup Main Menu

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. • Yes - Available • No - Not available

Add/Remove Surcharges to a Group

Add a Surcharge

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 from the upper grid to display its associated surcharges in the lower grid.
2. Select the red 'Remove' icon for each surcharge the group no longer includes.