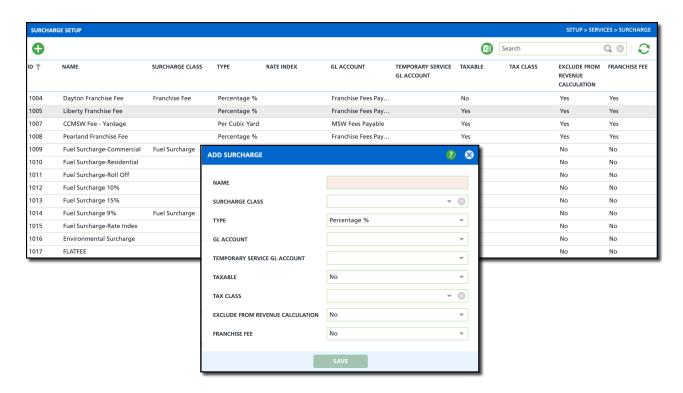
Surcharge Setup

Last Modified on 05/13/2025 11:47 am PDT

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

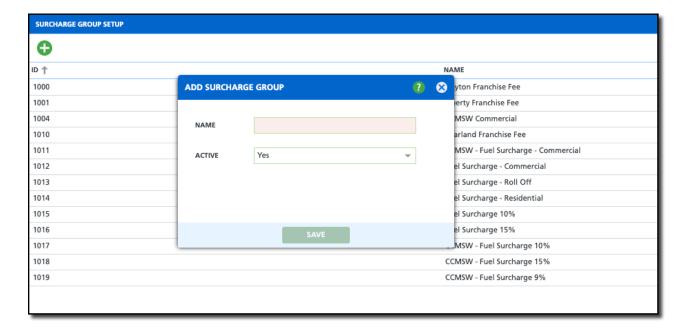
| Fields | Descriptions |
|-----------------|---|
| Name | The name of the surcharge. |
| Surcharge Class | Groups the surcharge into a class. When a surcharge is applied to a service, the assigned class will be displayed with it in a separate column/field. |
| Туре | Select a Type from the list of options to identify the calculation method for the surcharge. |

| Rate Index | This field will only appear if a Rate Index option is selected in the <i>Type</i> 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

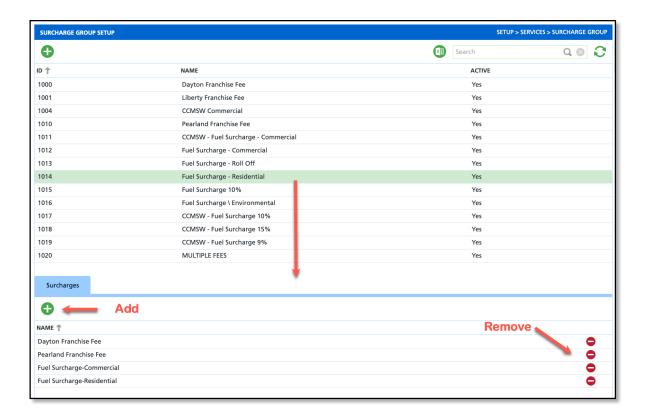
The following permission(s) are required to add and remove surcharges to a surcharge group:

| 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.