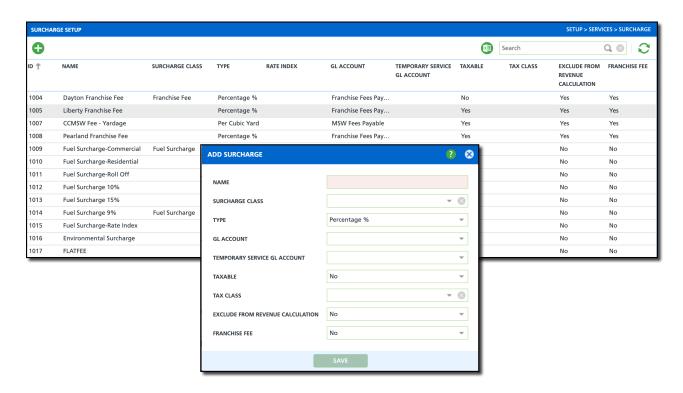# Surcharge Setup

Last Modified on 07/22/2025 11:50 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 |

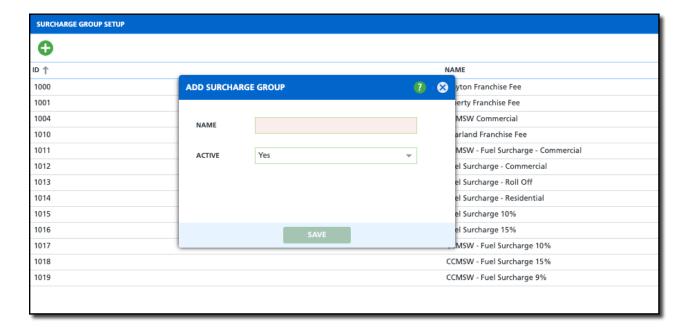### Add Surcharge: Field Descriptions

| 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. |
| 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.<br>• 'No' - surcharge is not taxable.<br>• 'Yes' - surcharge amount is included in tax calculations during billing.<br>• '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.<br>• Yes - Available<br>• No - Not available |

## Add/Remove Surcharges in 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.

# Nested Surcharges

Nesting surcharges is made possible through the **Level** column in the **Surcharges** tab. With surcharges defaulting to **Level 1**, setting a surcharge to **Level 2** allows it to apply to all Level 1 surcharges within the group.

### Setup to Consider

- For a nested surcharge to apply, the surcharge must also be enabled on the Surcharges tab for the Service Code being billed.
- The rate for a nested surcharge is determined by the rate defined for that surcharge in Surcharge Setup.

### Example

In the example below, the nested surcharge **LA Franchise Fee** (10%) was applied as a separate line item, calculated based on the invoice amount for the **Fuel Surcharge 15%,** surcharge.

| ID ↑ | | |
|------|------|------|
| 1000 | | |
| 1001 | | |
| 1004 | | |
| 1010 | | |
| 1011 | | |
| 1012 | | |
| 1013 | | |
| 1014 | | |
| 1015 | | |
| 1016 | | |
| 1017 | | |
| 1018 | | |
| 1019 | | |
| 1020 | | |
| 1021 | | |
| 1022 | | |
| 1023 | | |
| 1024 | | |
| 1025 | | |
| 1026 | Fuel Surcharge by Index | Yes |
| 1027 | Surcharge Multi Levels | Yes |

**INVOICE ADJUSTMENT - 915961 - 7/31/25 - $ 133.50 - CREATED BY ALIENA SOMERS ON 7/22/25 12:33 PM**

REASON CODE [        ]   PERIOD [ 2025-07 ]   NOTE [                    ]

CREDIT ENTIRE INVOICE ☐

| | DATE | SITE ID ↑ | SITE NAME | WO # | QUANTITY | DESCRIPTION ↑ | INVOICE AMOUNT | PREVIOUS ADJUSTMENTS | PENDING ADJUSTMENTS | REJECTED ADJUSTMENTS | ADJUSTMENT AMOUNT |
|---|------|-----------|-----------|------|----------|---------------|----------------|----------------------|----------------------|----------------------|-------------------|
| 📁 | 07/01/25 - 07/31/25 | 49447001 | Fawn Doe Rosa | | 1 | 2 Yard Trash Service | $ 100.00 | $ 0.00 | $ 0.00 | $ 0.00 | |
| 📄 | 07/31/25 | 49447001 | Fawn Doe Rosa | | | Fuel Surcharge 15% | $ 15.00 | $ 0.00 | $ 0.00 | $ 0.00 | |
| 📄 | 07/31/25 | 49447001 | Fawn Doe Rosa | | | LA Franchise Fee | $ 10.00 | $ 0.00 | $ 0.00 | $ 0.00 | |
| 📄 | 07/31/25 | 49447001 | Fawn Doe Rosa | | | LA Franchise Fee | $ 1.50 | $ 0.00 | $ 0.00 | $ 0.00 | |
| 📁 | 07/31/25 | 49447001 | Fawn Doe Rosa | | 1 | Paper Bill Fee - Com... 915961 | $ 7.00 | $ 0.00 | $ 0.00 | $ 0.00 | |

**Surcharges**

| NAME ↑ | TYPE | TAXABLE | TAX CLASS | EXCLUDE FROM REVENUE CALCULATION | FRANCHISE FEE | LEVEL | |
|--------|------|---------|-----------|----------------------------------|---------------|-------|---|
| Fuel Surcharge 15% | Percentage % | Yes | | No | No | Level 1 | ⊖ |
| LA Franchise Fee | Percentage % | No | | No | Yes | Level 2 | ⊖ |