

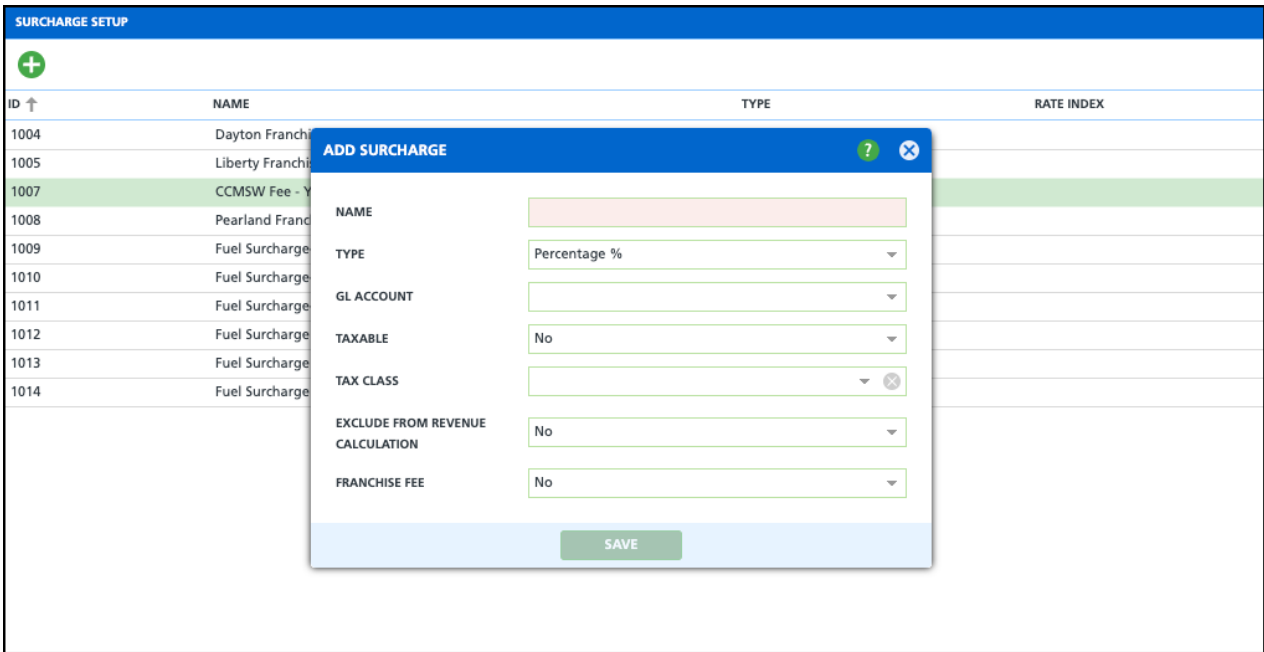
# Surcharge Setup

Last Modified on 03/12/2024 4:41 pm EDT

The following article details the setup of surcharges and surcharge groups. Surcharges are an additional charge added to services rendered that are assigned to an account's billing setup (if applicable) by using a Surcharge Group, a grouping 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.
Type	Select a Type from the list of options to identify the calculation method for the surcharge.
GL Account	Displays a drop down list of GL accounts. If applicable, select the GL account that applies to the surcharge.
Taxable	Indicates if the surcharge is taxable. <ul style="list-style-type: none"> <li>'No' - surcharge is not taxable.</li> <li>'Yes' - surcharge amount is included in tax calculations during billing.</li> <li>'Tax Class' - taxed through the Tax Class identified in the Tax Class field.</li> </ul>

<b>Tax Class</b>	Required field if 'Tax Class' is selected from the Taxable field.
<b>Exclude From Revenue Calculation</b>	Indicates if the Surcharge should be excluded from company's revenue calculations.
<b>Franchise Fee</b>	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.

The screenshot shows the 'SURCHARGE GROUP SETUP' interface. It features a table with columns for 'ID' and 'NAME'. A modal window titled 'ADD SURCHARGE GROUP' is open, displaying a form with the following fields:

- NAME:** A text input field.
- ACTIVE:** A dropdown menu currently set to 'Yes'.
- SAVE:** A green button at the bottom of the modal.

The background table lists the following surcharge groups:

ID	NAME
1000	Myton Franchise Fee
1001	Myton Franchise Fee
1004	MSW Commercial
1010	Myton Franchise Fee
1011	MSW - Fuel Surcharge - Commercial
1012	Fuel Surcharge - Commercial
1013	Fuel Surcharge - Roll Off
1014	Fuel Surcharge - Residential
1015	Fuel Surcharge 10%
1016	Fuel Surcharge 15%
1017	MSW - Fuel Surcharge 10%
1018	CCMSW - Fuel Surcharge 15%
1019	CCMSW - Fuel Surcharge 9%

## 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
<b>Name</b>	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.
<b>Active</b>	Controls availability of a surcharge group for selection and use. <ul style="list-style-type: none"> <li>• Yes - Available</li> <li>• No - Not available</li> </ul>

## Add/Remove Surcharges to a Group

**SURCHARGE GROUP SETUP** SETUP > SERVICES > SURCHARGE GROUP

+ Search

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

**Surcharges**

+ **Add** **Remove**

NAME ↑	
Dayton Franchise Fee	
Pearland Franchise Fee	
Fuel Surcharge-Commercial	
Fuel Surcharge-Residential	

## Add a Surcharge

**Surcharges**

+

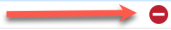


NAME ↑	
Fuel Surcharge 10%	
Environmental Surcharge	

**ADD SURCHARGE** ? X

NAME ↑	
Dayton Franchise Fee	<span style="color: green;">+</span>
Liberty Franchise Fee	<span style="color: green;">+</span>
CCMSW Fee - Yardage	<span style="color: green;">+</span>
Pearland Franchise Fee	<span style="color: green;">+</span>
Fuel Surcharge-Commercial	<span style="color: green;">+</span>
Fuel Surcharge-Residential	<span style="color: green;">+</span>
Fuel Surcharge-Roll Off	<span style="color: green;">+</span>
Fuel Surcharge 15%	<span style="color: green;">+</span>
Fuel Surcharge 9%	<span style="color: green;">+</span>
Fuel Surcharge-Rate Index	<span style="color: green;">+</span>

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

Surcharges	
+	
NAME ↑	
Dayton Franchise Fee	
Fuel Surcharge 10%	
Environmental 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.
-