

Surcharge Setup

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Pathway: Setup > Services > Surcharge

This article explains how to set up surcharges that can later be added to a surcharge group for application to a site's billing settings. Surcharges are additional fees applied to services and are included in a site's billing setup through a surcharge group, which is a collection of surcharges applied to an account. After setup here is complete, review the [Surcharge Group](#) documentation to apply surcharges to sites through a surcharge group.

The screenshot displays the 'SURCHARGE SETUP' interface. At the top, there is a search bar and navigation icons. 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 17 surcharges, including Franchise Fees, Fuel Surcharges, and Environmental Surcharges. 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 Requirements

The following permissions are required to add surcharges:

Permission ID	Permission Name
118	Setup \ Services

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 to determine how the surcharge is calculated, such as a percentage of the charge or a flat fee applied during billing.
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. <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 a Surcharge

Adding a new surcharge defines the surcharge and its core settings, including how the surcharge rate is calculated, GL tracking and taxability. Rates are configured separately, allowing the same surcharge to be used across multiple divisions and service regions where rates may differ.

The screenshot shows the 'SURCHARGE SETUP' screen with a table of existing surcharges. A red arrow points to a '+' icon in the top left corner. A modal window titled 'ADD SURCHARGE' is open, containing the following fields:

- NAME**: Text input field with a 'TRANSLATE' button.
- SURCHARGE CLASS**: Dropdown menu.
- TYPE**: Dropdown menu set to 'Percentage %'.
- GL ACCOUNT**: Dropdown menu.
- TEMPORARY SERVICE GL ACCOUNT**: Dropdown menu.
- TAXABLE**: Dropdown menu set to 'No'.
- TAX CLASS**: Dropdown menu.
- EXCLUDE FROM REVENUE CALCULATION**: Dropdown menu set to 'No'.
- FRANCHISE FEE**: Dropdown menu set to 'No'.

A 'SAVE' button is located at the bottom of the modal.

1. Click the **Add icon** from the Surcharge Setup screen. This will display the Add Surcharge popup editor.
2. Enter a **Name** for the new surcharge.
3. Select a **Surcharge Class** if one applies.
4. Select a **Type** to determine how the surcharge fee is calculated.
5. Select the **GL Account** the surcharge will be tracked under.

6. Select if the surcharge is **taxable** and the Tax Class if one applies.
7. If the surcharge should be **excluded from revenue calculations**, select No here.
8. If a the surcharge is not part of a **franchise fee**, select No here.

Add a Surcharge Rate

Once a surcharge is created, its rates can be applied by division, service region, and effective dates. Since surcharge rates may vary across divisions and service regions, there is no need to create duplicate surcharges, instead, rates can be set up within a single surcharge specific to each division or region as needed.

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1. Click on a surcharge from the upper grid to display the **Surcharge Rate** tab in the lower grid.
2. Select the **Add** icon to open the **Add Surcharge Rate** popup editor. Confirm the surcharge displayed is the correct before proceeding.
3. Select a **Division** from the drop down list.
4. If the rate applies to a specific service region, select the **Service Region**. Otherwise, leave blank and the rate will apply to all service regions within the division.
5. Enter the **Rate**.
6. Enter the **Effective Date** for the rate. If the rate is temporary and an end date is known, enter an **End Date**; otherwise, leave the End Date field blank and the rate will remain active.
7. Add a **Note** if one applies and click **Save** when finished.

Next Steps

Once surcharges and their rates are created, add them to a [Surcharge Group](#) so they can be assigned to a site and included in billing.

Related Articles

[Surcharge Group](#)

