

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.

SURCHARGE SETUP

SETUP > SERVICES > SURCHARGE

Search

ID ↑	NAME	SURCHARGE CLASS	TYPE	RATE INDEX	GL ACCOUNT	TEMPORARY SERVICE GL ACCOUNT	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE
1004	Dayton Franchise Fee	Franchise Fee	Percentage %		Franchise Fees Pay...		No		Yes	Yes
1005	Liberty Franchise Fee		Percentage %		Franchise Fees Pay...		Yes		Yes	Yes
1007	CCMSW Fee - Yardage		Per Cubic Yard		MSW Fees Payable		Yes		Yes	Yes
1008	Pearland Franchise Fee		Percentage %		Franchise Fees Pay...		Yes		Yes	Yes
1009	Fuel Surcharge-Commercial	Fuel Surcharge							No	No
1010	Fuel Surcharge-Residential								No	No
1011	Fuel Surcharge-Roll Off								No	No
1012	Fuel Surcharge 10%								No	No
1013	Fuel Surcharge 15%								No	No
1014	Fuel Surcharge 9%	Fuel Surcharge							No	No
1015	Fuel Surcharge-Rate Index								No	No
1016	Environmental Surcharge								No	No
1017	FLATFEE								No	No

ADD SURCHARGE

NAME

SURCHARGE CLASS

TYPE

Percentage %

GL ACCOUNT

TEMPORARY SERVICE GL ACCOUNT

TAXABLE

No

TAX CLASS

EXCLUDE FROM REVENUE CALCULATION

No

FRANCHISE FEE

No

SAVE

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' interface. A red arrow points to a green plus icon in the top left corner. A modal window titled 'ADD SURCHARGE' is open, containing the following fields and options:

- NAME:** Text input field.
- SURCHARGE CLASS:** Dropdown menu.
- TYPE:** Dropdown menu with 'Percentage %' selected.
- GL ACCOUNT:** Dropdown menu.
- TEMPORARY SERVICE GL ACCOUNT:** Dropdown menu.
- TAXABLE:** Dropdown menu with 'No' selected.
- TAX CLASS:** Dropdown menu.
- EXCLUDE FROM REVENUE CALCULATION:** Dropdown menu with 'No' selected.
- FRANCHISE FEE:** Dropdown menu with 'No' selected.
- Buttons:** 'TRANSLATE' (green) and 'SAVE' (green) buttons.

The background table shows existing surcharges with columns: ID, NAME, SURCHARGE CLASS, TYPE, and RATE INDEX. Visible rows include 'LA Franchise Fee' with a 'Franchise Fee' type and 'Percentage %' rate index.

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 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 based on division, service region, and effective dates.

The screenshot displays the 'SURCHARGE SETUP' interface. At the top, there's a header bar with a search icon and a refresh icon. Below the header is a table listing various surcharges. A red arrow points from the 'LA Franchise Fee' row (ID 1020) to the 'Add Surcharge Rate' popup. The popup is titled 'ADD SURCHARGE RATE' and contains the following fields:

- SURCHARGE:** LA Franchise Fee
- DIVISION:** A dropdown menu.
- SERVICE REGION:** A dropdown menu.
- RATE:** A text input field.
- EFFECTIVE DATE:** A date picker.
- END DATE:** A date picker.
- NOTE:** A text area.
- SAVE:** A button at the bottom.

Below the popup, there's a 'Surcharge Rate' tab and a 'Show Rate History' checkbox. Below that, there's a table with columns 'DIVISION' and 'SERVICE REGION'. The table contains two rows: 'QAWASTE' and 'QAWASTE', both with 'QA Service Region 2' in the 'SERVICE REGION' column.

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

