

# 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

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(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 <a href="#">Fuel Rate Index Surcharge</a> article as an example.

<b>GL Account</b>	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: <a href="#">GL Account Setup and Overview</a> .
<b>Temporary Service GL Account</b>	If revenue from temporary services is tracked at the surcharge level, select the corresponding GL account it should be tracked under.
<b>Taxable</b>	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 displays the 'SURCHARGE GROUP SETUP' interface. It features a table with columns 'ID' and 'NAME'. The 'ID' column is sorted in ascending order. The table lists various surcharge groups, including 'Hyton Franchise Fee', 'Property Franchise Fee', 'MSW Commercial', 'Marland Franchise Fee', 'MSW - Fuel Surcharge - Commercial', 'Fuel Surcharge - Commercial', 'Fuel Surcharge - Roll Off', 'Fuel Surcharge - Residential', 'Fuel Surcharge 10%', 'Fuel Surcharge 15%', 'MSW - Fuel Surcharge 10%', 'CCMSW - Fuel Surcharge 15%', and 'CCMSW - Fuel Surcharge 9%'. An 'ADD SURCHARGE GROUP' modal form is overlaid on the table. The modal has a blue header with a question mark icon and a close button. It contains two fields: 'NAME' with a text input box and 'ACTIVE' with a dropdown menu set to 'Yes'. A green 'SAVE' button is at the bottom of the modal.

### 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
<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 in a Group

SURCHARGE GROUP SETUP

Search

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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	Flat Fee	Yes
1021	Per Ton Surcharge	Yes
1022	QA Surcharge	Yes
1023	QAFRANFEE	Yes
1024	QA Fuel Surcharge 15%	Yes
1025	QA Fuel Surcharge 10%	Yes
1026	Fuel Surcharge by Index	Yes
1027	Surcharge Multi Levels	Yes

Surcharges

Add

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1

Remove

## Add a Surcharge

**ADD SURCHARGE**

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Dayton Franchise Fee	Percentage %	No		Yes	Yes	Level 1
Liberty Franchise Fee	Percentage %	Yes		Yes	Yes	Level 1
CCMSW Fee - Yardage	Per Cubic Yard	Yes		Yes	Yes	Level 1
Pearland Franchise Fee	Percentage %	Yes		Yes	Yes	Level 1
Fuel Surcharge-Commercial	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Residential	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Roll Off	Percentage %	No		No	No	Level 1
Fuel Surcharge 10%	Percentage %	Yes		No	No	Level 1
Fuel Surcharge 9%	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Rate Index	Rate Index %	No		No	No	Level 1
Environmental Surcharge	Percentage %	No		No	No	Level 1
FLATFEE	Flat	No		No	No	Level 1
Per Disposal Ton	Per Disposal Ton	No		No	No	Level 1
SURTEST	Flat	No	Equipment	No	No	Level 1
LA Franchise Fee	Percentage %	No		No	Yes	Level 1
InacTest	Percentage %	No		No	No	Level 1
Test	Percentage %	No		No	No	Level 1

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 ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1
Environmental Surcharge	Percentage %	No		No	No	Level 1
Per Disposal Ton	Per Disposal Ton	No		No	No	Level 1

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.

SURCHARGE GROUP SETUP

SETUP > SERVICES > SURCHARGE GROUP

+

ID ↑

1000

1001

1004

1010

1011

1012

1013

1014

1015

1016

1017

1018

1019

1020

1021

1022

1023

1024

1025

1026

1027

+

SEARCH

Q

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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

SEARCH

Q

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	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	

Fuel Surcharge by Index

Yes

Surcharge Multi Levels

Yes

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	⊖