

Surcharge Setup

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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

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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

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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 <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 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 table lists various surcharge groups, including 'Hyton Franchise Fee', 'Property Franchise Fee', 'MSW Commercial', 'Farland 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 fields for 'NAME' (a text input) and 'ACTIVE' (a dropdown menu set to 'Yes'). A 'SAVE' button is located 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
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. <ul style="list-style-type: none"> • Yes - Available • No - Not available




Add/Remove Surcharges to a Group





SURCHARGE GROUP SETUP SETUP > SERVICES > SURCHARGE GROUP

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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	MULTIPLE FEES	Yes



Surcharges

  **Add** **Remove** 

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





Add a Surcharge

Surcharges

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 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.