

# Services (Setup) - Surcharge Setup Updated (16224) [Enhancement]

Last Modified on 01/30/2024 4:26 pm EST

The following changes have been applied to the Surcharge Rate Setup screen:

1. A 'Show Rate History' check box has been added. By default, it is unchecked, allowing for the display of only current and future surcharge rates.
2. The Surcharge Rate tab includes multiple updates:
  - o A 'Created By User' and timestamp tooltip has been added to the Division, Service Region, and Effective Date columns. To view the tooltip, hover the mouse over the effective date.
  - o A 'Ended By User' and timestamp tooltip has been added to the End Date column. To view the tooltip, hover the mouse over the end date.
  - o The Rate column has been updated to match the surcharge rate type.
  - o A delete option has been added to surcharge rates and will allow for a rate to be deleted if it hasn't been used on an AR record.
  - o Background color coding has been applied to the surcharge rows, determined by the effective date and end date.
    - Red = Indicates the surcharge rate has a future end date.
    - White = Indicates the surcharge rate does not have an end date.
    - Purple = Displays for rates with a future dated Effective Date.
3. Changes to Add/Update Surcharge Rate popup editor:
  - o End Date and Note fields have been added.
  - o Edit logic has been applied to only allow the editing of the End Date and Note if the surcharge is associated to an AR record.
    - If the surcharge is linked to an AR record, the end date must fall after the most recent AR record's date.

The screenshot displays the 'SURCHARGE SETUP' interface. At the top, there's a search bar and navigation icons. The main area contains a table with columns: ID, NAME, TYPE, RATE INDEX, DIVISION, EXCLUDE FROM REVENUE CALCULATION, and FRANCHISE FEE. A popup window titled 'UPDATE SURCHARGE RATE' is open, showing fields for SURCHARGE (Fuel Surcharge 15%), DIVISION (HOUSTON), SERVICE REGION, RATE (15), EFFECTIVE DATE (01/01/2000), END DATE, and NOTE. A 'SAVE' button is at the bottom of the popup. Below the main table, there's a 'Surcharge Rate' tab and a 'Show Rate History' checkbox. A second table below shows a detailed view of surcharge rates with columns: DIVISION, SERVICE REGION, EFFECTIVE DATE, END DATE, RATE, and NOTE. This table uses background color coding: red for future end dates, white for no end date, and purple for future dated effective dates. Red minus icons are visible on the right side of the bottom table rows.

Pathway: Setup > Services > Surcharge

