Surcharge Management

Last Modified on 07/21/2025 12:18 pm PDT

Pathway: Sales > Surcharge Management

The Surcharge Management screen is used to oversee and regulate surcharges applied to accounts and their sites. Within this screen, users can compare the base rate (the surcharge rate applied to the division) with the current rate (the surcharge override applied at the account or site level) and can also apply a new surcharge rate override.

SURCHARGE MANAGER	MENT											SA	LES > SURCHARGE M	MANAGEMENT
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Has Active Service	es 🗹 Surcharge Rate	Overridden	IMP	ORT										
ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	OVERRIDE	EFFECTIVE DATE		ESTIMATED R	EVENUE	
				GROUP					LEVEL		RECURRING	BASE RATE	CURRENT RATE	VARIANCE
									TOTALS	5	\$ 1,326.83	\$ 64.63	\$ 43.33	\$ (21.30)
BJ'S RESTAURANT 43199	BJ'S Restaurant 43199002	Active	Aliena Som	Pearland Franchise Fee	Pearland Franchise Fee	Percentage		0.02%	Account	07/01/2025	\$ 194.25	\$ 0.00	\$ 0.04	\$ 0.04
Trader Joe's 48986	Trader Joe's 48986001	Active	House Acco	. Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage	5%	<u>0.03%</u>	Site	07/01/2025	\$ 630.00	\$ 31.50	\$ 0.19	\$(31.31)
<u>G L Food Wholesale</u> 49378	G L Food Wholesale 49378001	Active	Aliena Som	Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage	5%	<u>8%</u>	Site	07/01/0025	\$ 400.00	\$ 20.00	\$ 32.00	\$ 12.00
mandarin coffee st 49396	mandarin coffee st 49396001	Active	Aliena Som	- Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage	5%	<u>4%</u>	Account	07/01/0025	\$ 102.58	\$ 5.13	\$ 4.10	\$(1.03)
Whata Peach 49390	Whata Peach 49390001	Active	Aliena Som	. Flat Fee	FLATFEE	Flat	\$ 8.00	<u>\$ 7.00</u>	Account	07/01/0025		\$ 8.00	\$ 7.00	\$(1.00)

Permissions

The following permissions are required to use the Surcharge Management screen:

Permission ID	Permission Name
452	Surcharge Rate Management

Field Descriptions

Field	Description
	Filter Options
Division	Filters the screen to only display sites belonging to the selected division.
Service Region	Filters the screen to only display sites belonging to the selected service region.
Surcharge Group	Filters the screen to only display sites belonging to the selected surcharge group.
Surcharge	Filters the screen to only display sites that have the selected surcharge applied.
Has Active Services	Filters the screen to only display sites that have at least one active service.
Surcharge Rate	Filters the screen to only display sites where the base surcharge rate has been
Overridden	overridden by a surcharge assigned at the account or site level.
	Fields
Account	Displays the name of the account a surcharge is applied.

Site	Displays the name of the site the surcharge is applied to.
Site Status	Refers to the current status of the site.
Sales Rep	Identifies the sales representative associated to the account.
Surcharge Group	Indicates the surcharge group the account belongs to.
Surcharge	Displays the name of the surcharge that is currently being applied to the site.
Туре	Indicates how the surcharge is calculated such as a percentage, or flat rate.
Base Rate	Displays the division's rate for the surcharge. Hover your mouse over the rate to see additional information. Rates at the account or site level override the base rate (division rate).
Current Rate	Displays the rate that is currently being applied to the account/site. Hover your mouse over the rate to see additional information including the override source (division, account or site).
Override Level	Indicates whether a surcharge override has been applied at the account or site level. If no override is present, the column remains blank.
Effective Date	Refers to the date the current rate became effective.
	Estimated Revenue (Columns)
Totals	Displays a count of records displayed on the screen that the Estimated Revenue fields are based on.
Recurring	Sum of active site service rates, that the current rate surcharge is applicable to.
Base Rate	Calculated as the recurring revenue multiplied against the base rate.
Current Rate	Calculated as the recurring revenue multiplied against the current rate.
Variance	 Difference between the Base Rate and the Current Rate. Red: indicates the current rate is less than the base rate. Yellow: indicates no change between the base rate and the current rate. Green: indicates the current rate is higher than the base rate.

Surcharge Rate Overrides

To access the Surcharge Rate Override screen, click on the "Current Rate" hyperlink associated with the site you want to review for surcharge rate overrides.

KROUP RECURRING RASE RATE CURRENT RATE VARIAL TOTALS 5 \$1,326.83 \$64.63 \$43.33 \$(21.3) dearland Franchise Fee Franchise Fee Commercial Percentage % 0.02% Account 07/01/2025 \$194.25 \$0.00 \$0.04 \$0.019 \$(31.3) ommercial Uel Surcharge- Commercial Percentage % 5% 0.03% Site 07/01/025 \$400.00 \$20.00 \$31.50 \$0.19 \$(31.3) uel Surcharge- Commercial Percentage % 5% 0.03% Site 07/01/0025 \$400.00 \$20.00 \$32.00 \$12.00 Uel Surcharge- Commercial Percentage % 5% 0.4% Account 07/01/0025 \$102.58 \$5.13 \$4.10 \$(1.0) Idel Surcharge- Commercial Stocharge- Commercial \$8.00 \$2.00 Account 07/01/0025 \$8.00 \$7.00 \$(1.0) Idel Surcharge- Commercial BASE RATE \$8.00 \$7.00 \$(1.0) <td colspa="</th"><th>IRCHARGE</th><th>SURCHARGE</th><th>TYPE</th><th>BASE RATE</th><th>CURRENT RATE</th><th>OVERRIDE LEVEL</th><th>EFFECTIVE DATE</th><th></th><th>ESTIMATED R</th><th></th><th></th></td>	<th>IRCHARGE</th> <th>SURCHARGE</th> <th>TYPE</th> <th>BASE RATE</th> <th>CURRENT RATE</th> <th>OVERRIDE LEVEL</th> <th>EFFECTIVE DATE</th> <th></th> <th>ESTIMATED R</th> <th></th> <th></th>	IRCHARGE	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	OVERRIDE LEVEL	EFFECTIVE DATE		ESTIMATED R		
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Field Descriptions

Field	Description
Add Icon	Option to apply an account level or site level override to a site.
Show Rate History	If selected, all surcharge rates, including those with an end date in the past, will be displayed.
Override Level	Identifies if the surcharge rate is at the account level or site level. Account level surcharges override base level (Division) and site level surcharges override both the base level and the account level surcharge rates.
Effective Date	 The specified date on which the surcharge rate takes effect. Background color coding is used to assist in the identification of a rate's status based on the effective date. White: indicates the surcharge rate is currently being used and does not include an end date. Red: indicates the surcharge rate is no longer in effect. Purple: indicates the surcharge rate has a future effective date.
End Date	Designated date marking the end of a specified surcharge rate. If the surcharge rate is used in an AR record, the end date must come after the most recent AR record's date.
Rate	The rate that will be applied to the site based on the effective date.
Note	Optional field to enter a note regarding the surcharge rate.
Delete	Option to delete a surcharge rate record if it is not linked to an AR record.

Apply a New Surcharge

From the **Current Rate** column, users can select an existing surcharge rate and apply a surcharge rate override to individual accounts or sites.

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Add a Surcharge Rate Overrride

- 1. Click on the "Current Rate" hyperlink corresponding to the site you want to add a new surcharge override to. This action will open the Surcharge Rate Overrides popup editor.
- 2. Click on the **add icon**, and the Add Surcharge Rate Override editor will appear.
- 3. Choose the **Override Type** to specify whether the surcharge applies at the account level or site level.
- 4. Input a Rate, which will be shown under the Current Rate column based on the effective date.
- 5. Specify the **Effective Date** when the rate will become effective.
- 6. If the rate is temporary and has a known end date, enter an **End Date**.
- 7. Add an optional **Note** to regarding the surcharge rate override.
- 8. Click Save when finished.

Edit Existing Surcharge

Logic:

- Once a surcharge is used (it is linked to an AR record), only the End Date can be modified.
- The End Date will automatically populate by the addition of a new record with matching division and service region.
- 1. Click on the "**Current Rate**" hyperlink corresponding to the site you want to add a new surcharge override. This action will open the Surcharge Rate Overrides popup editor.
- 2. Review the fields and update based on the applied logic.
- 3. Click **Save** when finished.

Import Surcharge Rates

Users have the option to import surcharge rates from a CSV file. This allows for efficient bulk updates by uploading a properly formatted file containing the required data.

ICE REGION BR	ROKER GROUP	SURCHARGE GROUP	SURCHARGE	
Angeles, Orange County, 📼	Ψ	All	✓ All	
te Overridden	MPORT			
SITE	SITE	STATUS SALES REP	SURCHARGE GRO	DUP
<u>BJ'S Restaurant</u> 43199002	IMPORT SURCHAR	GE RATES	4 S	iise Fee
<u>Trader Joe's</u> 48986001	SELECT FILE	Select File	BROWSE	- Commercial
<u>G L Food Wholesale Inc</u> 49378001	<u>c</u>			- Commercial
mandarin coffee stand 49396001	!			Commercial
<u>Whata Peach</u> 49390001		IMPORT		J
	CE REGION B Angeles, Orange County, ♥ I te Overridden I SITE BJ'S Restaurant 43199002 Trader Joe's 48986001 G L Food Wholesale In 49378001 mandarin coffee stand 49396001 Whata Peach 49390001	BROKER GROUP Angeles, Orange County, IMPORT te Overridden IMPORT SITE SITE BJ'S Restaurant SITE 43199002 Trader Joe's 48986001 SELECT FILE G L Food Wholesale Inc 49376001 mandarin coffee stand 49390001 Whata Peach 49390001	CE REGION BROKER GROUP SURCHARGE GROUP Angeles, Orange County, Import All Angeles, Orange County, Import All te Overridden Import SITE SITE SITE STATUS SALES REP SITE SITE STATUS SALES REP BJ'S Restaurant 43199002 Import SURCHARGE RATES SELECT FILE Select File G L Food Wholesale Inc 49396001 Select File Whata Peach 49390001 Import	CE REGION BROKER GROUP SURCHARGE GROUP SURCHARGE Angeles, Orange County, Import All All te Overridden Import SITE SITE STATUS SALES REP SITE SITE STATUS SALES REP SURCHARGE GROUP BJ'S Restaurant All Import SURCHARGE RATES ? 43199002 Select File BROWSE G L Food Wholesale Inc Select File BROWSE Myont Import Import

Required File Format

The import will not process if any required columns are missing. The "Note" column is optional and may be left out without affecting the import.

- 1. Account ID
- 2. Site ID
- 3. Surcharge ID
- 4. Override Level
- 5. Current Rate
- 6. Effective Date (mm/dd/yyyy format)
- 7. Note (optional)