

New Surcharge Management Screen and Updated Site Surcharge Window in Customer Service Screen (16223) [Enhancement]

Last Modified on 01/31/2024 1:21 pm EST

Site Surcharge

Pathway: Accounts > (Site section) > Select Surcharge Group (Note - a surcharge group must be assigned to display)

The following changes have been applied to the Site Surcharge Rates window:

1. The Type column has been relocated to display before the Franchise Fee and Rate columns.
2. If the rate is a percentage:
 - A red asterisk has been added to display with the rate when the rate is overridden at the account or site level.
 - Upon hovering the mouse over the rate, a tooltip with information on the base rate and override information will display.
3. An action button has been added that will open the Site Surcharge Rates.
 - This button is only visible if the user has permission 451 (Add or Edit - Override Account of Site Surcharge Rates).

41898001 | Navusoft - Demo

1 of 2 ✓ Post Oak Blvd
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ACCESS Gate Code 1234
NOTE Site Notes

Active

DIVISION CORPUS
SERVICE REGION CORPUS OPEN MARKET
SALES REP House Acct non System
SOURCE Cold Call
GENERATOR Not Applicable
SURCHARGE GRP Fuel Surcharge - Commercial
TAX REGION CC CITY-NUECES COU-CC MTA-CC CRIME CON
TAX EXEMPT No

SURCHARGE	TYPE	FRANCHISE FEE	RATE / INDEX
Fuel Surcharge-Commercial	Percentage %	No	10% *

New Surcharge Management

Pathway: Accounting > Surcharge Management

A new Surcharge Management screen has been created and is available in the Accounting module. This 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.

The Surcharge Management screen requires the user to have the following permissions:

- 452 - Surcharge Rate Management

For more information on how to use the screen, review the [Surcharge Management](#) article.

SURCHARGE MANAGEMENT										ACCOUNTING > SURCHARGE MANAGEMENT			
DIVISION		SERVICE REGION		SURCHARGE GROUP		SURCHARGE				Search			
QAWASTE		QA Service Region 2, QA Was		All		All		LOAD					
<input checked="" type="checkbox"/> Has Active Services <input checked="" type="checkbox"/> Surcharge Rate Overridden													
ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE GROUP	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	EFFECTIVE DATE	ESTIMATED REVENUE			
										RECURRING	BASE RATE	CURRENT RATE	VARIANCE
TOTALS									8	\$ 825.00	\$ 59.00	\$ 52.05	\$(6.95)
AJ's RESTAUR... 43199	AJ's Restaurant 43199002	Active	Aliena Somers	Pearland Franchise Fee	Pearland Franchise Fee	Percentage %		9%	12/24/2023	\$ 185.00	\$ 0.00	\$ 16.65	\$ 16.65
Bubble Tea (T... 49031	Cafe 5 49031004	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	4%	12/31/2023	\$ 120.00	\$ 12.00	\$ 4.80	\$(7.20)
Encanto Resta... 49033	Encanto Resta... 49033001	Active	Aliena Somers	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	12/31/2023	\$ 100.00	\$ 10.00	\$ 8.00	\$(2.00)
Encanto Resta... 49033	Encanto Resta... 49033001	Active	Aliena Somers	MULTIPLE FEES	Environmental Surcharge	Percentage %	5%	3%	12/31/2023	\$ 100.00	\$ 5.00	\$ 3.00	\$(2.00)
Jack in the Box 48977	Jack in the Box 48977001	Active	House Account	Fuel Surcharge 10%	Fuel Surcharge 10%	Percentage %	10%	5%	12/31/2023		\$ 0.00	\$ 0.00	\$ 0.00
Bubble Tea (T... 49031	Bubble Tea (T... 49031001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	3%	12/31/2023	\$ 120.00	\$ 12.00	\$ 3.60	\$(8.40)
Holiday Cafe... 49032	Holiday Cafe... 49032001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	12/31/2023	\$ 100.00	\$ 10.00	\$ 8.00	\$(2.00)
Cascade Nutri... 49029	Cascade Nutri... 49029001	Active	House Account	MULTIPLE FEES	Fuel Surcharge 10%	Percentage %	10%	8%	01/24/2024	\$ 100.00	\$ 10.00	\$ 8.00	\$(2.00)