

Fuel Rate Index Surcharge Setup and Application

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A Fuel Rate Index Surcharge is used to adjust pricing in response to fuel cost changes. Typically associated with a published index, such as the EIA (U.S. Energy Information Administration) diesel average, it allows companies to account for market fluctuations without frequently updating customer contracts. This article explains how to set up and apply a Fuel Rate Index in Navusoft.

ID	NAME	UNIT
100	DOE Fuel Index	gallon
OCC	OCC Index	ton

ID	START DATE	VALUE
1000	11/28/2022	3.50
1004	03/01/2025	4.58
1003	04/01/2025	5.25

Rate Index Setup

Pathway: *Setup > Services > Rate Index*

The Rate Index Setup screen is used to configure index rates and define their corresponding fuel cost value. The screen is divided into two grids: the upper grid is for adding rate indexes, and the lower grid is for entering values tied to each index. During billing, the applicable rate is determined by the value's start date in relation to the service date on the invoice.

RATE INDEX SETUP SETUP > SERVICES > RATE INDEX

ID	NAME	UNIT
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Rate Index Value

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Add Rate Index

Click the **Add** icon to create a new Rate Index for fuel costs. This will act as a container for entering rate index values as fuel prices fluctuate.

RATE INDEX SETUP

ID	NAME
100	DOE Fuel Index
OCC	OCC Index

ADD RATE INDEX

ID

NAME

UNIT

SAVE

Add Rate Index Value

Once a Rate Index has been added to the upper grid, select it to open the *Rate Index Value* tab in the lower grid. Here, you can enter the index value (fuel cost) along with the *Start Date* indicating when it takes effect. New index values can be added over time to reflect changes in fuel costs.

Note: The system does not display an *End Date* for each index value. Instead, the *Start Date* of the next value automatically serves as the end date of the previous value's effective period. When a site is invoiced, the system will compare the service date to the start date of the rate index values. The corresponding value

will determine the surcharge that applies.

RATE INDEX SETUP SETUP > SERVICES > RATE INDEX

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Rate Index Value

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ADD RATE INDEX VALUE

VALUE:

START DATE:

SAVE

Surcharge Setup

Pathway: Setup > Services > Surcharge

Surcharge Setup defines the surcharge amount that can be invoiced to a site—either as a flat fee or a percentage. This setup follows the logic outlined in the previous section, where the applicable surcharge is determined by comparing the service date to the start date of the rate index values.

SURCHARGE SETUP SETUP > SERVICES > SURCHARGE

ID	NAME	SURCHARGE CLASS	TYPE	RATE INDEX	GL ACCOUNT	TEMPORARY SERVICE GL ACCOUNT	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE
1015	Fuel Surcharge-Rate Index		Rate Index %	DOE Fuel Index			No		No	No

Rate Index Values

ID	SURCHARGE	FROM QUANTITY	VALUE
1000	Fuel Surcharge-Rate Index	0.00	0.00
1001	Fuel Surcharge-Rate Index	2.50	5.00
1002	Fuel Surcharge-Rate Index	5.00	9.00
1003	Fuel Surcharge-Rate Index	7.50	12.00

Add Surcharge

Use the **Add** icon to create a new surcharge where the **Type** is set to a Rate Index option and a specific Rate Index is selected. This must be done before values can be associated.

The screenshot shows a software interface for setting up surcharges. A modal window titled 'ADD SURCHARGE' is open, allowing users to create a new surcharge entry. The modal contains several input fields and dropdown menus. The 'Type' field is set to 'Rate Index %', and the 'Rate Index' field is highlighted in red. The 'Taxable' and 'Exclude from Revenue Calculation' fields are both set to 'No'. A 'SAVE' button is located at the bottom of the modal. In the background, a table lists existing surcharges with columns for 'ID' and 'RATE INDEX'. A red arrow points to a green '+' icon in the top left corner of the main window, indicating where to click to add a new surcharge.

Field Descriptions

Field	Description
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 Rate Index option from the <i>Type</i> drop down to define the calculation method used for the surcharge.
Rate Index	Select the appropriate Rate Index previously created for this surcharge. This field will only appear if a Rate Index option is selected in the <i>Type</i> field.
GL Account	Specifies the GL Account used to track revenue streams associated with the surcharge.
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.

Rate Index Values

After a surcharge for rate index pricing has been created, select it from the upper grid to enter the Rate Index Values in the lower grid.

SURCHARGE SETUP								
ID ↑	NAME	SURCHARGE CLASS	TYPE	RATE INDEX	GL ACCOUNT	TEMPORARY SERVICE GL ACCOUNT	TAXABLE	TAX CLASS
1004	Dayton Franchise Fee	Franchise Fee	Percentage %		Franchise Fees Payable		No	
1005	Liberty Franchise Fee		Percentage %		Franchise Fees Payable		Yes	
1007	CCMSW Fee - Yardage		Per Cubic Yard		MSW Fees Payable		Yes	
1008	Pearland Franchise Fee		Percentage %		Franchise Fees Payable		Yes	
1009	Fuel Surcharge-Commercial	Fuel Surcharge	Percentage %		Service Income: Fuel S...		Yes	
1010	Fuel Surcharge-Residential		Percentage %		Service Income: Fuel S...		Yes	
1011	Fuel Surcharge-Roll Off		Percentage %		Service Income: Fuel S...	TEMP Roll Off Revenu...	No	
1012	Fuel Surcharge 10%	Fuel Surcharge	Percentage %		Service Income: Fuel S...		Yes	
1013	Fuel Surcharge 15%		Percentage %		Service Income: Fuel S...		Yes	
1014	Fuel Surcharge 9%	Fuel Surcharge	Percentage %		Service Income: Fuel S...		Yes	
1015	Fuel Surcharge		Rate Index %	DOE Fuel Index			No	
1016	Environmental Surcharge		Percentage %		Service Income: Fuel S...		No	
1017	FLATFEE		Flat		Accounts Receivable		No	
1018	Per Disposal Ton		Per Disposal Ton		Accounts Receivable		No	
1019	SURTEST	Fuel Surcharge	Flat		Accounts Receivable		No	Equipment
1020	LA Franchise Fee	Franchise Fee	Percentage %		Other Income		No	
1021	InacTest		Percentage %				No	

Rate Index Values

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Field Descriptions

Field	Description
ID	System generated ID.
Surcharge	Identifies the surcharge that will be applied.
From Quantity	The 'From Quantity' fields establish threshold ranges that determine when a Rate Index value qualifies for the surcharge.
Value	Specifies the amount to be applied, whether as a percentage-based surcharge or a flat fee.

Relationship Between Surcharge Rate Index Values and Rate Index Values

During the billing process, if a site is subject to a fuel surcharge, the system will first look at the **Start Date** and **Value** (fuel cost) in Rate Index Setup to determine based on the site's service date, which value applies. Once it has identified the appropriate value (in Rate Index Setup), it will then look at the 'From Quantity' and 'Value' columns for the surcharge to identify the surcharge amount to be billed.

Example Scenario: A site was serviced on February 25, 2025, and invoiced on March 15, 2025. Based

on the service date, the applicable Rate Index value is 3.50. Because this value falls within the defined surcharge range of 2.50 to 5.00 (refer to the 'From Quantity' column), the system will apply the surcharge **value** of 5.00.

SURCHARGE SETUP

ID ↑	NAME	SURCHARGE CLASS	TYPE
1009	Fuel Surcharge-Commercial	Fuel Surcharge	Percentage
1010	Fuel Surcharge-Residential		Percentage
1011	Fuel Surcharge-Roll Off		Percentage
1012	Fuel Surcharge 10%	Fuel Surcharge	Percentage
1013	Fuel Surcharge 15%		Percentage
1014	Fuel Surcharge 9%	Fuel Surcharge	Percentage
1015	Fuel Surcharge-Rate Index		Rate Index

RATE INDEX SETUP

ID	NAME	UNIT
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Rate Index Value

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SURCHARGE GROUP SETUP

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Surcharge Group

Pathway: Setup > Services > Surcharge Group

Surcharges cannot be applied directly to a site's billing settings. Instead, they must be added to a Surcharge Group, which is then assigned to the site. Once a Rate Index surcharge is created, it must be included in an appropriate Surcharge Group to take effect.

As with other setup screens, begin by selecting the appropriate Surcharge Group from the upper grid. Then, add the Rate Index surcharge to the *Surcharges* tab in the lower grid.

SURCHARGE GROUP SETUP

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

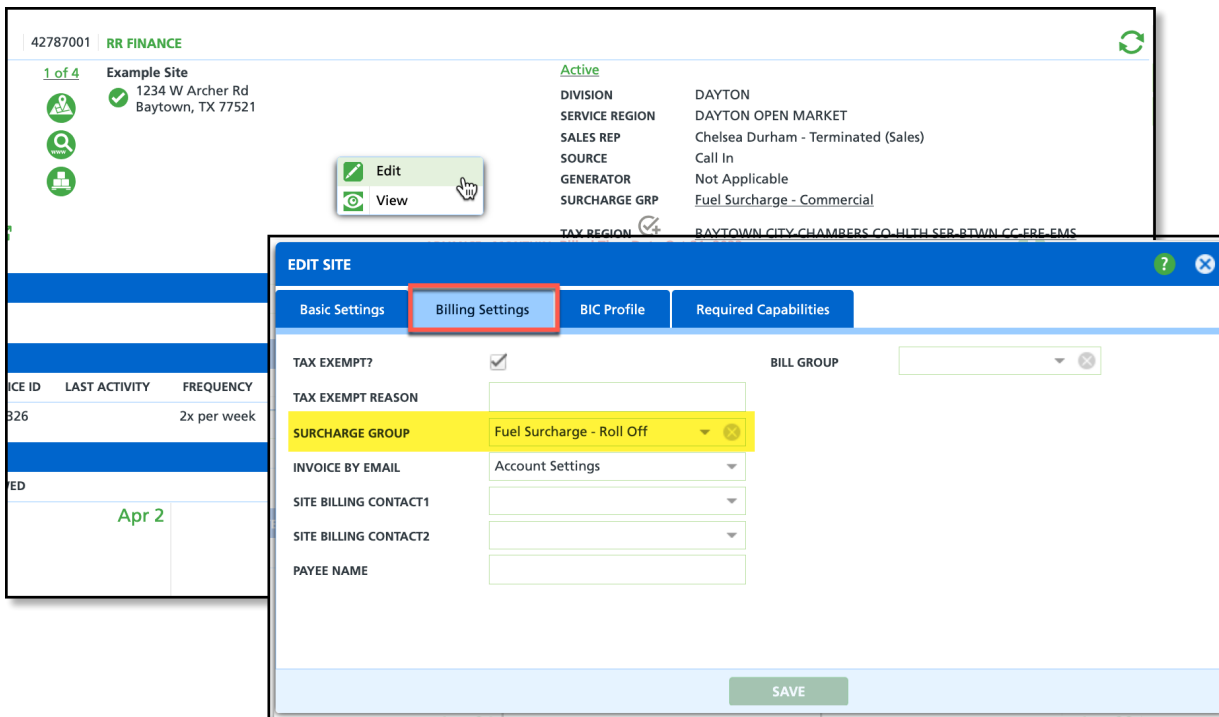
Surcharges

NAME ↑	LEVEL
Dayton Franchise Fee	Level 1
Fuel Surcharge-Rate Index	Level 1
Environmental Surcharge	Level 1

Edit Site

Pathway: [Accounts](#) > [Customer Service Screen](#) > [Edit Site](#) > [Billing Settings](#) [tab]

A Surcharge Group is assigned to a site from the *Billing Settings* tab within the *Edit Site* popup editor. Any updates to the surcharge or Rate Index values will automatically impact the site's billing in the next cycle.



Related Articles

[Surcharge Setup](#)