

# 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.

The screenshot displays two sections of the Navusoft interface. The top section, titled "RATE INDEX SETUP", contains a table with the following data:

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

The bottom section, titled "Rate Index Value", contains a table with the following data:

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
100	DOE Fuel Index	gallon
OCC	OCC Index	ton

**Rate Index Value**

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

## 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.

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

## 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.

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

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 over a table. The modal contains the following fields:

- NAME:** A text input field.
- SURCHARGE CLASS:** A dropdown menu with a clear button (X).
- TYPE:** A dropdown menu with 'Rate Index %' selected.
- RATE INDEX:** A dropdown menu with a red border and a clear button (X).
- GL ACCOUNT:** A dropdown menu.
- TEMPORARY SERVICE GL ACCOUNT:** A dropdown menu.
- TAXABLE:** A dropdown menu with 'No' selected.
- TAX CLASS:** A dropdown menu with a clear button (X).
- EXCLUDE FROM REVENUE CALCULATION:** A dropdown menu with 'No' selected.
- FRANCHISE FEE:** A dropdown menu with 'No' selected.

A green 'SAVE' button is located at the bottom of the modal. In the background, a table with columns 'ID' and 'RATE INDEX' is visible, with a red arrow pointing to a '+' icon in the top left corner.

### Field Descriptions

Field	Description
<b>Name</b>	The name of the surcharge.
<b>Surcharge Class</b>	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.
<b>Type</b>	Select a Rate Index option from the <i>Type</i> drop down to define the calculation method used for the surcharge.
<b>Rate Index</b>	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.
<b>GL Account</b>	Specifies the GL Account used to track revenue streams associated with the surcharge.
<b>Temporary Service GL Account</b>	If revenue from temporary services is tracked at the surcharge level, select the corresponding GL account it should be tracked under.
<b>Taxable</b>	Indicates if the surcharge is taxable. <ul style="list-style-type: none"> <li>• 'No' - surcharge is not taxable.</li> <li>• 'Yes' - surcharge amount is included in tax calculations during billing.</li> <li>• 'Tax Class' - taxed through the Tax Class identified in the Tax Class field.</li> </ul>
<b>Tax Class</b>	Required field if 'Tax Class' is selected from the Taxable field.
<b>Exclude From Revenue Calculation</b>	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.

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	

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

## 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
100	DOE Fuel Index	gallon
OCC	OCC Index	ton

**Rate Index Values**

ID	START DATE	VALUE
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**SURCHARGE**

ID ↑	SURCHARGE	FROM QUANTITY	VALUE
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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

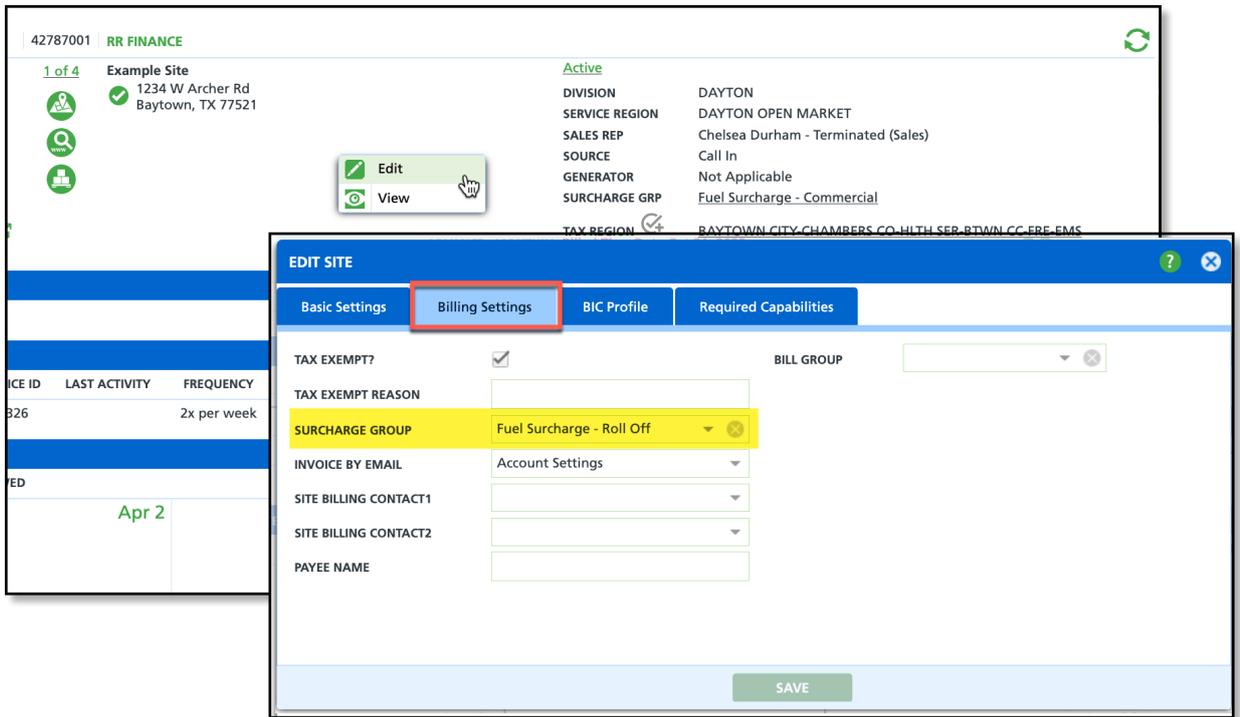
**Surcharges**

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](#)