

Rate Index

Last Modified on 06/05/2026 5:44 am PDT

Pathway: Setup > Services > Rate Index

Rate Index Setup plays a key role in rebate calculations for commodities such as cardboard, plastic, and metal. It is also used as the foundation for calculating fuel surcharges, allowing fuel costs to be absorbed into servicing and not your profit margin. Once a Rate Index is set up, it must be actively maintained with updated rate values over time. **Navusoft does not automatically track commodity or fuel price changes** or adjust rates accordingly, so these updates must be managed manually.

RATE INDEX SETUP

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SETUP > SERVICES > RATE INDEX

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ID	NAME	UNIT
100	DOE Fuel Index	gallon
101	Metal	pound
OCC	OCC Index	ton

Rate Index Value

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REFRESH

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

Add a Rate Index and Apply Rate Index Values

The **Rate Index Setup** screen is organized into two sections: an upper grid and a lower grid. The upper grid is used to create a new Rate Index, while the lower grid is used to manage the index values as rates change over time.

Add Rate Index

Use the upper grid to create a new **Rate Index**. This serves as a “container” for managing rates through the Rate Index Values in the lower grid. If rates change (increase or decrease), a new Rate Index is not required, updates are handled through the associated Rate Index Values.

RATE INDEX SETUP

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ID	NAME	UNIT
100	DOE Fuel Index	gallon
101	Metal	pound
OCC		ton

ADD RATE INDEX

ID

NAME

UNIT

SAVE

Add Rate Index Value

Rate Index Value is directly tied to a specific Rate Index created in the upper grid. This section is used to maintain and update rate values over time as they increase or decrease, while also preserving historical rate index values. Historical tracking is established by an effective Start Date, which automatically end-dates the previous rate value. When billing for a past period, if the service dates fall within a prior rate's effective date range, that historical rate is applied.

RATE INDEX SETUP

SETUP > SERVICES > RATE INDEX

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ID	NAME	UNIT
100	DOE Fuel Index	gallon
101	Metal	pound
OCC	OCC Index	ton

Rate Index Value

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REFRESH

ID	START DATE	VALUE
1001	02/01/2024	40.00
1002	03/01/2024	35.00
1005	05/01/2025	50.00

Add New Rate Index Value

1. Select a **Rate Index** from the upper grid to add or update an index value. Its associated values (if any exist) will display in the Rate Index Value grid below.
2. Click on the green **Add** button to display the **Add Rate Index Value** popup.
3. Enter a **Value**.
4. Enter a **Start Date** the value is effective.

Application of Use

Rate Indexes created here serve two primary purposes: supporting rebate calculations and driving fuel surcharge adjustments. As underlying rates change, such as fluctuations in fuel costs, the Rate Index can be updated to reflect those changes, ensuring pricing stays aligned over time.

Rebates

Review the following article to set up and begin applying rebates.

- [Rebates](#)

Fuel Surcharges

Review the following article to set up and begin applying fuel surcharges.

- [Fuel Rate Surcharge Index](#)

Permissions

The following permissions are required to interact with the Rate Index Setup screen:

Permission ID	Permission Name
118	Setup \ Services
