

# Surcharge Management (Sales) - Added Ability to Export/Import Multiple Surcharge Rate Changes (18345)

Last Modified on 06/25/2025 9:45 am PDT

The following updates were applied to the Surcharge Management screen:

1. Import functionality has been added with support for CSV file format. The file must include the required columns listed below; the import will fail if any are missing, except for the optional "Note" column.
  - Account ID
  - Site ID
  - Surcharge ID
  - Override Level
  - Current Rate
  - Effective Date (mm/dd/yyyy format)
  - Note (optional)
2. An Override Level column has been added. If a rate hasn't been overridden the column is blank.
  - In the import file,
    - if "Site" is entered as the Override Level, the surcharge override applies only to that specific site.
    - if "Account" is entered, the override applies to all sites associated with the account.
3. Surcharge Management has been relocated to the Sales module. Previously, it was located in the Accounting module.

SURCHARGE MANAGEMENT

DIVISION

QAWASTE

SERVICE REGION

gion 2, Bunn NC, Los Angeles

BROKER GROUP

BrokerGroup1, Test, test3, ter

SURCHARGE GROUP

All

SURCHARGE

All

LOAD

Has Active Services

Surcharge Rate Overridden

IMPORT

SALES > SURCHARGE MANAGEMENT

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ACCOUNT	SITE	SITE STATUS	SALES REP	SURCHARGE GROUP	SURCHARGE	TYPE	BASE RATE	CURRENT RATE	OVERRIDE LEVEL	EFFECTIVE DATE	ESTIMATED REVENUE				
											RECURRING	BASE RATE	CURRENT RATE	VARIANCE	
										TOTALS	\$	\$ 1,326.83	\$ 64.63	\$ 63.07	\$ (1.56)
BU'S RESTAURANT 43199	BU'S Restaurant 43199002	Active	Aliena Somers	Pearland Franchise Fee	Pearland Franchise Fee	Percentage %		1.2%	Account	11/01/2023	\$ 194.25	\$ 0.00	\$ 2.33	\$ 2.33	
Trader Joe's 48986	Trader Joe's 48986001	Active	House Account	Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage %	5%	2%	Site	03/01/2024	\$ 630.00	\$ 31.50	\$ 12.60	\$(18.90)	
G.I. Food Wholesale Inc 49378	G.I. Food Wholesale Inc 49378001	Active	Aliena Somers	Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage %	5%	10%	Site	04/01/2025	\$ 400.00	\$ 20.00	\$ 40.00	\$ 20.00	
mandarin coffee stand 49396	mandarin coffee stand 49396001	Active	Aliena Somers	Fuel Surcharge - Commercial	Fuel Surcharge- Commercial	Percentage %	5%	3.5%	Account	04/01/2025	\$ 102.58	\$ 5.13	\$ 3.59	\$(1.54)	
Whata Peach 49390	Whata Peach 49390001	Active	Aliena Somers	Fiat Fee	FLATFEE	Flat	\$ 8.00	\$ 4.55	Account	04/01/2025	\$ 8.00	\$ 4.55	\$ 4.55	\$(3.45)	

Pathway: Sales > Surcharge Management