

[75.1 Release] Surcharge Group (Setup) - Support for Nested Surcharge Levels Added (18340) [New Feature]

Last Modified on 08/06/2025 9:05 am PDT

A new **Level** column has been added to the **Surcharges** tab in **Surcharge Group Setup** to allow surcharges to be nested, applying one surcharge on top of another. By default, new surcharges are assigned **Level 1**. To apply a surcharge on all Level 1 surcharges in the group, users must manually set the nested surcharge to **Level 2**.

Setup to Consider

- For a nested surcharge to apply, the surcharge must also be enabled on the **Surcharges** tab for the Service Code being billed.
- The rate for a nested surcharge is determined by the rate defined for that surcharge in **Surcharge Setup**.

Example

In the example below, the nested surcharge **LA Franchise Fee** (10%) was applied as a separate line item, calculated based on the invoice amount for the **Fuel Surcharge 15%**, surcharge.

SURCHARGE GROUP SETUP

SETUP > SERVICES > SURCHARGE GROUP

Search

ID ↑

1000

1001

1004

1010

1011

1012

1013

1014

1015

1016

1017

1018

1019

1020

1021

1022

1023

1024

1025

1026

1027

Surcharges

+

NAME ↑

TYPE

TAXABLE

TAX CLASS

EXCLUDE FROM REVENUE CALCULATION

FRANCHISE FEE

LEVEL

Fuel Surcharge 15%

Percentage %

Yes

No

No

Level 1

+

LA Franchise Fee

Percentage %

No

No

Yes

Level 2

+

INVOICE ADJUSTMENT - 915961 - 7/31/25 - \$ 133.50 - CREATED BY ALIENA SOMERS ON 7/22/25 12:33 PM

REASON CODE

PERIOD 2025-07

NOTE

CREDIT ENTIRE INVOICE

Search

DATE	SITE ID ↑	SITE NAME	WO #	QUANTITY	DESCRIPTION ↑	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS	PENDING ADJUSTMENTS	REJECTED ADJUSTMENTS	ADJUSTMENT AMOUNT
07/01/25 - 07/31/25	49447001	Fawn Doe Rosa		1	2 Yard Trash Service	\$ 100.00	\$ 0.00	\$ 0.00	\$ 0.00	
07/31/25	49447001	Fawn Doe Rosa			Fuel Surcharge 15%	\$ 15.00	\$ 0.00	\$ 0.00	\$ 0.00	
07/31/25	49447001	Fawn Doe Rosa			LA Franchise Fee	\$ 10.00	\$ 0.00	\$ 0.00	\$ 0.00	
07/31/25	49447001	Fawn Doe Rosa			LA Franchise Fee	\$ 1.50	\$ 0.00	\$ 0.00	\$ 0.00	
07/31/25	49447001	Fawn Doe Rosa		1	Paper Bill Fee - Com... 915961	\$ 7.00	\$ 0.00	\$ 0.00	\$ 0.00	

Fuel Surcharge by Index

Yes

Surcharge Multi Levels

Yes

Pathway: Setup > Services > Surcharge Group