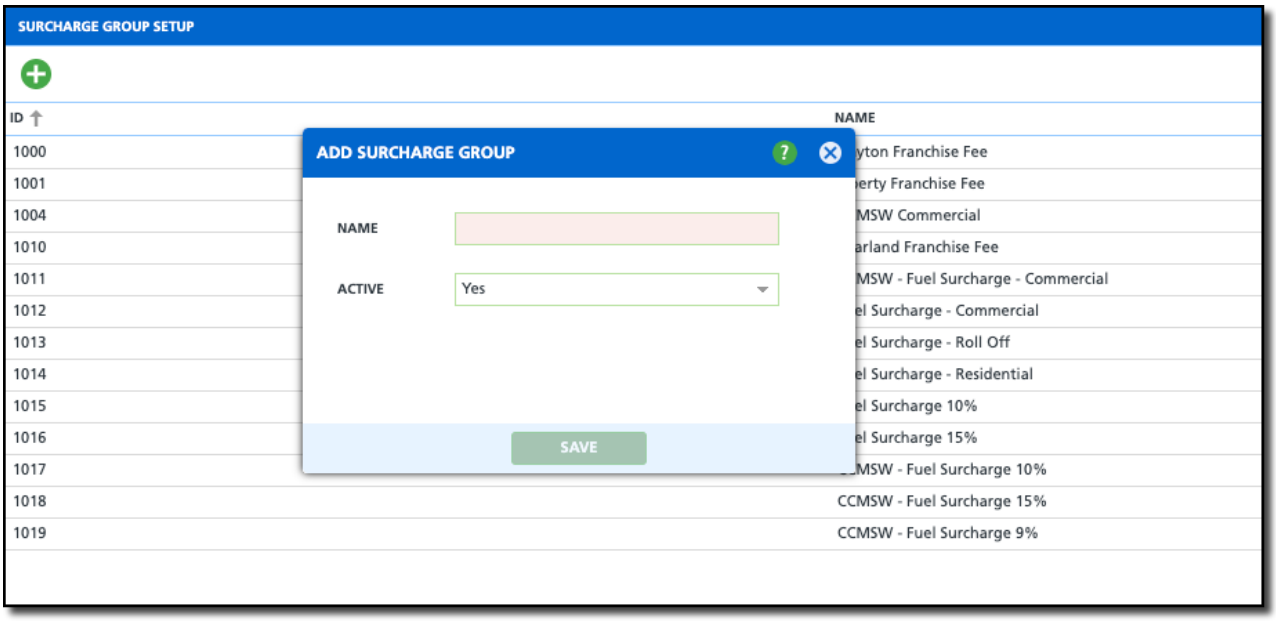
Surcharge Group

Last Modified on 09/30/2026 9:53 am PDT

Pathway: *Setup > Services > Surcharge Group*

Surcharge Groups are collections of surcharges assigned to an account. Individual surcharges cannot be assigned directly to an account and must be added to a group. A single surcharge can be included in multiple surcharge groups. By grouping surcharges, users can easily manage which charges are applied to a site's invoice to ensure consistent billing across multiple sites or services.

For a surcharge to be applied to a site's invoice, it must be enabled for the site's assigned service code and included in the site's assigned surcharge group. Follow the setup below to ensure surcharges are applied correctly. Refer to the Surcharge Setup article for more information and full setup instructions.



Permissions

The following permission(s) are required to add and remove surcharges to a surcharge group:

Permission ID	Permission Name
95	Setup Main Menu
118	Setup \ Services

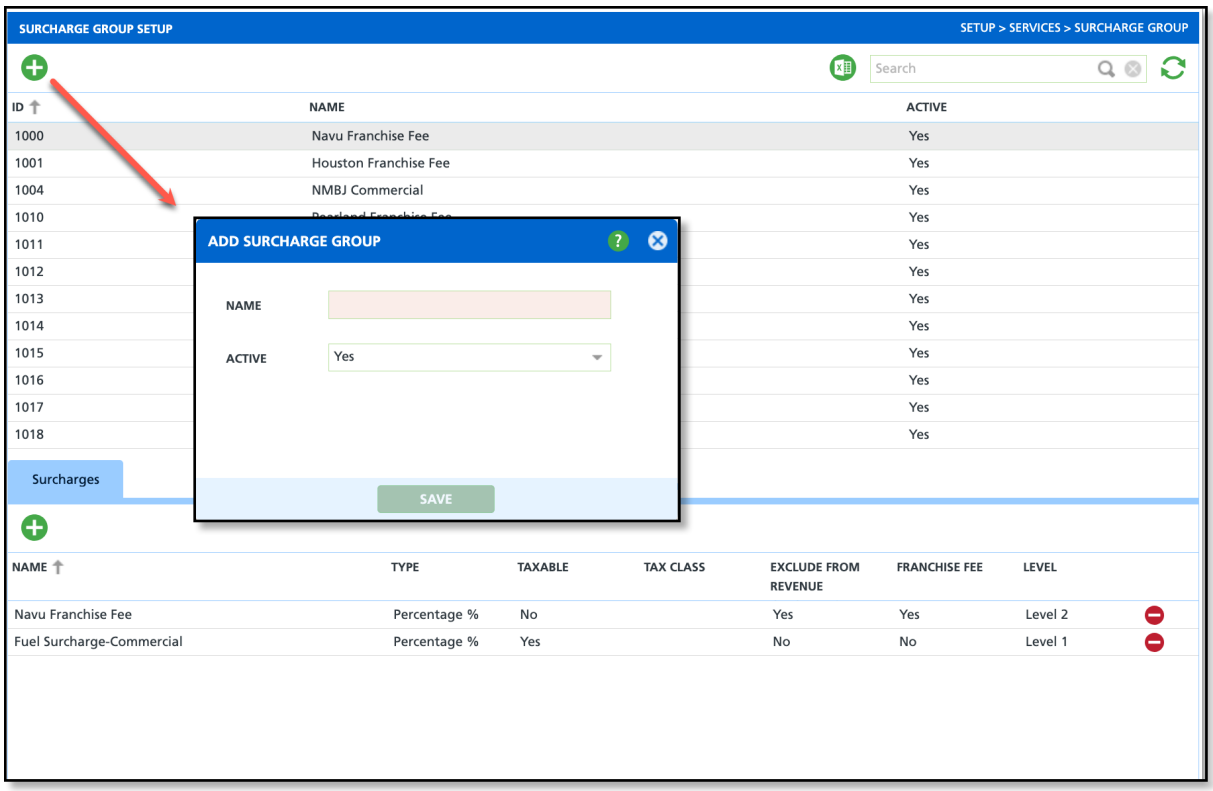
Prerequisites

The following setup must be complete before surcharge groups can be created and applied to a site.

- Surcharges were created in Surcharge Setup
- Surcharges are enabled on the service codes they apply

Add a Surcharge Group

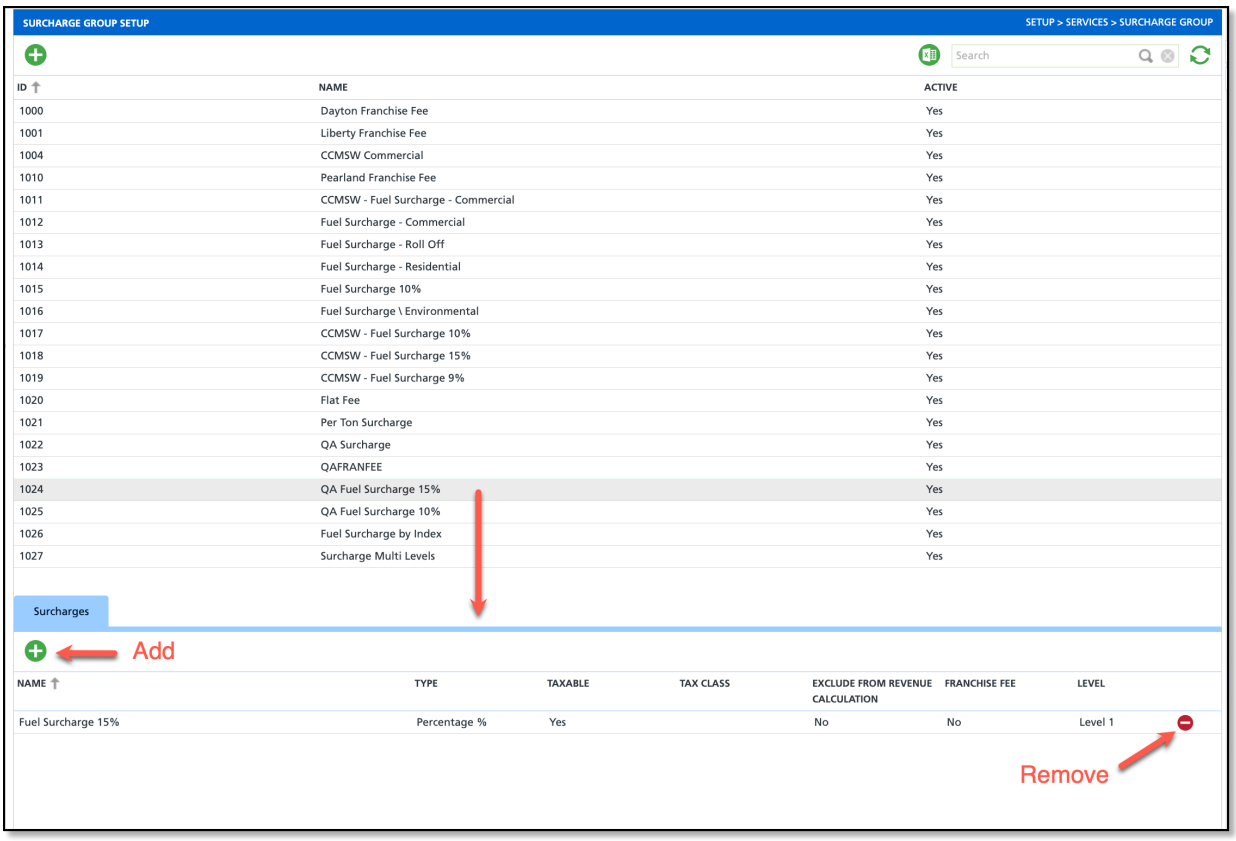
Creating a surcharge group involves two steps. First, the group is created. Second, surcharges are added to the group. Not all surcharges in a group are necessarily applied to a site. When a group is assigned to a site, the site is billed only for the surcharges associated with the service code of its active service. As a result, a surcharge group may contain multiple surcharges, while a site may be billed for only those that apply based on its active service.



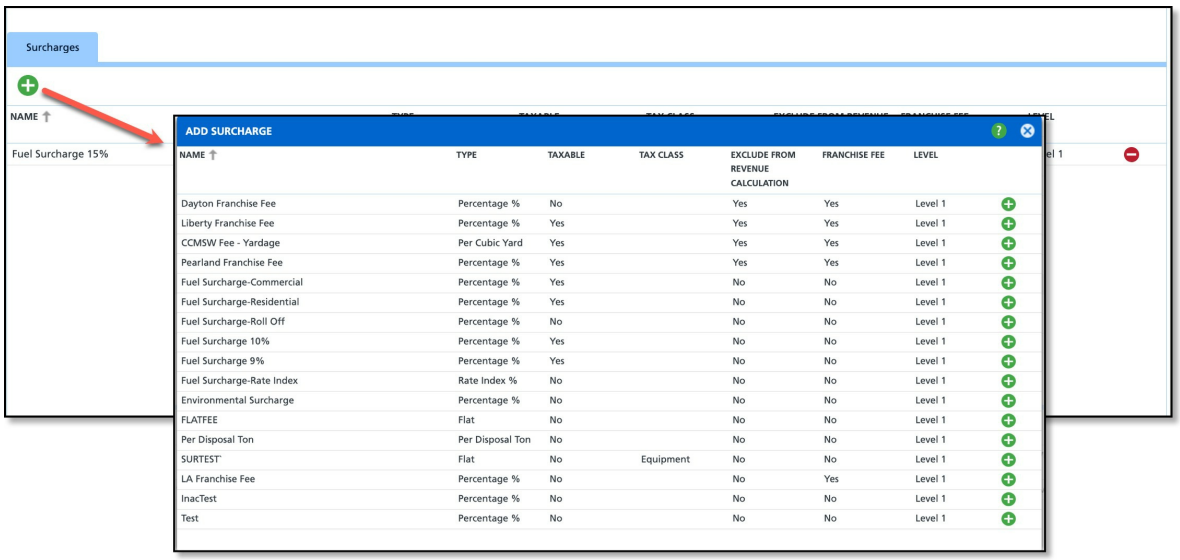
1. Click on the **Add** icon to open the *Add Surcharge Group* popup editor.
2. Enter a **Name** of the surcharge group. If a surcharge group is specific to a division, or class type, consider a naming method that identifies the surcharge group's purpose.
3. Select the **Active** status of the surcharge group.

Add/Remove Surcharges in a Group

Selecting the surcharge group from the upper grid will display its Surcharges tab in the lower grid where previously created surcharges can be added or removed.

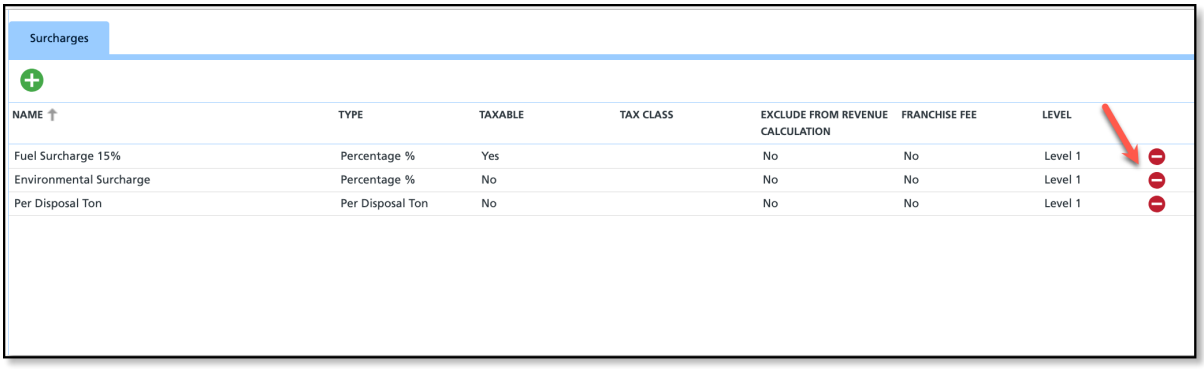


Add a Surcharge



1. Select a surcharge group from the upper grid.
2. In the Surcharges tab, click on the green ' + ' add icon. This will display the Add Surcharge popup window.
3. Select the green ' + ' add icon for each surcharge you would like to add to the surcharge group.
4. Close the window when finished.

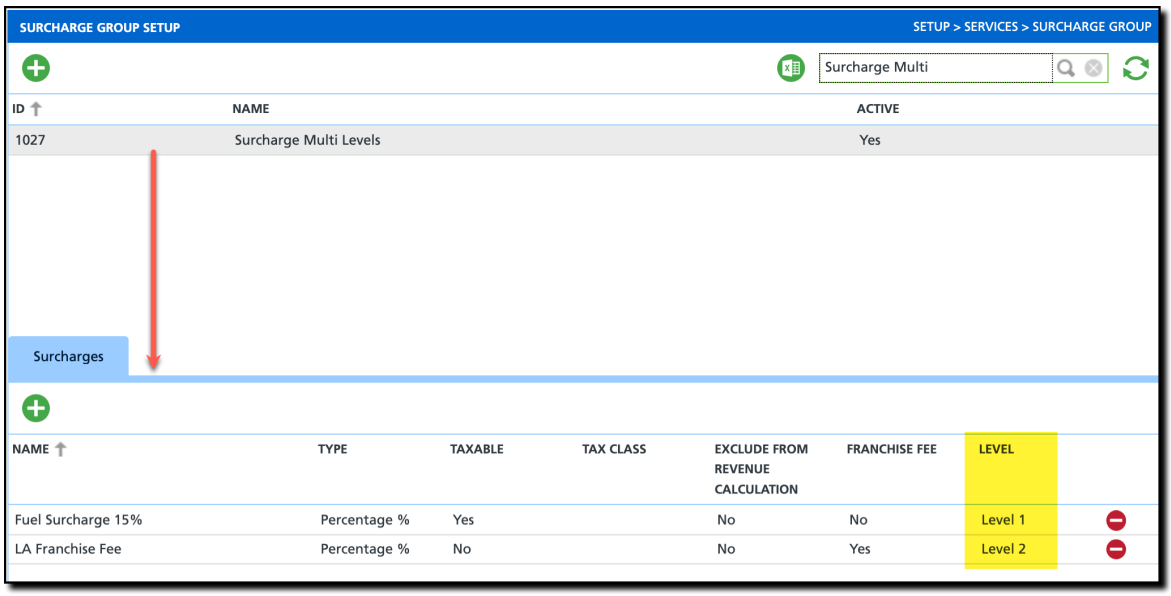
Remove a Surcharge



1. Select the Surcharge Group from the upper grid to display its associated surcharges in the lower grid.
2. Select the red 'Remove' icon for each surcharge the group no longer includes.

Nested Surcharges (Level 1 / Level 2)

Nested surcharges allow one surcharge to be calculated based on the amount of another surcharge rather than solely on the service amount. This is controlled by the **Level** column on the **Surcharges** tab.



Setup Requirements

- 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.
  - ***In the example that is being illustrated below**, the LA Franchise Fee was set up as 10% in Surcharge Setup.*

Level 2 Surcharge Calculation

By default, all surcharges are assigned **Level 1** and are calculated from the billed service amount. Assigning a surcharge to **Level 2** causes it to be calculated from the total of all applicable **Level 1** surcharges within the assigned Surcharge Group.
In the example below:

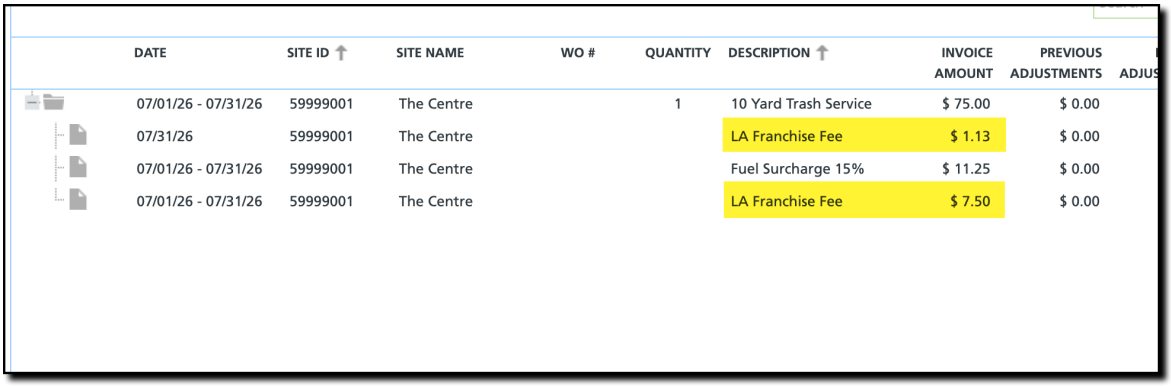
Charge	Calculation	Amount
10 Yard Trash Service	Base service charge	**$75.00**
Fuel Surcharge 15% (Level 1)	15% × $75.00	**$11.25**
LA Franchise Fee (Level 1)	10% × $75.00	**$7.50**
LA Franchise Fee (Level 2)	10% × $11.25	**$1.13**

The total **LA Franchise Fee** is:
$7.50 + $1.13 = $8.63

How It Appears in AR History

When viewing or adjusting an invoice in **AR History**, each surcharge calculation is displayed as a separate line item. This allows users to see exactly how each surcharge amount was calculated.

- Fuel Surcharge 15% **$11.25**
- LA Franchise Fee (Level 1) **$7.50**
- LA Franchise Fee (Level 2) **$1.13**

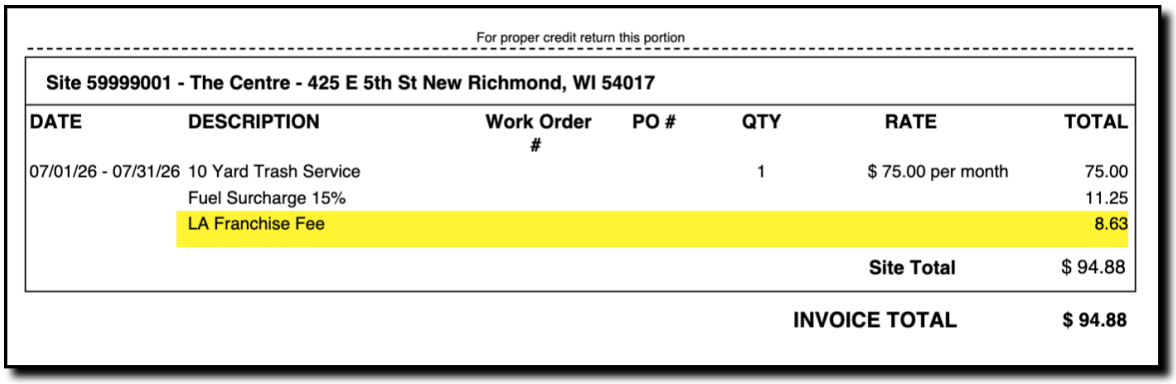


DATE	SITE ID	SITE NAME	WO #	QUANTITY	DESCRIPTION	INVOICE AMOUNT	PREVIOUS ADJUSTMENTS
07/01/26 - 07/31/26	59999001	The Centre		1	10 Yard Trash Service	$ 75.00	$ 0.00
07/31/26	59999001	The Centre			LA Franchise Fee	$ 1.13	$ 0.00
07/01/26 - 07/31/26	59999001	The Centre			Fuel Surcharge 15%	$ 11.25	$ 0.00
07/01/26 - 07/31/26	59999001	The Centre			LA Franchise Fee	$ 7.50	$ 0.00

How It Appears on the Customer Invoice

The customer invoice consolidates surcharge calculations by surcharge name. Instead of displaying separate Level 1 and Level 2 entries, the invoice combines both **LA Franchise Fee** calculations into a single line item.

The customer sees a single **LA Franchise Fee** of **$8.63**, which is the combined total of the **Level 1** ($7.50) and **Level 2** ($1.13) calculations.



For proper credit return this portion

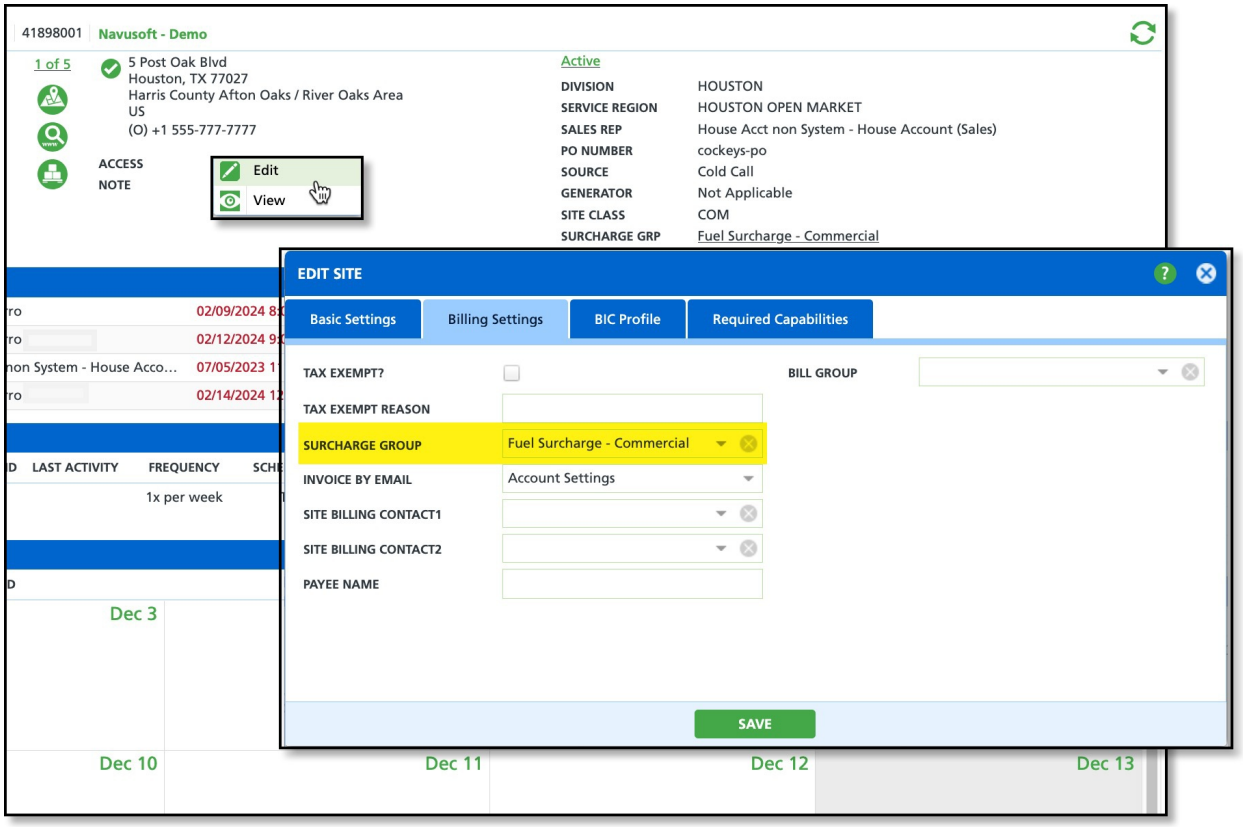
Site 59999001 - The Centre - 425 E 5th St New Richmond, WI 54017

DATE	DESCRIPTION	Work Order #	PO #	QTY	RATE	TOTAL
07/01/26 - 07/31/26	10 Yard Trash Service			1	$ 75.00 per month	75.00
	Fuel Surcharge 15%					11.25
	LA Franchise Fee					8.63
					Site Total	$ 94.88

INVOICE TOTAL **$ 94.88**

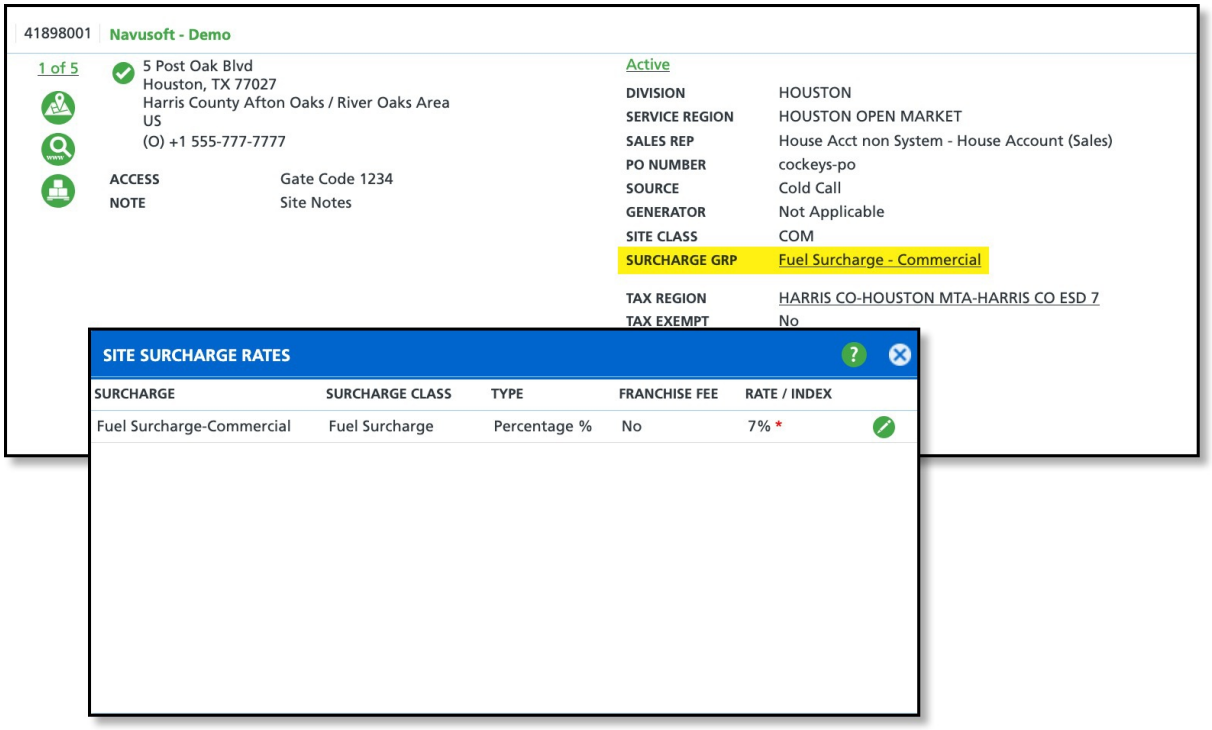
Apply a Surcharge Group to a Site

After a surcharge group has been created, it can be applied to a site's billing settings.



View Surcharge Rates Applied to a Site

After a surcharge group is applied to a site, it appears as a hyperlink in **Site Details**. Selecting the surcharge group link opens the **Site Surcharge Rates** screen, which displays only the rates associated with the site's active services. From this screen, users can override a surcharge rate for the specific site, if needed, by selecting the green **Edit** bubble icon.



Related Articles

Surcharge Setup
Account Screen Overview