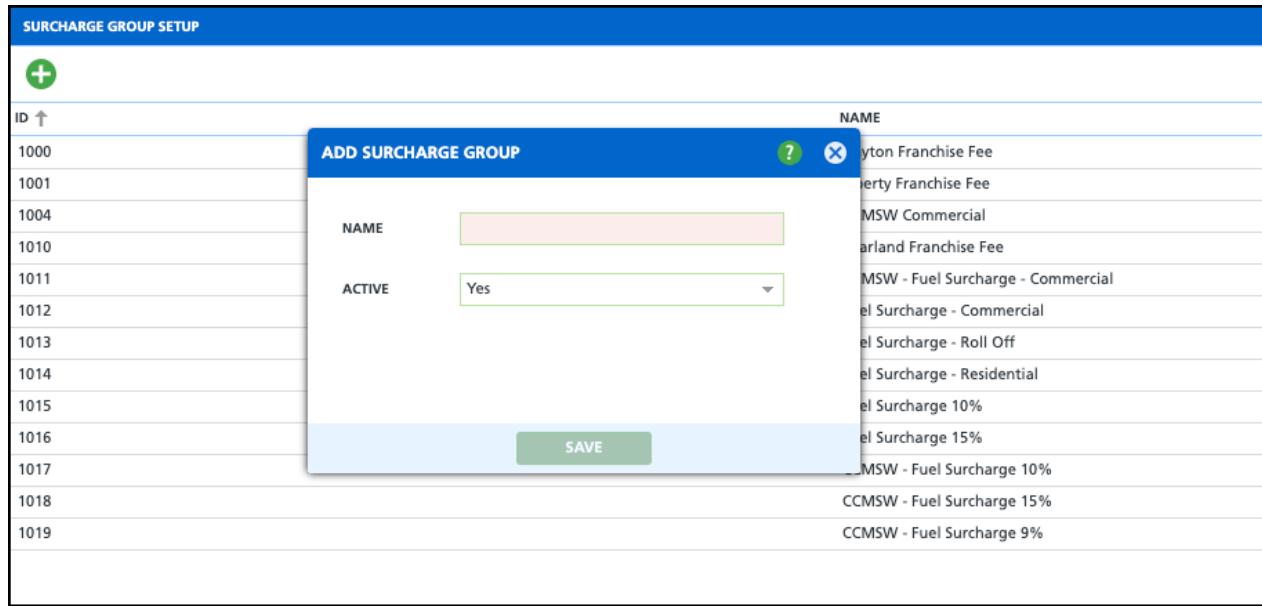


Surcharge Group

Last Modified on 01/05/2026 6:49 am PST

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 billing to ensure consistent billing across multiple sites or services. Only surcharges associated with active services at a site are applied.



ID	NAME
1000	Dayton Franchise Fee
1001	Property Franchise Fee
1004	MSW Commercial
1010	Carland Franchise Fee
1011	MSW - Fuel Surcharge - Commercial
1012	General Surcharge - Commercial
1013	General Surcharge - Roll Off
1014	General Surcharge - Residential
1015	General Surcharge 10%
1016	General Surcharge 15%
1017	MSW - Fuel Surcharge 10%
1018	CCMSW - Fuel Surcharge 15%
1019	CCMSW - Fuel Surcharge 9%

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 its active services. 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 services.

SURCHARGE GROUP SETUP

SETUP > SERVICES > SURCHARGE GROUP

ID ↑	NAME	ACTIVE
1000	Navu Franchise Fee	Yes
1001	Houston Franchise Fee	Yes
1004	NMBJ Commercial	Yes
1010	Delayed Franchise Fee	Yes
1011		Yes
1012		Yes
1013		Yes
1014		Yes
1015		Yes
1016		Yes
1017		Yes
1018		Yes

Surcharges

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE	FRANCHISE FEE	LEVEL
Navu Franchise Fee	Percentage %	No		Yes	Yes	Level 2
Fuel Surcharge-Commercial	Percentage %	Yes		No	No	Level 1

ADD SURCHARGE GROUP

NAME:

ACTIVE: Yes

SAVE

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.

SURCHARGE GROUP SETUP

SETUP > SERVICES > SURCHARGE GROUP

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
1016	Fuel Surcharge \ Environmental	Yes
1017	CCMSW - Fuel Surcharge 10%	Yes
1018	CCMSW - Fuel Surcharge 15%	Yes
1019	CCMSW - Fuel Surcharge 9%	Yes
1020	Flat Fee	Yes
1021	Per Ton Surcharge	Yes
1022	QA Surcharge	Yes
1023	QAFRANFEE	Yes
1024	QA Fuel Surcharge 15%	Yes
1025	QA Fuel Surcharge 10%	Yes
1026	Fuel Surcharge by Index	Yes
1027	Surcharge Multi Levels	Yes

Surcharges

Add

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1

Remove

Add a Surcharge

Surcharges

Add Surcharge

NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	No		Yes	Yes	Level 1
Dayton Franchise Fee	Percentage %	No		Yes	Yes	Level 1
Liberty Franchise Fee	Percentage %	Yes		Yes	Yes	Level 1
CCMSW Fee - Yardage	Per Cubic Yard	Yes		Yes	Yes	Level 1
Pearland Franchise Fee	Percentage %	Yes		Yes	Yes	Level 1
Fuel Surcharge-Commercial	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Residential	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Roll Off	Percentage %	No		No	No	Level 1
Fuel Surcharge 10%	Percentage %	Yes		No	No	Level 1
Fuel Surcharge 9%	Percentage %	Yes		No	No	Level 1
Fuel Surcharge-Rate Index	Rate Index %	No		No	No	Level 1
Environmental Surcharge	Percentage %	No		No	No	Level 1
FLATFEE	Flat	No		No	No	Level 1
Per Disposal Ton	Per Disposal Ton	No		No	No	Level 1
SURTEST	Flat	No	Equipment	No	No	Level 1
LA Franchise Fee	Percentage %	No		No	Yes	Level 1
InaTest	Percentage %	No		No	No	Level 1
Test	Percentage %	No		No	No	Level 1

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

Surcharges						
NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1
Environmental Surcharge	Percentage %	No		No	No	Level 1
Per Disposal Ton	Per Disposal Ton	No		No	No	Level 1

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

Nesting surcharges is made possible through the **Level** column in the **Surcharges** tab. With surcharges defaulting to **Level 1**, setting a surcharge to **Level 2** allows it to apply to all Level 1 surcharges within the group.

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

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

REASON CODE: PERIOD: 2025-07

CREDIT ENTIRE INVOICE

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

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 -

Apply a Surcharge Group to a Site

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

41898001 | Navusoft - Demo

1 of 5 5 Post Oak Blvd
Houston, TX 77027
Harris County Afton Oaks / River Oaks Area
US
(O) +1 555-777-7777

ACCESS NOTE  

Active

DIVISION	HOUSTON
SERVICE REGION	HOUSTON OPEN MARKET
SALES REP	House Acct non System - House Account (Sales)
PO NUMBER	cockeys-po
SOURCE	Cold Call
GENERATOR	Not Applicable
SITE CLASS	COM
SURCHARGE GRP	Fuel Surcharge - Commercial

EDIT SITE

Basic Settings Billing Settings BIC Profile Required Capabilities

TAX EXEMPT? BILL GROUP 

TAX EXEMPT REASON 

SURCHARGE GROUP Fuel Surcharge - Commercial  

INVOICE BY EMAIL Account Settings 

SITE BILLING CONTACT1  

SITE BILLING CONTACT2  

PAYEE NAME 

SAVE

Dec 3 Dec 10 Dec 11 Dec 12 Dec 13

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.

41898001 | Navusoft - Demo

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Houston, TX 77027
Harris County Afton Oaks / River Oaks Area
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(O) +1 555-777-7777

ACCESS NOTE Gate Code 1234 Site Notes

Active

DIVISION	HOUSTON
SERVICE REGION	HOUSTON OPEN MARKET
SALES REP	House Acct non System - House Account (Sales)
PO NUMBER	cockeys-po
SOURCE	Cold Call
GENERATOR	Not Applicable
SITE CLASS	COM
SURCHARGE GRP	Fuel Surcharge - Commercial

TAX REGION HARRIS CO-HOUSTON MTA-HARRIS CO ESD 7
TAX EXEMPT No

SITE SURCHARGE RATES

SURCHARGE	SURCHARGE CLASS	TYPE	FRANCHISE FEE	RATE / INDEX
Fuel Surcharge-Commercial	Fuel Surcharge	Percentage %	No	7% * 

Related Articles

[Surcharge Setup](#)

[Account Screen Overview](#)
