

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	Hyton Franchise Fee
1001	Property Franchise Fee
1004	MSW Commercial
1010	Marland Franchise Fee
1011	MSW - Fuel Surcharge - Commercial
1012	el Surcharge - Commercial
1013	el Surcharge - Roll Off
1014	el Surcharge - Residential
1015	el Surcharge 10%
1016	el 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

+

Search

Q

✖

↺

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

Surcharges

+

ADD SURCHARGE GROUP

?

✕

NAME

ACTIVE

Yes

SAVE

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

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	
							<div> <div>+</div> <div>Search</div> <div>Q</div> <div>🔄</div> </div>	
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	QA FRANFEE	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								
							<div> <div>+</div> <div>Remove</div> </div>	
NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL		
Fuel Surcharge 15%	Percentage %	Yes		No	No	Level 1		

Add a Surcharge

Surcharges								
							<div> <div>+</div> </div>	
NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL		
Fuel Surcharge 15%						Level 1		

ADD SURCHARGE								
NAME ↑	TYPE	TAXABLE	TAX CLASS	EXCLUDE FROM REVENUE CALCULATION	FRANCHISE FEE	LEVEL		
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	+	
InacTest	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

+

ID ↑

1000

1001

1004

1010

1011

1012

1013

1014

1015

1016

1017

1018

1019

1020

1021

1022

1023

1024

1025

1026

1027

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

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

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

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

Edit

View

Active

DIVISION

SERVICE REGION

SALES REP

PO NUMBER

SOURCE

GENERATOR

SITE CLASS

SURCHARGE GRP

HOUSTON

HOUSTON OPEN MARKET

House Acct non System - House Account (Sales)

cockeys-po

Cold Call

Not Applicable

COM

Fuel Surcharge - Commercial

EDIT SITE

Basic Settings

Billing Settings

BIC Profile

Required Capabilities

TAX EXEMPT?

TAX EXEMPT REASON

SURCHARGE GROUP

INVOICE BY EMAIL

SITE BILLING CONTACT1

SITE BILLING CONTACT2

PAYEE NAME

BILL GROUP

Fuel Surcharge - Commercial

Account Settings

SAVE

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

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

Gate Code 1234

Site Notes

Active

DIVISION

SERVICE REGION

SALES REP

PO NUMBER

SOURCE

GENERATOR

SITE CLASS

SURCHARGE GRP

TAX REGION

TAX EXEMPT

HOUSTON

HOUSTON OPEN MARKET

House Acct non System - House Account (Sales)

cockeys-po

Cold Call

Not Applicable

COM

Fuel Surcharge - Commercial

HARRIS CO-HOUSTON MTA-HARRIS CO ESD 7

No

SITE SURCHARGE RATES

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

Related Articles

[Surcharge Setup](#)

[Account Screen Overview](#)
