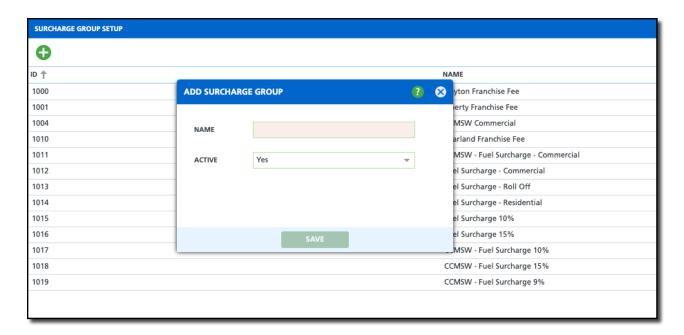
Surcharge Group

Last Modified on 12/23/2025 1:15 pm 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.



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

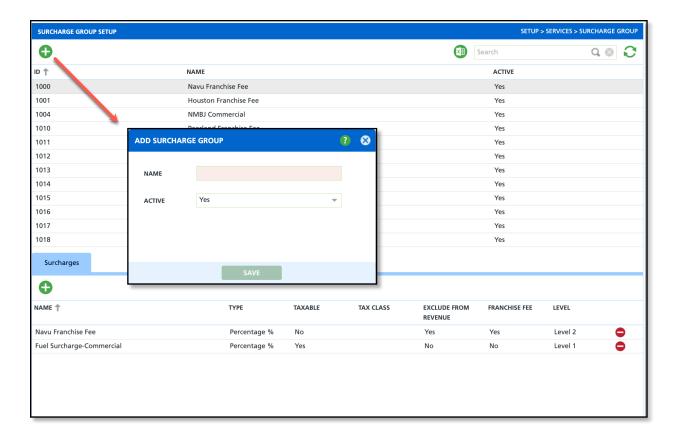
Prerequisites

The following setup must be completed 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

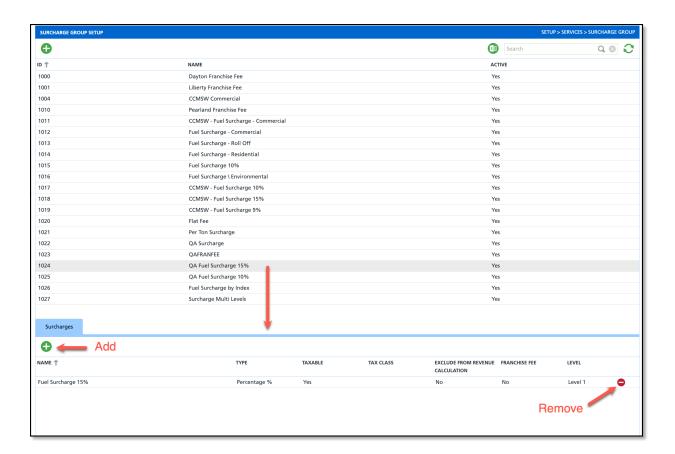
Creating a surcharge group involves two steps. First, the group is created. Second, surcharges are added to the group. Not all surcharges in a group are necessarily applied to a site. When a group is assigned to a site, the site is billed only for the surcharges associated with its active services. As 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.



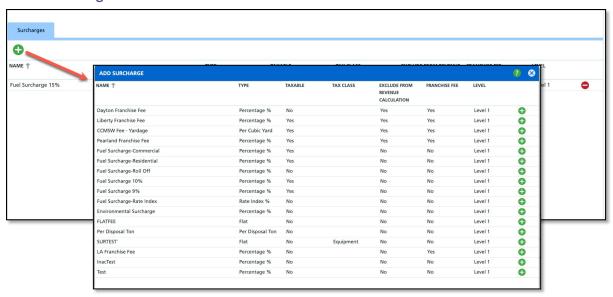
- 1. Click on the **Add** icon to open the Add Surcharge Group popup editor.
- 2. Enter a **Name** of the surcharge group. If a surcharge group is specific to a division, or class type, consider a naming method that identifies the surcharge group's purpose.
- 3. Select the **Active** status of the surcharge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

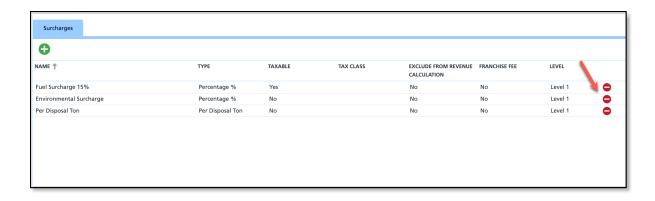


Add a Surcharge



- 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

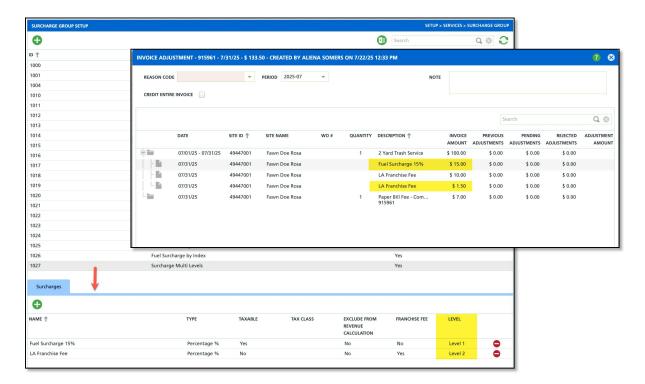
Nesting surcharges is made possible through the **Level** column in the **Surcharges** tab. With surcharges defaulting to **Level 1**, setting a surcharge to **Level 2** allows it to apply to all Level 1 surcharges within the group.

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.

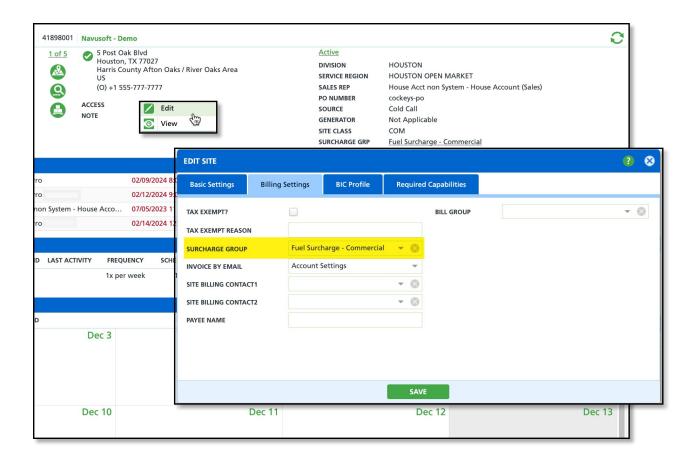
Example

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.



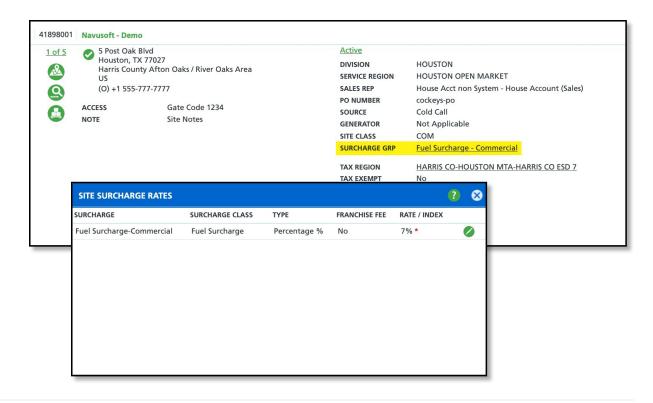
Apply a Surcharge Group to a Site

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