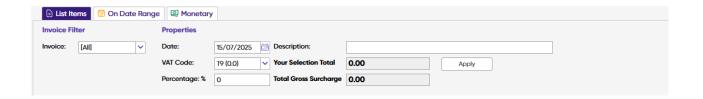# Surcharges

15/07/2025 12:28 pm BST

The Surcharges screen is used to apply surcharges to a client's account.

Details

The 'Surcharges' screen can be accessed via the Accounts Screen. This screen consists of three tabs which facilitate the surcharging of Clients: 'List Items', 'On Date Range' and 'Monetary'.

List Items tab

This tab is used to surcharge particular items from an invoice number by a percentage.

Surcharging an item

1. Select the item/s you wish to surcharge by placing a tick in the 'Select' column/s.
2. Enter a Date, VAT Code, Percentage figure and a Description for the Surcharge.
3. Select the 'Apply' button to submit the Surcharge.
4. The surcharge transaction will be added to the Client's Account.

On Date Range tab

This tab is used to surcharge particular items between a specified date range.

Surcharging an item (between specified dates)

1. Specify your date range using the From and To in the Date Filter.
2. Select the item/s you wish to surcharge by placing a tick in the 'Select' column/s.
3. Enter a Date, VAT Code, Percentage figure and a Description for the Surcharge.
4. Select the 'Apply' button to submit the Surcharge.

5. The surcharge transaction will be added to the Client's Account.

Monetary tab

This tab allows you to surcharge a Client's Account by a monetary value.

Surcharges can be applied by a manual value entered by the user or by a pre-defined value. Pre-defined surcharges can be configured by system administrators. Adding pre-defined surcharges is detailed in 'Accounts Libraries

Manual Surcharges

1. Enter a Date, Description and Surcharge Amount.
2. Select the 'Apply' button.
3. The Surcharge Transaction will be added to the Clients Account.

Pre-defined Surcharges

1. Select the 'Pre-Defined Surcharge' option.
2. Select a pre-defined surcharge from the drop-down list.
3. Enter a Description for the Surcharge and submit the Surcharge to the Clients account by selecting the 'Apply' button.
4. The Surcharge transaction will be added to the Clients Account.