

User Manual

Aptean Food and Beverage ERP

Surcharges

Product Documentation



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Release notes

Article • 2/25/2026 • 1 min read

To view what's new or changed in each release of the Aptean Surcharges extension, select the specific release version.

Date	Release version	Description
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Initial release



2601.1.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
354682	An error occurs on the Purchase Surcharge or Sales Surcharge page when changing the Status field value to <i>Active</i> . This issue occurs when the Auto-save with every field change toggle on the Feature Management page is turned off.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Features

With the features added in this release of the Apteian Surcharges extension, you can:

- Configure global surcharge settings to control sales and purchase surcharge behavior across the system. For more information, see [Configure surcharges setup](#).
- Create comprehensive surcharge rules using the fields on the **General** FastTab and detailed line configurations. For more information, see [Create surcharge for sales or purchase](#).
- Apply surcharge business groups directly to customer and vendor records for targeted surcharge applications. For more information, see [Assign surcharge business groups to customers and vendors](#).
- Extend customer and vendor templates with surcharge business group assignments for streamlined record creation.
- Apply deterministic surcharge selection using priority rules that ensure consistent surcharge application.
- Post documents with automatic surcharge recalculation for partial invoicing scenarios. For more information, see [Post documents with surcharges](#).

Integrations

The Apteian Surcharges extension has been integrated with the Apteian [Order Minimums](#) extension. For more information, see [Integrations](#).



Introduction

Article • 1/28/2026 • 1 min read

The Aptean Surcharges (SUR) extension provides comprehensive functionality for managing additional charges or allowances on sales and purchase documents. This extension allows you to automatically apply surcharges or allowances based on predefined rules, ensuring consistent application of fees, discounts, taxes, and other additional costs across your business processes.

With this extension, you can define complex surcharge scenarios based on customer and vendor relationships, quantities, weights, and various document criteria. The system supports both item charge and G/L account-based surcharges with flexible distribution methods.

The key benefits of this extension are:

- Automates the application of consistent surcharges or allowances across sales and purchase processes.
- Reduces manual entry errors and ensures compliance with pricing policies.
- Provides flexible surcharge calculation methods including fixed amounts, percentages, and tiered structures.
- Incorporates a surcharge aspect to the existing order minimums functionality.



Setup

Article • 1/28/2026 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Configure surcharges setup](#)
- [Set up surcharge business groups](#)
- [Set up surcharge item charges](#)
- [Set up surcharge accounts](#)



Manage Permission sets

Article • 1/28/2026 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *SURCHARGES200FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *SURCHBASIC200FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



Surcharges

The associated fields are automatically updated based on the entered value.

The user has the necessary permissions to use the features of the Aptean Surcharges extension, ensuring secure and role-based access.



Configure surcharges setup

Article • 1/28/2026 • 2 min read

You can configure global surcharge settings to control how surcharges or allowances are applied across sales and purchase documents. This setup defines the default behavior for surcharge creation, numbering, and distribution methods.

To configure the surcharges setup, follow these steps:

1. Select the Search icon , enter **Surcharges Setup**, and then choose the related link.
The **Surcharges Setup** page opens.
2. On the **Sales Surcharges** FastTab, enter the required information in the following fields:

Field	Description
Enable Sales Surcharges	Turn on this toggle to enable surcharge functionality for sales documents.
Sales Surcharge Nos.	Select the number series to be used for sales surcharge numbering.
Sales Document Surcharge Creation Method	Select when surcharges are created on sales documents. The available options are: <i>On Release</i> : Surcharges are automatically calculated and added when you release the order. However, you can still use manual surcharge calculation if needed. <i>Manual</i> : You must manually select the Calculate Surcharge action on the sales order to add surcharges and do not calculate automatically on release.
Sales Surcharge Reference Date	Select the date used for surcharge validation in relation to sales documents. The available options are: <i>Order Date</i> , <i>Shipment Date</i> , <i>Promised Delivery Date</i> , and <i>Requested Delivery Date</i> . The system compares this date against the starting and ending dates of your surcharge rules.
Default Sales Document Surcharge Line Type	This is an optional field. Select the default line type for sales surcharges. This saves time when you set up a new sales surcharge record because the value defaults automatically. The available options are: <i>Item Charge</i> or <i>G/L Account</i> . The selected option



	determines the type of the surcharge document line that the system inserts.
Default Sales Document Surcharge Distribution Method	This is an optional field. Select a default value for this field so new surcharge records use it automatically, saving time during setup. For more details about this field, see the Create surcharge for sales or purchase .

3. On the **Purchase Surcharges** FastTab, enter the required information in the following fields:

Field	Description
Enable Purchase Surcharges	Turn on this toggle to enable surcharge functionality for purchase documents.
Purchase Surcharge Nos.	Select the number series to be used for purchase surcharge numbering.
Purchase Document Surcharge Creation Method	Select when surcharges are created on purchase documents. The available options are: <i>On Release</i> : Surcharges calculate automatically and are added when you release the order. You can still calculate surcharges manually if needed. <i>Manual</i> : You must manually select the Calculate Surcharge action on the purchase order to add surcharges and do not calculate automatically on release.
Purchase Surcharge Reference Date	Select the date used for surcharge validation. The available options are <i>Order Date</i> and <i>Expected Receipt Date</i> . The system uses this date to check whether it falls within the start and end dates of your surcharge rules.
Default Purchase Surcharge Line Type	This is an optional field. Select the default line type for purchase surcharges to save time when you create a new purchase surcharge record, as the value defaults automatically. The available options are: <i>Item Charge</i> and <i>G/L Account</i> . The selected option determines the type of the surcharge document line that the system inserts.
Default Purchase Surcharge Distribution Method	This is an optional field. Select a default value for this field so new surcharge records use it automatically, saving time during setup. For more details about this field, see the Create surcharge for sales or purchase .

The surcharges setup is configured and ready for use across your sales and purchase processes.



Set up surcharge business groups

Article • 1/28/2026 • 2 min read

You can create surcharge business groups to categorize customers and vendors for targeted surcharge applications. These groups allow you to apply specific surcharge rules to different business segments or customer types.

To set up surcharge business groups, follow these steps:

1. Select the Search icon  , enter **Surcharge Business Groups**, and then choose the related link. Alternatively, select the **Surcharge Business Groups** action on the **Surcharges Setup** page. The **Surcharge Business Groups** page opens.
2. Select **New** to create a new surcharge business group.
3. Enter the required information in the following fields:

Field	Description
Code	Enter a unique code to identify the surcharge business group.
Description	Enter a description that explains the purpose or criteria of the business group.

The surcharge business groups are set up and can be assigned to customers, vendors, and surcharge rules.



Set up surcharge item charges

Article • 1/28/2026 • 2 min read

You must define which item charges are allowed for surcharges. This limits the options available to users when they set up new surcharge configurations.

To set up surcharge item charges, follow these steps:

1. Select the Search icon , enter **Surcharge Item Charges**, and then choose the related link. Alternatively, select the **Surcharge Item Charges** action on the **Surcharges Setup** page. The **Surcharge Item Charges** page opens.
2. Select **New** to create a new surcharge item charge entry.
3. Enter the required information in the following fields:

Field	Description
Item Charge Code	Select an existing item charge code to make it available for surcharge configurations.
Description	Displays the description of the selected item charge code. This field is automatically populated from the item charge master data and is non-editable.
Usage	Select where this item charge can be used. The available options are: <i>All</i> : Item charge may be used for both sales and purchase surcharges. <i>Sales</i> : Item charge may be used for sales surcharges only. <i>Purchase</i> : Item charge may be used for purchase surcharges only.

The surcharge item charges are configured and available for use in surcharge calculations.



Set up surcharge accounts

Article • 1/28/2026 • 2 min read

You must define which G/L accounts are allowed for surcharges. This limits the options available to users when they set up new surcharge configurations.

To set up surcharge accounts, follow these steps:

1. Select the Search icon  , enter **Surcharge Accounts**, and then choose the related link. Alternatively, select the **Surcharge Accounts** action on the **Surcharges Setup** page. The **Surcharge Accounts** page opens.
2. Select **New** to create a new surcharge account entry.
3. Enter the required information in the following fields:

Field	Description
G/L Account No.	Select the G/L account number to make it available for surcharge postings. This displays only records with the Posting Type field value set to <i>Posting</i> . However, it does not filter for records with <i>Direct Posting</i> . Since surcharges insert lines directly into documents, only accounts with <i>Direct Posting</i> type will succeed during posting.
Name	Displays the name of the selected G/L account. This field is automatically populated from the chart of accounts and is non-editable.
Usage	Select where this G/L account can be used. The available options are: <i>All</i> : G/L account may be used for both sales and purchase surcharges. <i>Sales</i> : G/L account may be used for sales surcharges only. <i>Purchase</i> : G/L account may be used for purchase surcharges only.

The surcharge accounts are configured and ready for use in surcharge rules and financial postings.



Assign surcharge business groups to customers and vendors

Article • 1/28/2026 • 2 min read

You can assign surcharge business groups directly to customer and vendor records, as well as to their ship-to and order addresses. This gives you flexibility to apply different surcharge rules at different levels. The surcharge business group automatically populates for any document that uses the associated customer, vendor, or address code. In line with standard Business Central behavior, a document using a ship-to address code or order address code inherits the surcharge business group from that record. If the address code is blank, the system uses the group defined on the customer or vendor record.

Set up customers

To assign surcharge business groups to customer records, follow these steps:

1. Open the required **Customer Card** page.
2. On the **Invoicing** FastTab, in the **Surcharge Business Group** field, select the appropriate surcharge business group for this customer.

Set up vendors

To assign surcharge business groups to vendor records, follow these steps:

1. Open the required **Vendor Card** page.
2. On the **Invoicing** FastTab, in the **Surcharge Business Group** field, select the business surcharge group for this vendor.

Set up ship-to addresses

You can assign surcharge business groups to ship-to addresses for more granular surcharge control by following these steps:

1. Open the required **Ship-to Address** page associated with the related **Customer Card** page.
2. On the **Surcharges** FastTab, in the **Surcharge Business Group** field, select the surcharge business group for this shipping location.



Set up order addresses

You can assign surcharge business groups to order addresses for purchase-specific surcharge control by following these steps:

1. Open the required **Order Address** page associated with the related **Vendor Card** page.
2. On the **Surcharges** FastTab, in the **Surcharge Business Group** field, select the appropriate surcharge business group for this order address.

Apply surcharge business groups to templates

You can add the surcharge business group to customer or vendor templates to simplify setup when creating new records. When a template is applied, the new record automatically inherits the surcharge business group value.



Create surcharge for sales or purchase

Article • 1/28/2026 • 2 min read

You can create comprehensive surcharge rules by defining surcharge headers with detailed line configurations. Surcharge headers contain the main rule parameters, while surcharge lines define specific conditions and calculation methods.

To create surcharge headers, follow these steps:

1. Select the Search icon  , enter **Sales Surcharges** or **Purchase Surcharges**, and then choose the related link. The **Sales Surcharges** or **Purchase Surcharges** list page opens.
2. Select **New** to create a new surcharge header. The **Sales Surcharge** or **Purchase Surcharge** page opens.
3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Code	Enter a unique code to identify this surcharge configuration. The system applies the standard number series logic.
Description	Enter a description that explains the purpose of this surcharge.
Assign-To Type	Select who this surcharge applies to. The available options are: <i>All Customers</i> : Apply to every customer. <i>Customer</i> : Apply to a specific customer. <i>Surcharge Group</i> : Apply to all customers in a business group.
Surcharge Line Type	Select the type of surcharge line. The available options are: <i>Item Charge</i> : Sets the inserted line type to <i>Item Charge</i> , which posts as an item charge during invoice posting. This creates additional value entries that affect the sales or cost of the items being shipped or received and impacts inventory costing. For more information, see Item Charges . <i>G/L Account</i> : Sets the inserted line type to <i>G/L Account</i> , which posts directly to the general ledger during invoice posting and does not affect the value of items shipped or received.
Surcharge Line Type Code	Select the specific item charge or G/L account code based on the surcharge line type selection. The options are limited to the records defined in surcharge accounts.
Surcharge Distribution Method	Select the method used to distribute the surcharge across document lines. This field is editable only when the Surcharge Line Type field value is set to <i>Item Charge</i> . The available options are:



	• <i>Equally</i>: Distributes the surcharge evenly across all lines in the purchase order. • <i>Amount</i>: Distributes the surcharge proportionally based on each line's amount. • <i>Weight</i>: Distributes the surcharge proportionally based on each line's weight. For more information, see Item Charges.
Surcharge Type	Select the type of surcharge. The available options are: • <i>Document Surcharge</i>: Adds a line with a positive amount, increasing the total value of the document. • <i>Document Allowance</i>: Adds a line with a negative amount, reducing the total value of the document. This allows you to apply discounts or adjustments directly on the document. • <i>Order Minimum</i>: Adds a line only when the order minimum restriction is triggered. Selecting this option makes the surcharge record available for use with order minimums.
Starting Date	Enter the date when this surcharge rule becomes effective.
Ending Date	Enter the date after which this surcharge is no longer in effect.
Currency Code	Select the currency for this surcharge rule. If you enter a value, the surcharge applies only to documents with a matching currency code. If the value is the local currency, it also applies to documents with a blank currency code. If the field is blank, the surcharge applies to all documents and converts to the document currency.
Unit of Measure Code	This is an optional field. Enter a UOM for the surcharge line on the resulting document. This is informational only, as the line type is <i>Item Charge</i> or <i>G/L Account</i> . For example, if the surcharge represents a per-pound fuel charge, you can set the Unit of Measure Code to <i>LB</i> so it appears on the printed invoice.
Threshold Basis	Select which quantity total the system should use to determine the applicable surcharge for the document. The available options are: • <i>Quantity</i>: Uses the total outstanding quantity of qualifying document lines to determine the surcharge based on the minimum weight. Changes to the Qty. to Invoice field value at invoicing do not recalculate the surcharge amount. • <i>Qty. to Invoice</i>: Uses the Qty. to Invoice field value of qualifying lines to determine the surcharge based on the minimum weight. For example, if the invoiced quantity is lower than the ordered quantity, the lower total gross weight may trigger a different surcharge rate. This applies only when the Calculation Method field value is set to <i>Amount Per Weight Unit</i>.



Once per Document	Use this to control whether the surcharge can be applied more than once on a single document, such as when the document is posted to invoice multiple times. For example, a flat-rate surcharge may be applied only on the first invoice posting and not on subsequent postings for the same document.
Status	Select the status of this surcharge configuraion. The available options are: <i>Draft</i> and <i>Active</i> . Only active surcharges are applied to documents. You can edit a surcharge configuration only when the Status field value is set to <i>Draft</i> .

4. On the **Lines** FastTab, enter the required information in the following fields:

Field	Description
Assign-To Type	Specifies the assignment type inherited from the General FastTab or select a more specific assignment type.
Assign-To No.	Select the specific customer, vendor, or surcharge group code based on the assign-to type. If the Assign-To Type field value is <i>All Customers</i> or <i>All Vendors</i> , leave this field blank.
Assign-To Address Code	Select a specific ship-to or order address code to apply the surcharge only to documents with matching values. This option is available only when the Assign-To Type field value is <i>Customer</i> or <i>Vendor</i> .
Shipment Method Code	Select the shipment method if this surcharge applies to specific shipping methods. The value must match the document header for the surcharge to apply. Leave the field blank to apply the surcharge regardless of the document value.
Shipping Agent Code	Select a shipping agent if the surcharge applies only to specific agents. The value must match the document header for the surcharge to apply. Leave the field blank to apply the surcharge regardless of the document value.
Shipping Agent Service Code	Select a shipping agent service if the surcharge applies only to specific services. The value must match the document header for the surcharge to apply. Leave the field blank to apply the surcharge regardless of the document value.
Location Code	Select a location if the surcharge applies only to documents with that specific location code. Leave the field blank to apply the surcharge regardless of the document value.



Minimum Quantity	Enter the minimum order quantity required for this surcharge to apply. For example, enter 100 if the surcharge only applies to orders of 100 units or more. Enter 0 if there is no minimum.
Minimum Weight	Enter the minimum weight required for this surcharge to apply. The system uses the total gross weight of the qualifying document lines to determine which surcharge line to apply. For example, enter 50 if the surcharge applies only when the total gross weight of qualifying lines is 50 or more. The surcharge line with the highest value among those that qualify is applied.
Surcharge Value/ Allowance Value	Enter the surcharge or allowance value for the line inserted on the document. This value becomes the unit price or direct unit cost of the line and converts to the document currency if needed. Use a negative value for an allowance. You can enter 0.00 to indicate that the surcharge or allowance no longer applies at a specific total weight. For example, to stop a surcharge when the document's total gross weight reaches 20,000, create surcharge lines for lower weight thresholds with different values, and include a final line with Minimum Weight = 20,000 and Surcharge Value = 0.00.

- Repeat for each line condition you want to define for this surcharge rule. When you have set all conditions, change the status to *Active*.

The surcharge is configured and ready to be applied to sales and purchase documents based on the defined criteria.



Apply surcharges for documents

Article • 1/28/2026 • 4 min read

You can apply surcharges to sales and purchase documents either manually using the **Calculate Surcharge** action or automatically when documents are released, depending on your surcharge setup configuration.

The system applies surcharges based on a deterministic selection process that considers multiple criteria including customer or vendor assignment, shipping details, location, exclusion rules, weights, and dates. Only one surcharge line is created by the surcharge rule based on priority ranking. For a single surcharge configuration, only one surcharge line can qualify. However, multiple surcharges may apply to the same document.

The system evaluates all active surcharge rules, applies the selection criteria, and creates the appropriate surcharge lines on the document. The surcharge code shows the code of the applied surcharge configuration.

The **Quantity** and **Unit Price** or **Direct Unit Cost field** values are set based on the surcharge configuration. If the line type is *Item Charge*, the item charge assignments are automatically applied according to the configured method.

Calculate surcharges manually

For sales and purchase documents, the **Calculate Surcharges** action is always available. You can use this action to preview all applicable surcharges before releasing the document, allowing you to review the impact in advance.

To calculate surcharges manually, use the **Calculate Surcharges** action on the document header. You can perform this action only when the document is not released.

Calculate surcharges on release

When the **Sales Document Surcharge Creation Method** or **Purchase Document Surcharge Creation Method** field value is set to *On Release* on the **Surcharges Setup** page, the system automatically calculates and applies surcharges when you release the document.

Reopen documents with surcharges

When you reopen a released document that contains surcharge lines, the system automatically deletes all existing unposted surcharge lines. The system recalculates and recreates the surcharges when you release the document again or when you use the **Calculate Surcharges** action.



Bypass surcharges

You can bypass surcharge calculations on specific documents for which surcharges should not apply, for example a special delivery order. The **Bypass Surcharges** field is available on the **Invoice Details** FastTab of the sales and purchase orders and can be set to *All* to prevent all surcharges from being calculated.

When you set the **Bypass Surcharges** field value to *All*, the system deletes any existing surcharge lines.

Exclude from surcharge

You can exclude specific document lines from surcharge calculation by setting the **Exclude from Surcharge** field value to *Yes*. The system automatically sets this value from the item record, but you can change it manually if needed.

Excluded lines are not considered in total weight threshold calculations and are skipped during item charge assignments. As a result, these lines do not incur any additional costs or sales value entries related to surcharges.

Calculate surcharges after partial invoicing

When you post an invoice for a document and one or more lines still have open quantities, the system continues to calculate surcharges for the remaining quantities. This behavior assumes that surcharges should apply to any quantities that are still to be shipped or received.

You can prevent additional surcharges from being inserted for a partially invoiced document in the following ways:

Prevent specific surcharges

To stop certain surcharges from being applied after the first invoice posting, set the **Once per Document** field value in the surcharge configuration to *Yes*. With this setting, the surcharge is applied only during the first invoice posting for the document.

Prevent specific document lines

To prevent specific document lines from influencing surcharge calculations, set the **Exclude from Surcharge** field value to *Yes* on those lines.



Prevent all surcharges

To stop all surcharges from being calculated for the document, set the **Bypass Surcharges** field value to *All*.



Post documents with surcharges

Article • 1/28/2026 • 2 min read

When you post documents that contain surcharges, the system performs additional calculations to ensure surcharge amounts reflect actual invoice quantities and amounts. The posting behavior varies based on the surcharge calculation method. The system updates the **Quantity**, **Unit Price**, or **Direct Unit Cost** field value, and recalculates item charge assignments to reflect only the quantities being invoiced.

Note

The surcharge posting logic ignores the **Auto Post Non-Invt. via Whse.** field value on the **Sales & Receivables Setup** and **Purchases & Payables Setup** pages, because posting the full surcharge quantity during the first warehouse shipment or receipt is not supported. The system adjusts surcharge line quantities to match the quantities being invoiced, and does so only when you post the invoice.

Post documents with amount per weight surcharges

For surcharges with the **Calculation Method** field value set to *Amount per Weight Unit*, the system recalculates the surcharge quantity during invoice posting to reflect the actual invoice quantity.

The system performs the following calculation:

Invoice Surcharge Quantity = (Invoiced Quantity ÷ Ordered Total Quantity) × Original Order Total Gross Weight

Surcharge line price or cost changes on invoice posting

When the **Threshold Basis** field value is set to *Qty. to Invoice*, the system updates the surcharge line unit price or direct unit cost during invoice posting. This occurs when the total invoiced weight causes a different surcharge line to apply based on the minimum Weight. This ensures the surcharge rate aligns with the total weight of the invoice.

If you do not want the surcharge value to change based on the invoiced weight, set the **Threshold Basis** field value to *Quantity* in the surcharge configuration.



Integrations

Article • 1/28/2026 • 1 min read

The Aptean Surcharge extension has been integrated with the following extension:

- [Aptean Order Minimums](#)



Integration with Apteian Order Minimums

Article • 1/28/2026 • 1 min read

When the Apteian Surcharges extension is used in conjunction with the Apteian [Order Minimums](#) extension, you can configure surcharges to be automatically applied when sales orders or purchase orders do not meet the required order minimum thresholds.

On the **Sales Surcharges** and **Purchase Surcharges** pages, you can set the **Surcharge Type** field value to *Order Minimum* to apply the surcharge in order minimum scenarios. When you select this option, most other fields become read-only because the system determines surcharge applicability through order minimum logic.

The **Surcharge No.** field has been added to the **Order Minimums** page. This field is available when the **Surcharge Type** field is set to *Order Minimum*. The field becomes non-editable when the **Mandatory** checkbox is selected.

When an order minimum setup uses a surcharge, the system inserts the surcharge line when you release the document after accepting the order minimum warning.

