RATE CARDS — Dependent Calculations — What, Why & How.

Rate card calculations can now be made conditional on the results of other calculations or charges on the same price list, eliminating the need for duplicate price tables and manual exclusion workarounds.

Updated 13 May 2026

Summary

What
Two new mechanisms for creating dependencies between rate card calculations:

- **Pick first matching calculation** - evaluates calculations on a charge top-to-bottom and applies the first one that produces a non-zero result.
- **Other charge dependency** - a condition metric on a calculation that makes it conditional on whether a specific other charge on the same price list meets a defined threshold.

Why
Rate card calculations previously ran independently, with no way to suppress one charge based on the result of another. This forced workarounds such as duplicating price tables across multiple surcharges or maintaining complex manual exclusion conditions.

How
Enable *Pick first matching calculation* directly on a charge to set up fallback pricing logic. Add *Other charge dependency* as a condition on an individual calculation, then select the reference charge and set the comparison operator and threshold.

Use Cases

- Transport companies with route-specific fixed rates can set up a primary price table calculation and a fallback calculation that only applies when the primary returns zero - eliminating the need for duplicate price tables per surcharge.
- Companies with fixed rate overrides can suppress surcharges (ADR, fuel, toll, waste) when a fixed rate charge has already applied, replacing complex manual exclusion conditions.
- Operations that need surcharges to apply only when a transport charge was successfully auto-rated can configure this directly as a condition, rather than duplicating price tables across each surcharge.

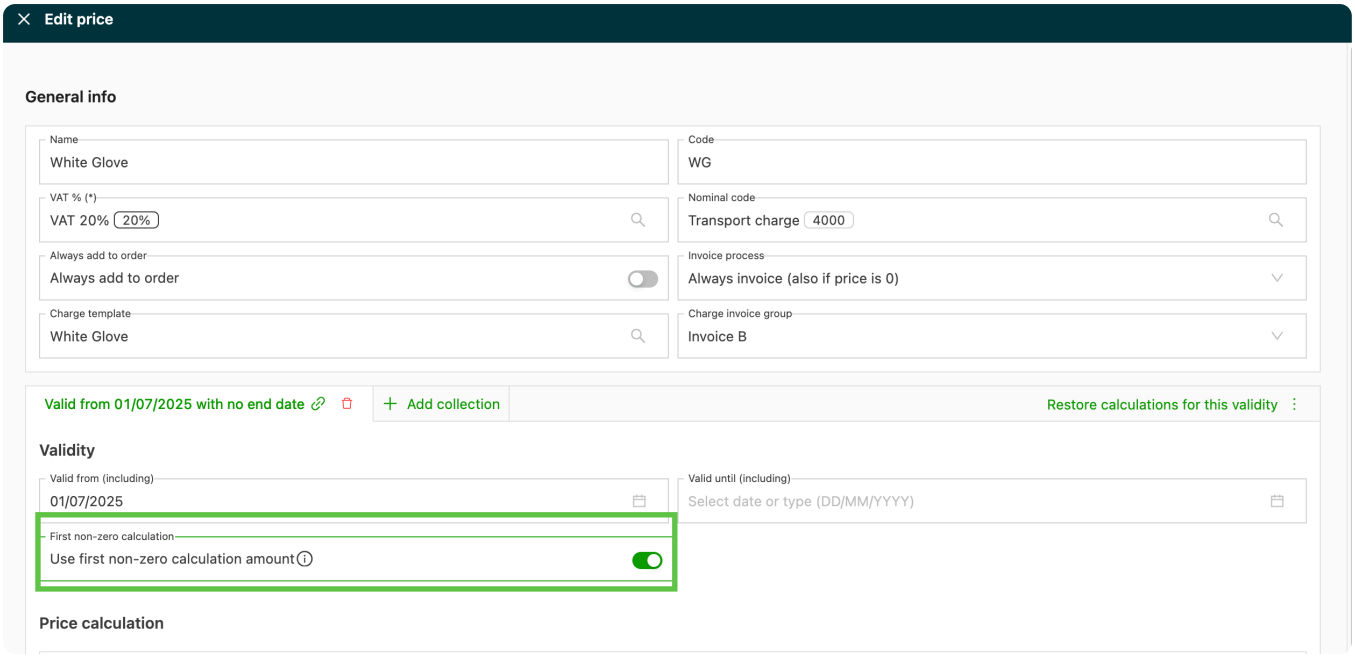
Terminology

Term	Definition
Pick first matching calculation	An option on a charge that evaluates calculations in order and applies the first one producing a non-zero result
Other charge dependency	A condition metric that makes a calculation conditional on the result of another charge on the same price list
Waterfall evaluation	Sequential top-to-bottom evaluation where the first successful calculation is used and subsequent ones are skipped
Circular dependency	A configuration error where two charges reference each other as conditions, creating an unresolvable loop
Price list	A rate card configuration containing one or more charges, each with one or more calculations

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Configuring a ‘Pick First Matching’ (waterfall) calculation

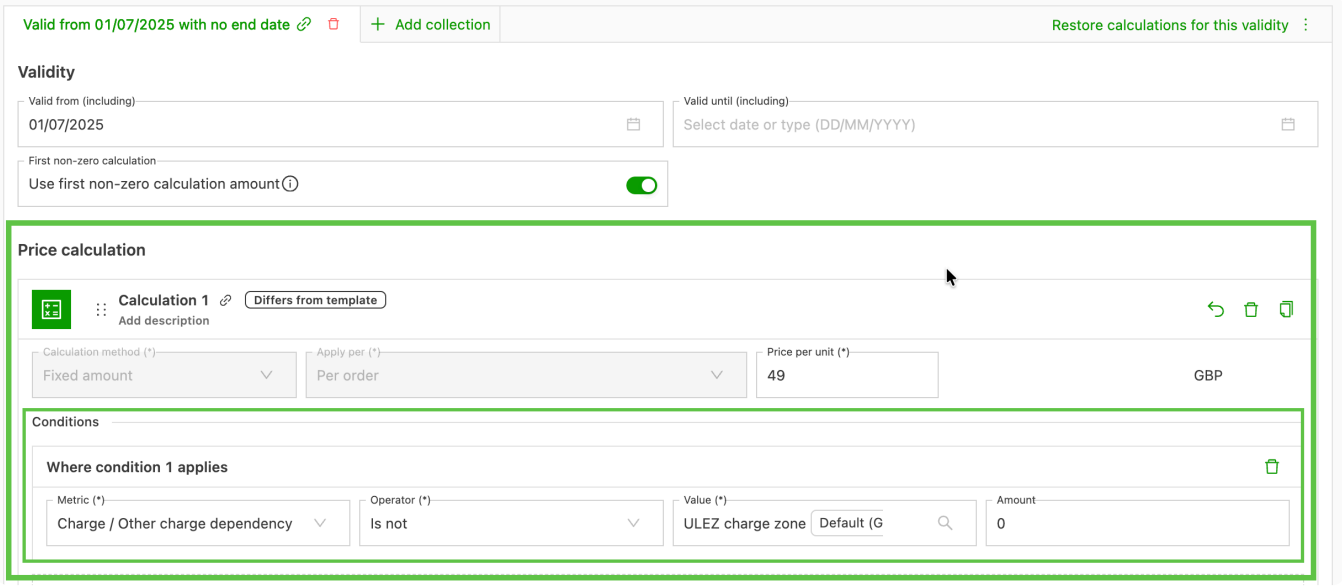
- **NAVIGATE** to **RATES** > ***Rate card customers*** and open the relevant price list.
- **OPEN** the price list to update.
- **SELECT** the charge to configure.
- **ENABLE** the *Pick first non-zero calculation amount* toggle.
- **ARRANGE** the calculations in the desired evaluation order — calculations are evaluated top-to-bottom, and the first one returning a non-zero result is applied. Subsequent calculations are skipped.
- **SAVE** the price list to apply the changes.



📚 All calculations must be fully configured before enabling this option. Each calculation is evaluated in sequence until a non-zero result is found; if none match, the charge returns zero.

Configuring an Other Charge Dependency Condition

- **NAVIGATE** to **RATES > *Rate card customers*** and open the relevant price list.
- **SELECT** the price list containing the charge to make conditional.
- **OPEN** the charge line calculation and navigate to the *Conditions* section.
- **ADD** a new condition and select ***Other charge dependency*** as the condition metric.
- **SELECT** the reference charge — the charge whose result will be evaluated. The reference charge must be on the same price list.
- **SET** the operator (=, ≠, >, <, ≥, ≤) and the threshold value (e.g., 0).
- **SAVE** the price list to apply the condition.



Example: To suppress a surcharge when a fixed rate applies, select the fixed rate charge as the reference charge, set the operator to ≠, and the value to 0. The surcharge calculation will only apply when the fixed rate charge returned no result.

Troubleshooting

Issue	Possible cause	Solution
Circular dependency error on save	Two charges reference each other as conditions	Review condition references and remove the circular link between the two charges
Waterfall not applying the expected calculation	Calculations are not in the intended order	Re-order calculations on the charge so the primary calculation appears first
Other charge dependency not filtering correctly	The reference charge is on a different price list	Cross-price-list conditions are not supported — both charges must be on the same price list
Condition references incorrect charge after price list copy	Condition references were not remapped on copy	Check that the condition on the copied price list references the intended charge