Rates - Rate card customers

This article covers how to add and configure customer rate cards, including specific metrics or conditions to apply when rating orders.

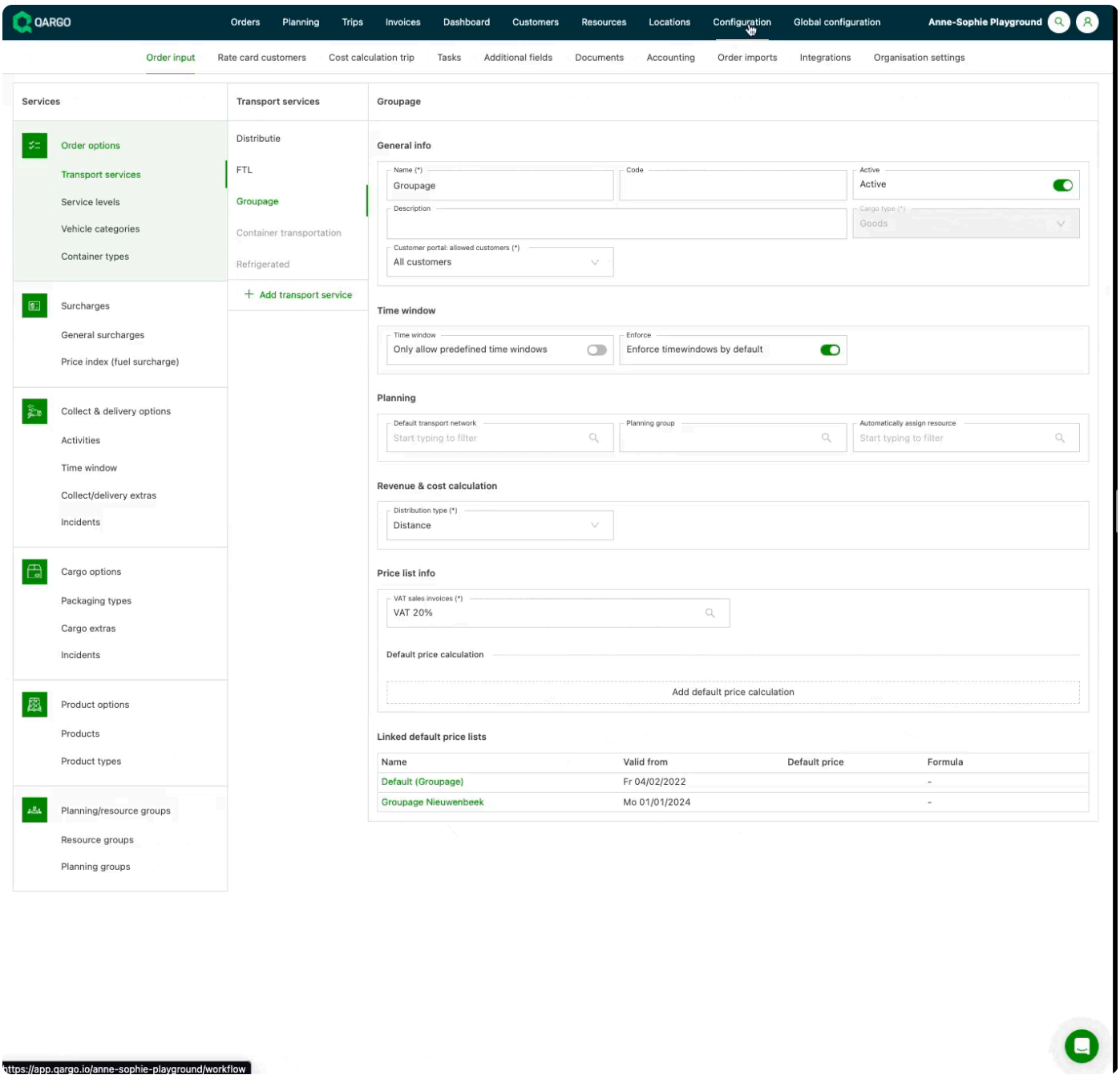
Updated July 27, 2026

Introduction

Users can create rate cards for customers that automatically link to the correct customer, transportation service, and order type, so that orders are rated without any manual input.
Qargo supports two types of rate cards: a **default rate card** that applies to all customers as a fallback, and **customer-specific rate cards** that override the default for individual customers or contract carriers. Prices can still be adjusted manually or supplemented with one-off items on individual invoices when needed.

Add a new price list

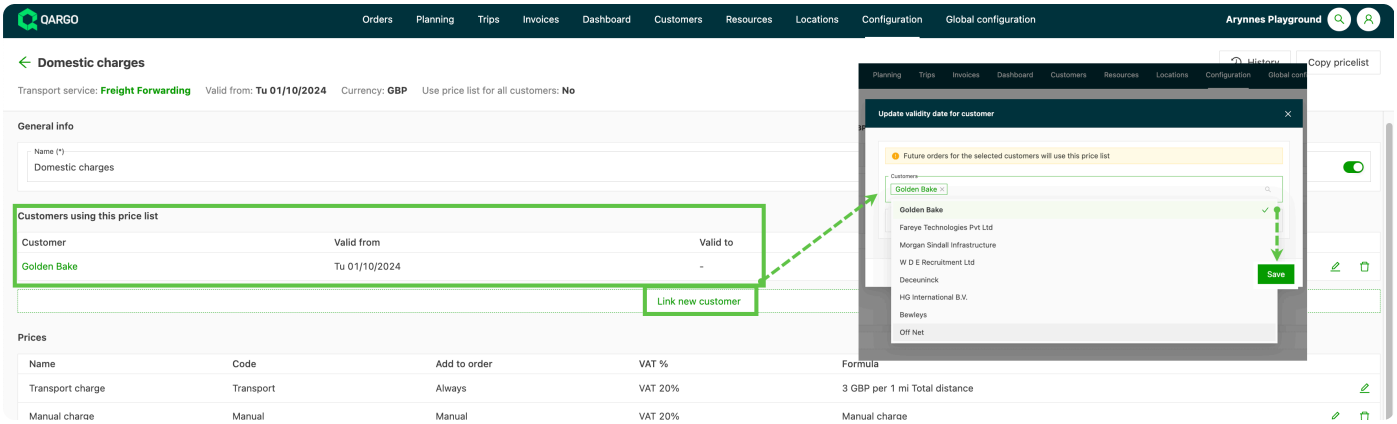
- Navigate to **Rates > Rate card customers**
- Click **Create price list** to create a new list, or select an existing one to update it.
- Select the **Transportation service** the price list applies to.
- Under **General info**, give the price list a **Name** and set a **Valid from** date.
- If creating a default price list, enable the **Use price list for all customers** toggle.
- **Save** the price list.



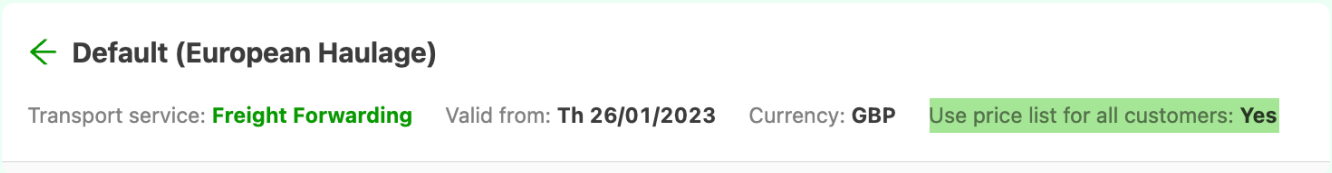
Configure a price list

If the price list was not set as the default for all customers, a **Link new customer** option is available.

- Click it and enter the customer name in the **Customers** field. Multiple customers can be selected. Any orders created for linked customers automatically have the saved prices applied.



📚 If the link option isn't visible, the price list was likely created as a default for all customers. Confirm this by checking the details just below the price list name.

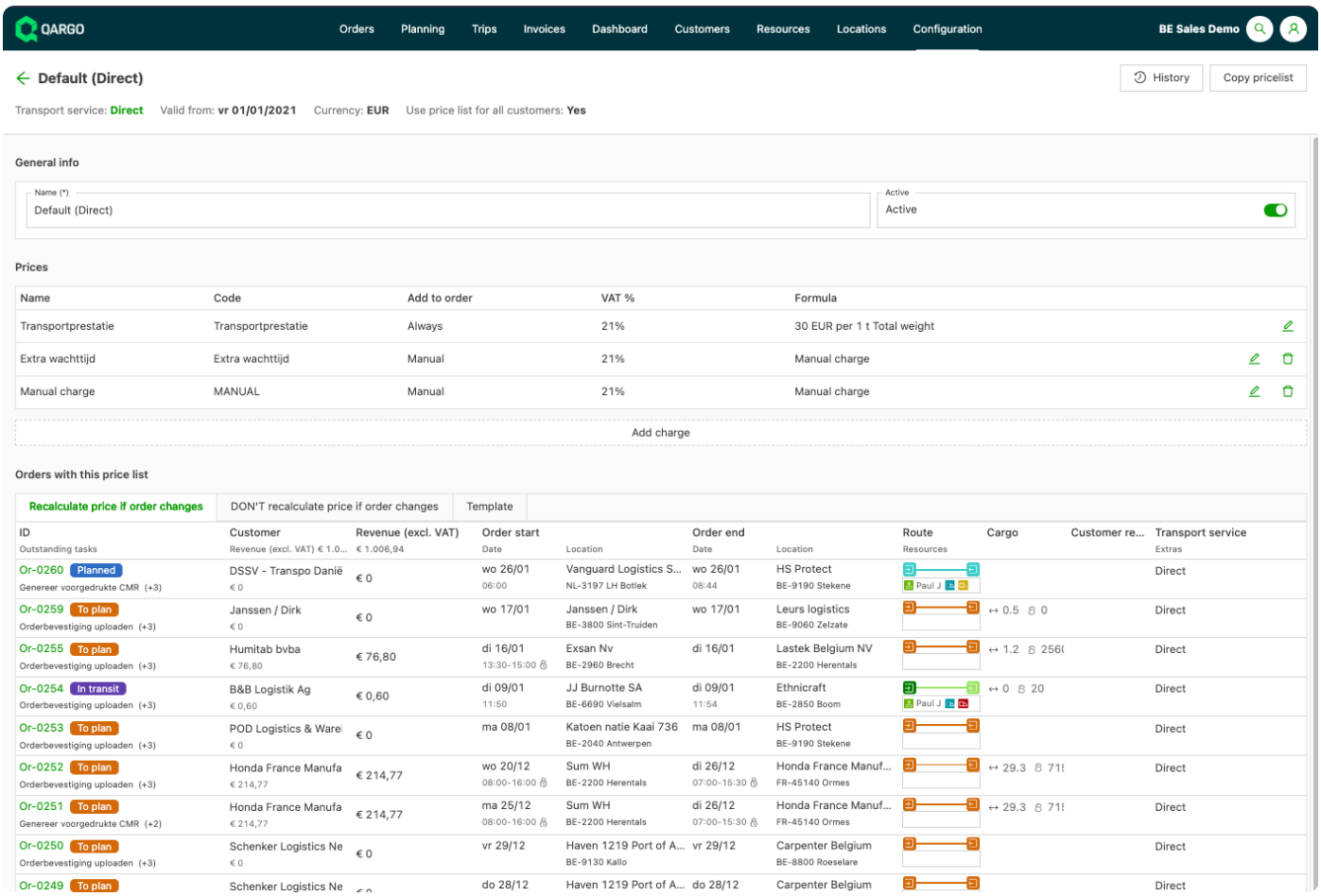


How default and customer-specific rate cards interact

- Customer-specific rate card assignments take precedence for new orders.
- If no specific rate card applies, the default is used as a fallback.
    - For customers not assigned to the default rate card, any applicable surcharges must be added manually to their customer-specific rate card.
- Changes to rate cards only apply to new orders. Completed orders always retain their original rating.

The **Transport charge** is always shown on the invoice; all other items can be added as preferred.

- Click the edit icon (pencil) to open the **Edit price** page.
- Click **Add charge** to add an additional item to the invoice.



Set up a price calculation

From the **Prices** table, click the edit icon (pencil) to enter or edit charges associated with that charge type. This opens a new **Edit price** page.

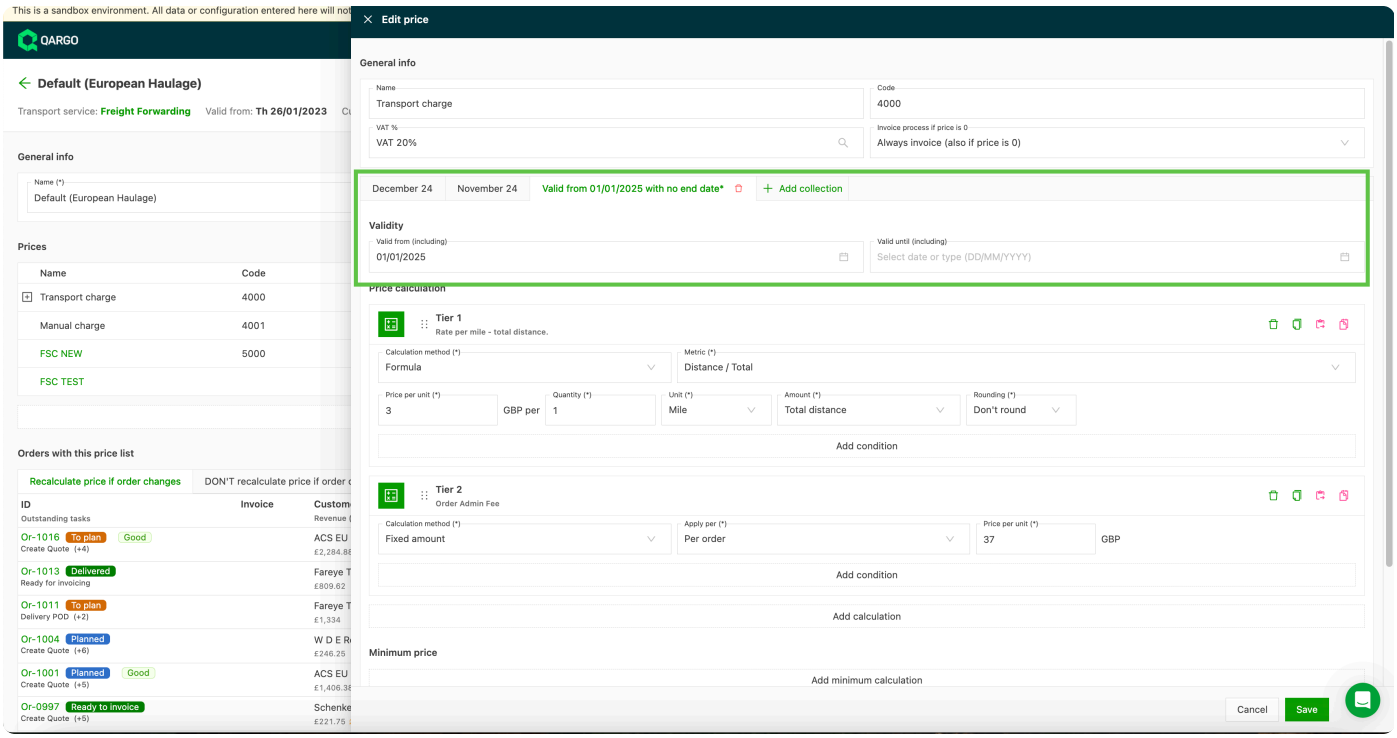
Step 1: General info

- **Name**: Name of the charge that will appear on the invoice
- **Code**: GL code associated with the accounting package
- **Tax %**: Tax percentage to be applied (if applicable)
- **Invoice process if price is 0**: Option to select whether this charge type appears as a line item on the invoice if no value is present

Step 2: Create / name a price collection

Charges are grouped by collections, shown as individual tabs that can be named for ease of identification.

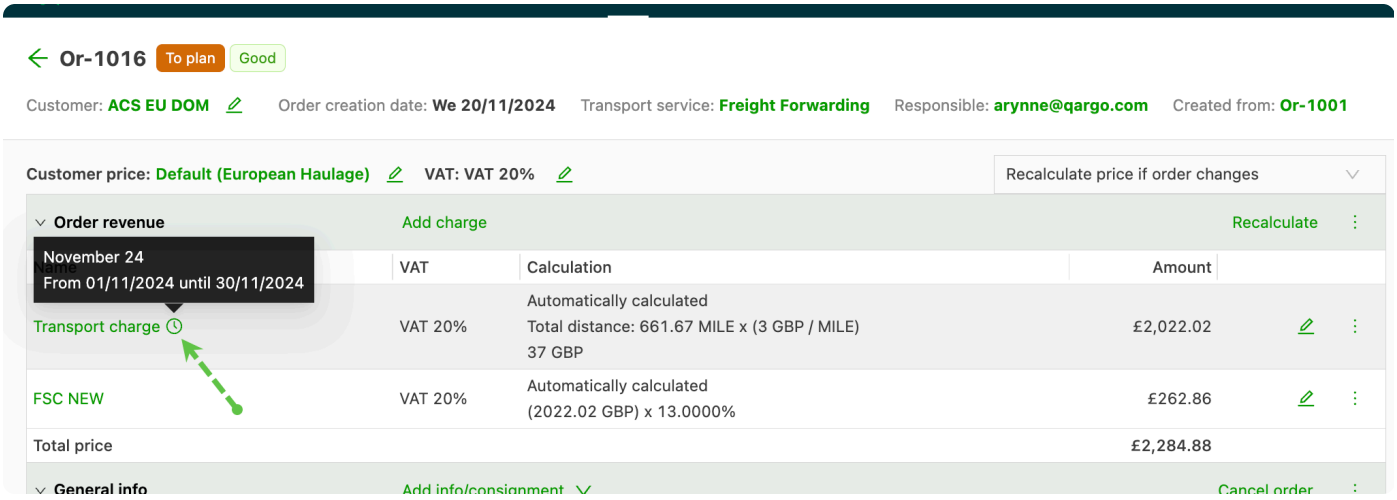
- If no name is specified, the collection (tab) defaults to the validity date(s) entered.
- Each collection has a **Valid from** and **Valid to** date.
- If only the **Valid from** date is entered, the collection has no end date.



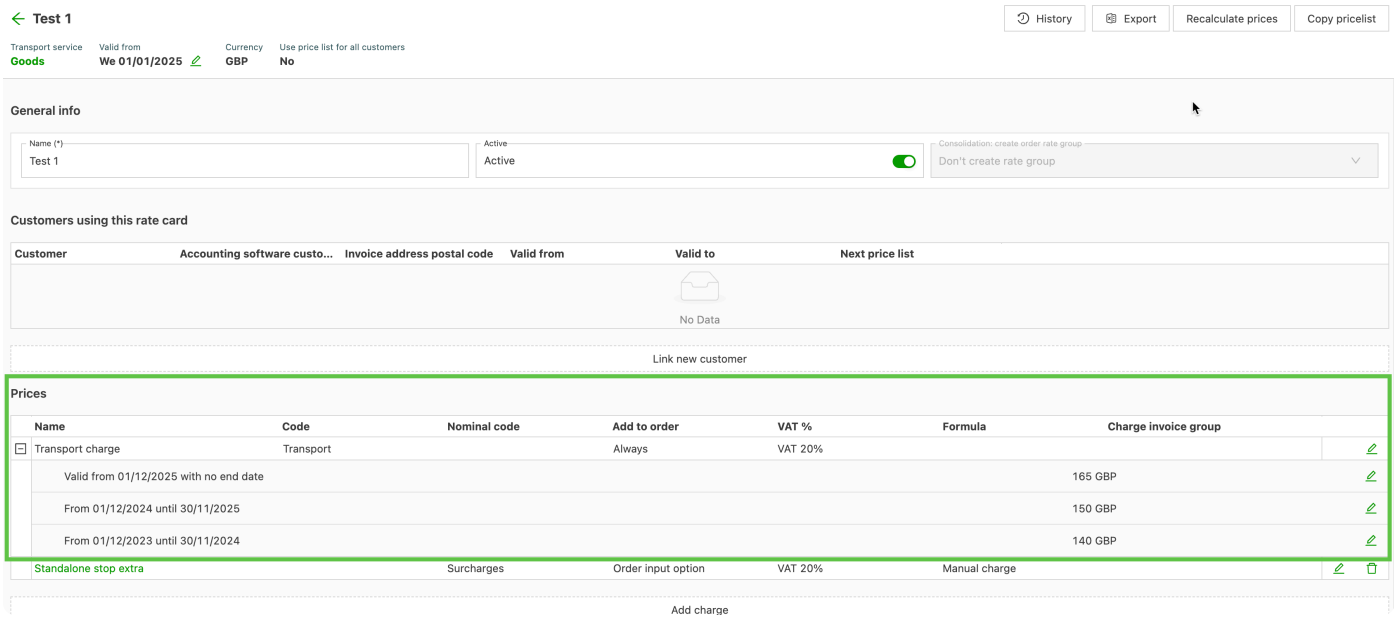
📚 The price collection used to calculate charges is visible on other pages as a link.

Create price collections

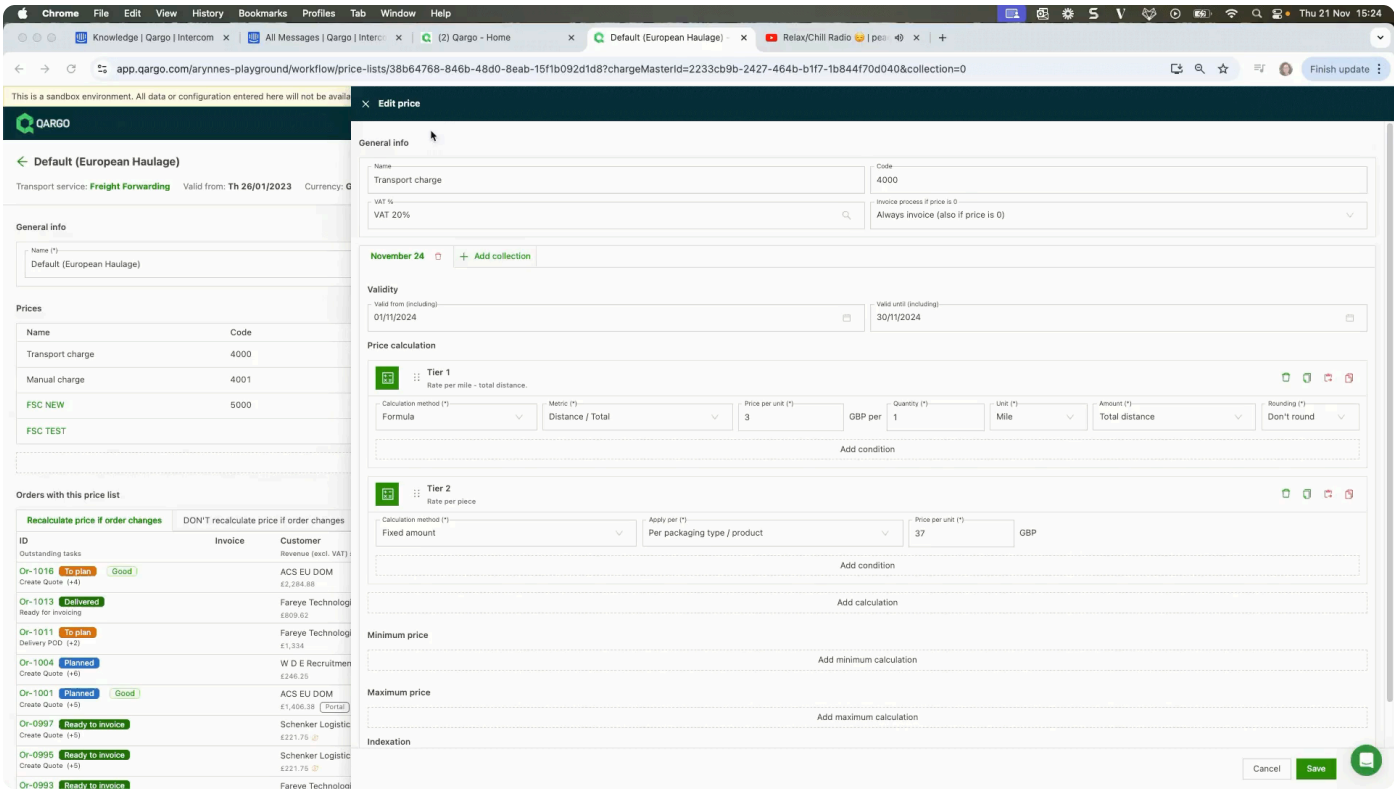
Use this option to add multiple price collections with different valid from/to dates, for instance for monthly rates, or when updating a price list to reflect a price change while still retaining the original.



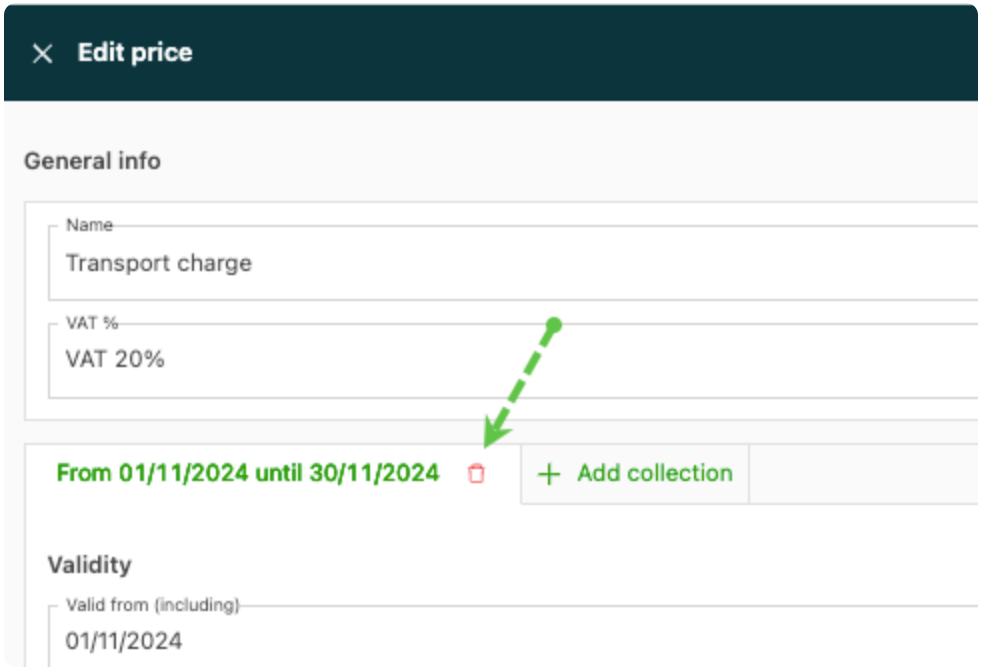
- To create multiple collections, click **+ Add collection** to add another tab.



- When the **Duplicate** option is used on a collection that has a **Valid to** date, the new collection automatically starts from the next available date.
- The collection **Name** defaults to the start date. Click it to overwrite it with the correct name.



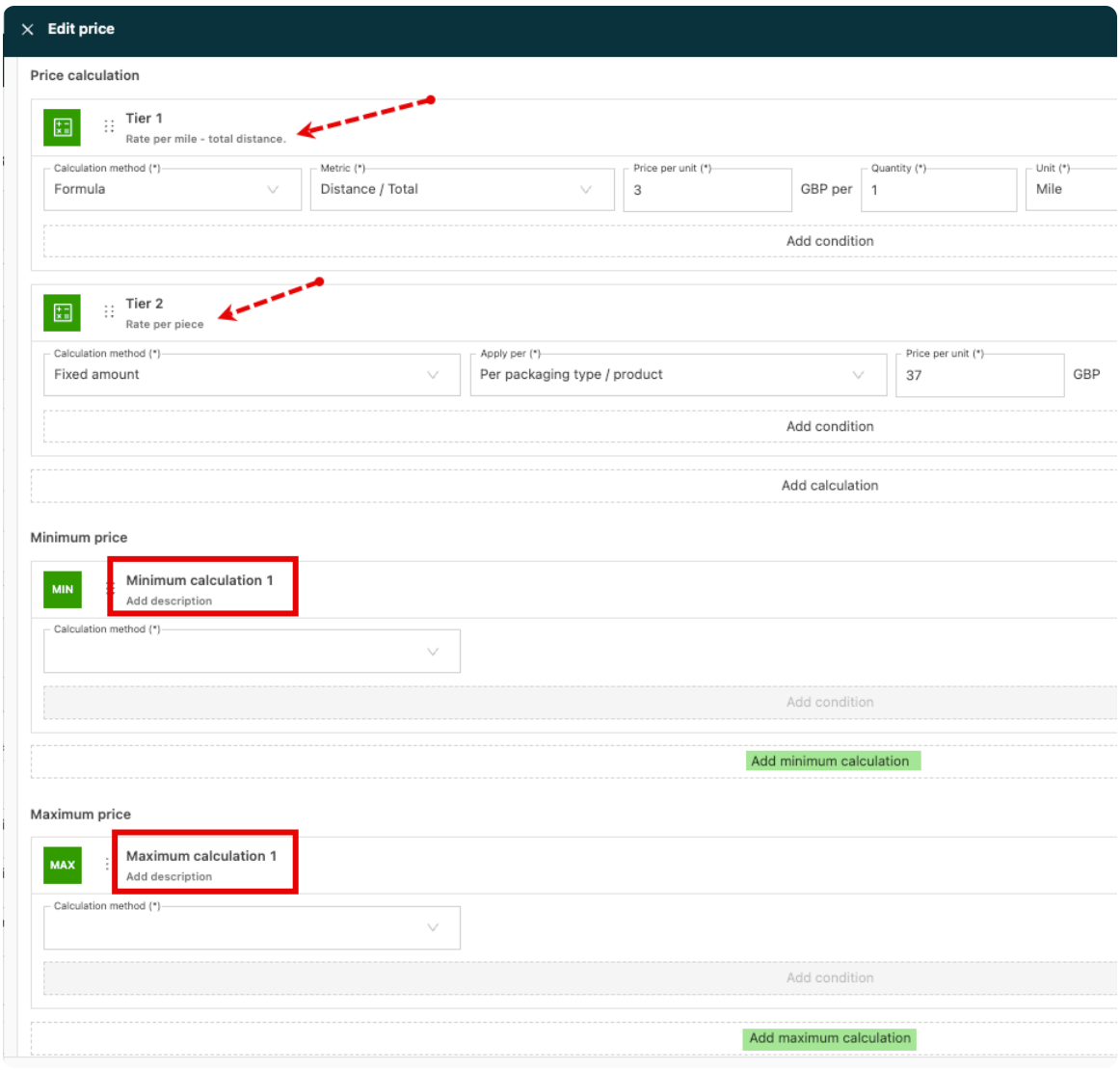
- To remove a price collection, click the **trash icon next to the name**.



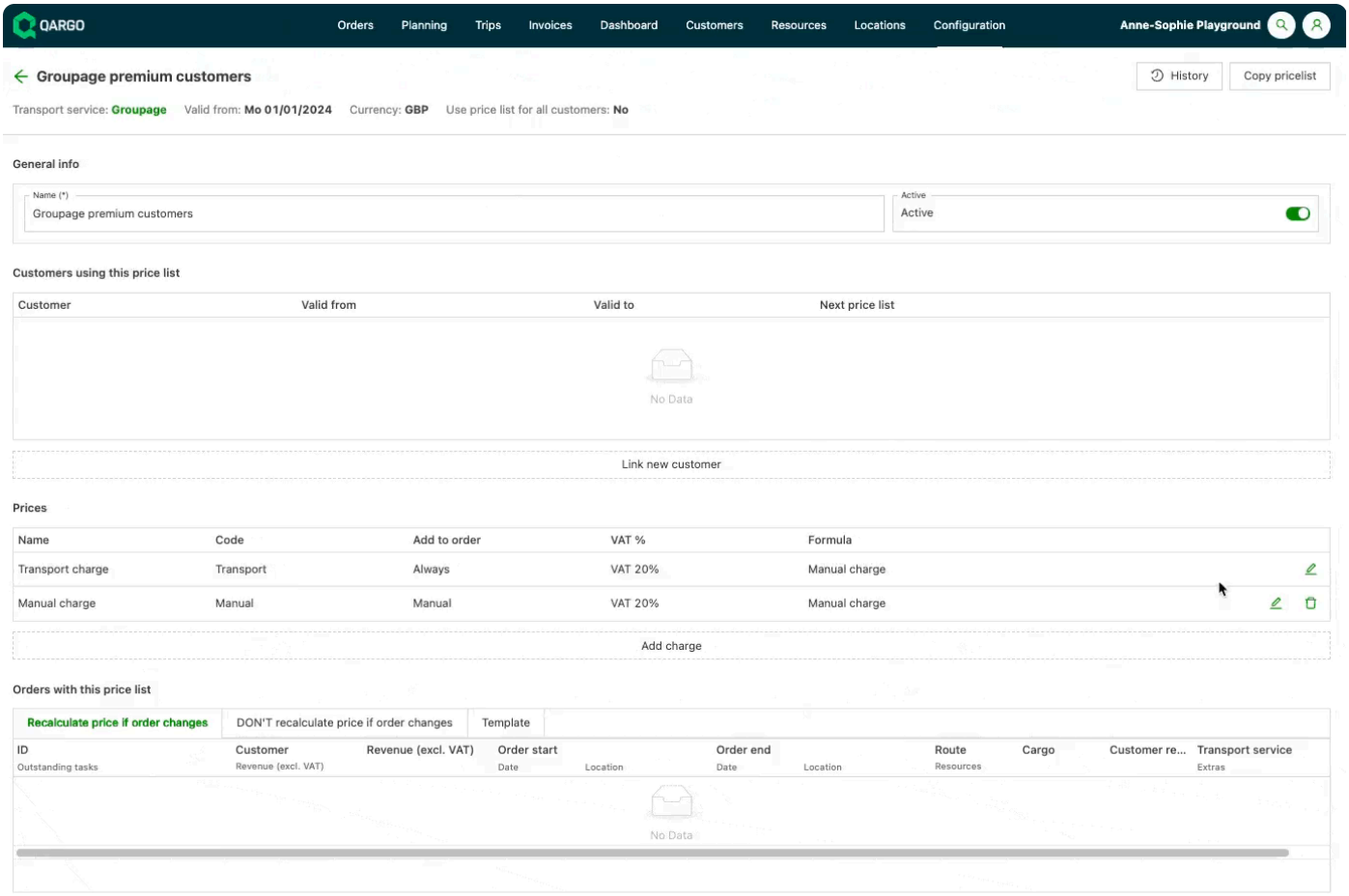
📚 Consider retaining old collections whenever possible to preserve historical rating information, which is useful for audits.

Step 3: Add price calculation

There is an option to give the calculation a **Name** and **Description**, which is useful if a price list has multiple calculation scenarios.

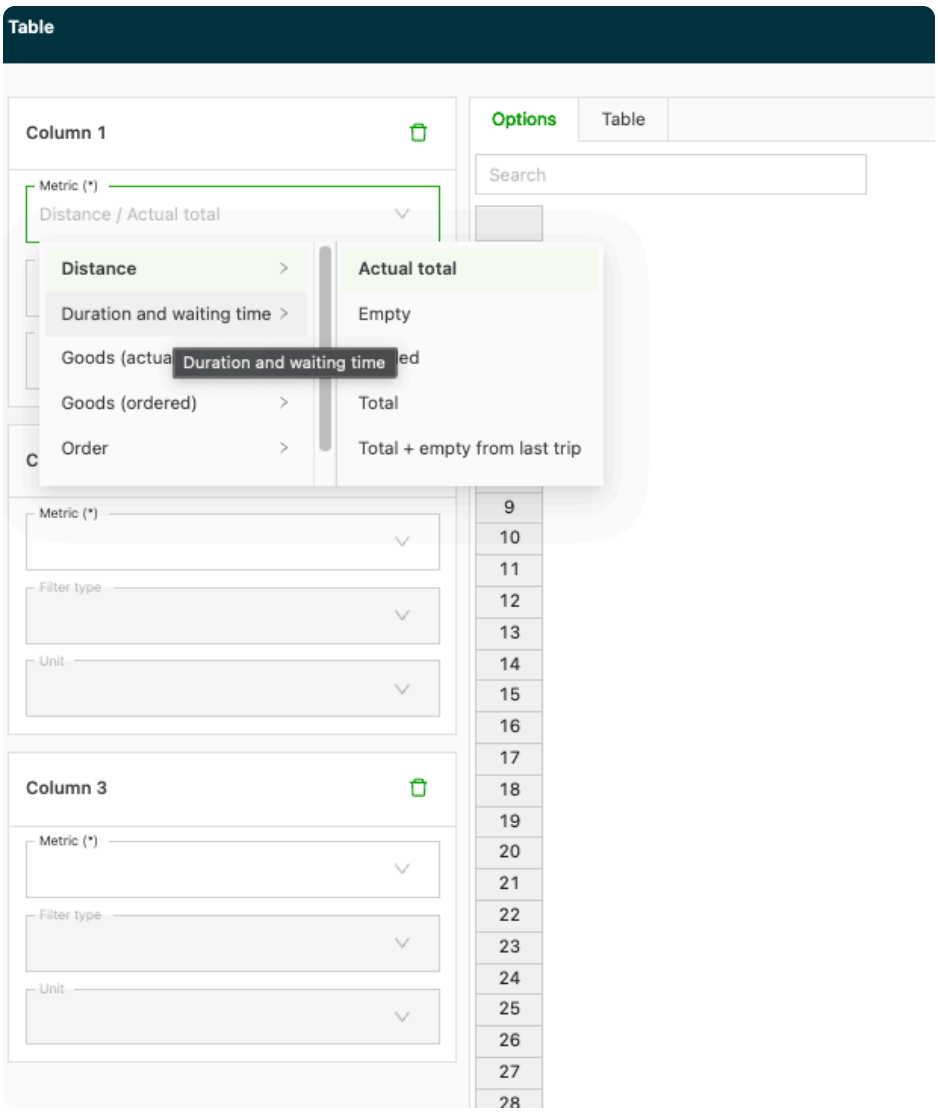


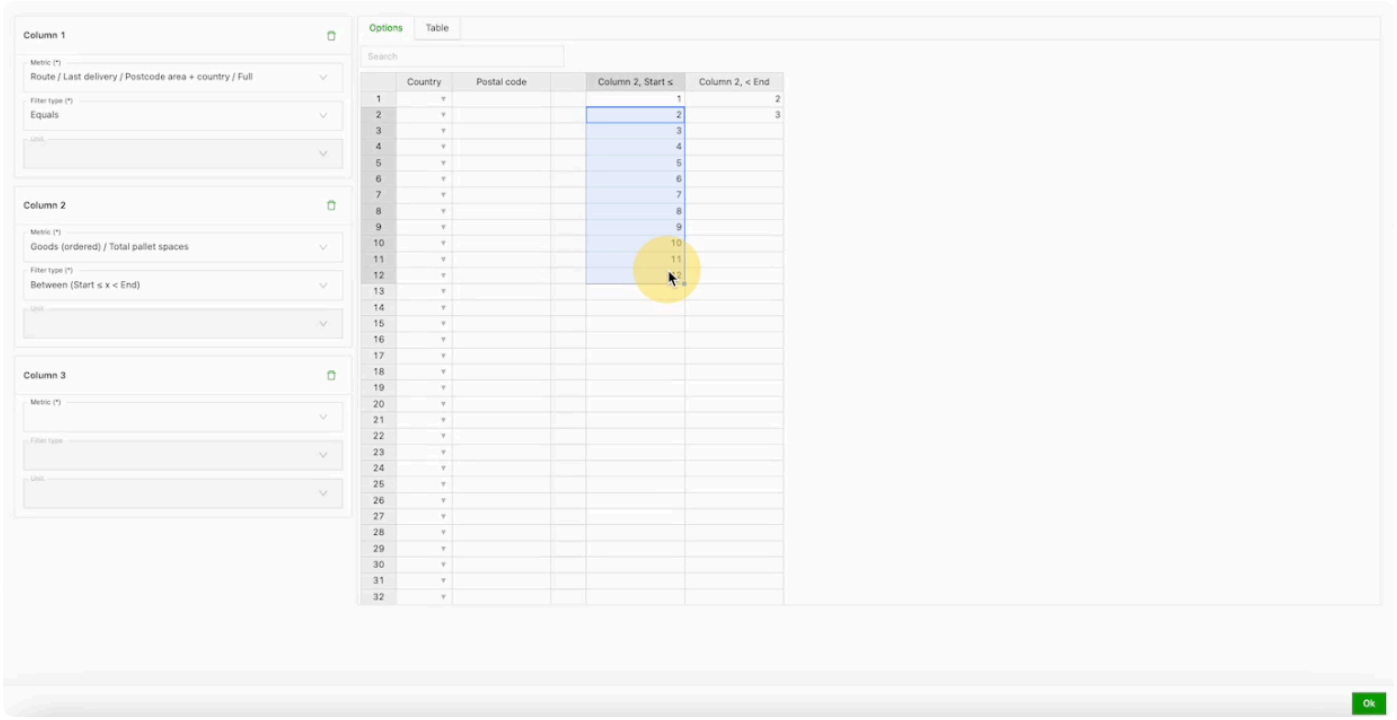
- Price calculations can be set up based on a **Fixed amount**, **Formula**, or **Rate table**.



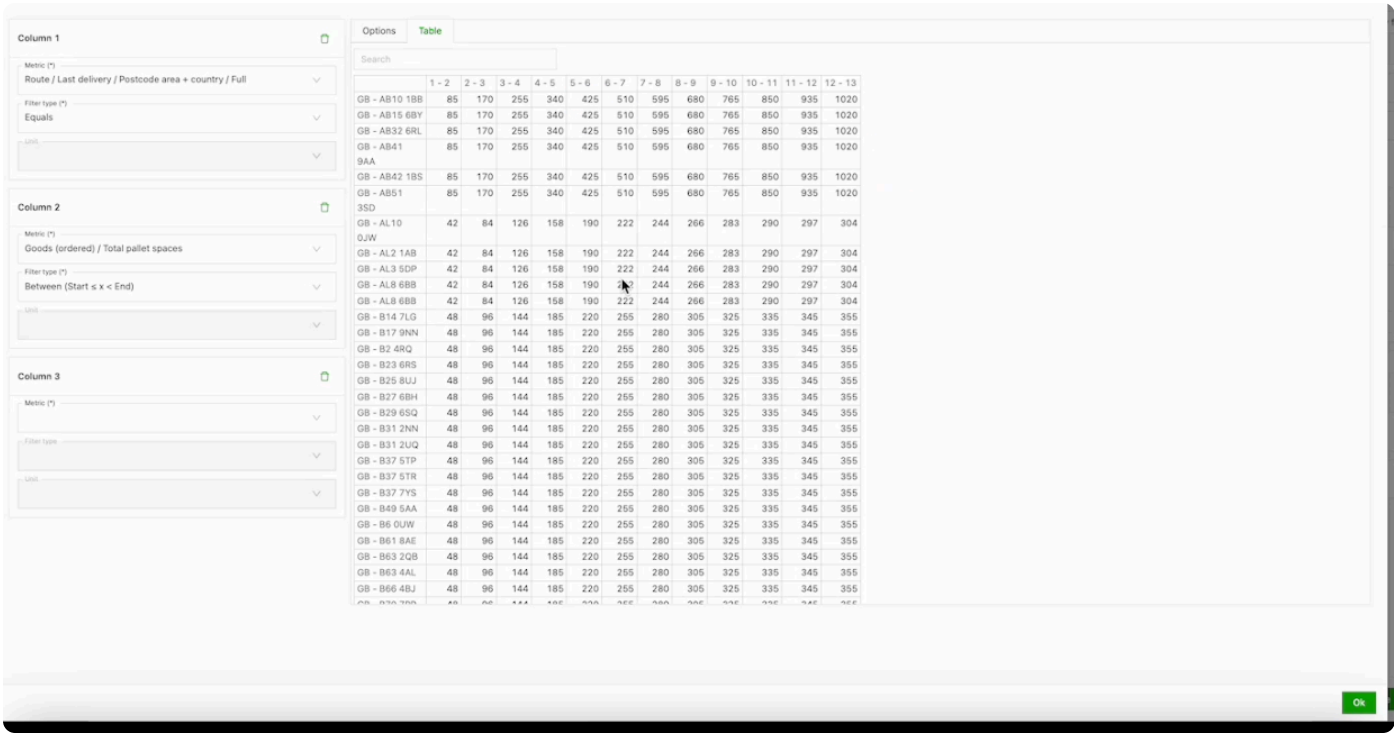
Step 4: Add metrics

Once a method is selected, metrics can be added in Options based on what the price depends on, e.g., delivery location or number of pallets. This creates the first column and first row of the table.


Table
Column 1
Metric (*)
Distance / Actual total
Distance
Duration and waiting time
Goods (actua
Goods (ordered)
Order
Actual total
Empty
ed
Total
Total + empty from last trip
Duration and waiting time
Metric (*)
Filter type
Unit
Column 3
Metric (*)
Filter type
Unit
Options
Table
Search
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- Once the metrics are chosen, navigate to **Table** to add prices.



Step 5: Add conditions to the price (if applicable)

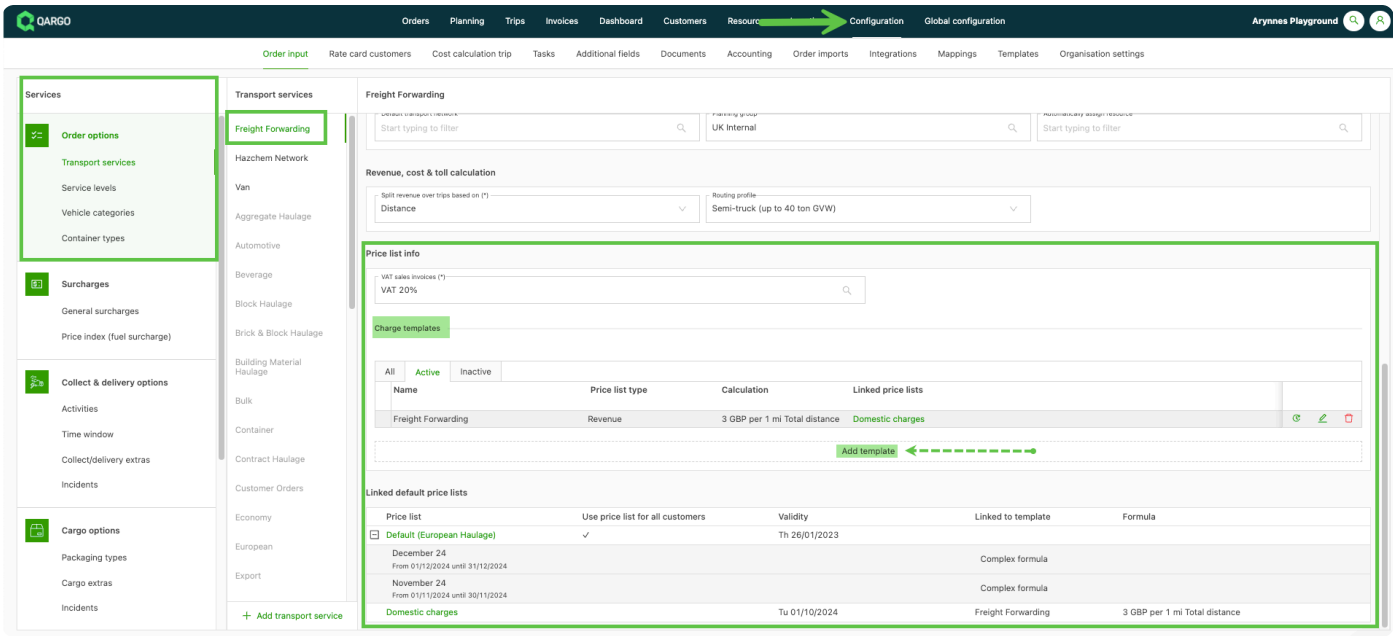
Optionally, specify that a price is not charged if a certain condition is not met, for instance a price list that does not apply to a certain zone (e.g., central London).
Once set up, conditions are visible when creating an order.



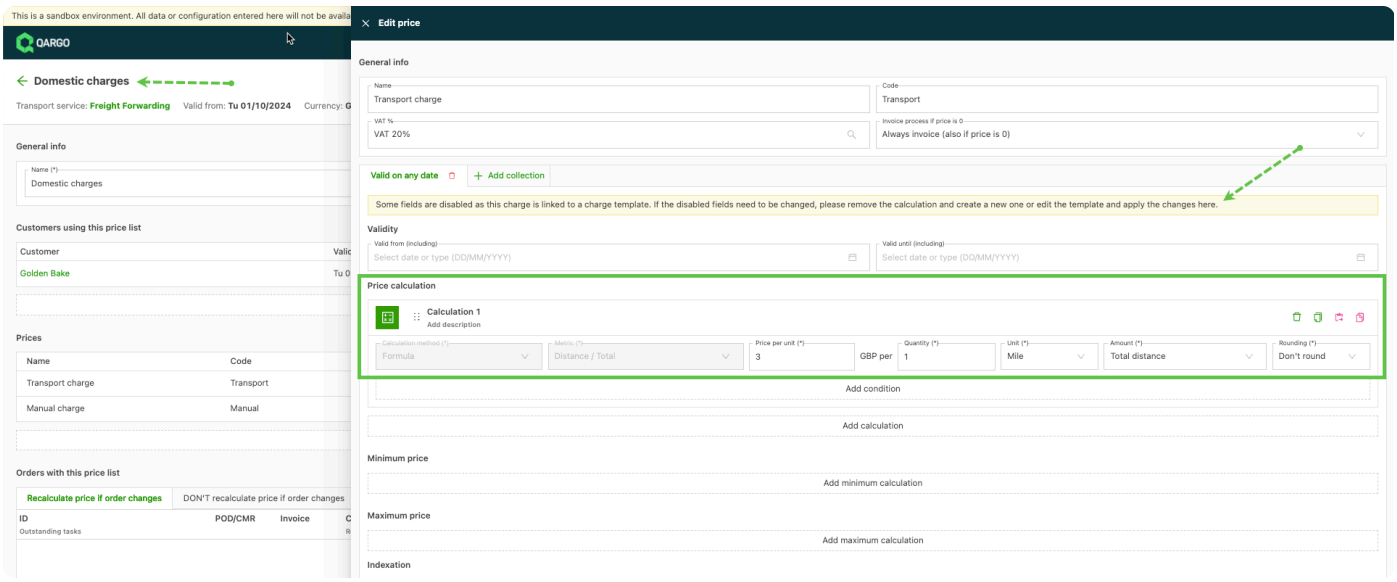
Standard price templates

Standard price templates streamline the configuration of price calculations across multiple price lists.

- Configured under **Transportation services**, templates make it possible to define a calculation structure once and apply it broadly. Existing price lists automatically become default templates.



- Once a charge template is linked to a price list or charge, the metrics on that calculation can no longer be changed.
- To update the metrics, delete the calculation and add a new one. The same applies to calculations on a charge linked to a charge template.



🎥 Watch this video for a full overview of creating and using rate cards.

▶ https://www.loom.com/embed/d06444ad95c2407eb1d00f14792a123a

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FAQ and best practices

Will existing orders be affected if a rate card is updated?
No. Changes to a rate card only apply to new orders. Existing orders retain their original rate card unless manually updated.

What if a setting on an existing rate card needs to change?
Some settings, such as switching the **Calculate charges per order** option from No to Yes, cannot be changed on an existing rate card. In these cases, create a new rate card with the desired configuration and apply it going forward.

Can the rate card on a job be edited?
The system only allows editing a rate card on a job when it detects that a more suitable rate card is available. In that case, a warning appears and the edit (pencil) icon is enabled. If no alternative is detected, the option is not available.

What if a customer isn't assigned to the default rate card?
Any applicable surcharges must be added manually to that customer's specific rate card.

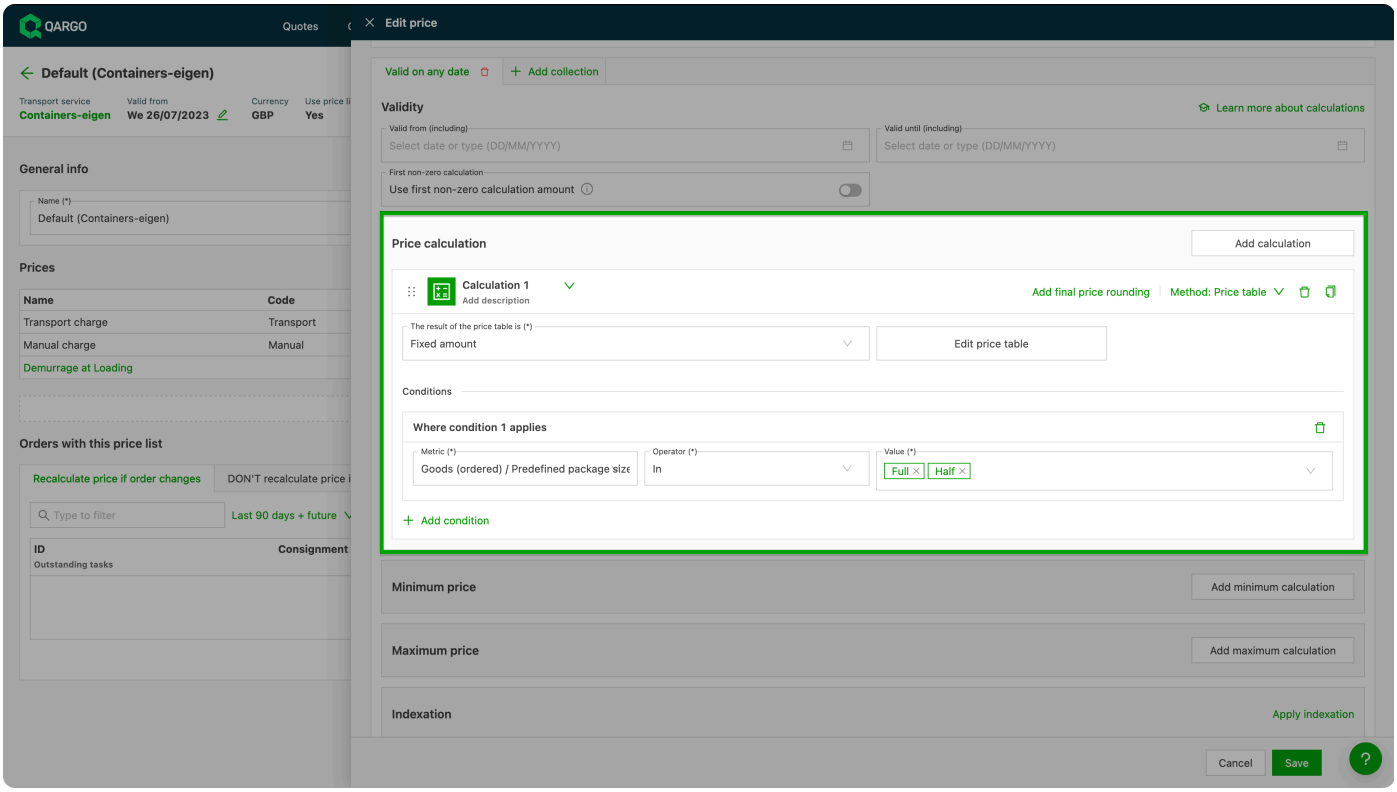
Can price collections overlap?
No. Make sure each collection has distinct validity dates to avoid conflicts.

Should old price collections be deleted?
It's best to keep them. Historical collections are useful for audits and for maintaining billing consistency.

Can one condition match multiple packaging types?
Yes. On the **Goods (ordered) / Predefined package size + packaging type** condition in the **Edit price** modal, select the **In** or **Not in** operator.

The **Value** field then becomes a multi-select, so one condition can match a list of packaging types instead of one at a time. **Is** and **Is not** keep their single-value behavior.

Conditions are evaluated per freight line, so **In** and **Not in** match packaging types within a single freight line, not across different lines on an order.



To set this up:

1. Navigate to **Rates > Rate card customers** and open the relevant rate card.
2. Open the **Edit price** modal and add or edit a **Predefined package size + packaging type** condition.
3. Select the **In** or **Not in** operator.
4. Configure the **Value** field, now a multi-select, and choose the list of packaging types to match.