Companies: Create a new customer

Learn how to add new customer accounts to Qargo with this step-by-step guide.

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Introduction

Creating new companies in Qargo is a straightforward process. It helps collect and manage all the details needed for orders, invoices and communication.

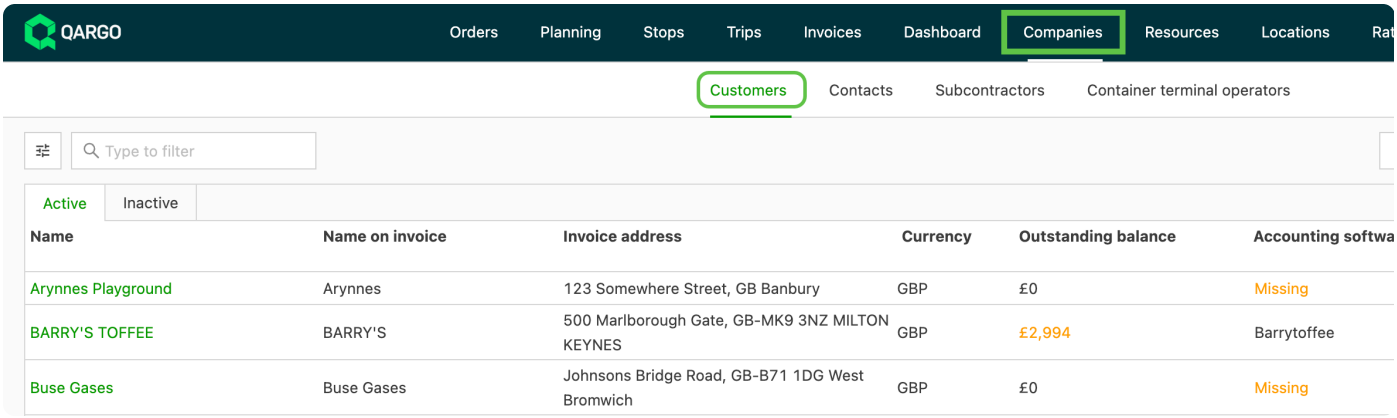
A common use case for this feature is a business onboarding a new client. The business can then track the client's orders and payment details efficiently and set credit limits for smoother financial control.

Key terminology

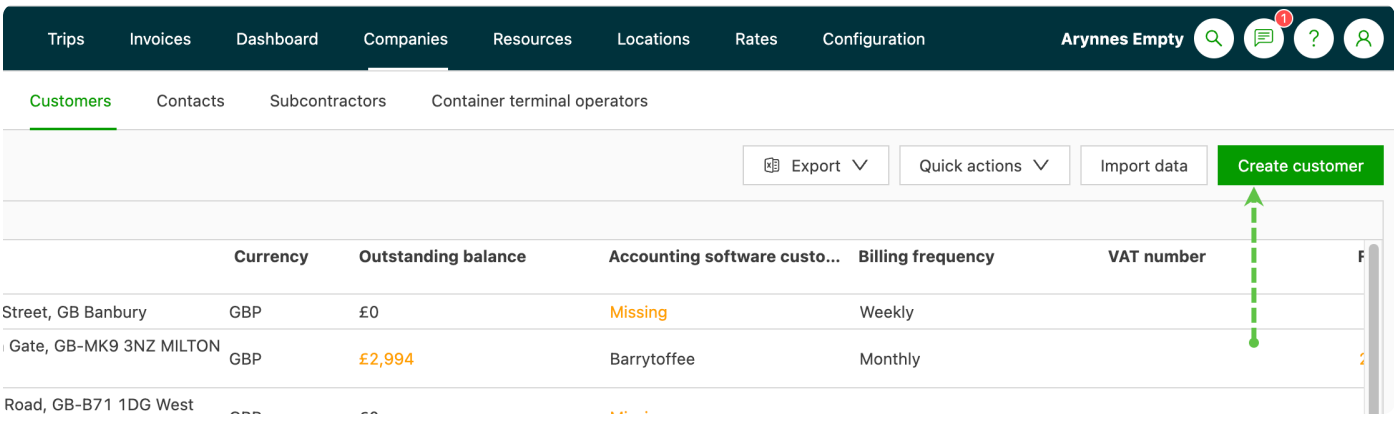
- **Customer:** A business or individual that receives services managed through Qargo.
- **Order:** A service request entered in the system on behalf of a customer.
- **Credit limit:** The maximum outstanding invoice balance a customer can carry before a warning is triggered.
- **Status:** The current relationship stage of the customer (Prospect, Approved, Not approved, Warning, Blocked).
- **Invoice:** A bill sent to the customer for services rendered.

Steps for adding a new customer

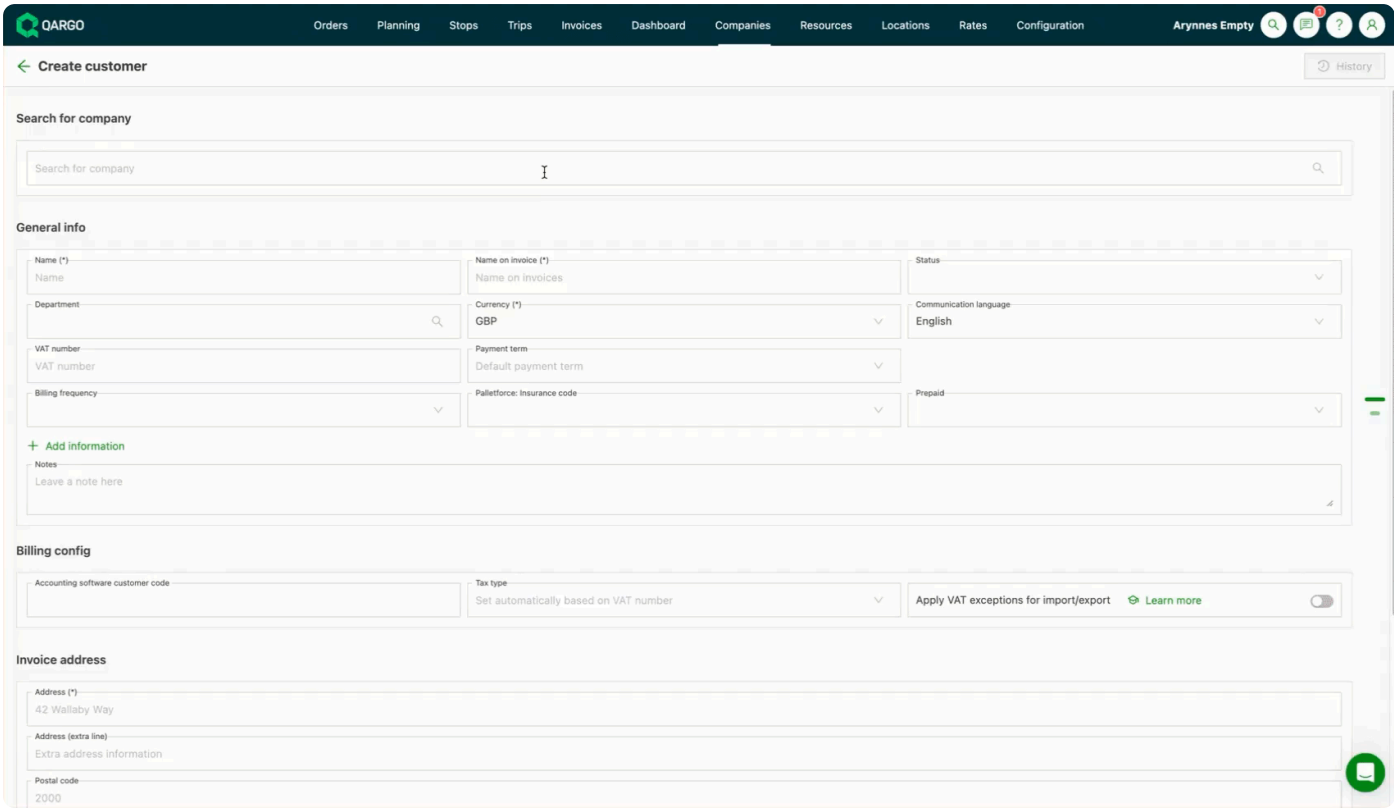
1. **Go to the Companies tab:** Start from the main navigation menu and click **Companies**.
2. **Click the Customers submenu:** This opens the *customer list page*, where current customers can be viewed.



3. **Start creating the customer:** Click the **Create customer** button at the top right of the page.

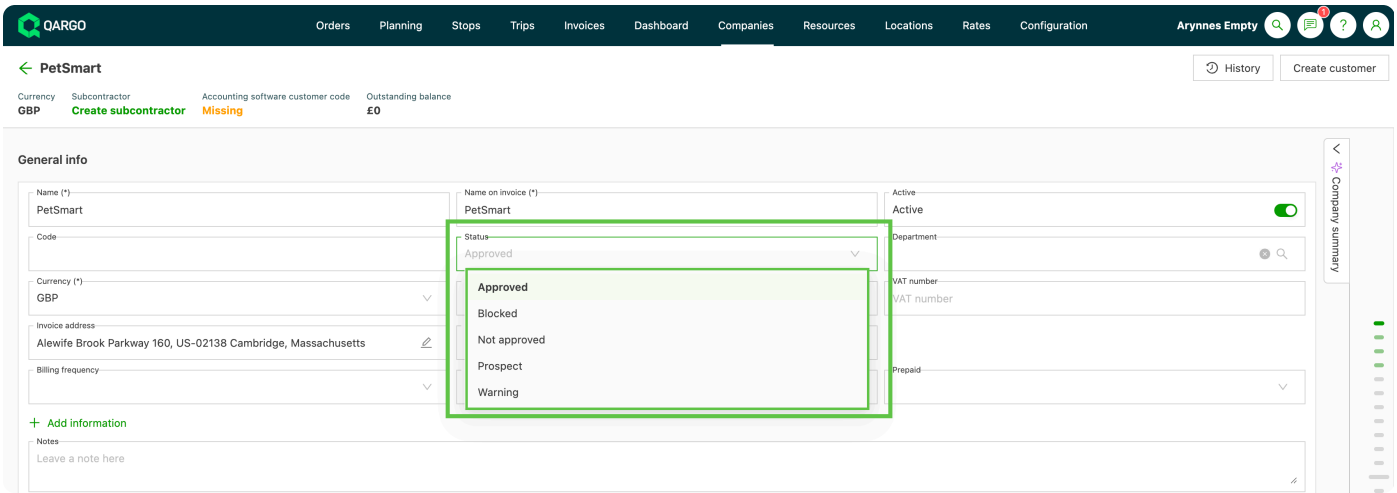


4. **Search for the customer's company:** Start typing the customer's company name. A Google Search box appears. It helps find the company and auto-fills company details such as the address.



5. **Fill in the customer details:** Complete the customer form and select a status:

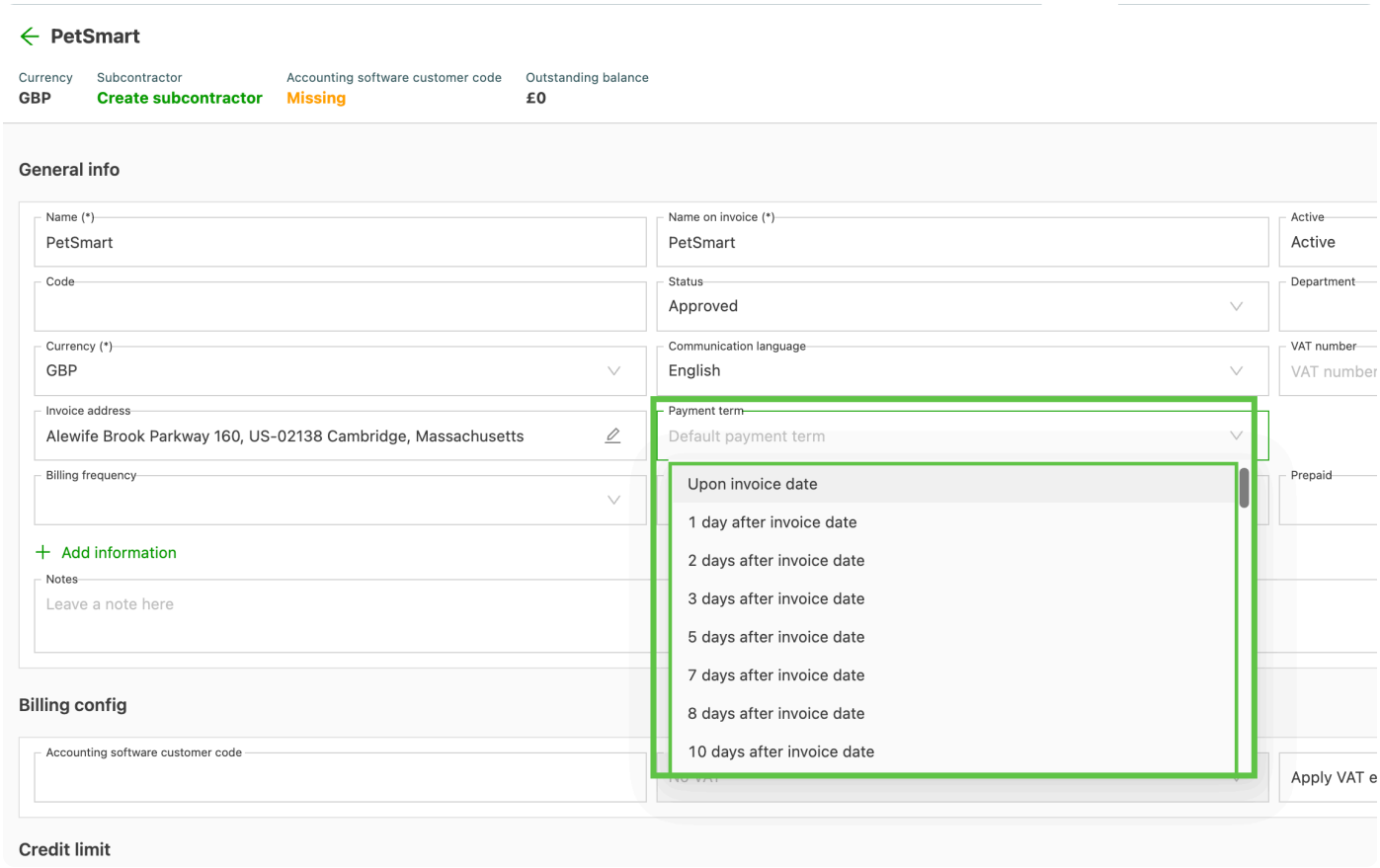
- **Prospect:** The company is a potential customer but is not yet approved. Only quotes can be created; no orders can be placed.
- **Not approved:** The company is not yet fully approved as a customer. This is an intermediate step between Prospect and Approved. The same permissions as Prospect apply.
- **Approved:** The customer is approved. Orders can be placed without restrictions.
- **Warning:** The customer is approved, but a warning is triggered when an order is created. The operator can dismiss the warning and continue with the order.
- **Blocked:** The customer is blocked; no new orders can be created.



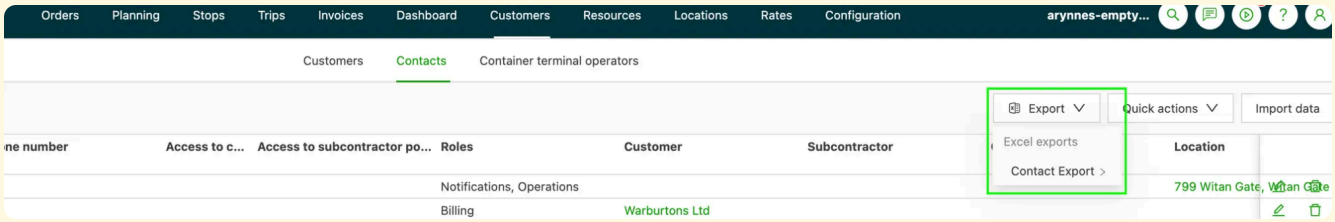
📚 A company that represents other companies (through the customer portal or the customer external API) can only create orders if it has the **Approved** status.

📚 When a contract carrier is also a customer, the statuses are separate, and the customer status works as described for customers.
See **here** for more information about contract carriers specifically.

6. **Set payment terms:** Add payment terms and other account details as needed.



📚 **Need to update many contacts at once?** Use the **Export** button on the Contacts list view to download the contact records.

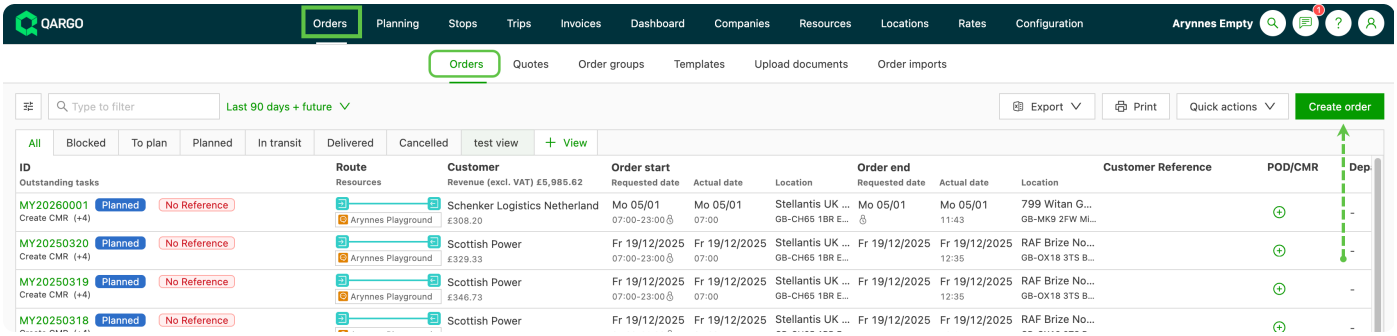


- **Same format as import:** the file matches the contact import format. Edit it offline and re-import it directly. See Data import: Importing contact data.
- **Respects the active filters:** export the full list or a filtered subset.
- **Customizable output:** the export uses existing export templates, so the fields can be changed. See How to configure custom export files.

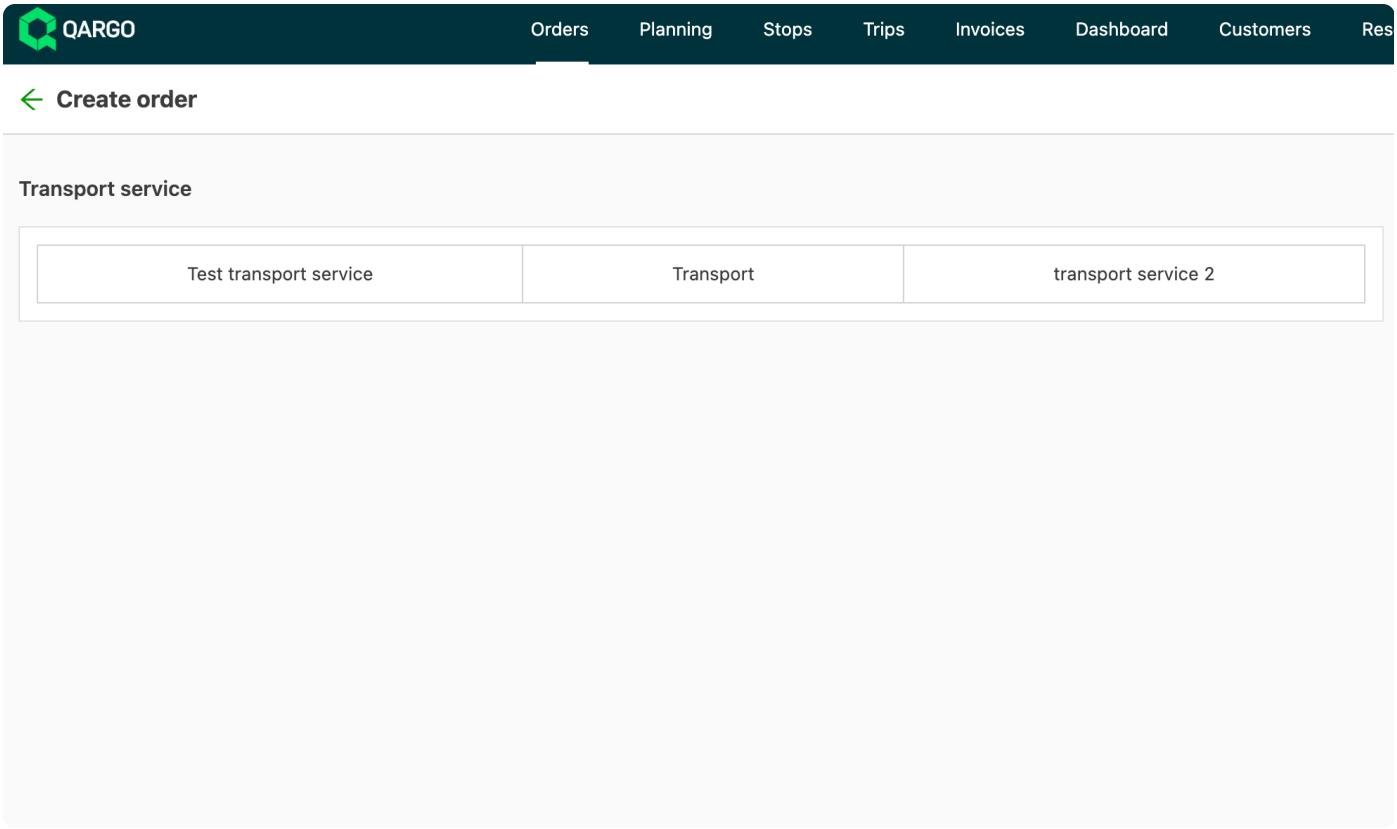
Creating a customer from the Orders tab

This is a useful shortcut for quickly adding a new customer while creating an order.

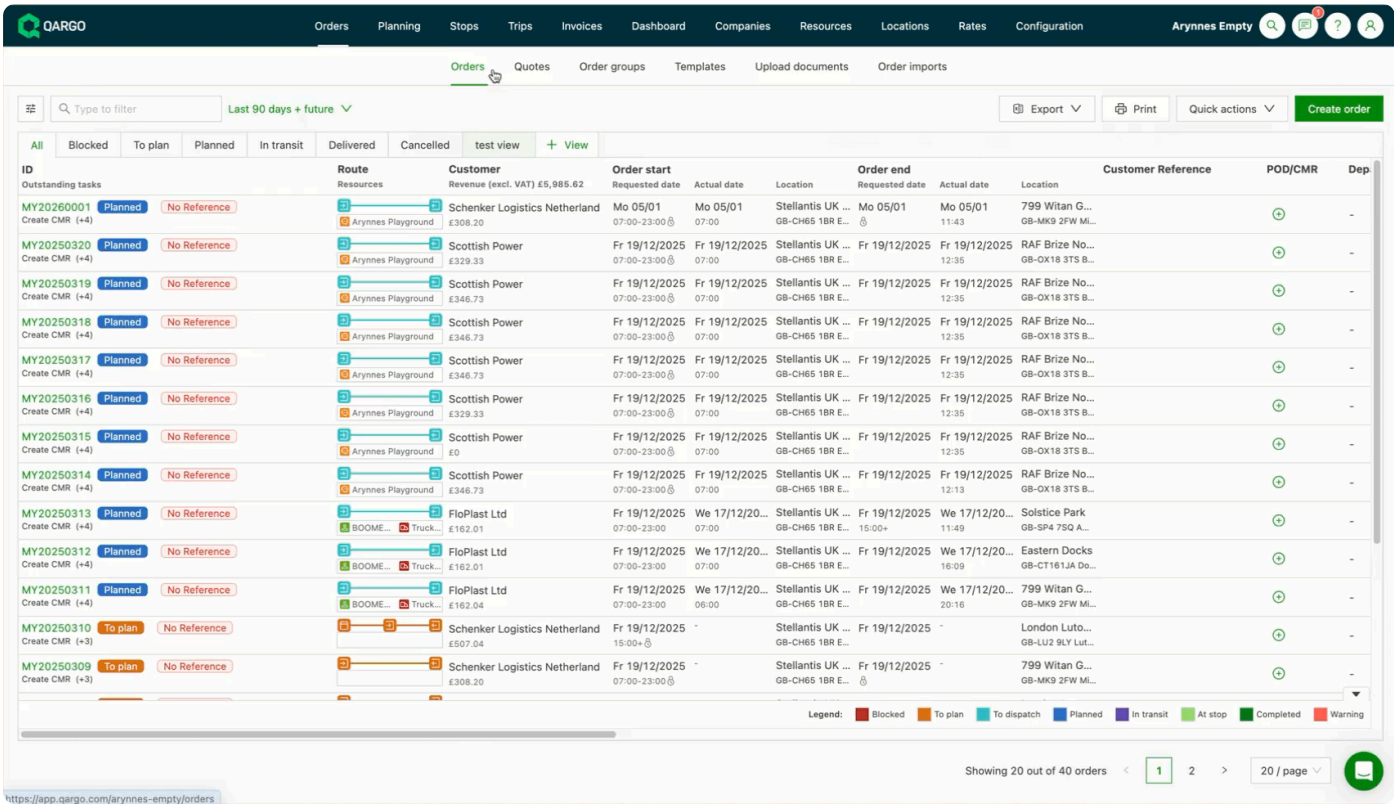
1. **Go to the Orders tab:** In the submenu, click the **Orders** tab and click the **Create order** button.



2. **Select the transportation service:** From the available options, select the transportation service required.



3. **Create a new customer:** Click the **Customer** box. A list of existing customers appears. Scroll to the bottom of this list and select the **+ Create new customer** option. Fill in the required customer details and click **Save**.



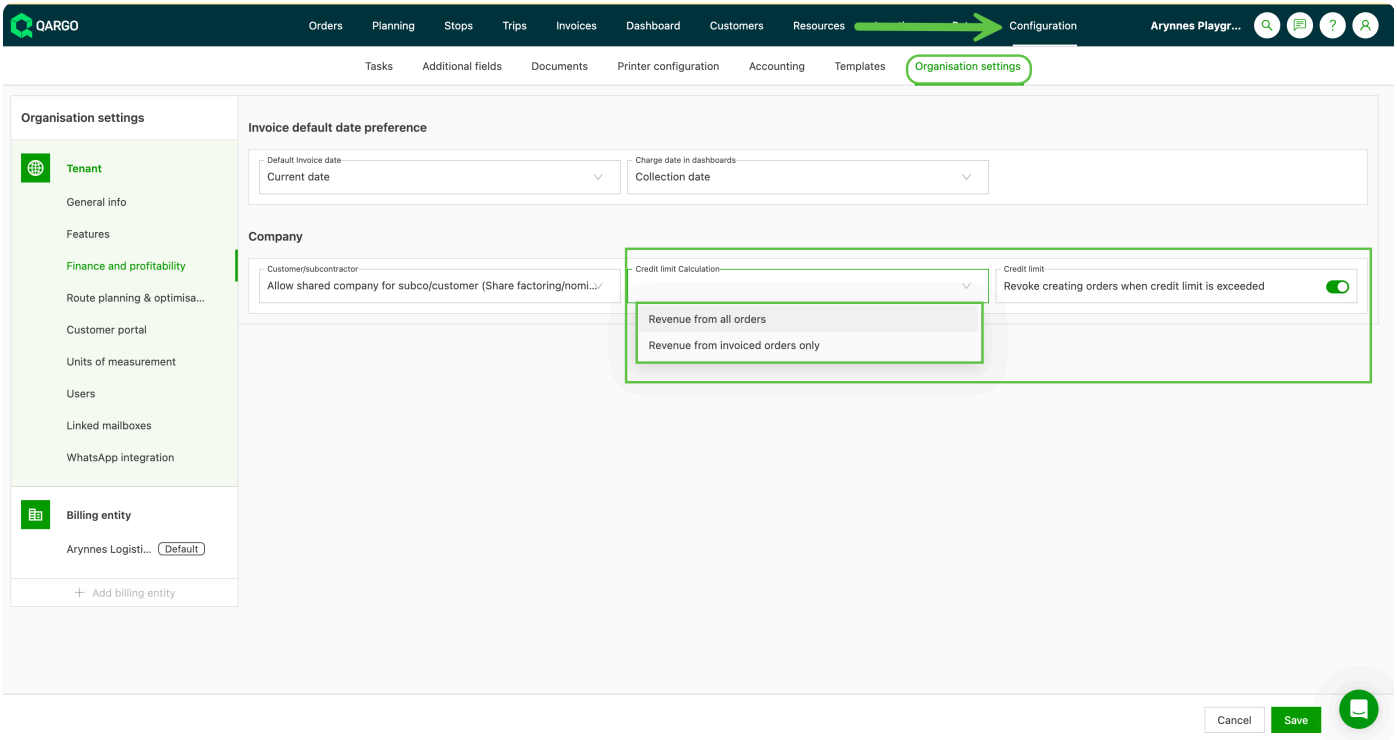
Setting customer credit limits

A customer credit limit makes it possible to monitor and control outstanding receivables. This helps a business stay financially healthy.

Configure organization settings for credit limit calculation and limits

Users can set how the credit limit is accrued in 2 different ways:

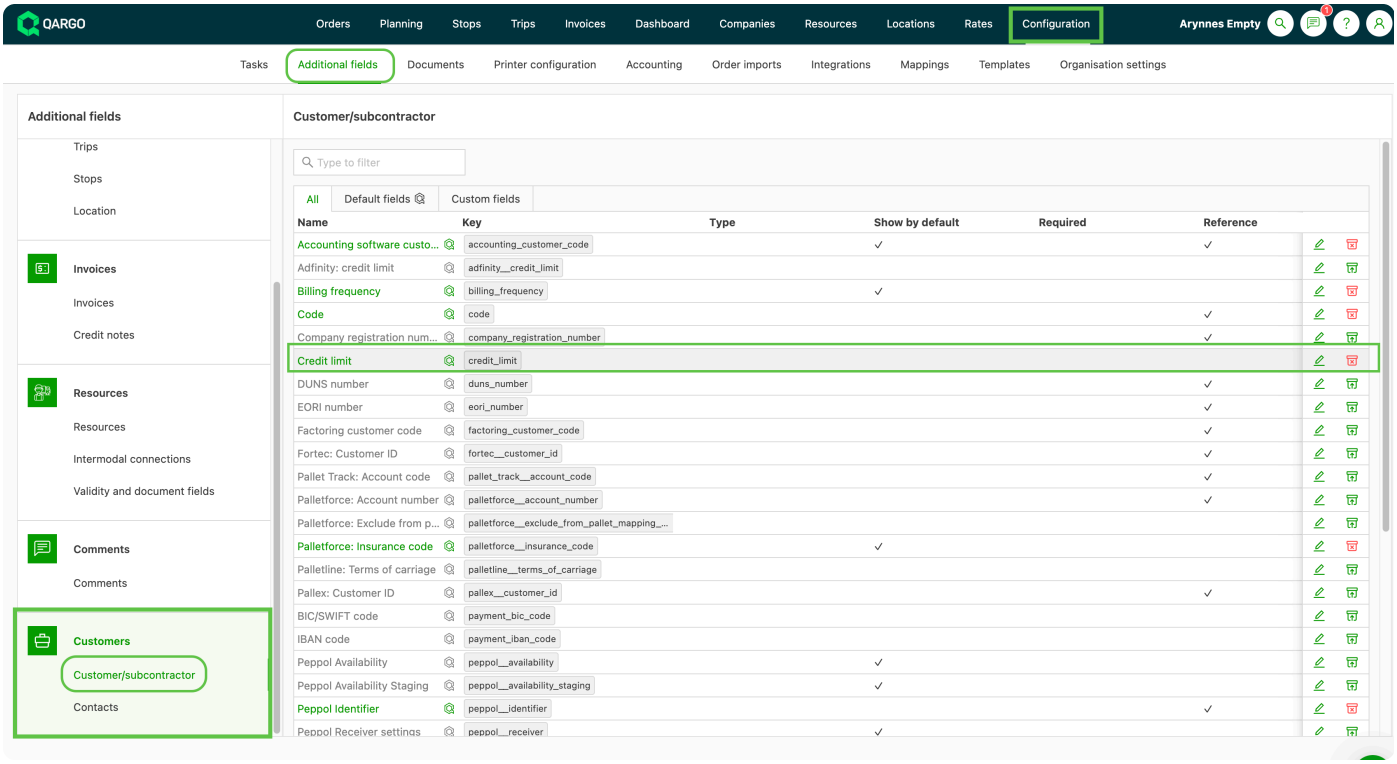
- Revenue from all orders
- Revenue from invoiced orders only

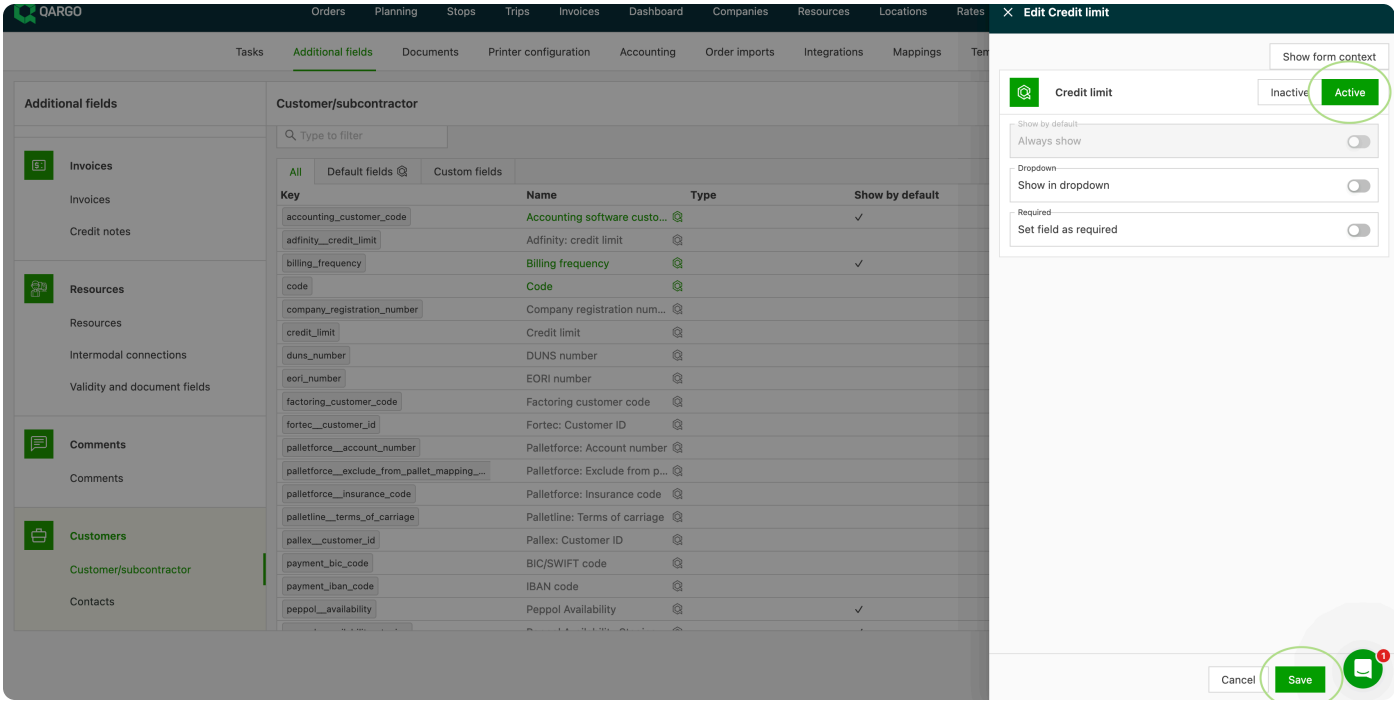


Configuration to use credit limits

1. **Activate the credit limit field:** Before assigning a credit limit to a customer, make sure the **'Credit limit'** field is activated in the configuration settings.

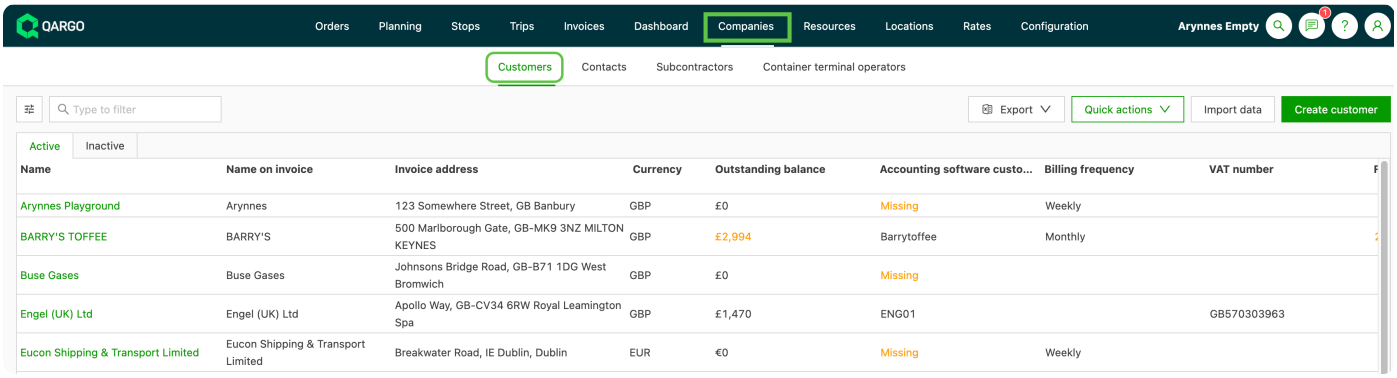
- Go to the **Configuration** module
- Select the **Additional fields** submenu
- In the left-hand menu, select **Customers**
- Click ***'Customer contract carrier'***, then find **Credit limit** in the list of fields and click it
- Click **Active**. Then click **Save**.



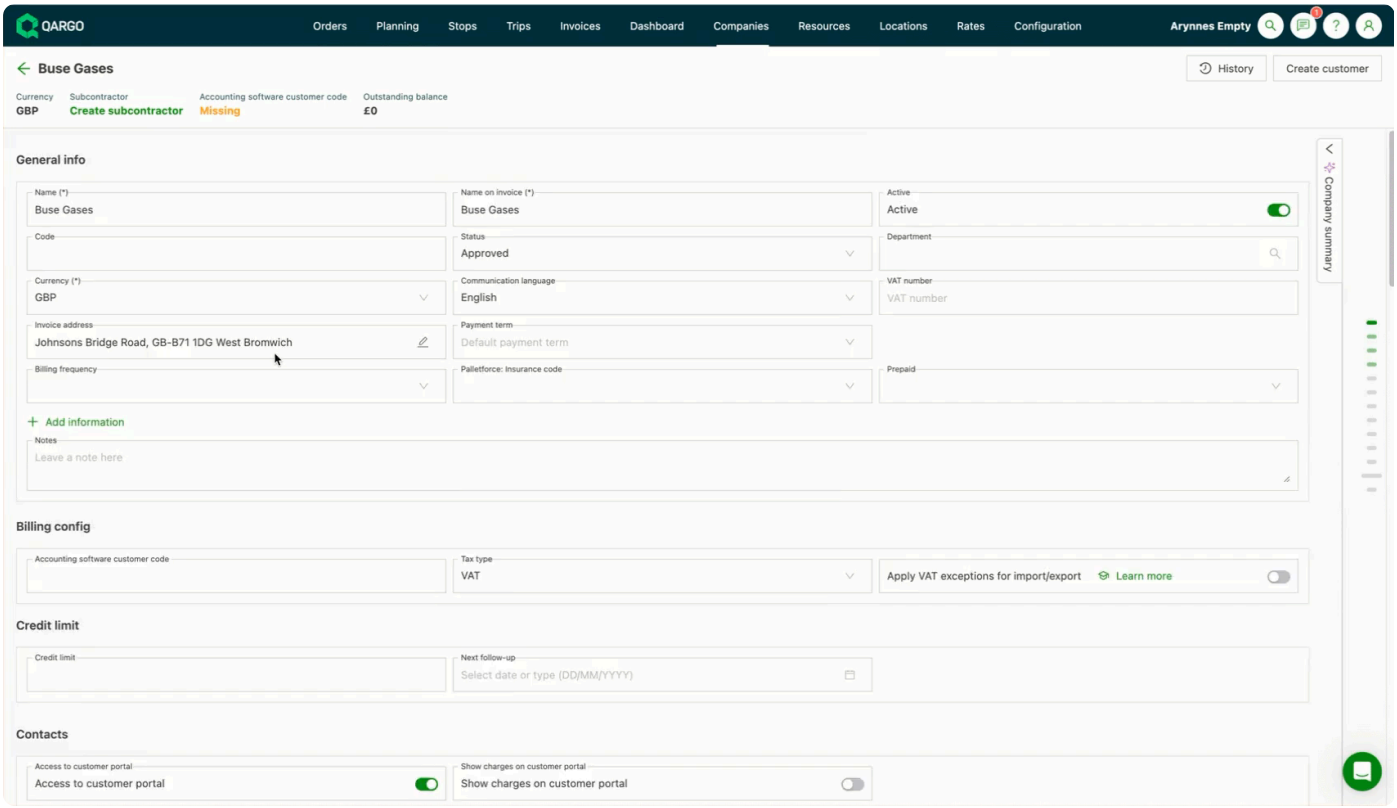


2. **Assign a credit limit to the customer**:

- Go back to the **Companies** screen and select the customer to edit.



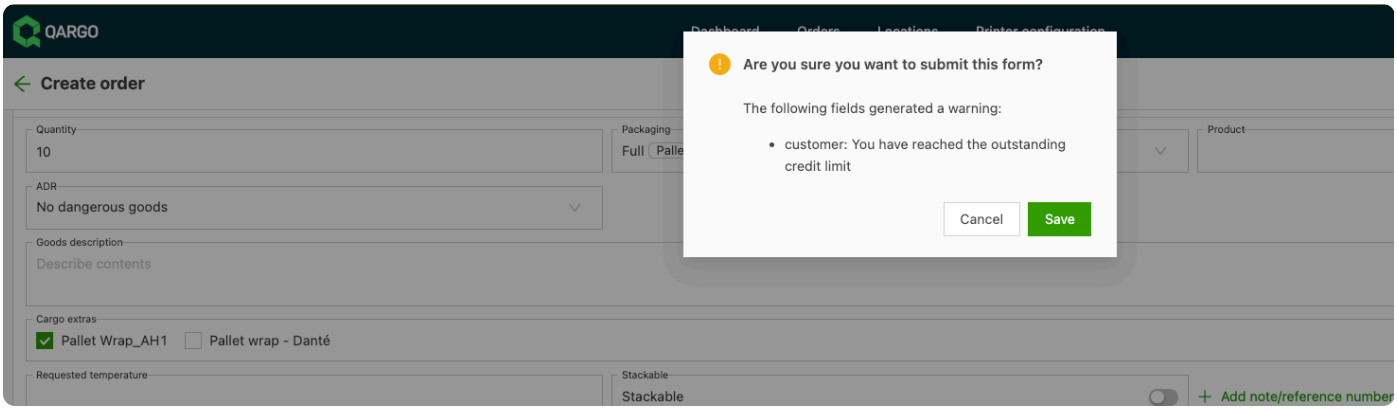
- Scroll down the customer details page to find the **Credit limit** field.
- Enter the credit limit amount for this customer.



📚 An appropriate credit limit for each customer helps manage risk and keeps accounting teams informed of client payment statuses.

3. **Warning for an exceeded credit limit**:

- Once the credit limit is configured, if a customer's outstanding invoices exceed this amount, Qargo automatically triggers a warning when someone tries to create an order for that customer. This helps manage exposure proactively.



‼️ If the setting to **revoke order creation** when the credit limit is exceeded is on, the order will not save. Users will see an error message at the bottom of the screen

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❌ Customer credit limit has been reached, cannot create order for this customer

📚 Always review the warning and consider discussing payment terms with the customer before continuing with more orders.

Additional use case examples

- Setting different credit limits for customers based on their payment history and reliability.
- Using the credit limit warning as a prompt to start credit control measures or pause further orders.
- Quickly updating credit limits after customer reviews during annual or quarterly financial assessments.