Rate cards: Fixed customer on price list charges – what, why and how

A field on a revenue price list charge that automatically routes the calculated charge to a specified customer instead of the order's main customer, supporting per-charge invoice routing.

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Screenshot suggestions:

- **Edit price** page in **Rates > Rate card customers** showing the new **Fixed customer** field in the **General info** block.
- Currency mismatch validation error shown after attempting to save a fixed customer with a different currency.
- Order detail revenue section displaying a charge routed to a fixed customer alongside other charges that remain on the order's main customer.
- **Invoices > Orders to invoice** list showing an order with charges split across two customers, kept in the list until each customer has been invoiced.

Summary

- **What is the Fixed customer field?**
  - A new optional field on each charge inside a revenue price list. When set, every charge calculated from that price list line is automatically invoiced to the selected customer instead of the order's main customer.
- **Why was it introduced?**
  - Some transport setups require specific charges on an order to be invoiced to a different legal entity. Typical examples are a sister entity within the same group, a holding company, or a different brand entity within a multi-brand organization. Without this field, planners had to manually reassign the customer on every affected charge after the order was calculated.
- **How does it work?**
  - The field is configured at the charge level on a revenue price list. Once saved, all newly calculated charges from that line carry the fixed customer through to the order's revenue view. When the order is invoiced, charges destined for different customers are split into separate invoices automatically, using the existing per-customer invoice creation behavior.

Prerequisites

- A revenue price list must exist and be linked to the relevant customer. See *Charge template – configuration for rate cards* for setup guidance.
- The target fixed customer must already be configured as a customer in Qargo with a currency matching the price list's currency.

Use cases

- **Surcharge routed to a separate group entity.** A transport company runs orders for a large retail customer and delivers to specific addresses. A handling surcharge linked to certain delivery addresses must be invoiced to the transport company's logistics entity rather than the retail customer. Setting the surcharge's **Fixed customer** to the logistics entity routes the surcharge automatically, while transport and fuel charges continue to be invoiced to the retail customer.

- **Brand orders with per-product legal entities.** A fashion logistics provider serves a single brand customer that has multiple legal entities across countries. Each product bundle on the order must be invoiced to its respective legal entity. Each product-specific charge on the price list is given a **Fixed customer** matching the correct legal entity, producing one invoice per legal entity from a single order.
- **Cross-entity cost recovery between sister companies.** A specific charge on an order needs to be invoiced internally to a sister company within the same group for accounting purposes. The charge's **Fixed customer** is set to the sister company, keeping the rest of the order on the main customer.

Terminology

Term	Definition
Charge	An individual line on a price list that calculates an amount on an order (for example transport, surcharges, or fixed prices).
Charge master	A configured charge on a price list that defines a charge's name, code, tax, calculation rules and now its fixed customer.
Fixed customer	The customer designated on a charge to receive the invoice for that charge, overriding the order's main customer.
Revenue price list	A price list used to calculate income on customer orders. Cost price lists (contract carrier or intermodal) are not in scope for this feature.
Charge instance	A calculated charge that lives on an individual order, produced from a charge master line.

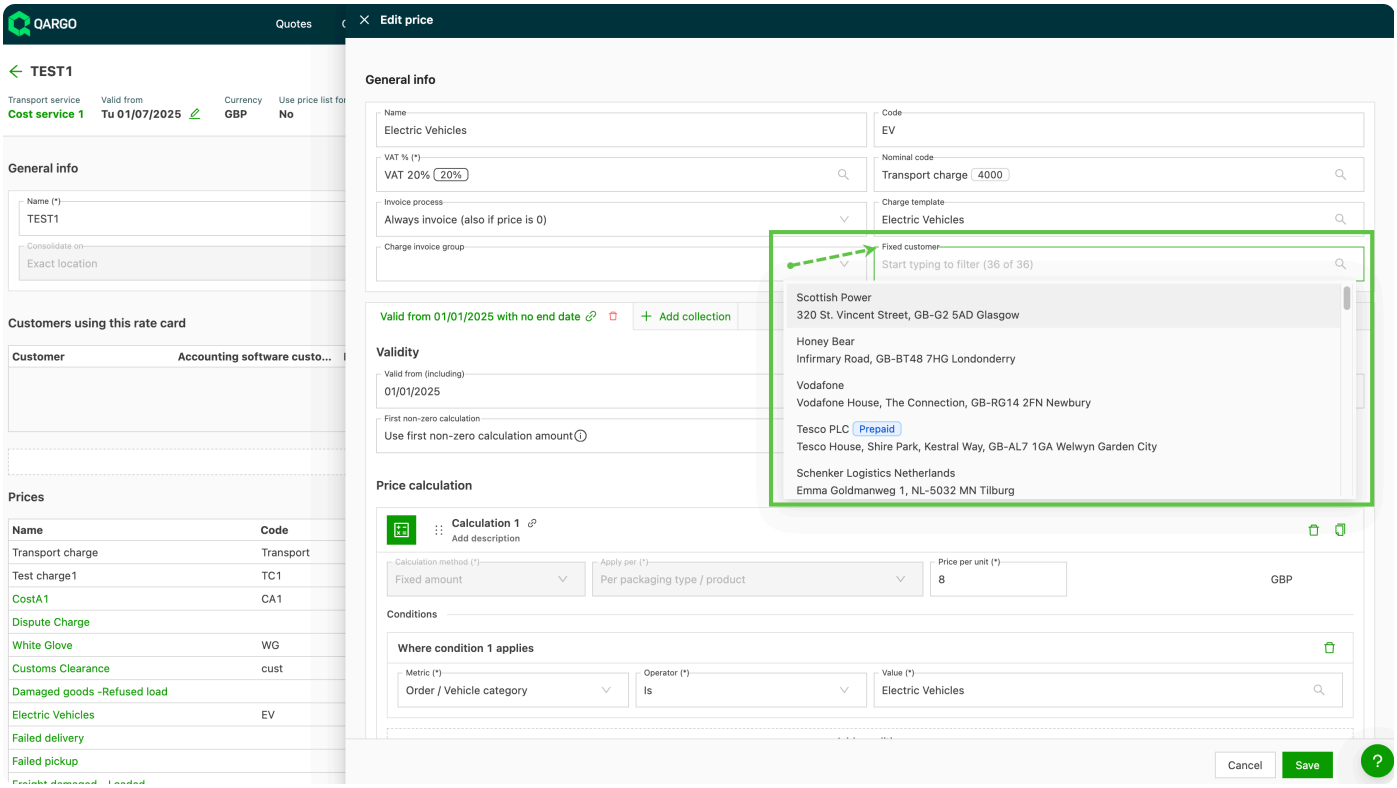
Configuring a fixed customer on a charge

Watch this video or follow the steps below to link a fixed customer to a charge:

▶ https://watchclueso.com/embed/q4c60omddlscjhyh

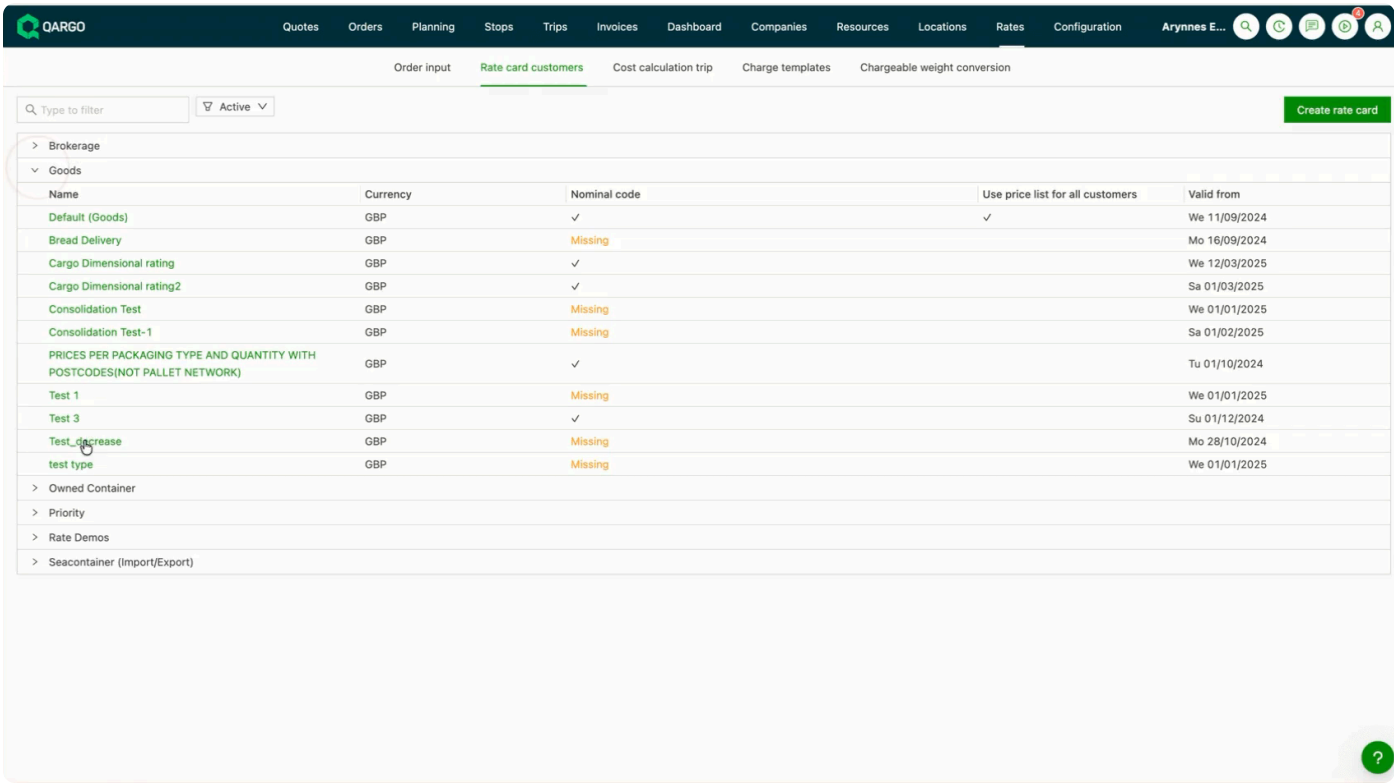
Open the price list

1. Navigate to **Rates > Rate card customers**.
2. Select the revenue price list that contains the charge to be configured.
3. Open the **Edit price** page for the relevant charge by clicking the pencil icon next to it.



Set the Fixed customer field

1. Locate the **Fixed customer** field in the **General info** block
2. Open the customer picker. The dropdown shows only customers whose currency matches the price list's currency.
3. Select the customer that should receive the invoice for this charge.
4. Save the charge.



📚 The customer picker filters by currency to prevent mismatches between the price list and the receiving customer. Saving is blocked with a validation error if the currencies do not match, and the message names both currencies involved.

🧰 The **Fixed customer** field is optional. When left empty, the charge keeps its default behavior and is invoiced to the order's main customer.

Remove or change a fixed customer

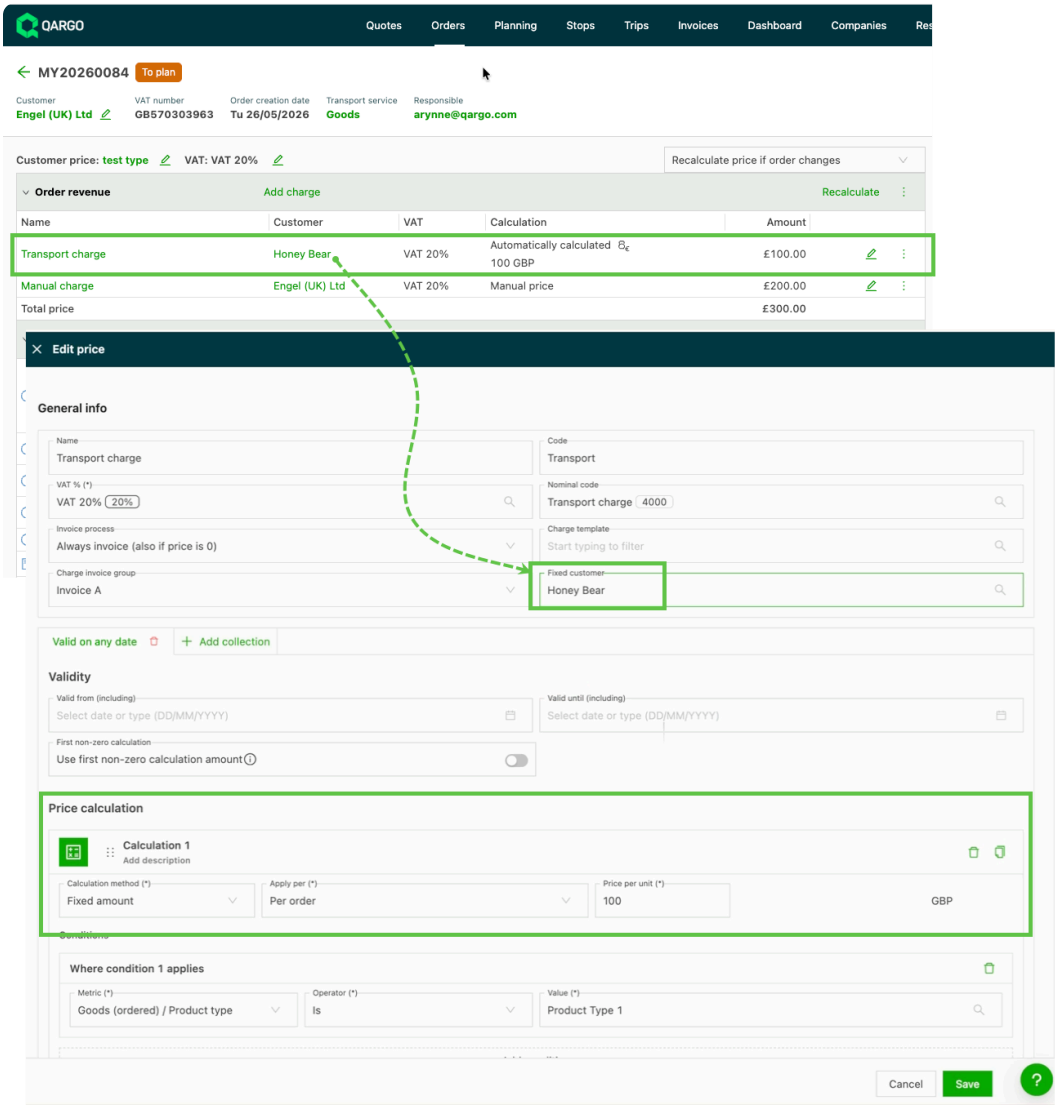
1. Open the **Edit price** page for the affected charge.
2. Clear the **Fixed customer** field to revert to the default behavior, or select a different customer with a matching currency to redirect future charges.
3. Save the change.

‼️ Existing charges that were already calculated on orders keep their original customer. The new **Fixed customer** value only applies to charges calculated after the change. There is no automatic backfill of historical charges.

How fixed customers appear on orders and invoices

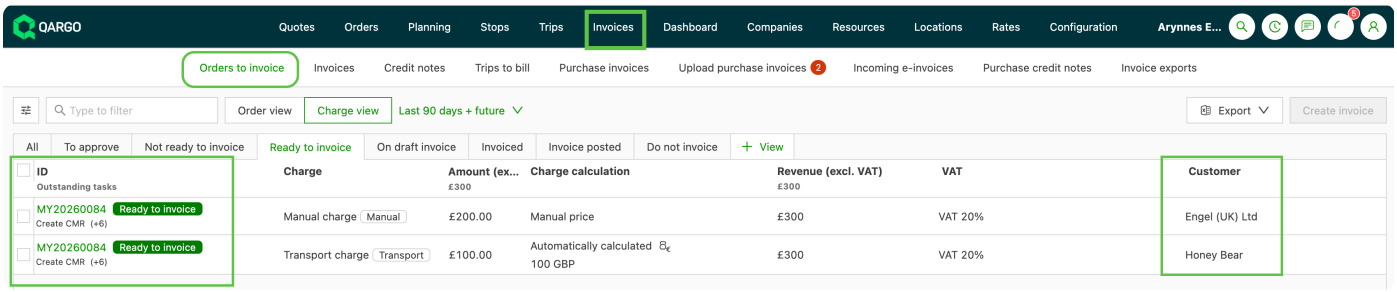
Order revenue view

- Charges originating from a price list line with a **Fixed customer** set display that customer in the existing customer column of the order's revenue table.
- Other charges on the same order continue to show the order's main customer.
- Manual overrides on an individual charge instance still work the same way as before. An explicit customer set on a charge instance takes precedence over the fixed customer from the master.



Billing orders with multiple customers

- An order whose charges belong to more than one customer produces one invoice per customer. The order remains visible in **Invoices > Orders to invoice** until every customer involved has been invoiced.
- Invoices are created using the existing per-customer invoice creation flow. Each invoice is generated separately.



📚 An order with charges split across two or more customers requires creating each invoice individually. There is no single-click flow that produces multiple invoices in one action.

Limitations

- The **Fixed customer** field is available on revenue price lists only. Cost price lists used for contract carriers or intermodal services do not include this field.
- No backfill. Charges calculated before a **Fixed customer** is configured keep their original customer. Recalculating an order does not retroactively reassign existing charges.
- Multi-customer orders require manual creation of each invoice. The behavior mirrors the current per-customer billing flow.

Troubleshooting

Issue	Likely cause	Resolution
Fixed customer field is not visible on the **Edit price** page	The price list is a cost price list (contract carrier or intermodal), where this field is hidden	Confirm the price list type. The field only appears on revenue price lists.
Saving is blocked with a currency mismatch error	The selected fixed customer's currency does not match the price list's currency	Select a customer with a matching currency, or update the customer's configured currency to match. The error message names both currencies for reference.
Existing orders still show the order's main customer on the charge after configuring a fixed customer	Existing charge instances are not backfilled when the master is updated	Trigger a new charge calculation on the order. New charge instances will pick up the fixed customer; previously calculated charges remain unchanged.
A charge that should be routed to the fixed customer still appears on the main customer's invoice	The charge instance was manually overridden, or it was created before the **Fixed customer** was configured	Inspect the charge instance on the order. Manual overrides take precedence; clear the override or recalculate to restore the fixed customer assignment.
Customer picker does not list the expected customer	The candidate customer's currency does not match the price list's currency, or the company is not configured as a customer in Qargo	Verify the customer's currency and customer status in **Customers**. Update the configuration so the customer is eligible for selection.
Order remains in **Orders to invoice** after billing the main customer	The order still has uninvoiced charges assigned to a different customer	Invoice the remaining customers' charges. The order leaves the list once every customer involved has been invoiced.