Rates — Charge currency on rate card charges — What, why & how

Set a currency per charge on a customer rate card, so charges in a different currency flow onto orders and loads automatically and are billed as one invoice per currency.

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Screenshot suggestions:

- **Edit Price** drawer in **Rates > Rate card customers** showing the **Currency** field in the **General info** block, pre-filled with the rate card currency.
- The same charge set to a different currency (for example GBP) while the rate card header shows EUR.
- **Add service to rate card** dialog (checkbox list, no currency option).
- Order revenue section showing two charges in two different currencies.
- **Invoices > Orders to invoice** or the invoice list showing one order split into one invoice per currency.
- The blocked **Currency** field on a charge with a linked **Charge template** (see Gaps - message text not confirmed).

Summary

- **What is the charge currency setting?**
  - A **Currency** field on each charge of a customer rate card, found on the **Edit Price** form. It starts on the rate card currency and can be changed so that one charge bills in a different currency from the rest of the rate card.
- **Why was it introduced?**
  - A rate card has one currency, and until now every charge on it followed that currency. Transport companies billing the same customer in two currencies had to change the currency by hand on every order. That was repetitive and easy to forget at volume.
- **How does it work?**
  - The currency is set once per charge on the rate card. Every order and load calculated after the change picks up that currency automatically, and the charge keeps recalculating when the order changes. When an order ends up with charges in more than one currency, it is billed as one invoice per currency.

Prerequisites

- A customer rate card must exist under **Rates > Rate card customers**. See Rates - Rate card customers.
- The currency to bill in must be available as a currency option in the tenant. The **Currency** dropdown only lists currencies configured for the tenant.

> 🧰 No change is needed on the customer record. The currency is set per charge on the rate card only.

Use cases

- **EU and UK traffic for one customer.** A transport company bills the same customer in EUR for European legs and in GBP for UK legs. The UK-related charges on the EUR rate card are set to GBP, so planners no longer change the currency on each order.
- **Two local currencies in Central Europe.** A carrier works in EUR and HUF for the same customer. Setting HUF on the relevant charges means the right currency is applied every time, instead of relying on planners to remember.

- **Revenue charges outside the customer currency.** A company needs some order and load revenue charges in a currency other than the one linked to the customer. The charge currency setting covers this without creating a second rate card.

Terminology

Term	Definition
Rate card	A customer price list under **Rates > Rate card customers**. It has one currency on its header.
Charge	A single price line on a rate card, such as a transport charge or a surcharge.
Charge master	The charge as configured on the rate card, opened with the pencil icon. It holds the name, code, calculation and now the currency.
Charge instance	The calculated charge that appears on an individual order or load, created from the charge master.
Rate card currency	The currency set on the rate card header. New charges start in this currency.
Deviating currency	A charge currency that differs from the rate card currency.
Charge template	A reusable charge configuration that can be linked to charges on several rate cards.
Recalculation	Qargo working out the charges on an order again, for example after the order changes. A *forced recalculation* is one started manually.

Setting a currency on a rate card charge

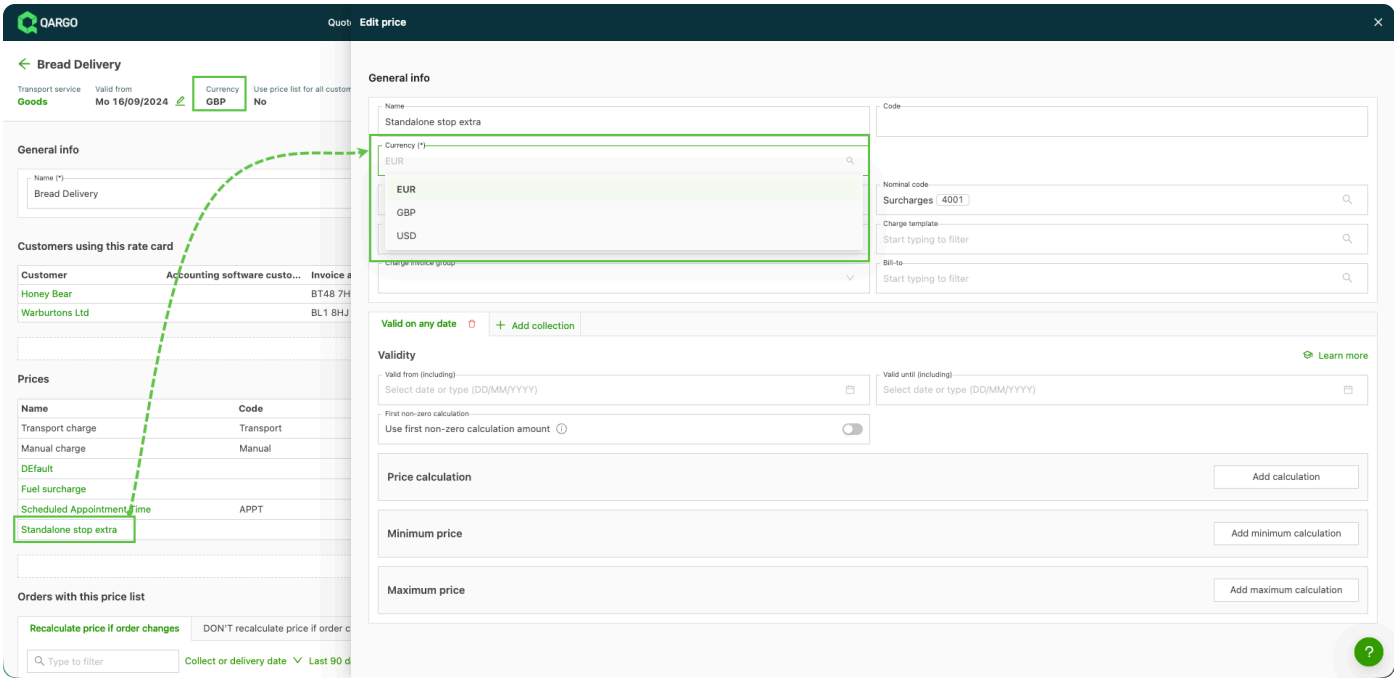
Open the charge

1. **Navigate** to **Rates > Rate card customers**.
2. **Select** the customer rate card that holds the charge.
3. **Click** the pencil icon next to the charge in the **Prices** list. The **Edit Price** form opens.

Change the currency

1. **Locate** the **Currency** field in the **General info** block. It shows the currency the charge bills in today, which is the rate card currency unless it was changed before.
2. **Select** the currency to bill this charge in.
3. **Save** the charge.

From this point, every new order and load that uses this charge picks up the selected currency automatically. The rate card header keeps its own currency.

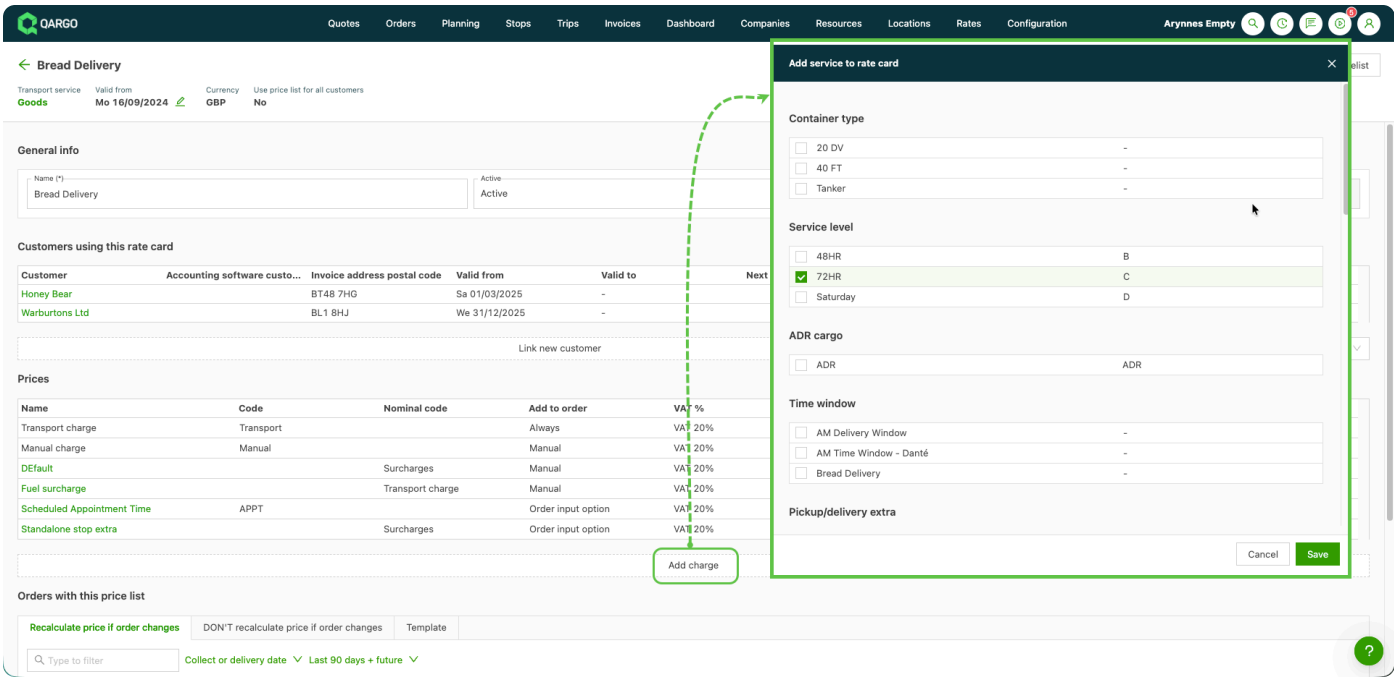


📚 The **Currency** field is never blank. To keep billing in the rate card currency, leave the field as it is. To undo a change, select the rate card currency again and save.

Charges added with “Add charge”

The **Add service to rate card** and **Add custom charge** options do not include a currency choice. Charges added this way start in the rate card currency.

1. **Add** the charge as usual.
2. **Open** the new charge with the pencil icon.
3. **Change** the **Currency** field and **save**.



Charges linked to a charge template

The **Currency** field cannot be changed while a **Charge template** is linked to the charge.

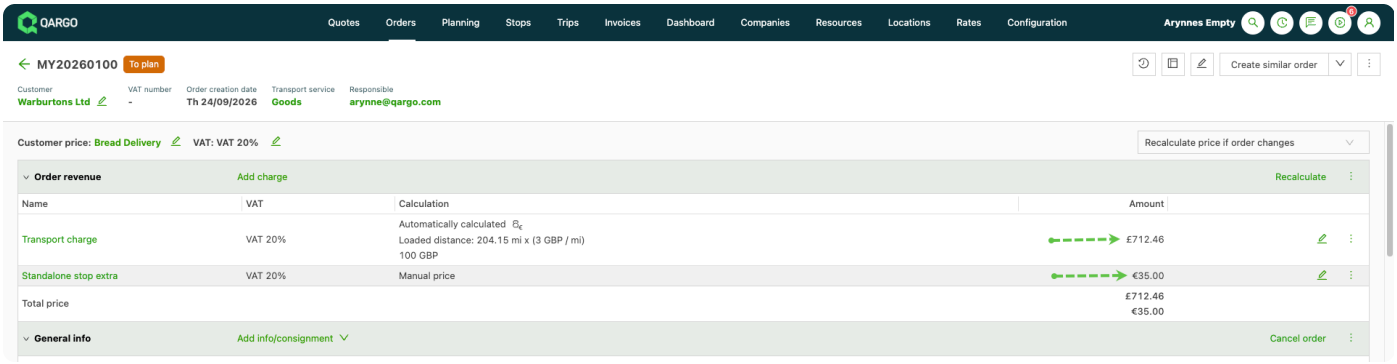
- To use the same formula in two currencies, use two separate charge templates, one per currency.

> 💬 For help setting up charge templates in more than one currency, contact the Qargo Account Manager.

How the charge currency appears on orders, loads and invoices

Orders and loads

- Charges calculated after the currency change carry the charge currency onto the order and the load, with no manual step.
- These charges stay calculated charges. They keep recalculating when the order changes, for example when distance or pallet count changes.
- Planners can still change the currency on an individual charge on an order when needed.



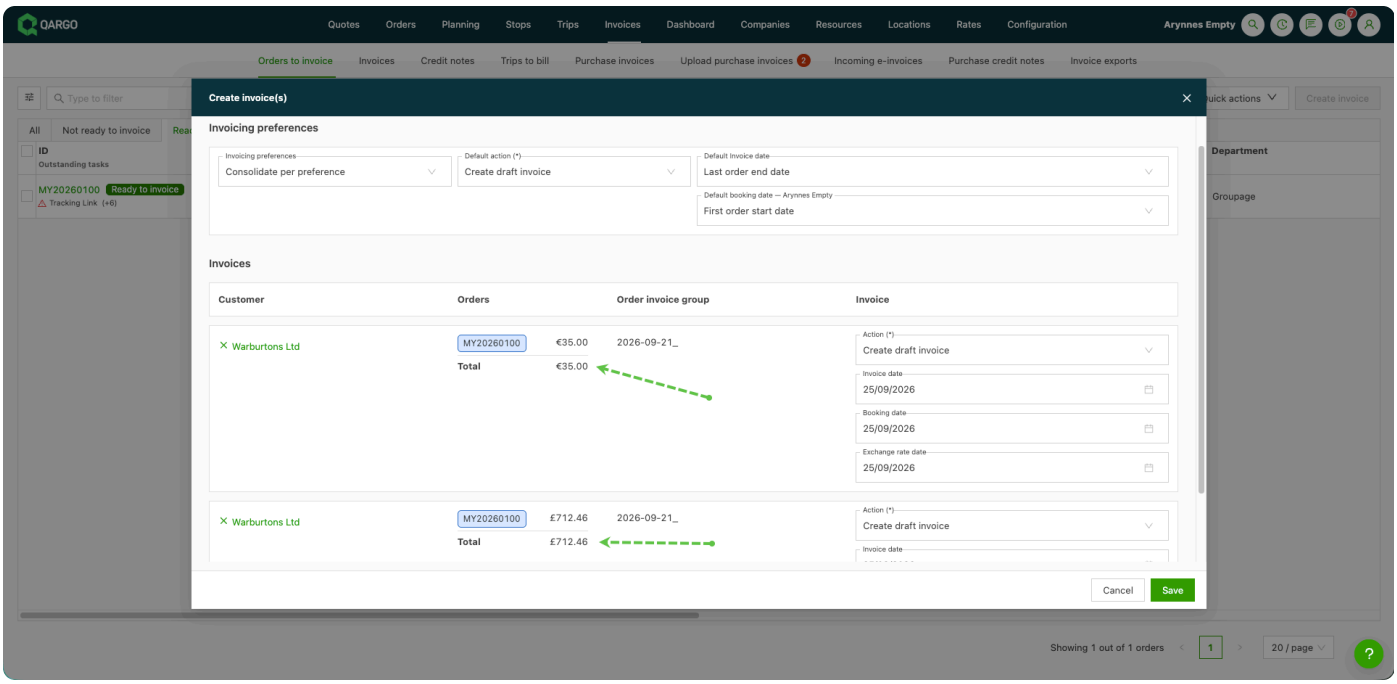
Existing charges are not changed

> ‼️ Charges that already exist on orders keep the currency they were created with. Changing the currency on the rate card only affects charges calculated afterward.

- When an existing charge has a different currency from its charge master, recalculation skips that charge and leaves it as it is. This also applies to a forced recalculation.
- This is true even when the currency is changed together with another field that normally triggers recalculation, such as the rating formula or the tax rate.
- To bring an existing charge in line, adjust it by hand on the order.

Billing orders with more than one currency

- An order holding charges in more than one currency is billed as **one invoice per currency**, so each invoice stays in a single currency.
- Each invoice is created separately. There is no single action that creates all invoices for the order at once.



Documents and templates

- Documents for orders and loads with more than one currency show totals per currency.
- Global document templates were updated automatically.

‼️ Customized document templates were not updated. When a document is generated for an order with more than one currency, a customized template must use the new per-currency total field; otherwise no total amount is shown. **Contact the Qargo Account Manager to review customized templates.**

Limitations

- **No currency conversion.** Amounts are billed in the charge currency exactly as calculated. No exchange rate is applied to the charge amount.
- **No backfill.** Existing charges on orders keep their currency. Only charges calculated after the change use the new currency.
- **No currency choice when adding charges.** Charges added with **Add service to rate card** or **Add custom charge** start in the rate card currency and must be changed afterward.
- **Charge templates.** The currency cannot be changed while a charge template is linked.
- **Separate invoices.** Multi-currency orders need one invoice per currency, each created individually.

Troubleshooting

Issue	Likely cause	Resolution
The **Currency** field cannot be changed	A **Charge template** is linked to the charge	Use a separate charge template for each currency.
The required currency is missing from the dropdown	The currency is not configured for the tenant	Contact the Qargo Account Manager to add the currency.
An existing order still shows the old currency after changing the charge	Existing charges are not updated, and recalculation skips charges whose currency differs from the charge master	Adjust the charge by hand on the order. New orders pick up the new currency automatically.
A forced recalculation did not update a charge	The charge currency differs from the charge master currency, so the charge is skipped on purpose	Adjust the charge by hand on the order.
A newly added charge is in the rate card currency	**Add service to rate card** and **Add custom charge** always use the rate card currency	Open the charge with the pencil icon and change the **Currency** field.
One order produced two invoices	The order holds charges in two currencies, and each invoice holds one currency	Expected behavior. Create and send each invoice.
A document shows no total amount for a multi-currency order	The tenant uses a customized document template that does not use the per-currency total field	Contact the Qargo Account Manager to update the template.