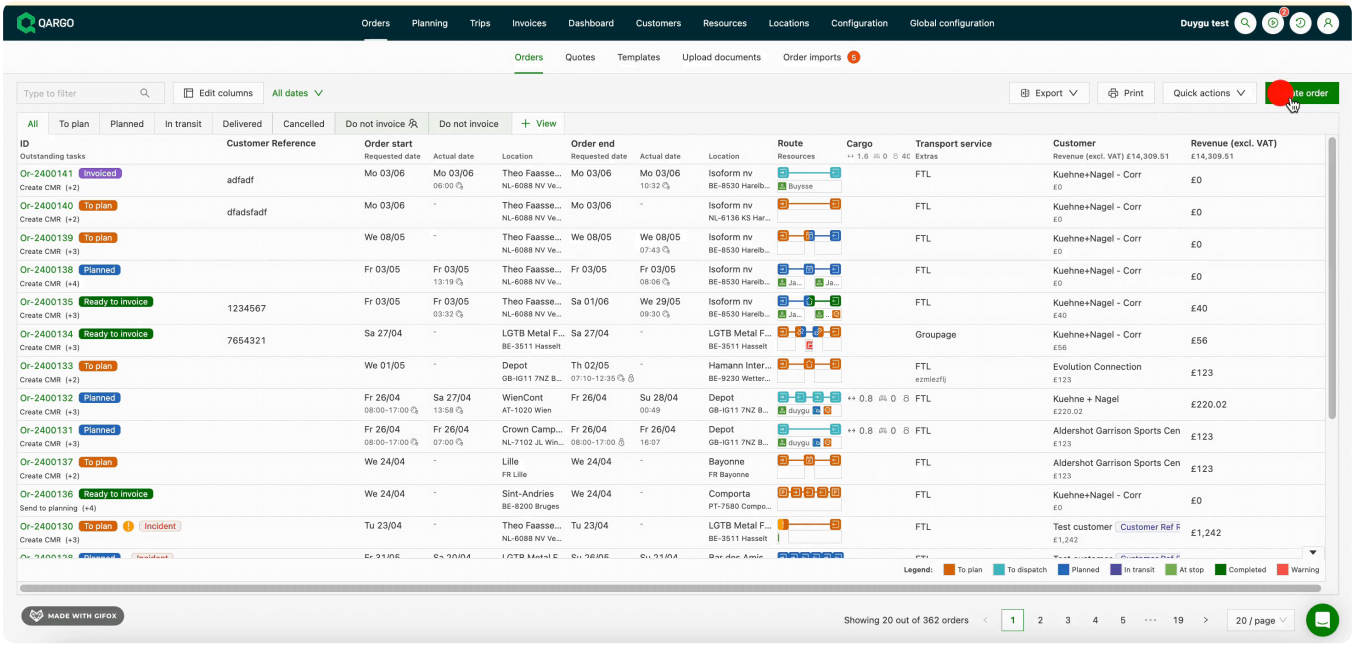
ORDERS - Order Creation via Order Confirmation Document

Article details how to scan and validate the order confirmation document to create a new order.

Updated 22 October 2026

Our AI model learns from past orders to *automatically* fill in data from scanned order confirmation documents into the order form. The AI model fills in suggestions for both New orders, but also orders that are created via a pre-existing order template. In both instances, the system will scan a pdf order confirmation document and prefill any suggestions.

Here's a detailed overview of how it works and what you can expect:



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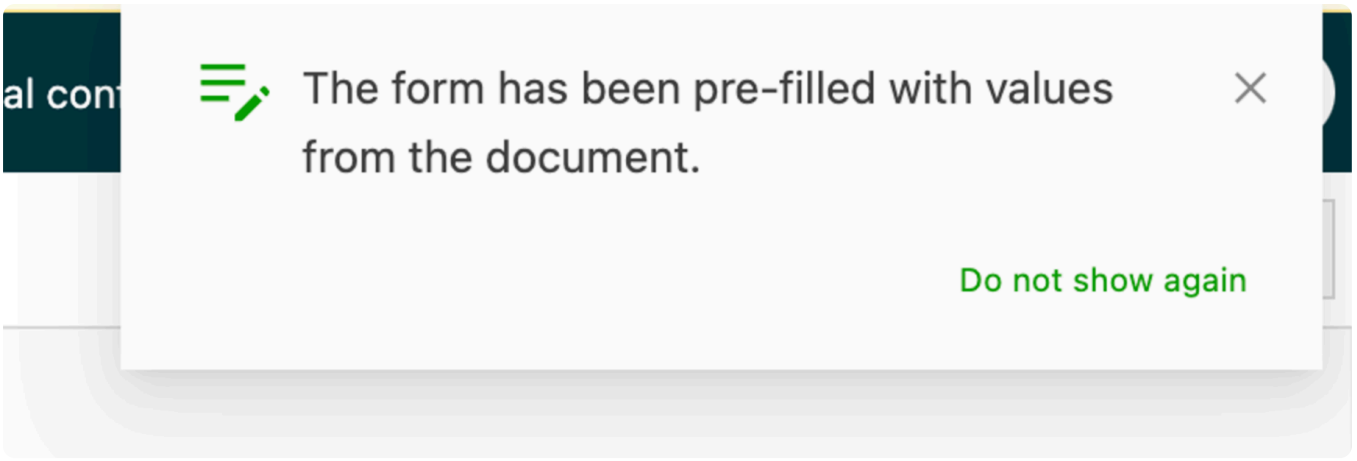
How it works {#h_e2b39ebc6c}

1. Learning Process

- The AI model learns every time a user creates an order for a specific customer using a scanned document.
- Typically, it takes about 3-5 scanned orders for the model to start providing pre-fills.

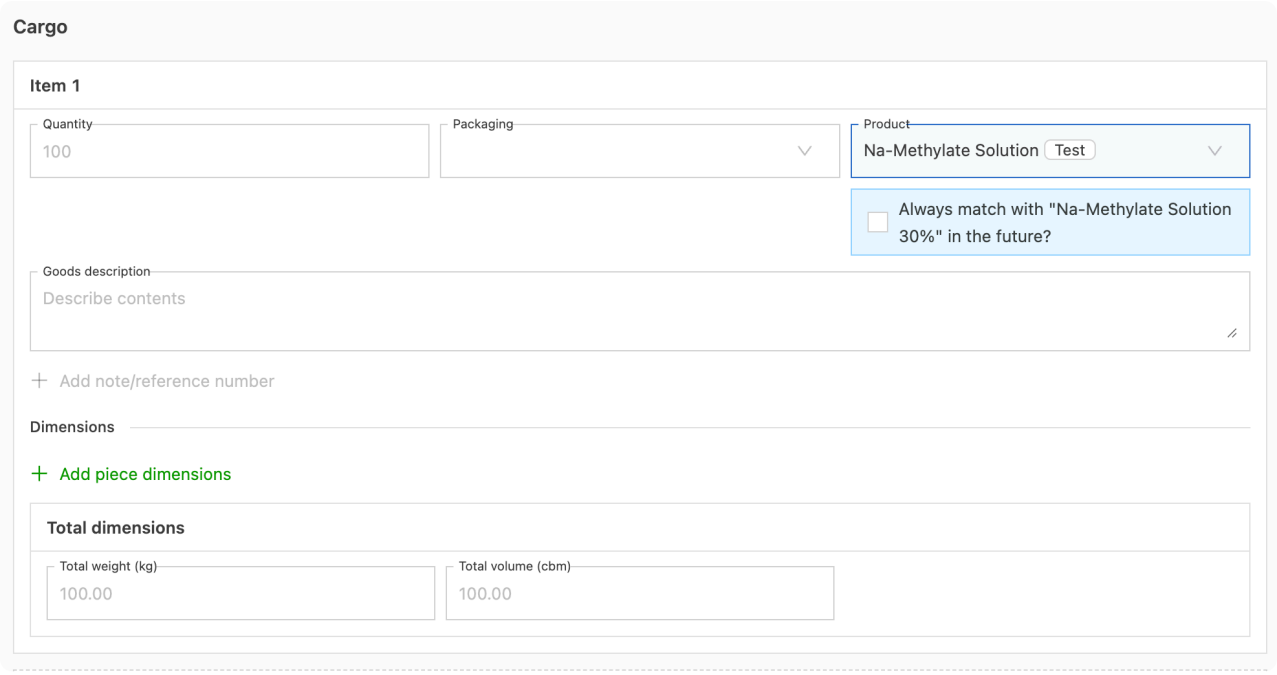
2. Automatic Pre-Fills

- When the model is confident that a value in the document matches a field in the order form, it will automatically fill in the corresponding field.
- Users will receive a notification in the top-right corner of the screen when one or more fields are pre-filled.



3. User Interface

- The recognised fields include:
  - Customer by VAT Number - must be added to the customer profile
  - Customer name - option to create alias with matched names
  - References
  - Dates / Times
    - Opening times
  - Numbers
  - Addresses
  - Products / Packaging



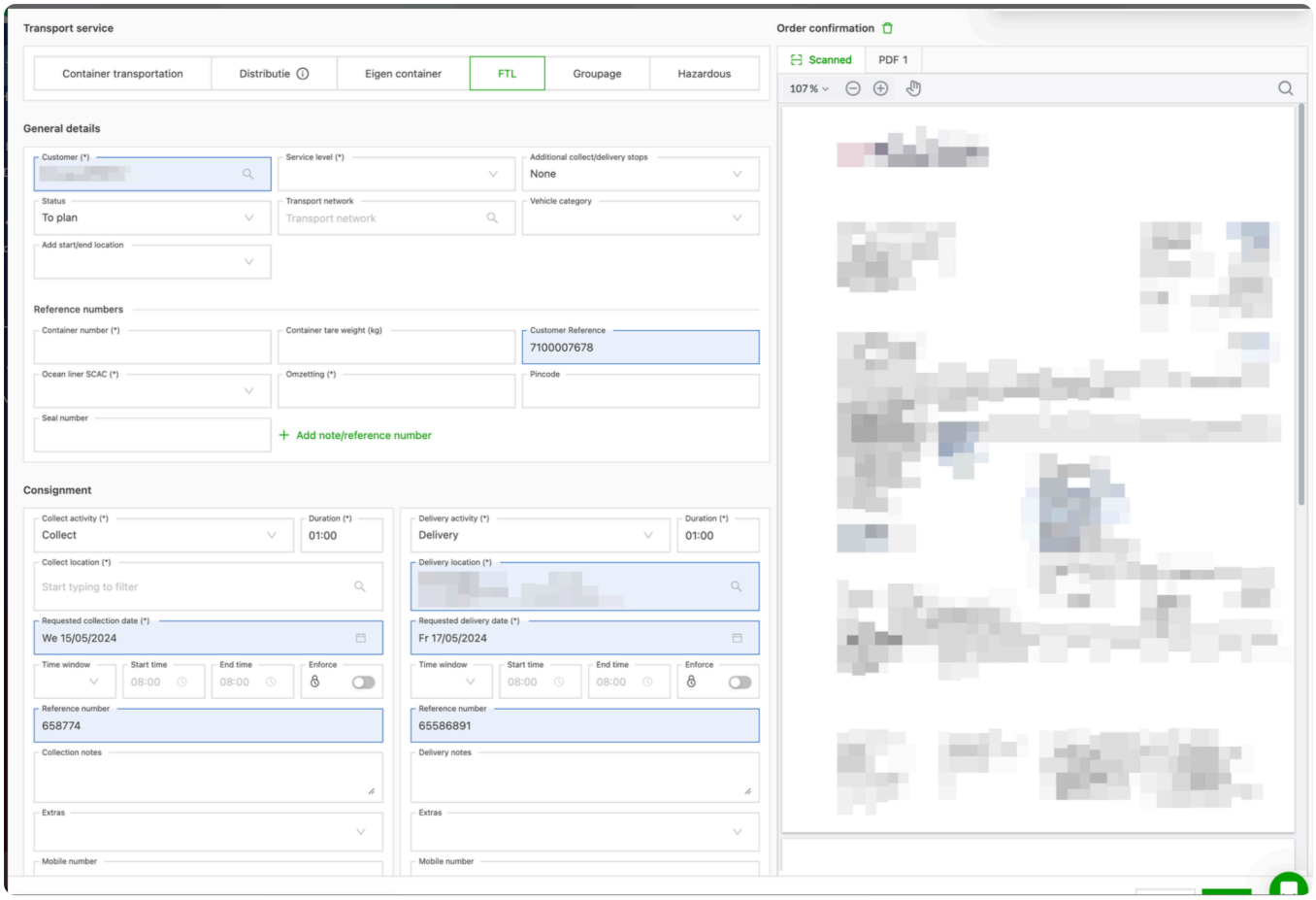
  - Descriptions / Additional instructions
    - Collection / Delivery Notes
    - Good descriptions

- Click on a field in the order and a dropdown will open.

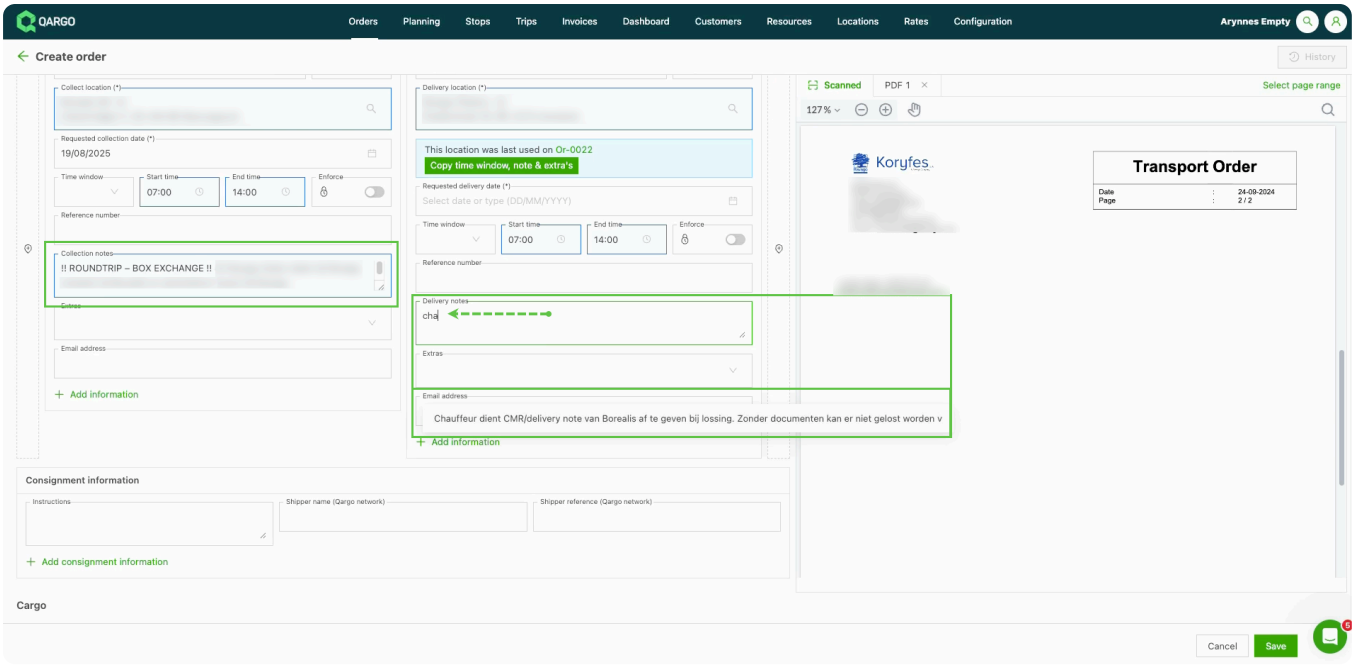
- Some options in that dropdown will have a label ***'Suggestion'***.
- This is data that is fetched from the uploaded document.

- Pre-filled fields will be highlighted in blue within the form, similar to when users manually select a suggestion from the document.

- Verify accuracy of the pre-filled data and manually complete any fields that are not automatically filled.



📚 If **NOTES** do not pre-fill typing in the box will display any matching options from the document.



4. Accuracy and Limitations

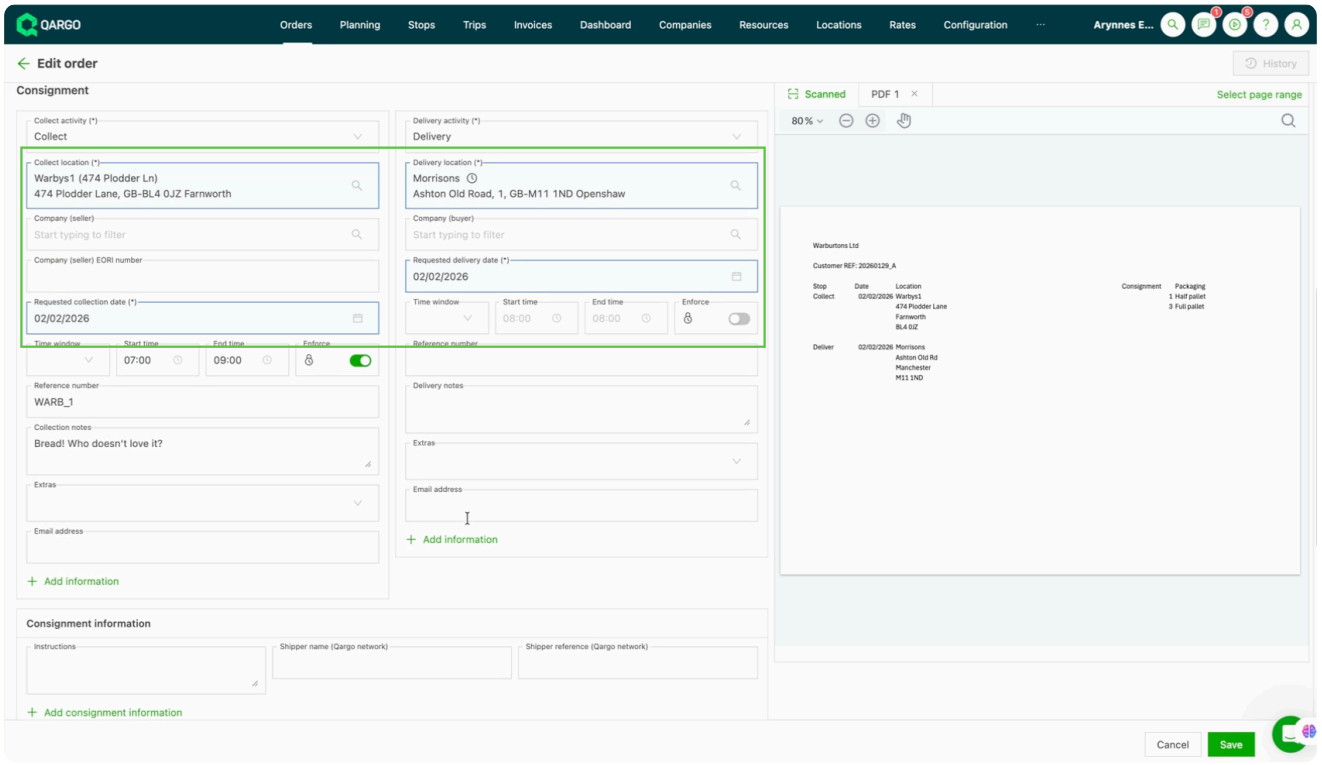
- The model is designed to provide pre-fills only when it is nearly 100% certain of the accuracy, aiming to minimise incorrect pre-fills.
- Users should not expect the entire form to be pre-filled but can anticipate a significant reduction in manual data entry.

📚 Document scanner will search for numeric values, addresses, dates/times and products to use as suggestions.

Using a template order

It is possible to use the document scanning and prefill functions alongside an order template.

- Navigate to **ORDERS > *Templates***
- Select the template to copy and click ***'copy selected orders'***
- From the new order that is created, click ***'Edit order'***
  - This opens the edit order page, including a section where the transport service and the upload documentation fields are available.
- From the ***'Order confirmation from customer'*** section, use the 'drag & drop' feature, or click to upload a file.
- The system will begin scanning and adding matched suggestions, shown highlighted in blue.



- Verify the copied information and enter any missing details.
- Click SAVE.

Click **Play**👇 to watch an overview of how to use the **customer order confirmation document** to create a new order from a template.

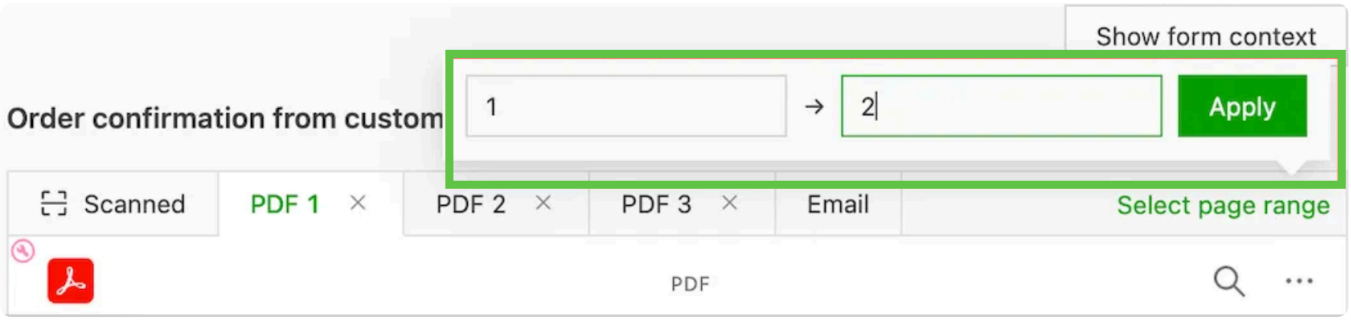


Split large PDF files for Scanning

- Create an order by dragging a pdf into Qargo. It's possible to define which pages of the PDF file(s) should be used for the order pre-fill and as order confirmation.



- User can specify what page range should be used. This range will be used to scan by AI and it will be used as the order confirmation attachment in the order.

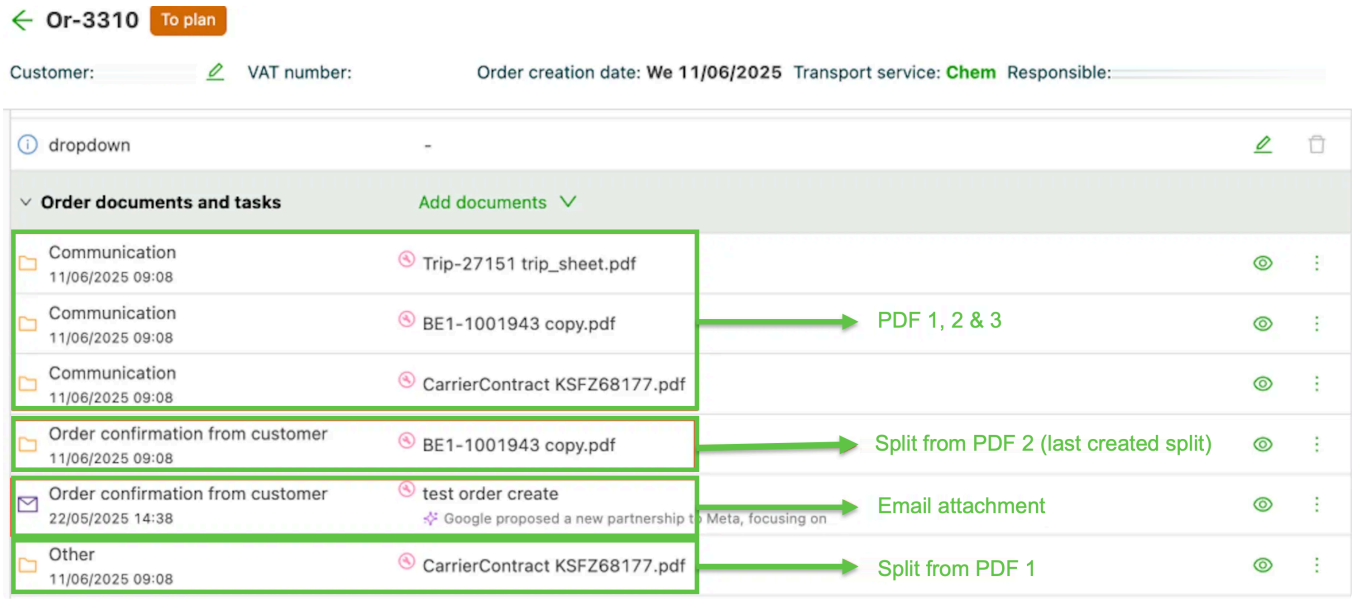


- Once the split has been created, this will be visible to review as well.
  - Create splits for the different PDF files that have been attached.
  - The original PDF files can be deleted or they can be left to attach to the order as well.



📚 ***When multiple splits are created, the last created split will be used as order confirmation.***

- The last created split will be added in attachment as the order confirmation from the customer as well as the email itself.
  - Other splits created from other PDF files will be added in attachment as document type **'Other'.**
  - The original PDF files are added at document type **'Communication'**



- Customers can now easily extract the order confirmation from larger PDF files.
- More accurate document scanning by specifying pages to be used.

Create multiple orders from one document

Scan one document that holds several transport orders and get one reviewable row per order in **Upload orders**, with no need to scan again for every order.

Terminology

Term	Definition
Upload orders	The tab in **Orders** where documents are scanned and reviewed before orders are created
Order row	One detected order from a scanned document
Consignment splitting	Setting that decides whether a multi-order document becomes several orders or one order with several consignments

Prerequisites

🧰 Upload orders is part of Qargo Intelligence and must be enabled.
Contact the Account Manager for configuration.

Once it is enabled, it is possible to modify **Consignment splitting** setting to either One order per pickup/delivery location or to One order per good in **CONFIGURATION** > ***Organisation settings*** > **Order confirmation scanning**.

The default value is One consignment per pickup/delivery location. With the default, a multi-order document stays one order with several consignments.

Create multiple orders from one document

1. Navigate to **ORDERS** > ***Upload orders***.
2. **Drag** a document file in.

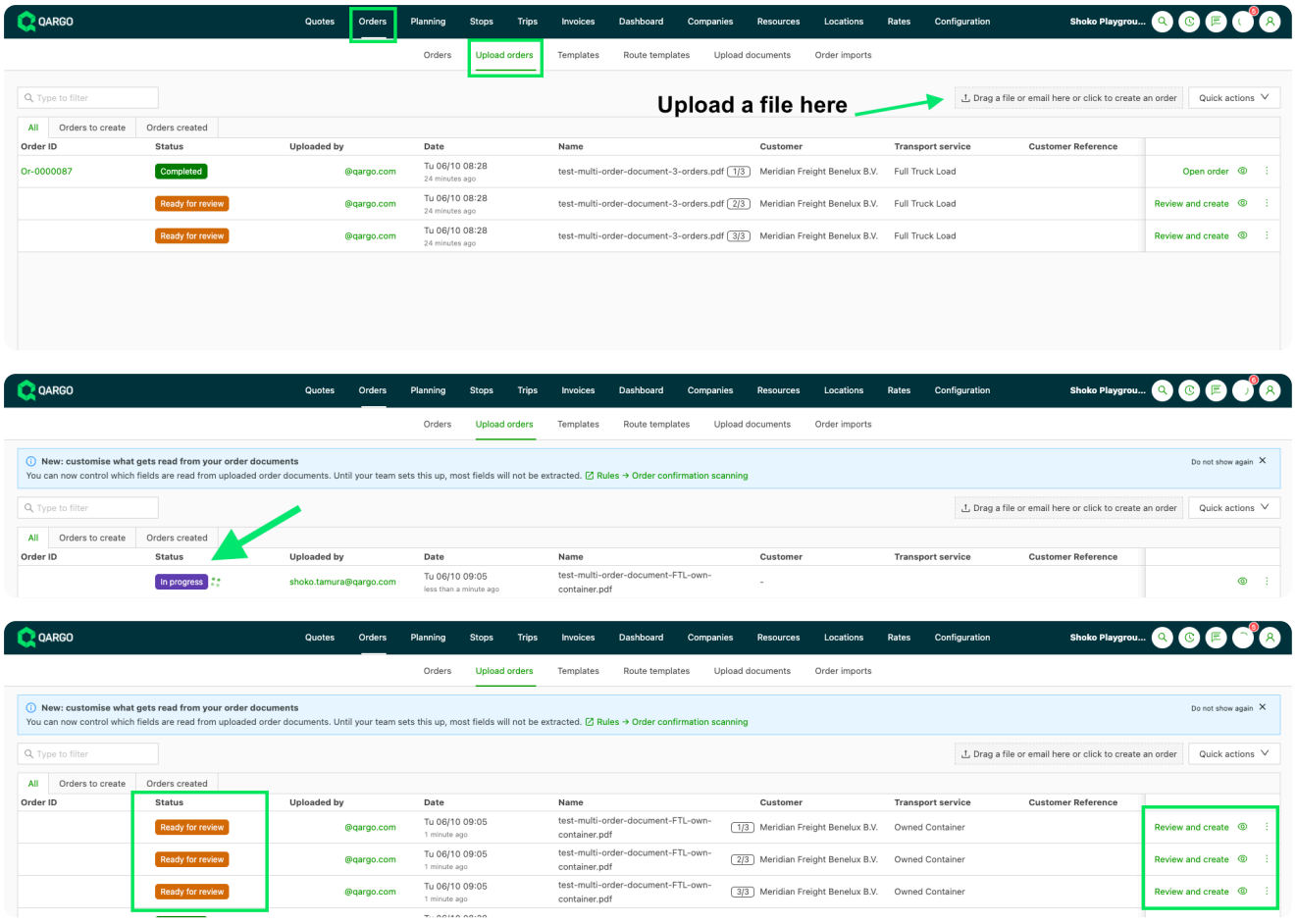
3. Wait for the scan to finish.
   Note: The customer and transport service are resolved on the document first, before it is split. Every order row therefore starts with the same customer and transport service.

4. Select the missing value if prompted. When the customer or the transport service cannot be matched, the document asks for it before any order rows appear.

5. **Review** the order rows. Each row is labelled with its place in the document (1/3, 2/3, 3/3), so it is clear which orders came from the same file.

6. Visualise the source document with the **Eye** icon.

7. Create each order with **Review and create**. Rows are reviewed and created independently.

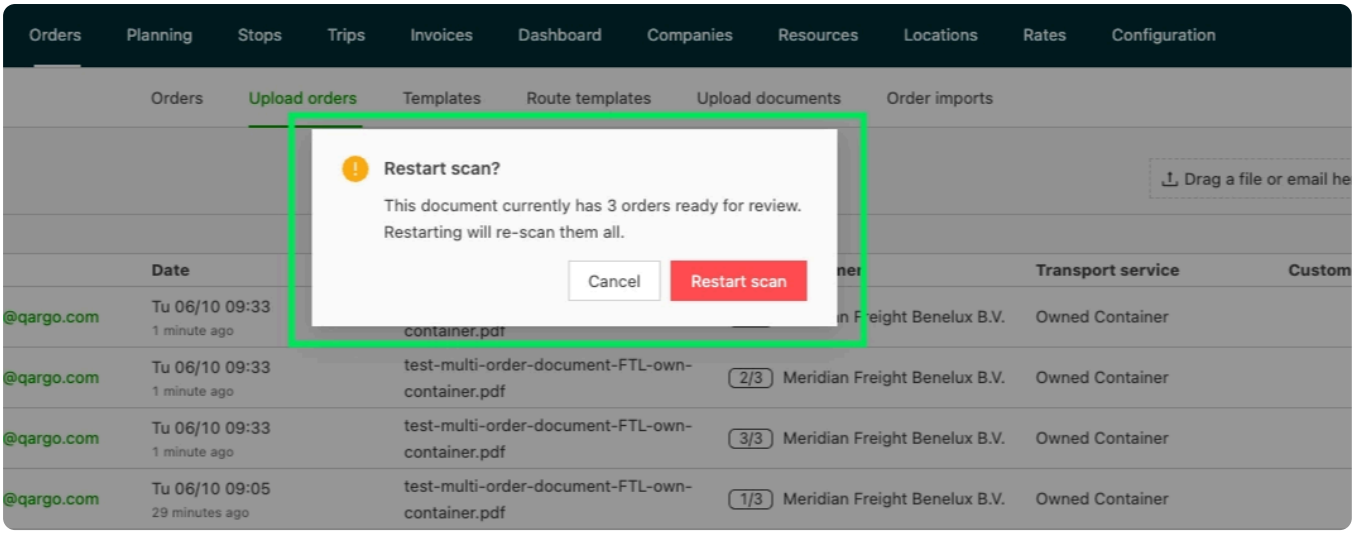


A document with only one order is shown as a normal single row, with no label.

Re-scan a full document

Re-scan full document replaces all order rows of that document with a fresh scan.

- When the document holds more than one order, a confirmation is shown first.
- Edits made on the existing rows are lost after confirming.
- A document with a single order restarts without a confirmation.



Good to know:

- Multi-order detection only runs from **Upload orders**. The Create order form and the Outlook add-in still create one order per scan.
- An email with several separate PDF attachments (one order per PDF) is not covered. Orders written in the email body are not detected either.
- There is no bulk create action. Each detected order is opened and created from its own row.

Troubleshooting

Situation	Cause	Solution
Upload orders tab is not visible	It is not enabled	Contact the Account Manager to enable it
A multi-order document becomes one order with several consignments	Consignment splitting is on the default value	Set it to One order per pickup/delivery location or One order per good
Document asks for a customer or transport service before showing rows	Customer or transport service could not be matched	Select the missing value on the document
Edits on order rows disappeared	Re-scan full document replaced all rows	Confirm the restart only when the edits are no longer needed