New order field for contact emails

This article outlines a new Order field that can be configured to allow a task to be emailed to a specific contact within a company.

Updated 28 October 2024

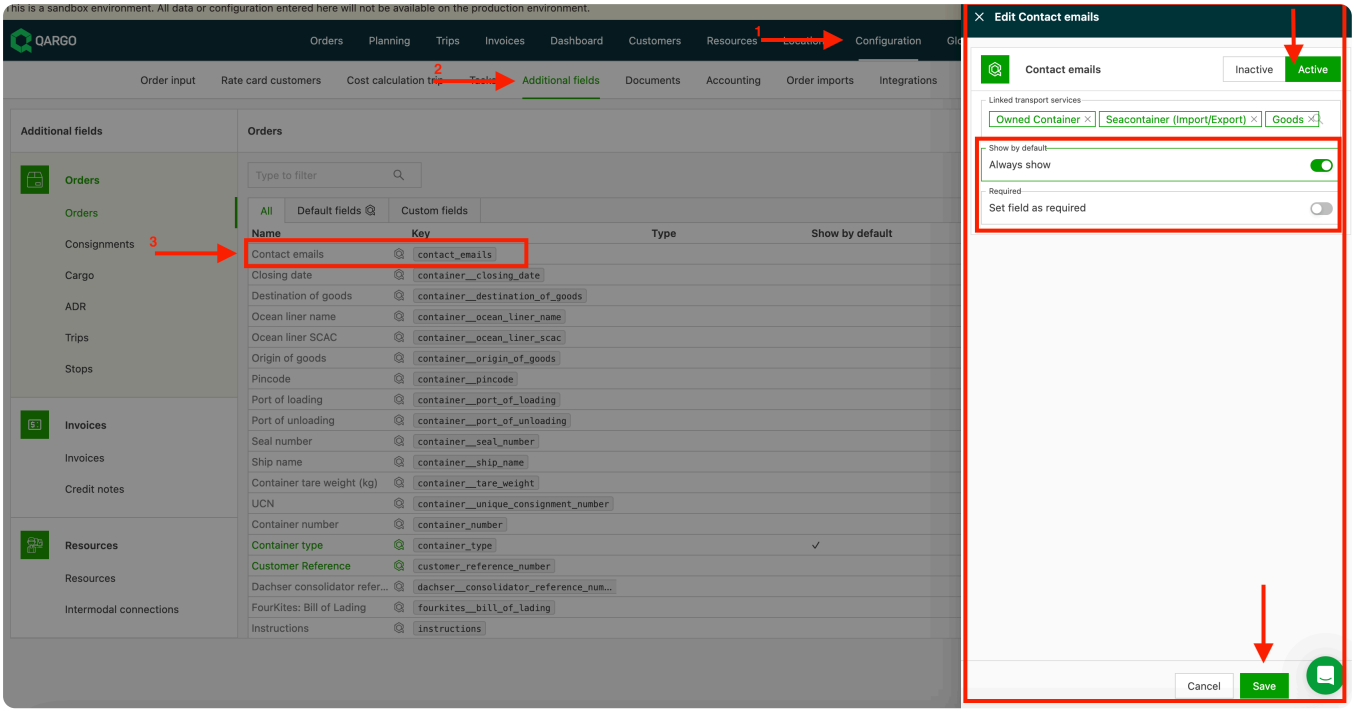
Sometimes sending emails to a dedicated Role in a company (ie: Operations), is not suitable. In some instances, not every user in that department (role) will handle every aspect of each order.

There is new field on the order page where you can enter a specific **Order Contact** to be used for contact tasks on a related order/consignment/stop. This new field will allow a specific contact at your customer to be able to receive the email task directly.

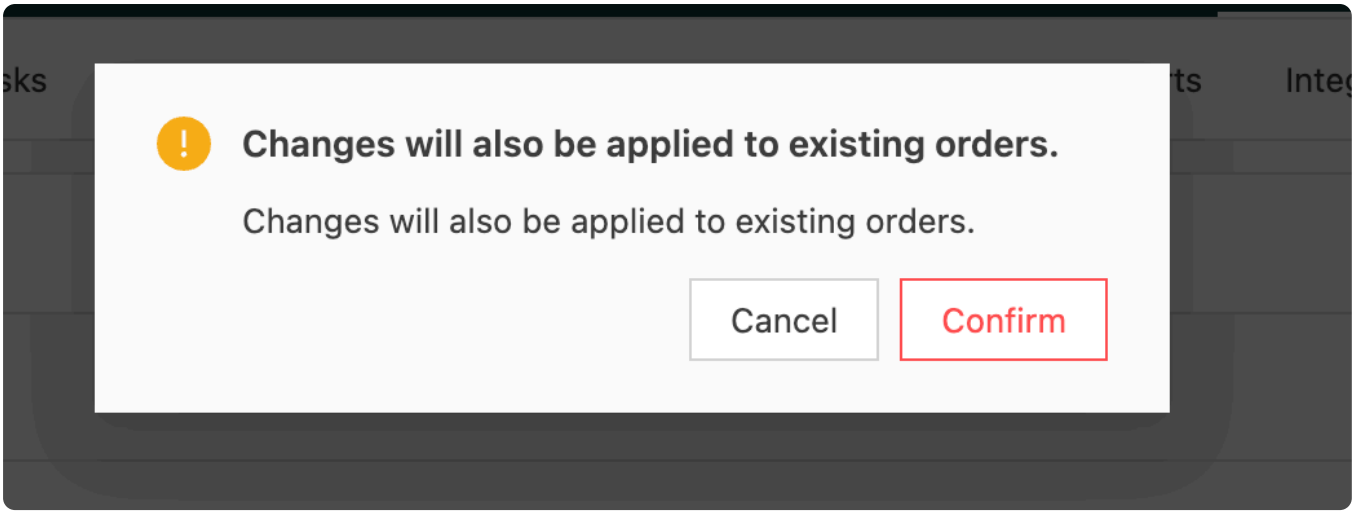
To Activate this option:

1. Navigate to the **CONFIGURATION** tab.
2. Select ADDITIONAL FIELDS> Orders.
3. Select 'Contact emails'. Click the pencil to edit the settings.

- This will open the **'Edit Contact emails'** panel.
- Select 'Active' so the field will be enabled.
- You can then select if this field will be 'Always Shown' and / or 'Required'.
- Use the toggle to select your preferences and **SAVE.**



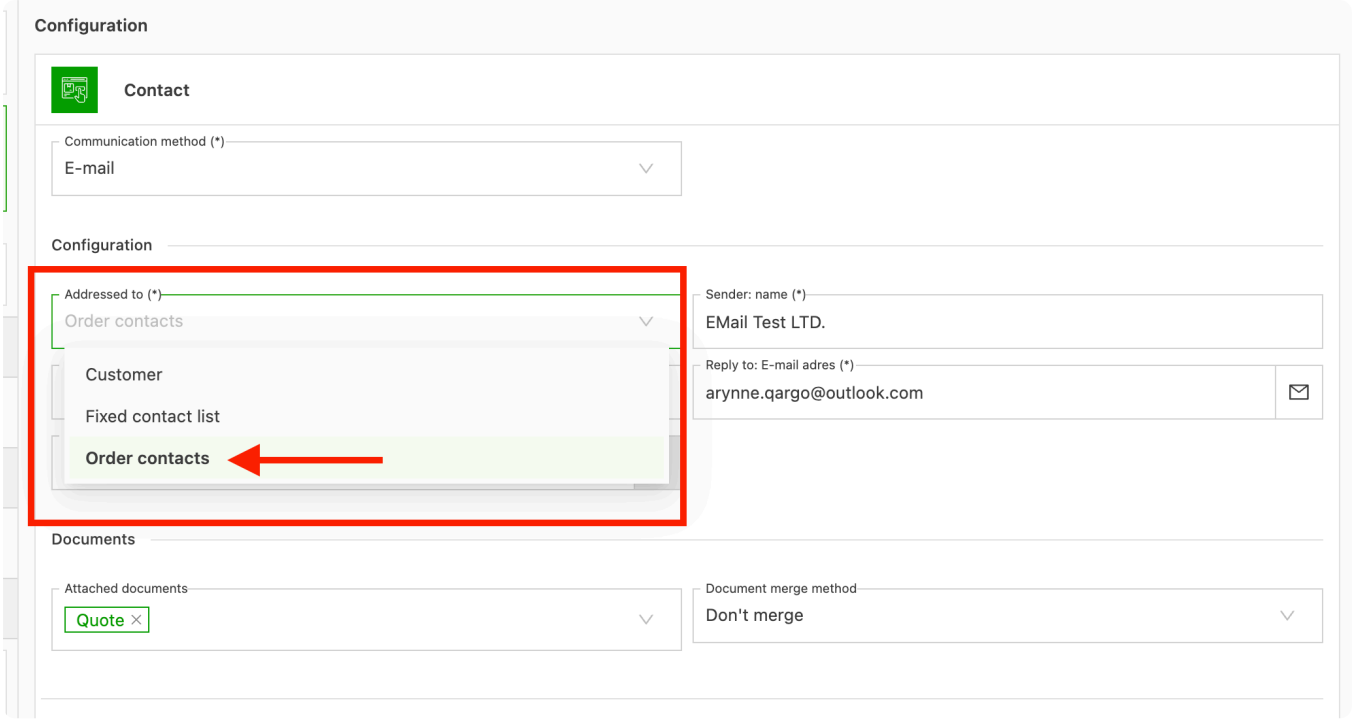
A confirmation window will open showing this field will be enabled on all existing orders.
Click **CONFIRM**.

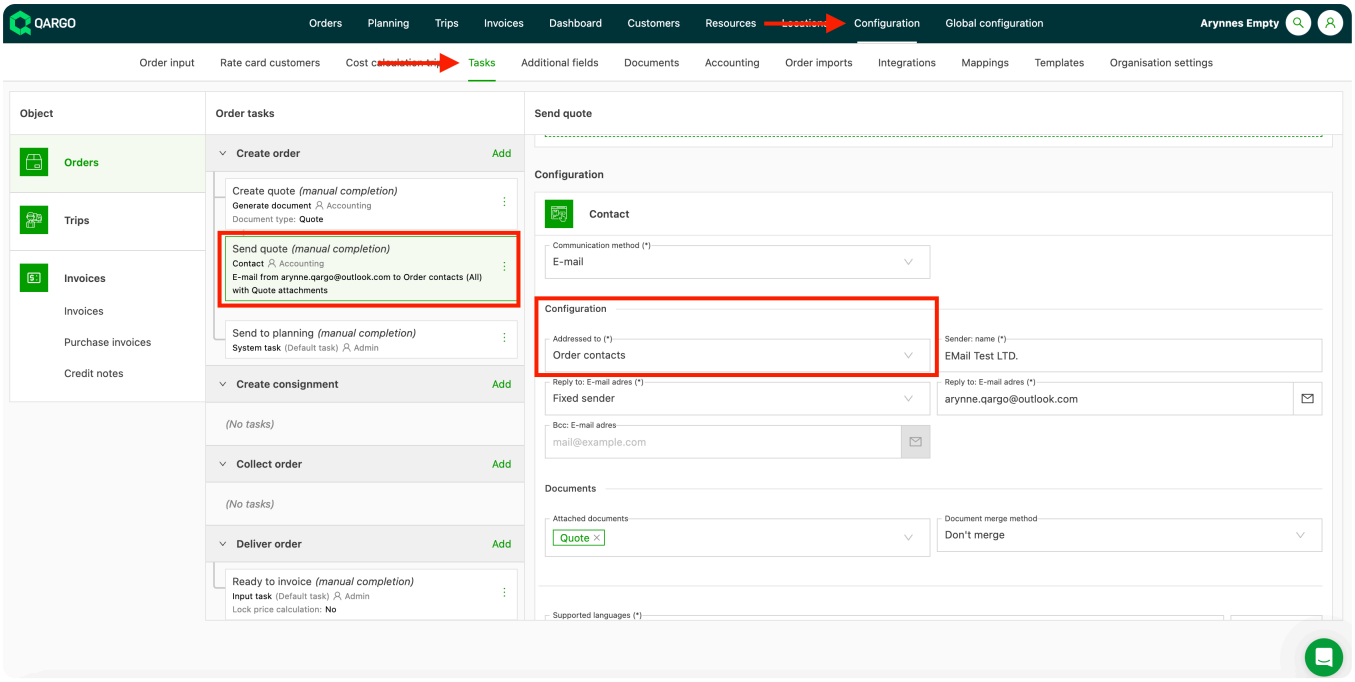


This will insert the field into the order but will not populate the contact email. You will need to select the relevant contact email.

Configure Tasks

You will need to update, or create new Tasks that you want to send direct to the order contact.
From the 'Addressed To' field, select **'Order Contacts'.**

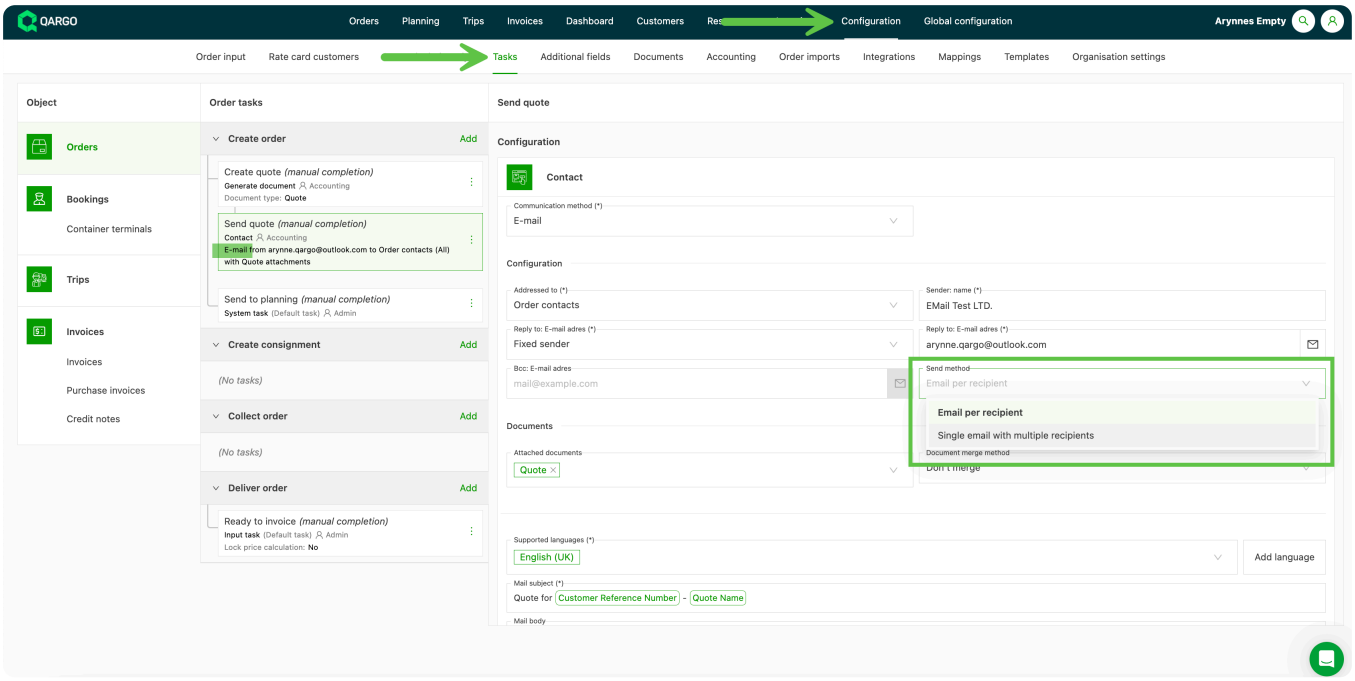




Add configuration for sending Email to multiple recipients.

When sending emails to multiple recipients, a new option has been added to configure how they are sent. You can send a separate email to each recipient (this is the previous behaviour and also the default), or send a single mail with multiple recipients.

The default setting behaviour is to send a separate email per user, it is possible to change this in Configuration > Task settings if you prefer to send 1 email to multiple users. It will include all the users in the TO: address line.

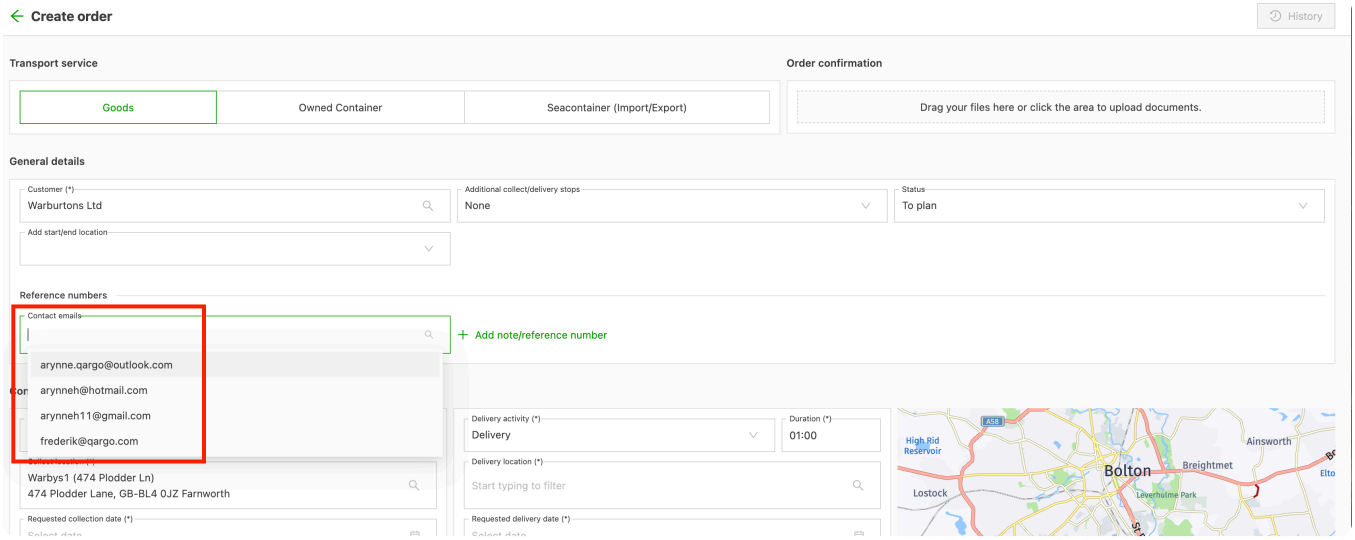


The task will be completed and emailed based on the order contacts selected.

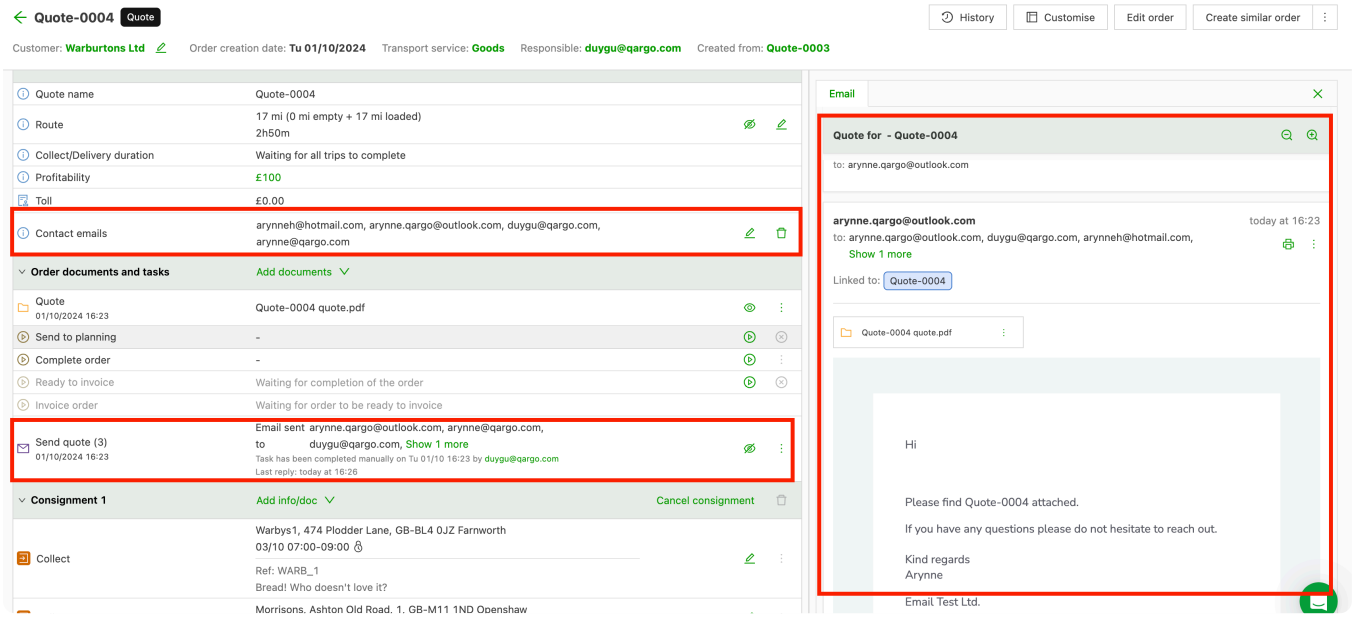
The Task must be configured before you add the user to the order.

Adding Users to the order.

Select from any contacts that are saved to the customer.



With the task configured, the individual contact emails are used to complete the tasks.



TIP:

You can link your emails directly to your Quotes & Orders using Qargo Email Intelligence.