Customer portal: Giving access to the customer portal

Updated October 26, 2026

The customer portal makes working with customers a seamless process. Giving a customer access is quick and easy to set up. Once access is enabled, users can submit orders directly to the system.

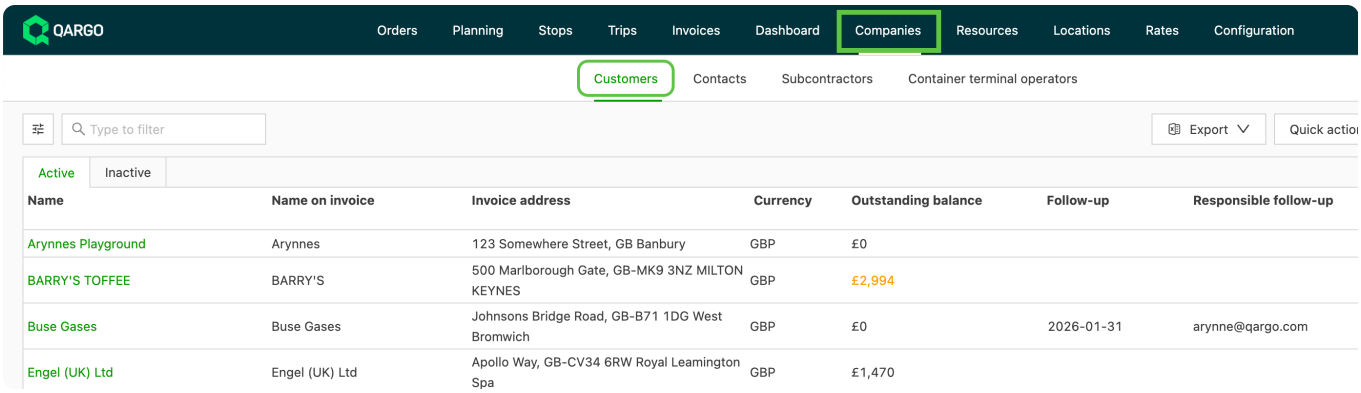
> 📚 The customer profile must be **created and saved first**. Follow the link 👉 to learn how to create a new customer.

🎥 Watch this video to find out how to grant access to the customer portal, or follow the steps below:

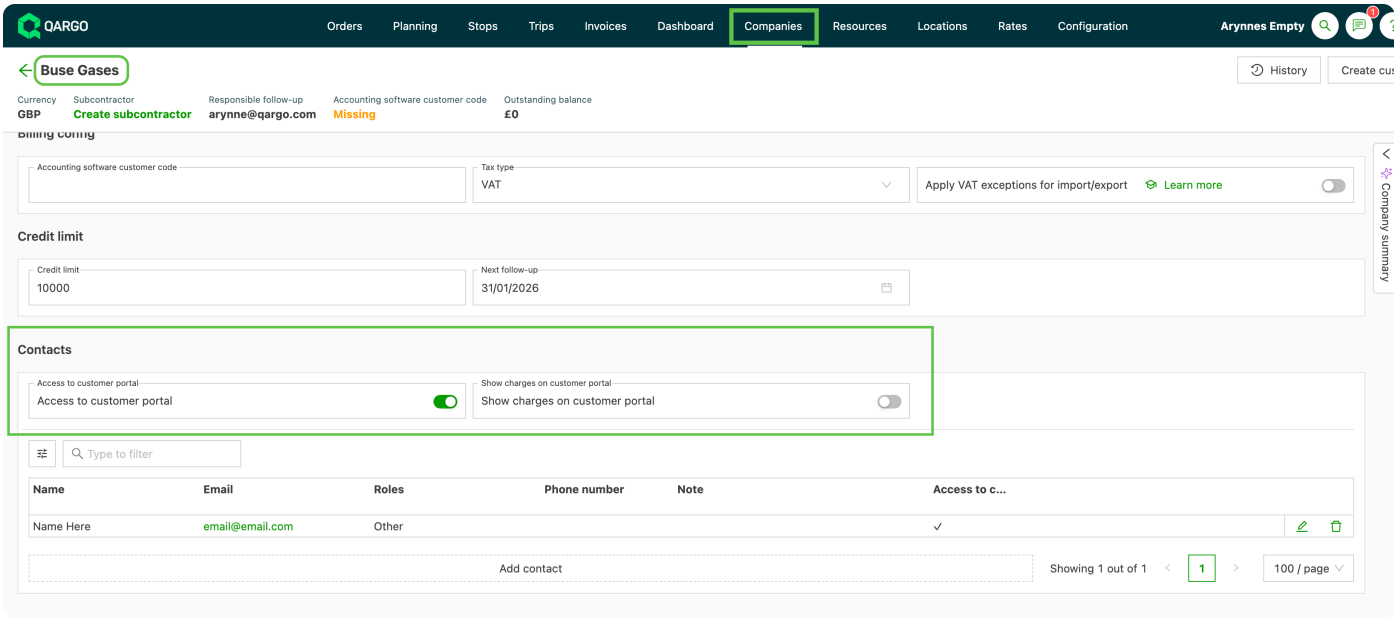
▶ https://watchclueso.com/embed/jxzf2fbdu0fbw2qu

Step 1: Activate the customer portal on the company profile

- Navigate to **Companies > Customers**



- Click the individual customer profile to open it
- Scroll to the **Contacts** panel
- Turn on the **Access to customer portal** toggle
    - To give customers visibility of charges, including approving and rejecting charges, turn on **Show charges on customer portal**
- Click **Save**.



🧰 To make financial details visible in the customer portal, including invoices and credit memos, turn on the **Show charges on customer portal** toggle. This can also be done via quick actions (see below).

To activate **multiple customers** at the same time, use the **Quick actions** function

- Select the **Access to customer portal** option under **Field***
- This displays the **Access to customer portal** toggle; turn it on.
- Click **Save**
- The customer list view now shows checkboxes next to the customer name
  - Select the customers to update
  - To select all customers, click the first box in the header and all the checkboxes are selected.
- Click **Update details**
- The customer portal is now enabled for the selected customer profiles.



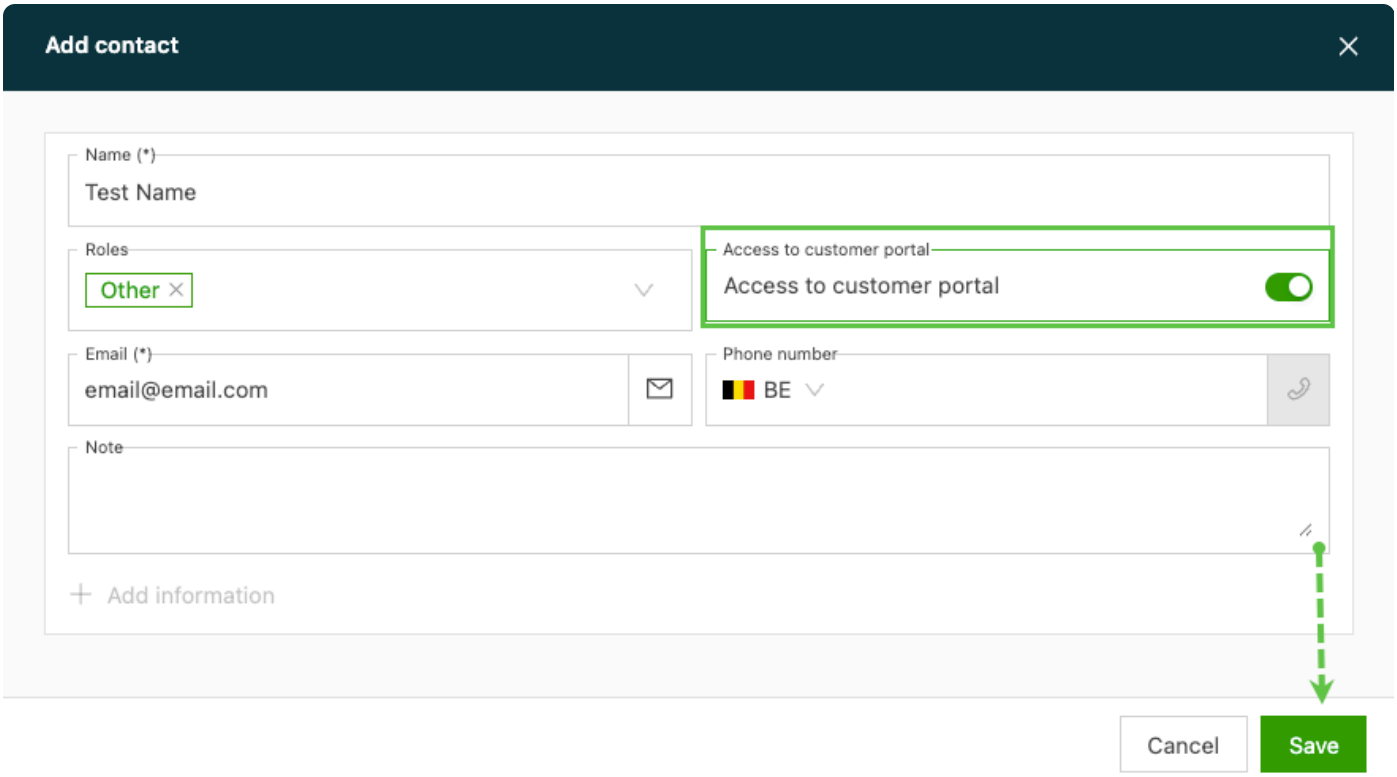
Step 2: Give a user portal access

- User access can be activated via the **Contacts** panel in the customer profile, or via the **Contacts** list view if the contact already exists in the customer profile.

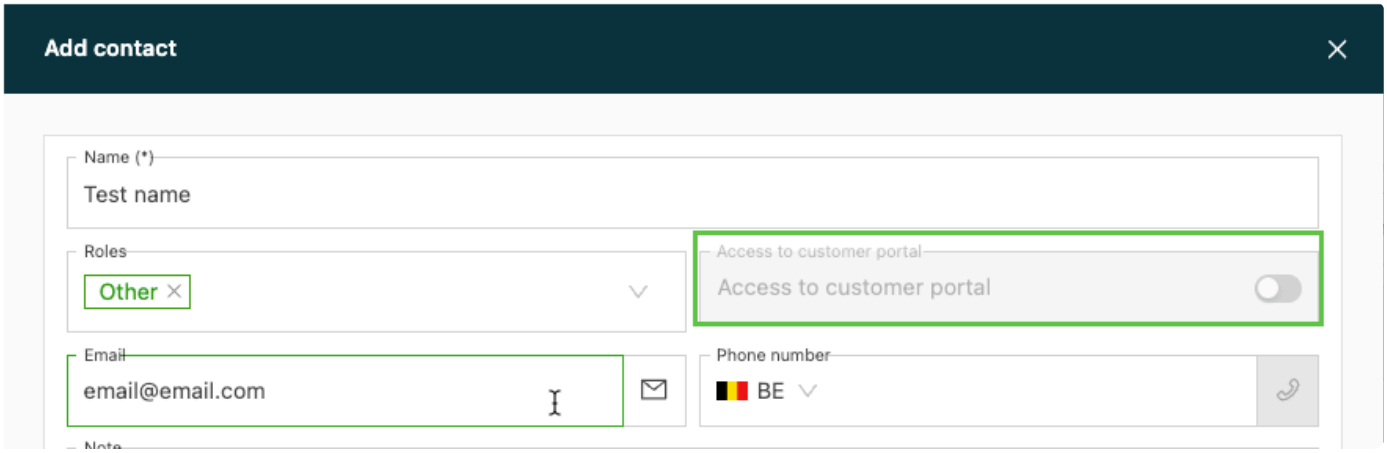


From the customer profile:

- Scroll to the **Contacts** panel in the customer profile
- Click **Add contact**
- Enter the contact details, including a valid email
- Turn on the **Access to customer portal** toggle.
- Click **Save**



‼️ When giving a user portal access, if the **Access to customer portal** toggle cannot be selected, check that portal access is enabled on the customer profile.



From the contacts list view:

- Navigate to **Companies > Contacts**
- Click the edit icon next to the contact to update
- Turn on the **Access to customer portal** toggle.
- Click **Save**

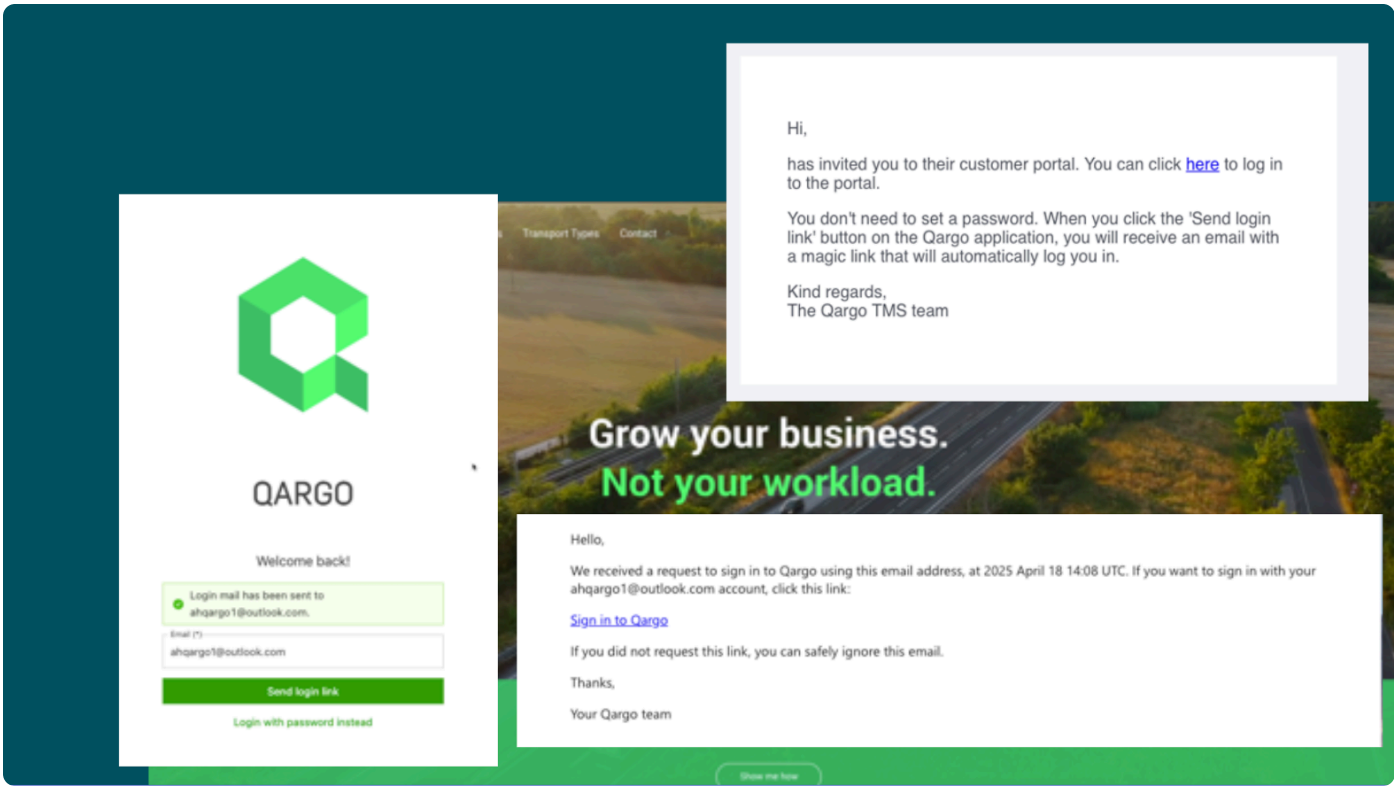


📚 Users automatically receive a welcome email confirming their portal access.

Accessing the portal

Once the portal is activated, the user receives a one-time email with a link to the Qargo login page.

- The user enters the registered email and clicks **Send login link** to receive an email with a secure login link.
    - A password can also be used if preferred.



Once users have access, they can:

- Create and submit orders directly to the carrier tenant
- Edit or cancel orders (this needs to be configured first)
- View charges and invoices (once visibility is enabled)
- Review dashboards showing key operational data
- Add and modify location data to use as stops in orders
- Set up printer configuration for easy document printing

📚 It is generally **not possible** to edit an order once it has been submitted via the portal, unless this has been configured. More information can be found here.

Viewing invoices and credit memos

Customers can now view and download invoices and credit memos directly from the customer portal, with no need to contact the operations team.

Prerequisites

A Super Admin must complete all three steps before the **Invoices** tab is visible to the customer:

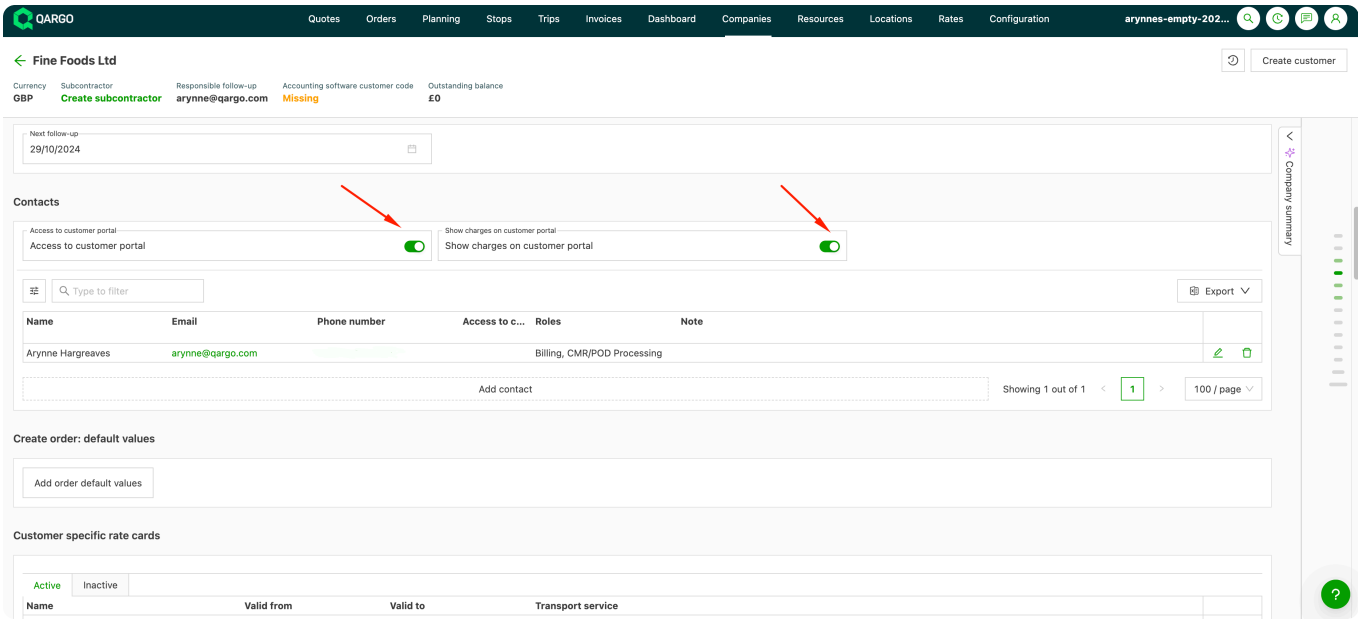
1. Portal access must be enabled on the customer record.
2. The **Show charges on customer portal** toggle must be enabled on the customer record.
3. The **Invoice** and **Credit memo** document types must be set to visible in **Configuration > Documents configuration**.

Use cases

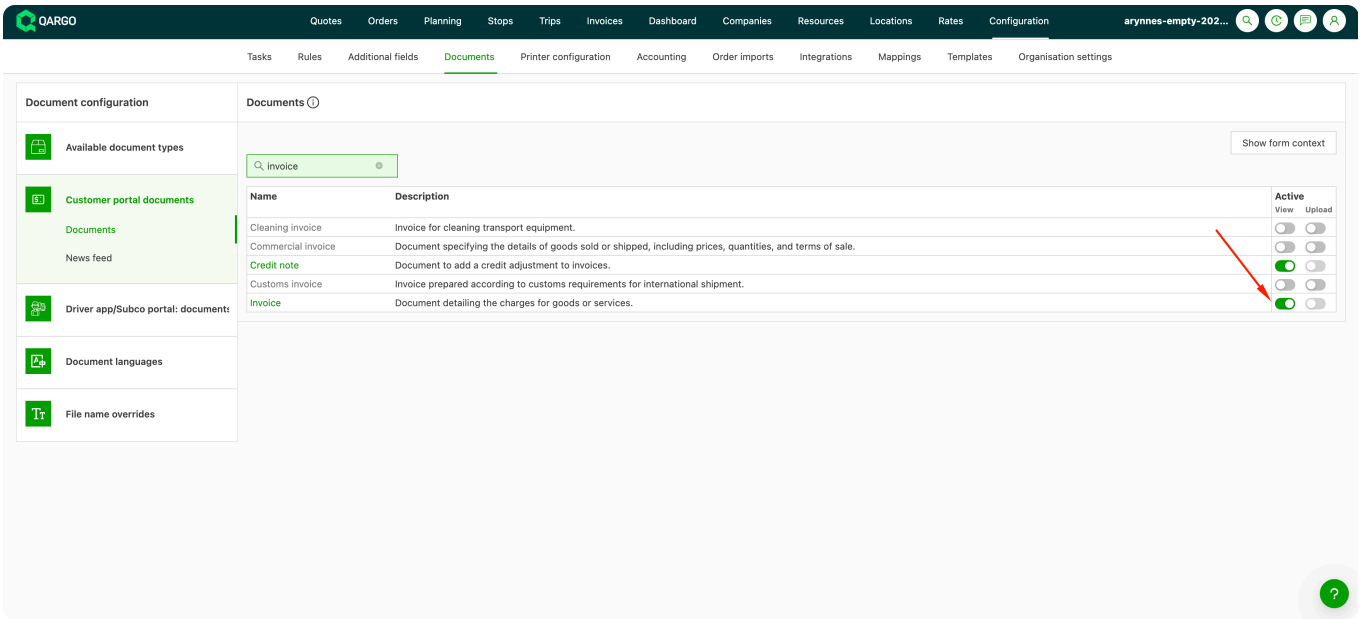
- A customer downloads a PDF copy of their latest invoice without contacting the operations team.
- A finance contact reviews the charge breakdown before approving payment.
- A customer has a question about a credit memo and views the line-item detail directly in the portal.

How to enable invoice visibility (admin)

1. **Navigate** to the customer record in **Customers**.
2. **Confirm** that portal access is enabled for this customer.
3. **Enable** the **Show charges on customer portal** toggle.

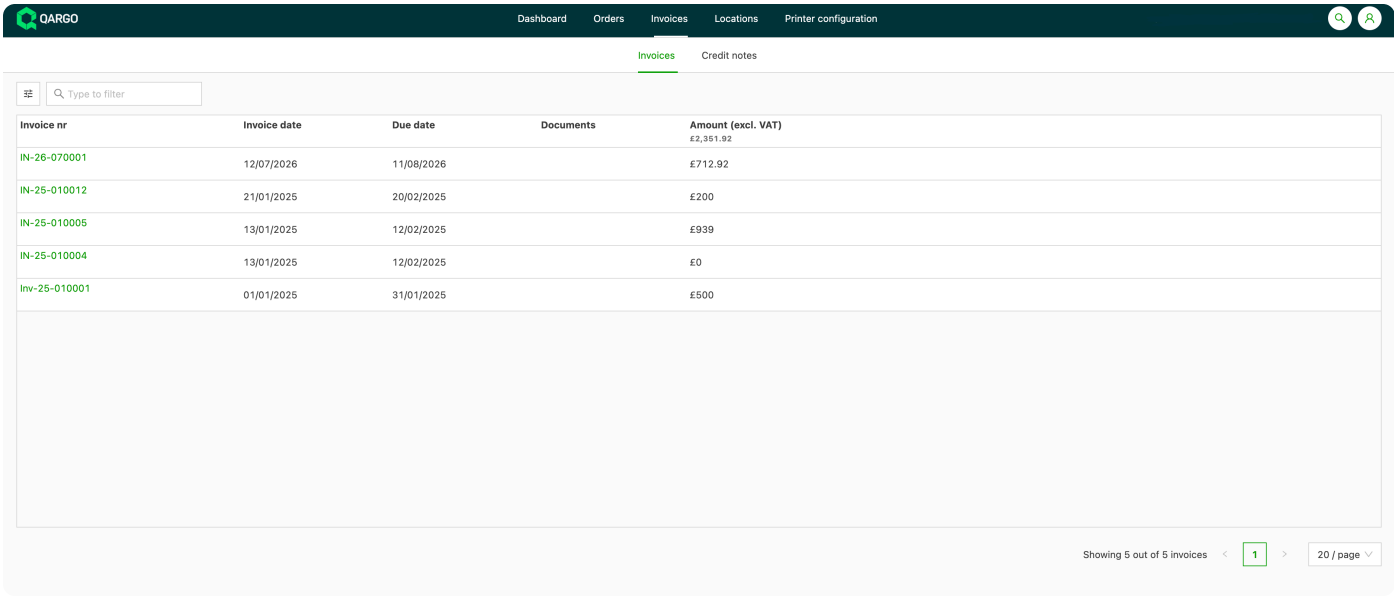


4. **Navigate** to **Configuration > Documents configuration**.
5. **Confirm** that the **Invoice** and **Credit memo** document types are set to visible.



Make sure the same document types are also available in the **Available document types** option; otherwise, customers will not be able to view or upload them.

The **Invoices** tab appears in the customer portal at the next login.



▶ https://watchclueso.com/embed/aeirleooc043xn3g

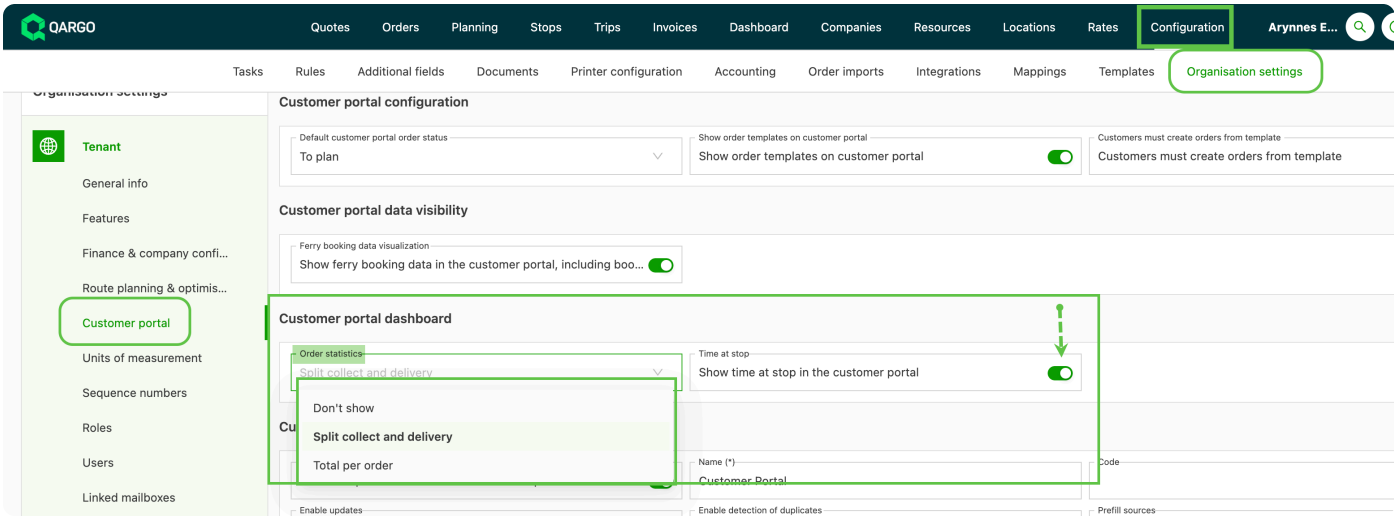
Configure the dashboard statistics and time at stop

Use cases

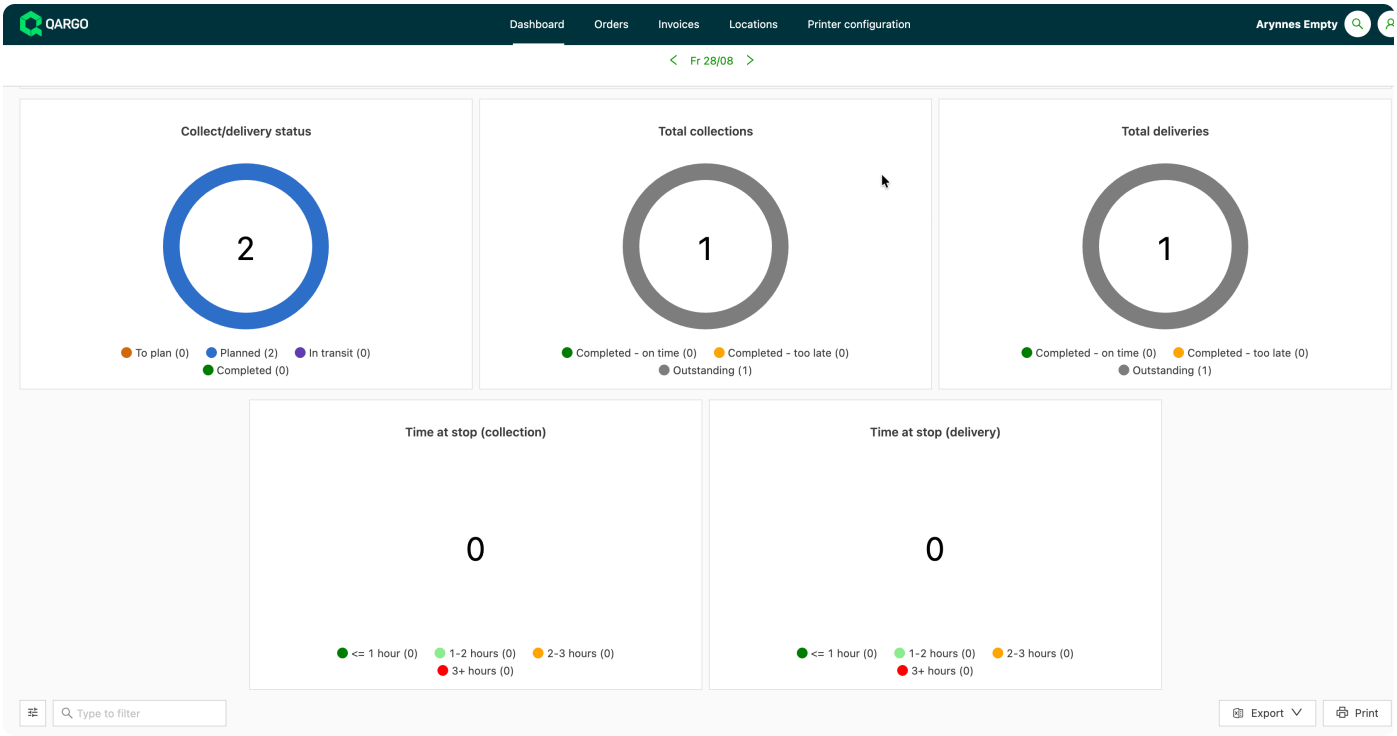
- Full-load and container operators want portal users to land on a clean orders view, because separate pickup and delivery dials add confusion when an order is effectively one load.
- Network freight operators do not record stop times, so the time-at-stop figure is meaningless and is better hidden.
- Operators who want a single figure per order can switch to total-per-order statistics instead of separate pickup and delivery dials.

Open the customer portal dashboard settings

1. **Navigate** to **Configuration > Organization settings > Tenant > Customer portal**.
2. **Find** the **Customer portal dashboard** section.



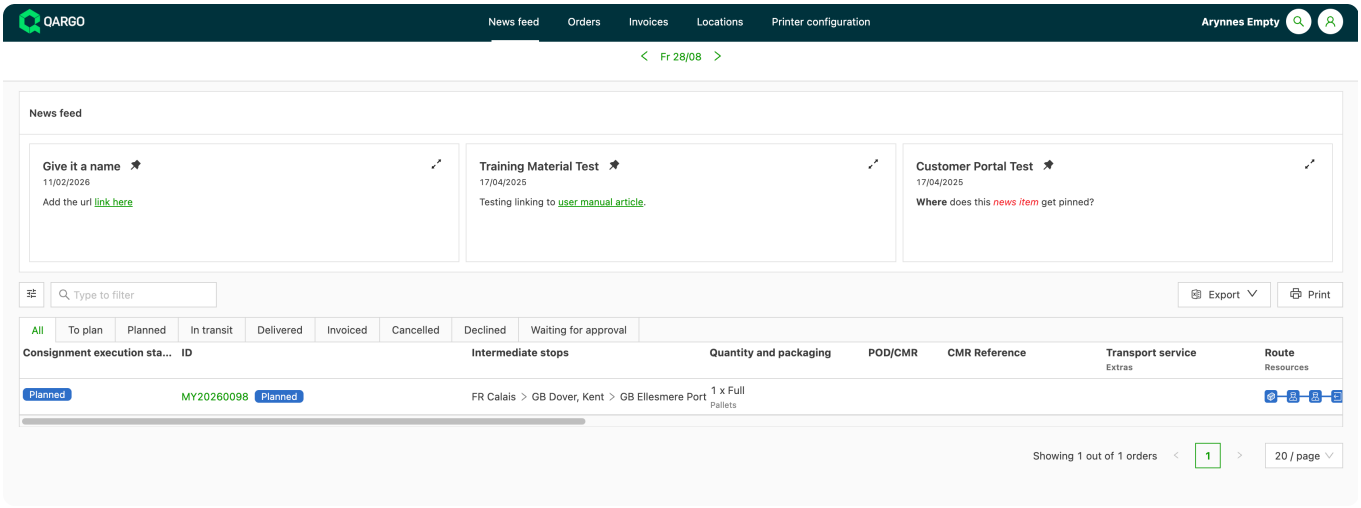
- The default settings are **Order statistics: Split pickup and delivery**, with the **Time at stop** toggle **on**.



🧰 The three settings apply to the customer portal of the whole tenant, for every portal customer. They cannot be set for individual customers.

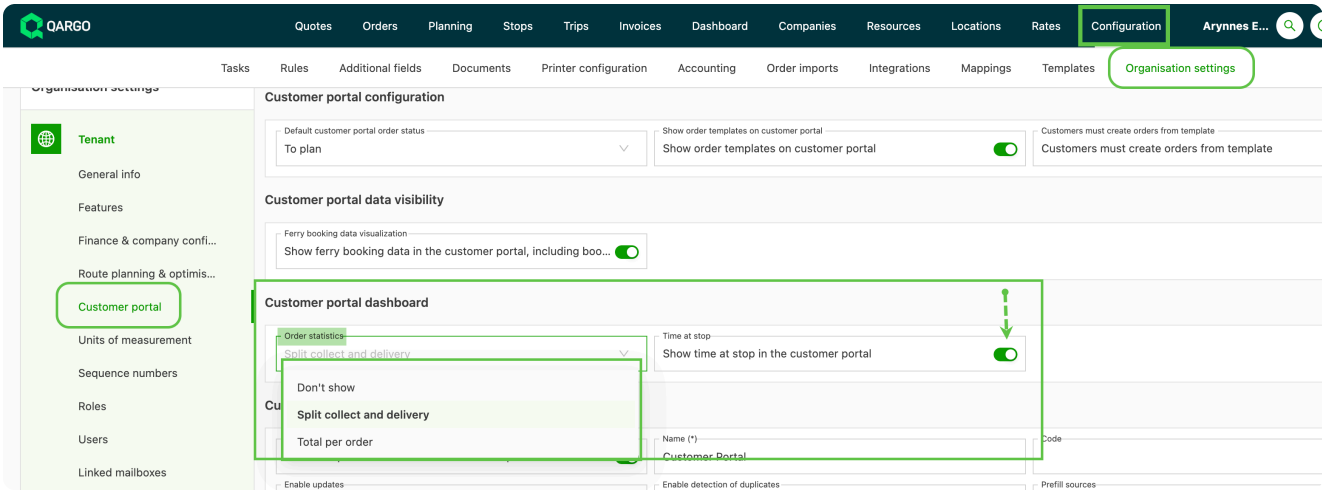
Choose how statistics are shown

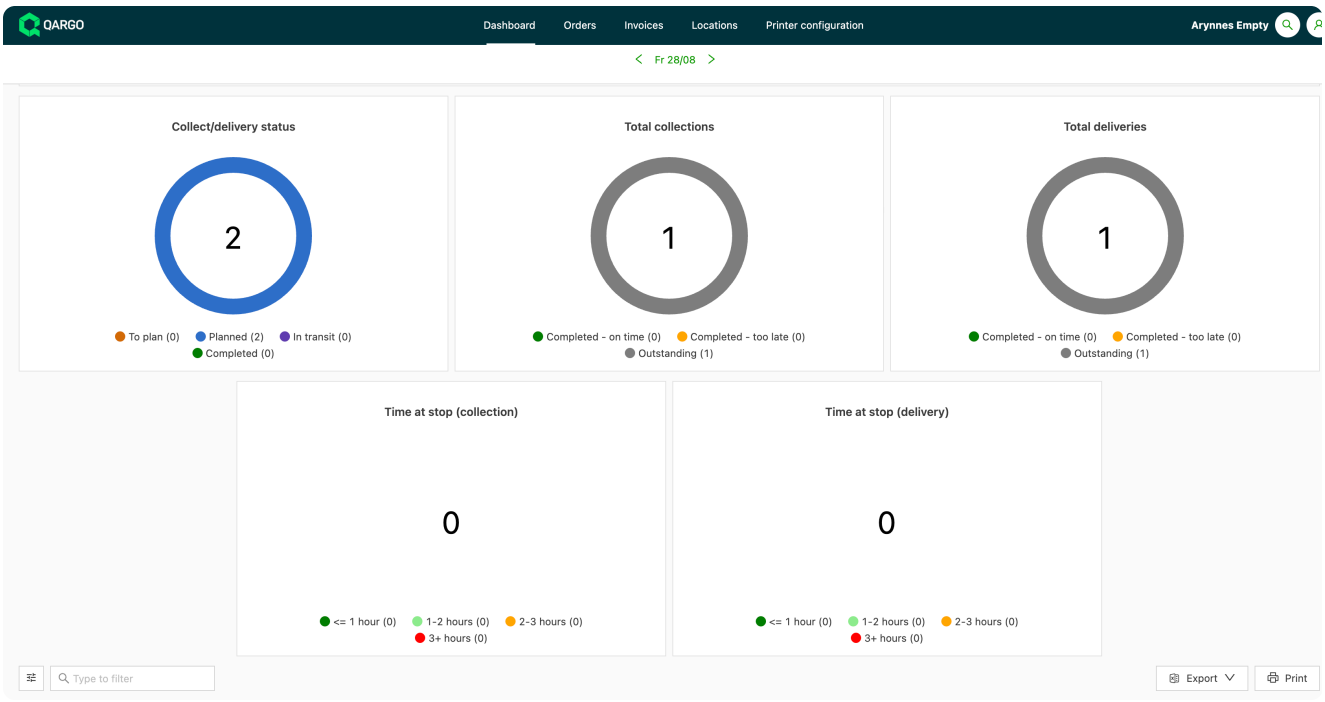
1. **Set Order statistics** to **Don't show**. When this is set, all dashboard statistics are hidden, only the news feed remains, and the **Dashboard** tab is renamed **News feed**.



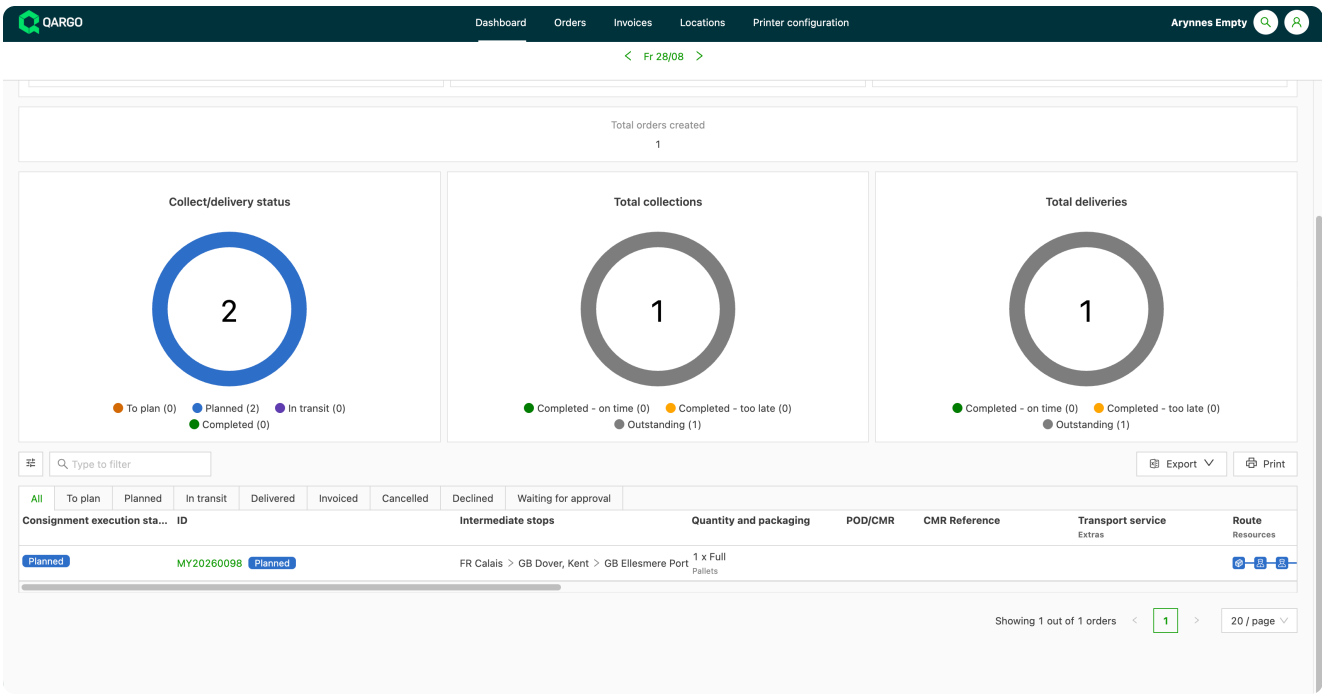
2. **Select** an option in the **Pickup and delivery statistics** dropdown:

   - Split pickup and delivery statistics (the default): one dial per status for pickup and one for delivery.
   - Total per order statistics: a single dial per status that counts each order once instead of adding up its pickup and delivery stops, so the dials match the number of orders a portal user actually has.





3. **Select** an option in the **Time at stop** dropdown:
   - Show time at stop (the default): the time-at-stop figure is displayed on the dashboard.
   - Hide time at stop: the time-at-stop figure is removed from the dashboard.



4. **Save** the settings.

📚 The default keeps the current behavior (separate pickup and delivery dials, time at stop shown), so existing portals stay unchanged until a setting is changed.

💬 Portal users keep receiving announcements even when statistics are hidden, because the news feed stays in place.

To publish announcements, see Customer portal – News feed: What, why and how.

Troubleshooting

Issue	Resolution
The **Invoices** tab is not visible in the portal.	Confirm that **Show charges on customer portal** is enabled on the customer record and that the **Invoice** document type is visible in **Documents configuration**. Both settings must be active.
An invoice is visible before it is approved.	Invoices become visible as soon as they leave **Draft** status. There is no separate publishing step.
Charges are shown alongside the invoice. Is this expected?	Enabling **Show charges on customer portal** always shows the full charge breakdown. The current version has no option to show invoices without charges.
The statistics need to be hidden for only some portal customers	Not supported. The settings apply to the whole tenant and to every customer on the portal.
A single dial (such as completed late) needs to be hidden on its own	Not supported. Statistics are all or nothing: either all are shown or all are hidden via `Hide statistics`.
The **Dashboard** tab disappeared after hiding statistics	Expected behavior. With `Hide statistics` on, the tab is renamed `News feed` rather than removed, so the news feed stays available.
The `Customer portal dashboard` section is not visible in the settings	Confirm Super Admin access and that the customer portal is enabled for the tenant. Contact the Qargo account manager if access is needed.