Customer portal walkthrough

Customer-facing overview of the customer portal, including a video walkthrough.

Updated August 13, 2026

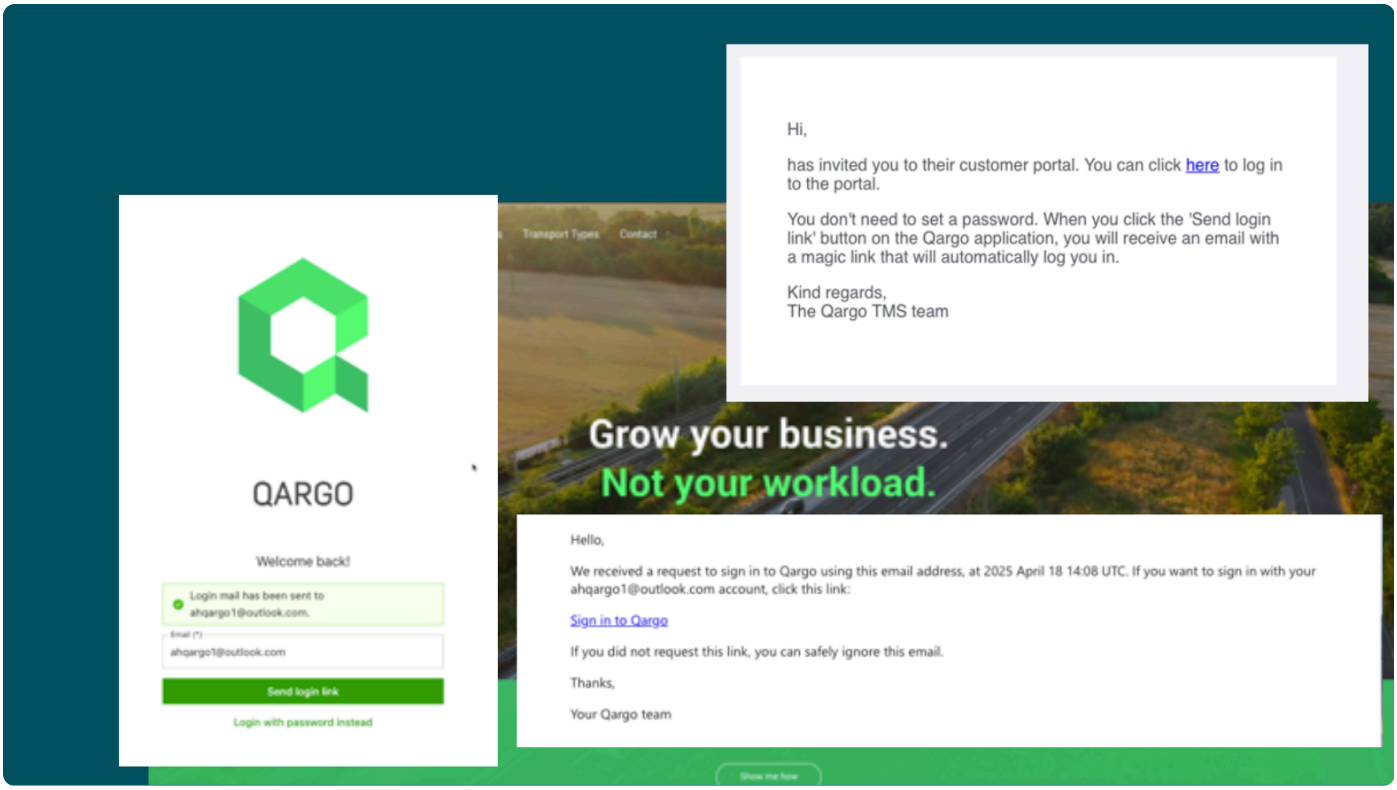
The Qargo customer portal is designed to be a personalized tool for efficient order management and tracking. Seamless order integration and up-to-date order status give clear visibility of load progress.

Watch the training video to get the most out of this tool.

▶ https://www.youtube.com/embed/zgCWytqSaVo?rel=0

Accessing the portal

- Once a carrier has activated the portal, a one-time email is generated with a link to the Qargo login page.
- Enter the email address and click **Send Login link**. The user receives an email with a secure link to log in.
  - A password can also be used if preferred.

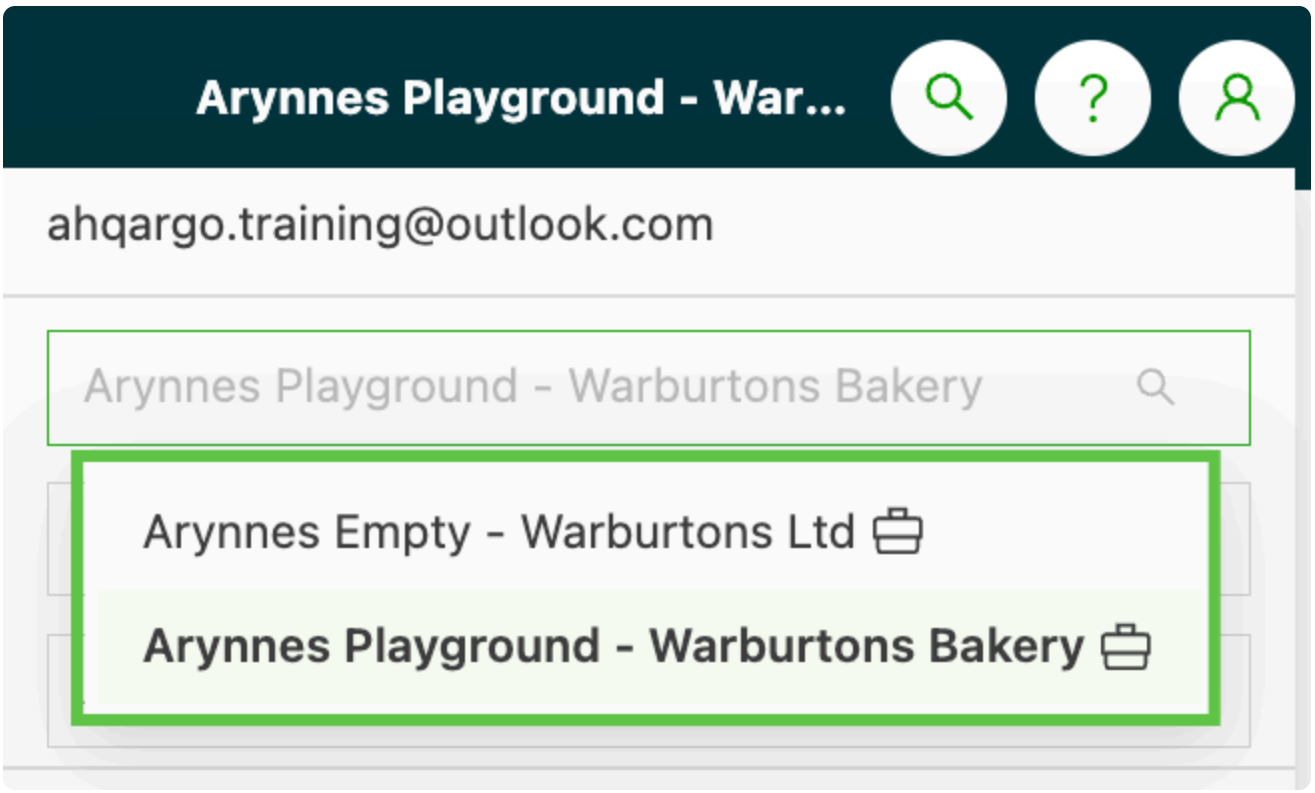


Where a customer has access to multiple Qargo portal instances (for example, when working with more than one Qargo carrier), the system allows seamless navigation between portals.

How do I switch between portals?

Use the **tenant switcher** in the top right corner of the portal. It displays the name of the currently active carrier alongside the customer company name.

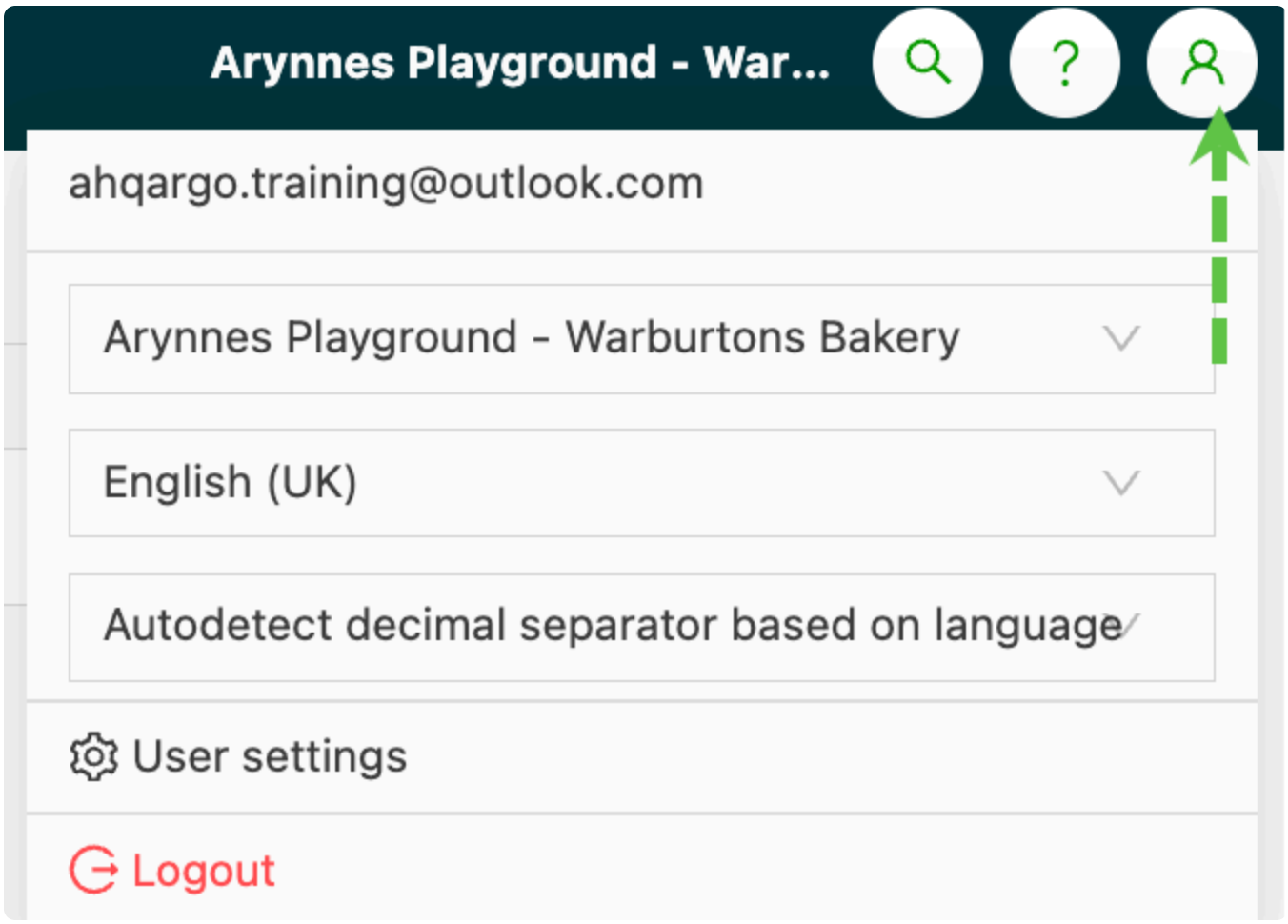
- **Click** the switcher to see all portals available to the logged-in email address.
- **Select** the carrier to switch to.



- The portal reloads under the selected carrier's account.
- No logout is required. Switching can be done at any time from within the portal.

Where exactly is the tenant switcher?

The tenant switcher is located in the **top right corner** of the portal interface. It shows the active carrier's tenant name and the customer company name in the format: *[Carrier name] [Customer name]*.

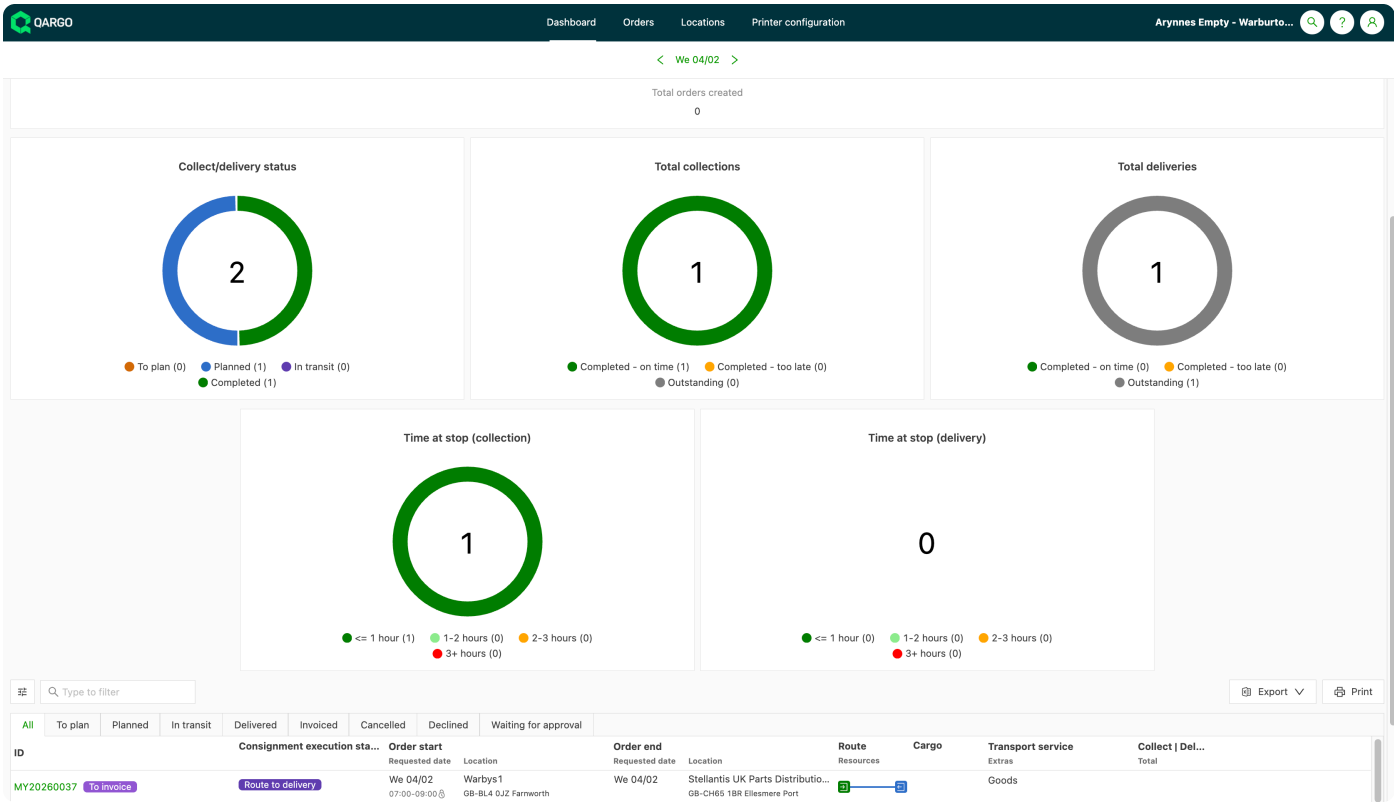


Navigating the portal

Once logged in, there are 3 tabs:

- Dashboards (the first tab users see)
- Orders
- Locations

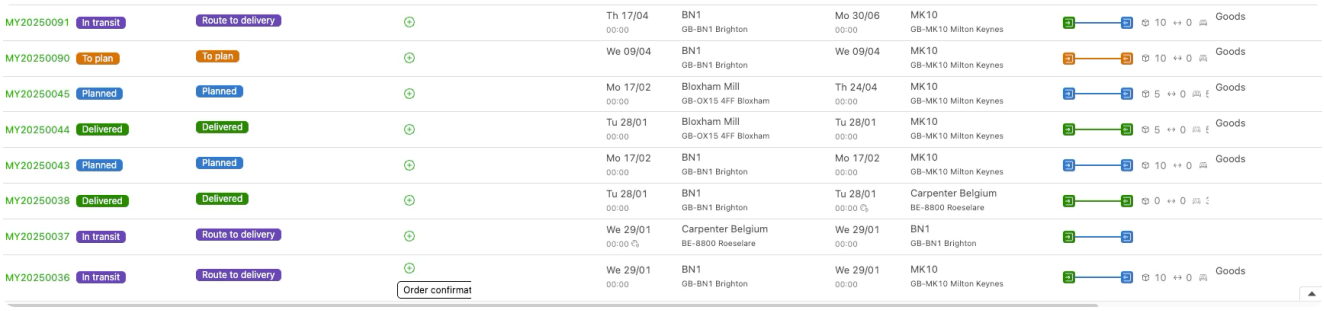
Dashboards



- The dashboard feature provides a quick overview, organized by day, of order statuses, delivery numbers and performance metrics.
- Visual aids and filters are available for analyzing delivery and pickup statuses, time spent per stop and other operational insights.
- The order panel shows all orders for the day in their current status.

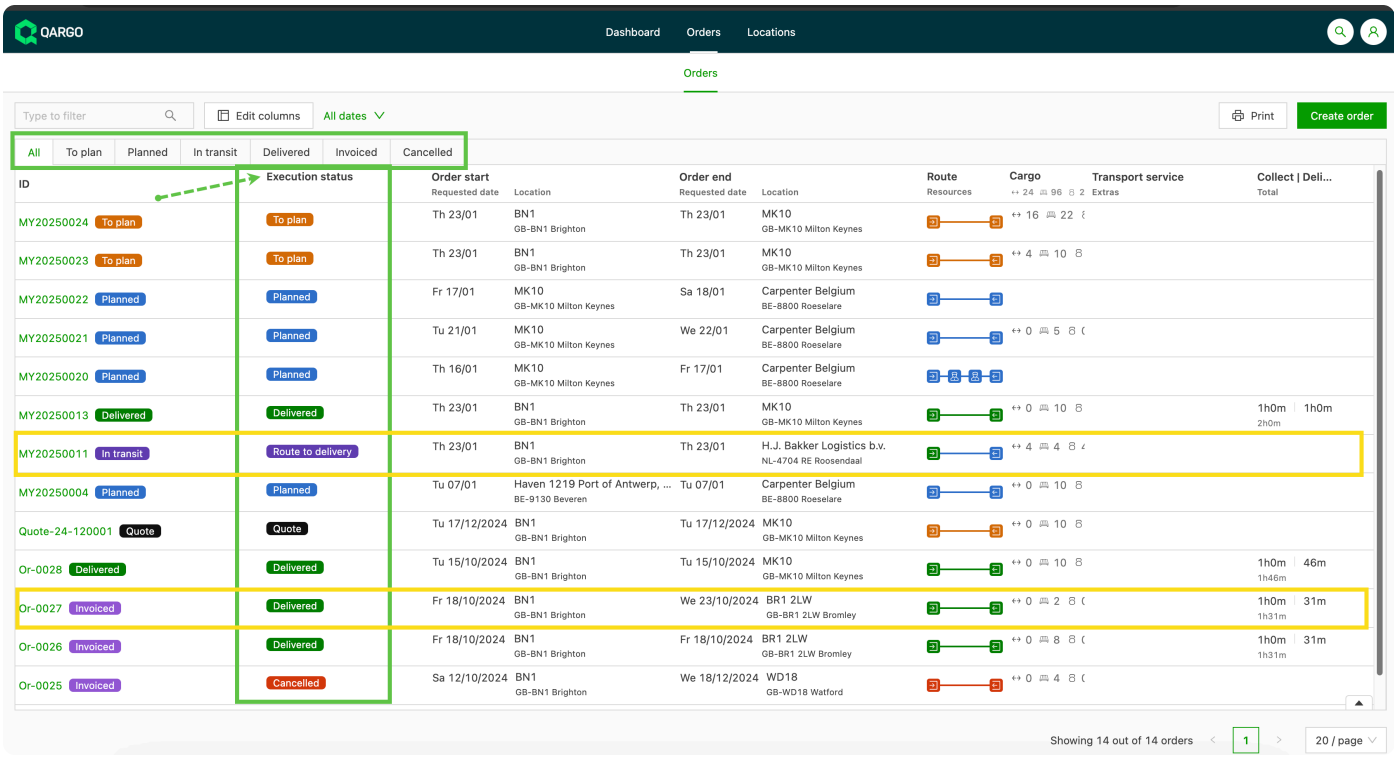
Orders

- Use the order list page to view all orders, or orders grouped by status.
- Tabs sort orders based on their order status, including:
  - To plan
  - Planned
  - In transit
  - Delivered
  - Invoiced
  - Canceled.

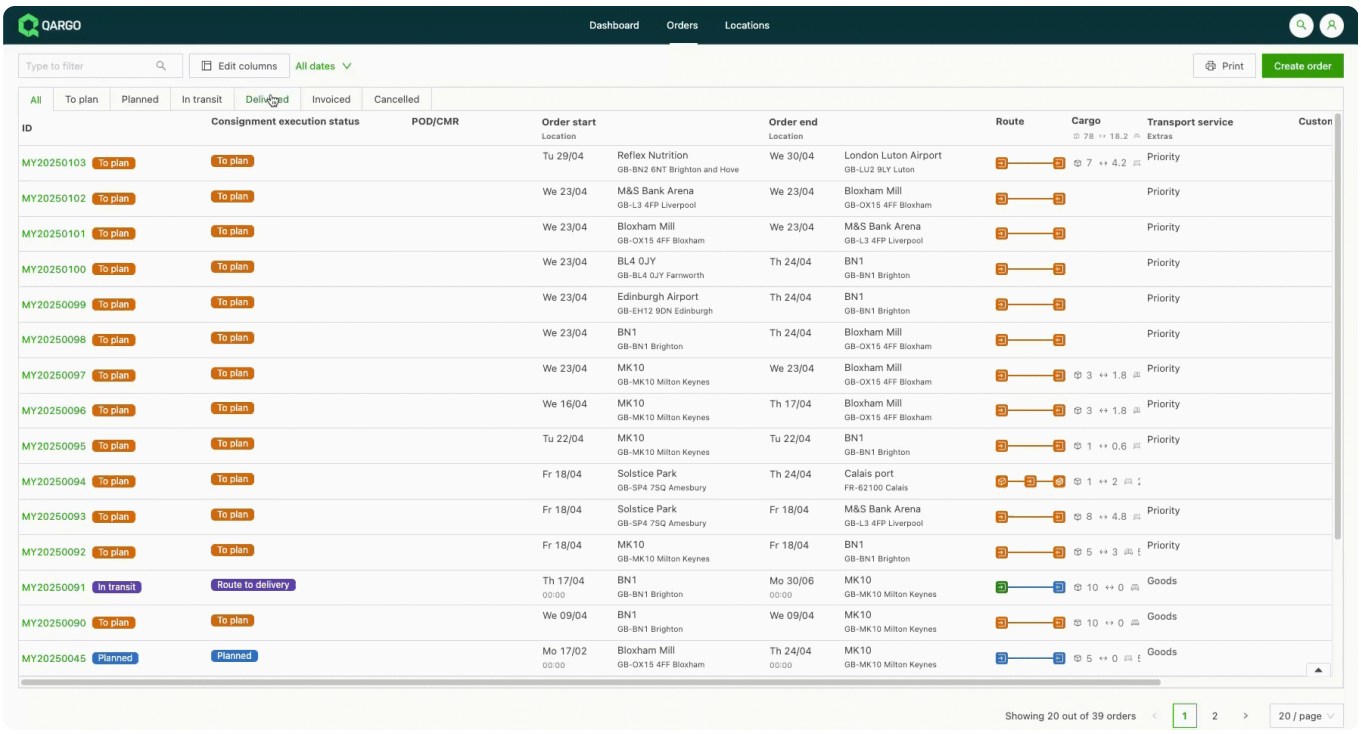


- The **Operations status** column displays the status of the most recent shipment on the load.
  - The status is displayed at stop level (i.e., Route to delivery).
  - Invoice status details are shown here as the order is processed.

Canceled orders are not displayed in the **All** tab by default. Instead, they are organized under a dedicated **Canceled** tab. This design makes canceled orders easy to locate without cluttering the main order list.

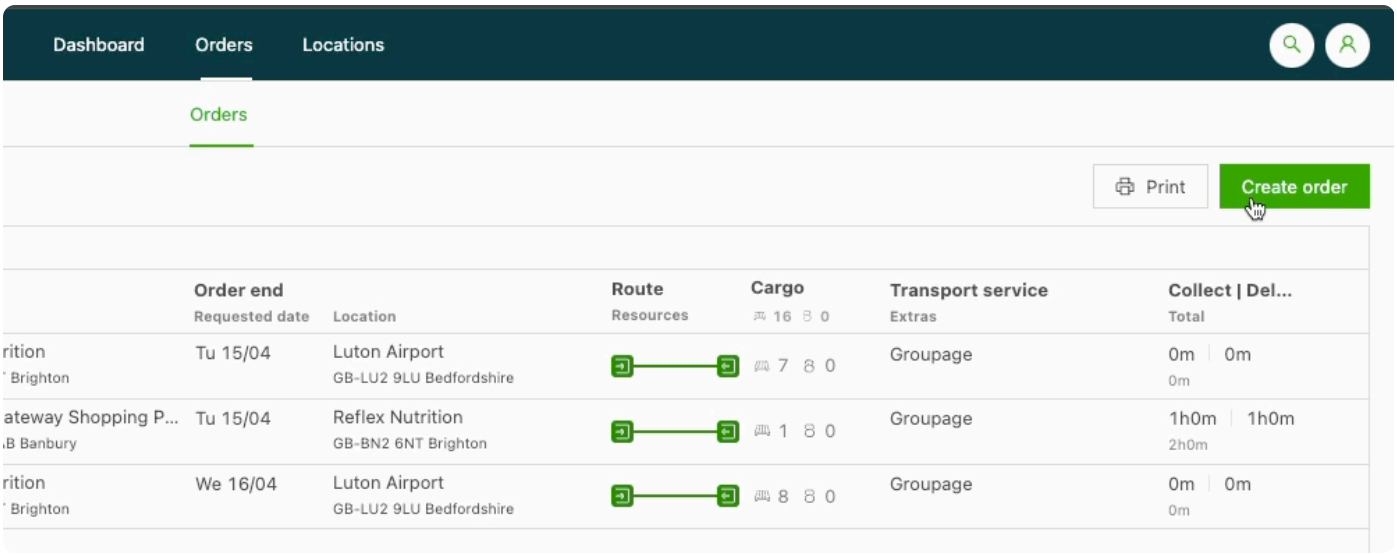


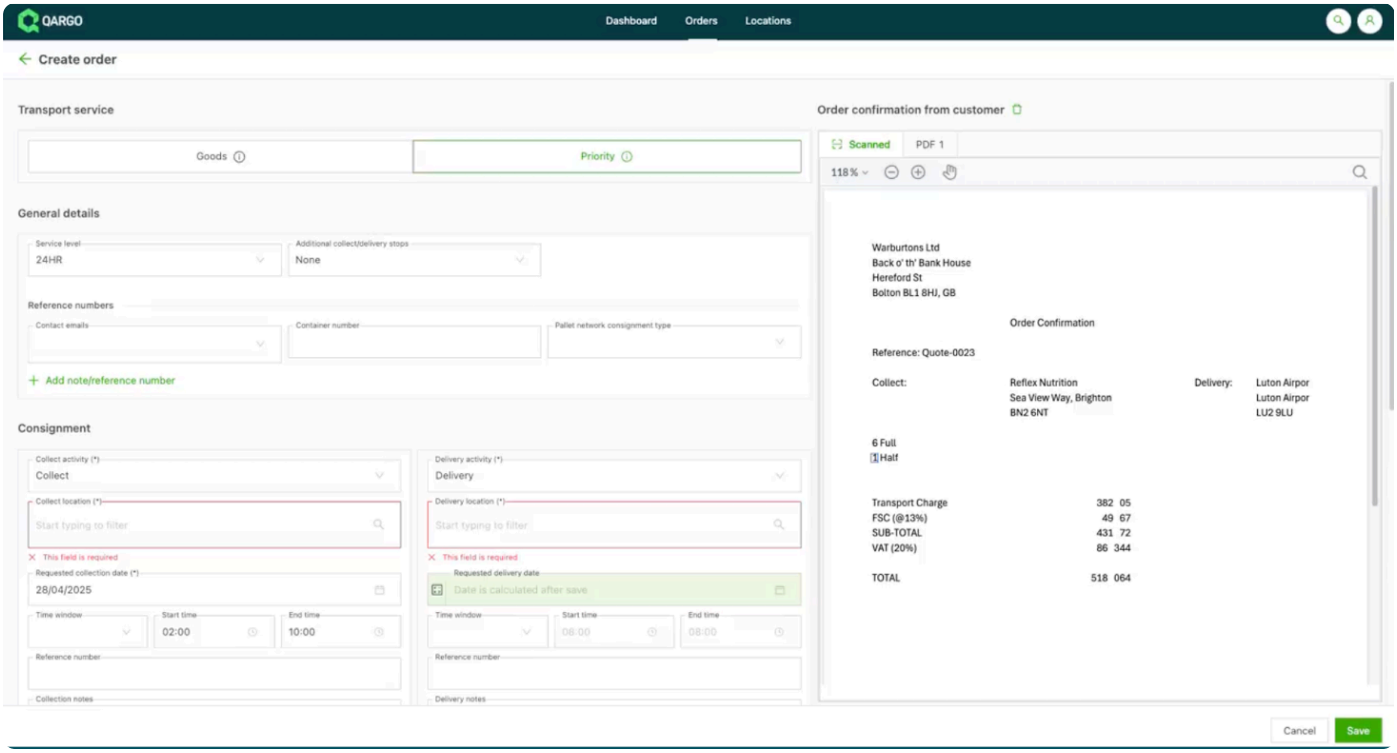
- Filter and sort orders by status, order number and other criteria for customized viewing.
- Customizable display options to include or exclude specific order details.
- Filter orders by date or ID for targeted information.
- Adjust visible columns and tailor the interface to user preferences with the **Edit columns** option.



Create an order

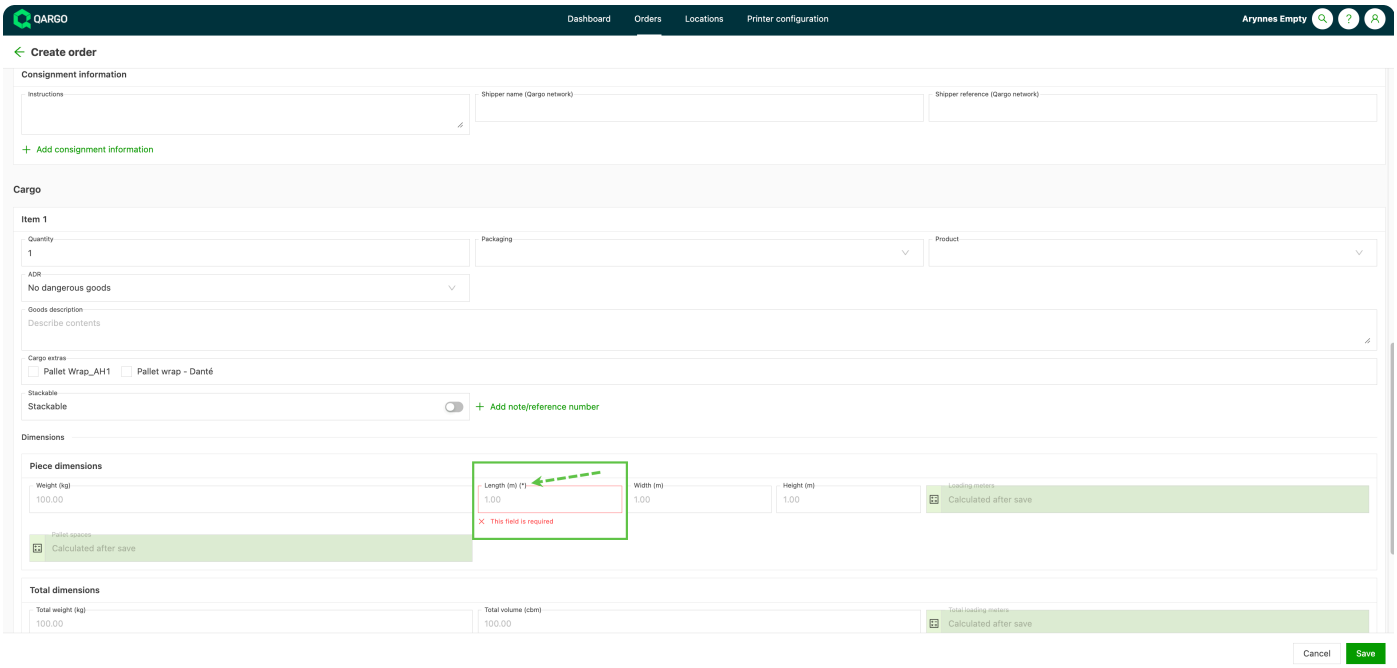
- An easy order creation process integrates orders seamlessly and eliminates additional steps to send order details and double data entry.
    - A simple click creates an order; then complete the required information.
    - Attach the order confirmation and use the integrated scanning to add order details even more quickly.





Pro tip: The carrier can create order defaults if order data is consistently the same, i.e., pickup or delivery locations are always the same. This information is filled in automatically when building a new order.

When adding freight details, some fields may be required, for instance length, width and height. Required fields are indicated by *, and if data is missing, the field is highlighted when saving the order.



Create an order from a template

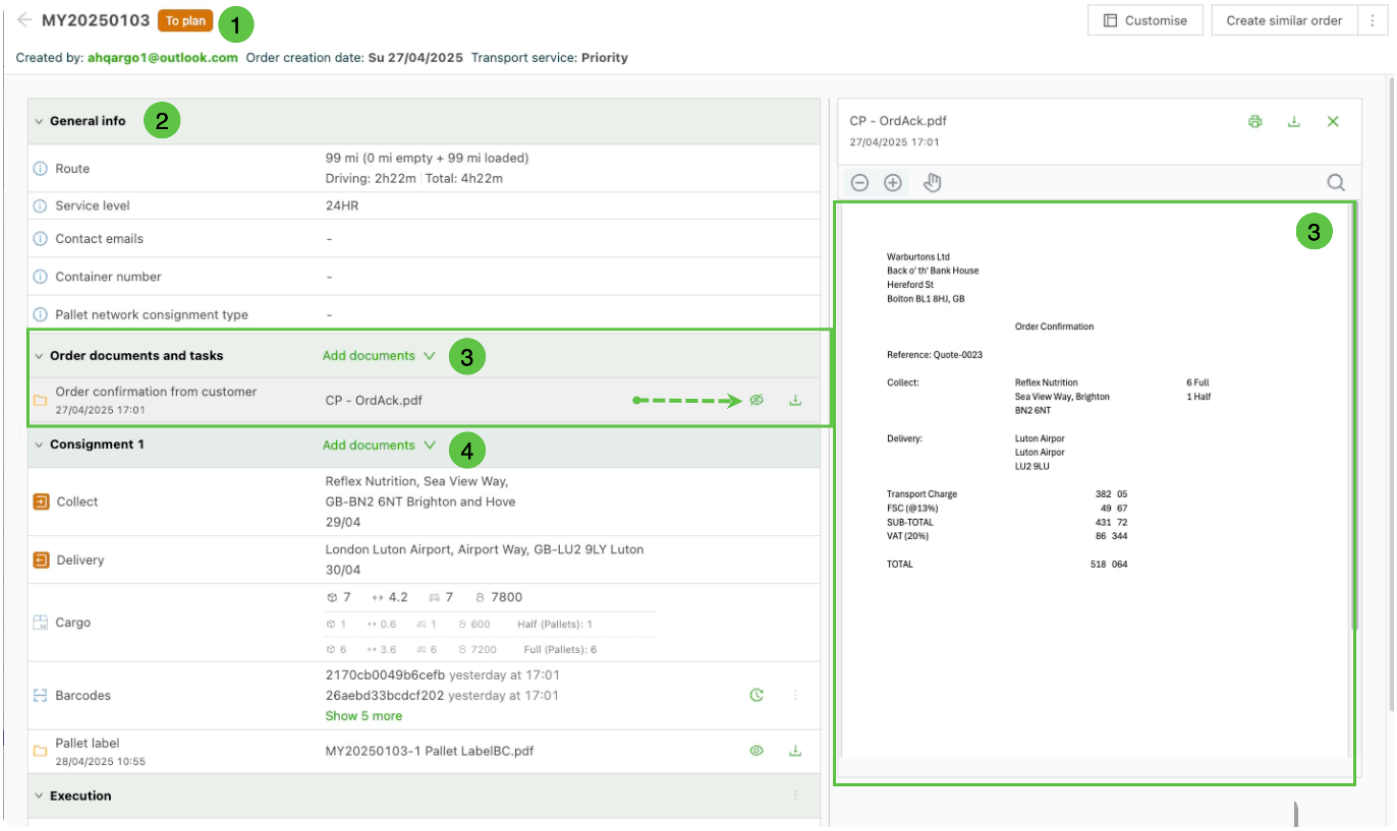
As well as creating orders manually, it is also possible to set up order templates for customer portal users. This is particularly useful for recurring routes. To set this up:

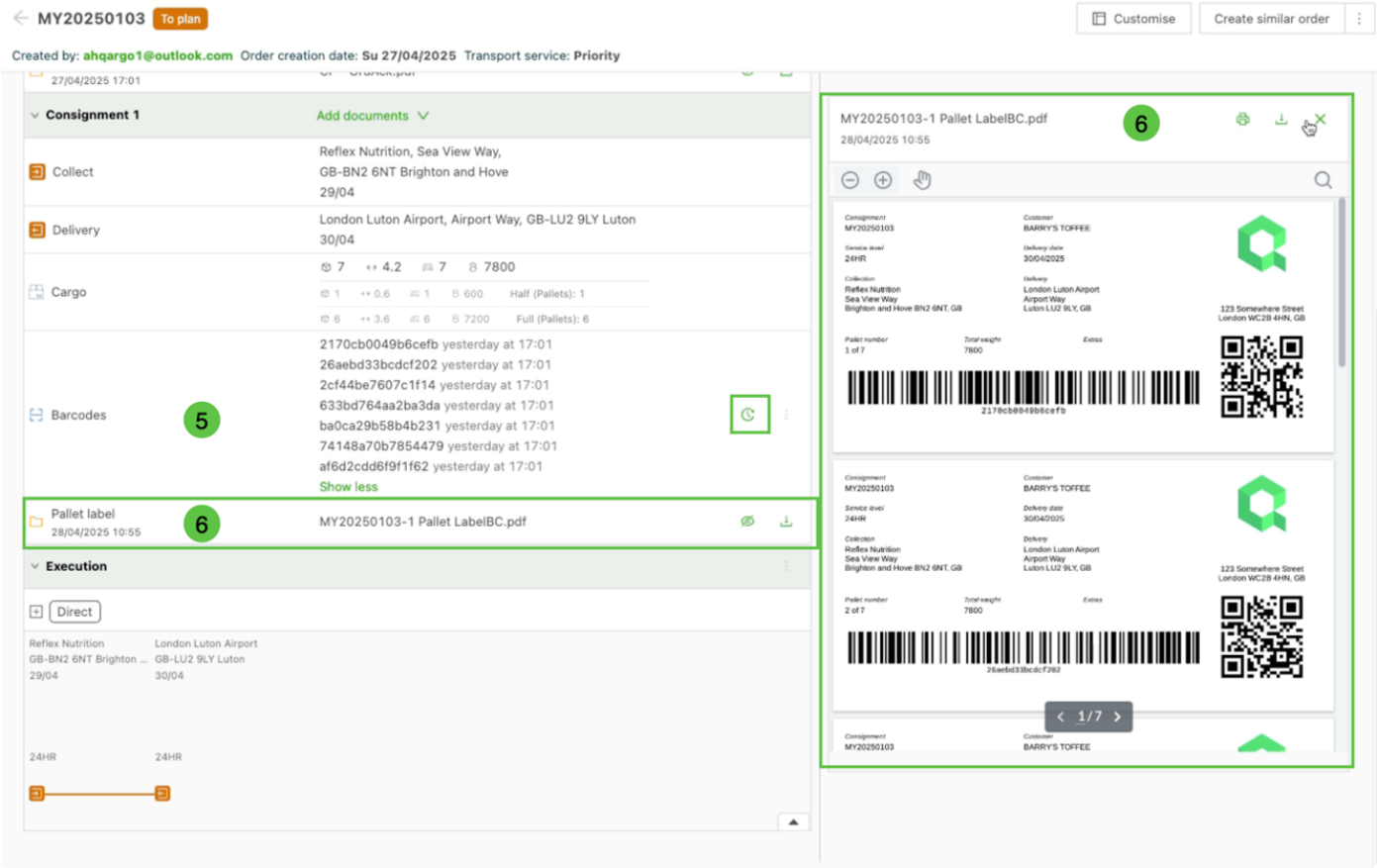
1. A super admin must enable the **Show order templates on customer portal** toggle.
2. A customer portal user selects the **Templates** subtab.
    1. This opens a list of available templates for this customer.
3. The customer portal user can then select **Create order from template**.
    1. The order creation form opens, prefilled with the template's data.

This video explains the full process, from template configuration to order creation:

▶ https://watchclueso.com/embed/fusypiwhvqcjnxs3

Order details explained



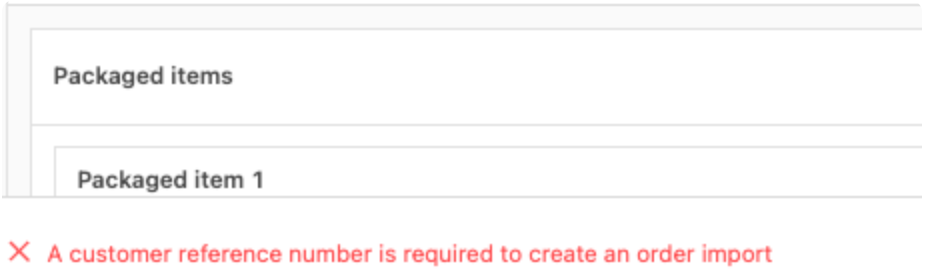


1. Order number and color-coded order status. This updates as the order progresses.
2. General information. This may vary depending on the transportation services. If details are required, a red outline may show with a warning that the order cannot be saved until this is completed.
3. If available, order documents can be attached. Select the appropriate document type from the dropdown and upload.
    1. Uploaded documents can be previewed using the eye icon.
    2. Use the download icon to download documents.
4. Shipment details include stop details (pickup/delivery) and freight information, including dimensions, quantities and packaging types.
5. Barcodes are shown (if available) based on the number generated.
    1. Click the clock icon to view the pallet tracking history. As the pallet progresses through the load, each update is shown in the history panel for that specific barcode.
6. Pallet labels (if available) can be printed from the preview page.
    1. Click the eye icon to view the file.
    2. Click the download icon to download the file.

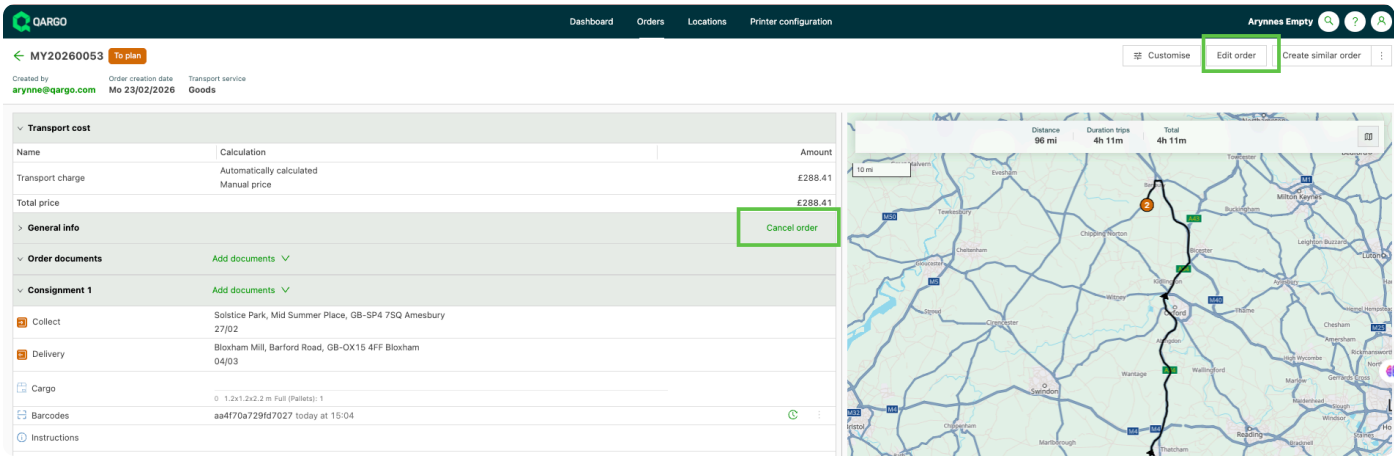
Edit and cancel orders (requires activation)

- To submit a new order, portal customers **must use a unique customer reference**; otherwise, an error is displayed to the user.

- This reference number is used to link the portal order to the TMS order.



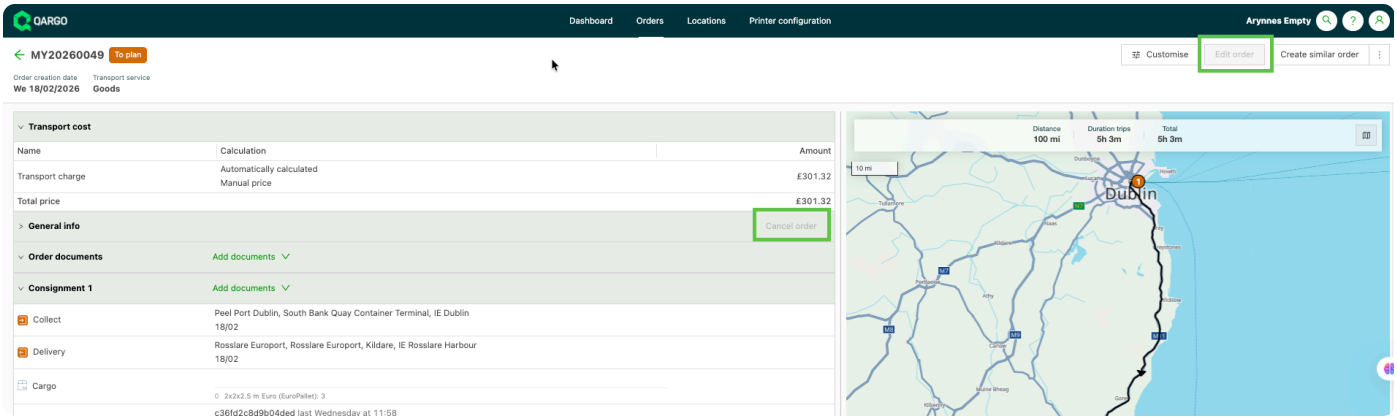
- Portal customers see **Edit** and **Cancel** options **on eligible orders.**



- Submitted changes may update the order in the TMS automatically (check with the carrier).
  - Portal users see the label **Update awaiting approval** until the order is opened in the carrier account, which approves the update.
- Where automatic updates **are not enabled**, customers can still edit the order, and the carrier sees an **Update** label appear on the order.

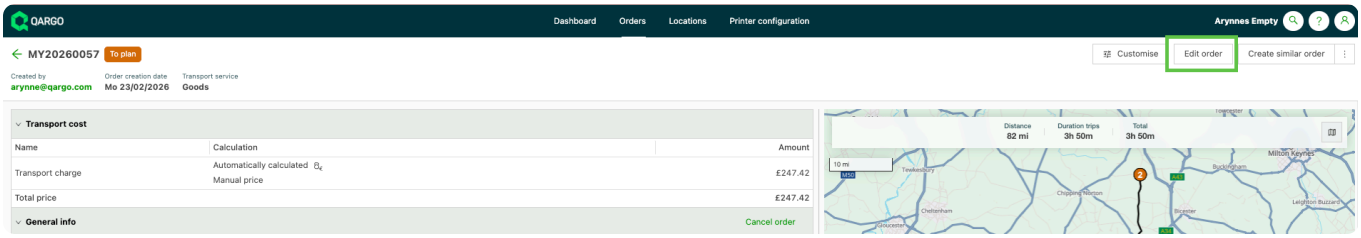
📚 Whether an order can be edited or canceled after submission depends on how the carrier has configured the portal. If this functionality has not been enabled, orders remain *read-only once submitted*. New orders submitted via a third-party integration also **cannot be edited or canceled**; these options are grayed out.

- If edits are not permitted through the portal, customers must contact the internal team to request changes.
- Edits and cancellations are only possible until the order has been picked up. Once it has been picked up, no further changes can be made.
- Administrators can configure a cut-off time to prevent last-minute edits, so changes are made within a reasonable timeframe before processing.

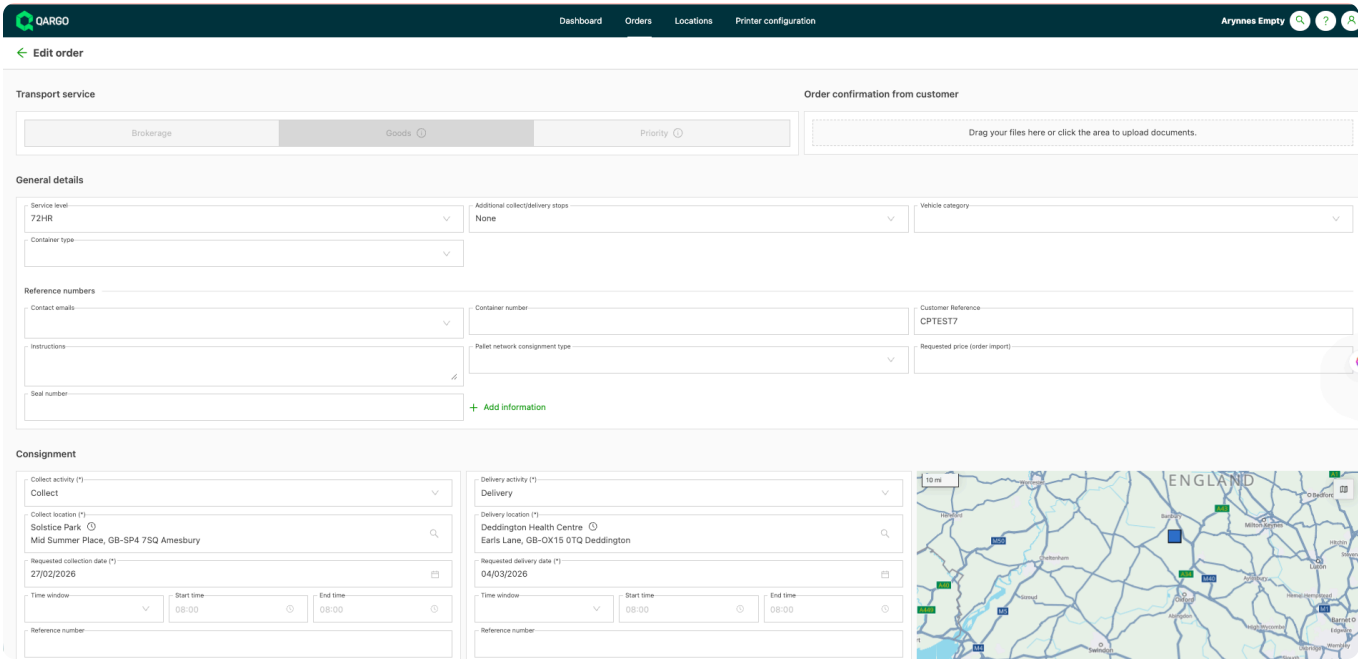


Submitting an edit

- To edit an order, open the order and select **Edit order**.



- Update the relevant fields and confirm the changes.



  - While an edit is pending approval, **no further changes can be made** to that order.

Canceling an order

- To cancel an order, open the order and select **Cancel order**.
- Confirm Yes/No in the pop-up to complete the cancellation.

Viewing canceled orders

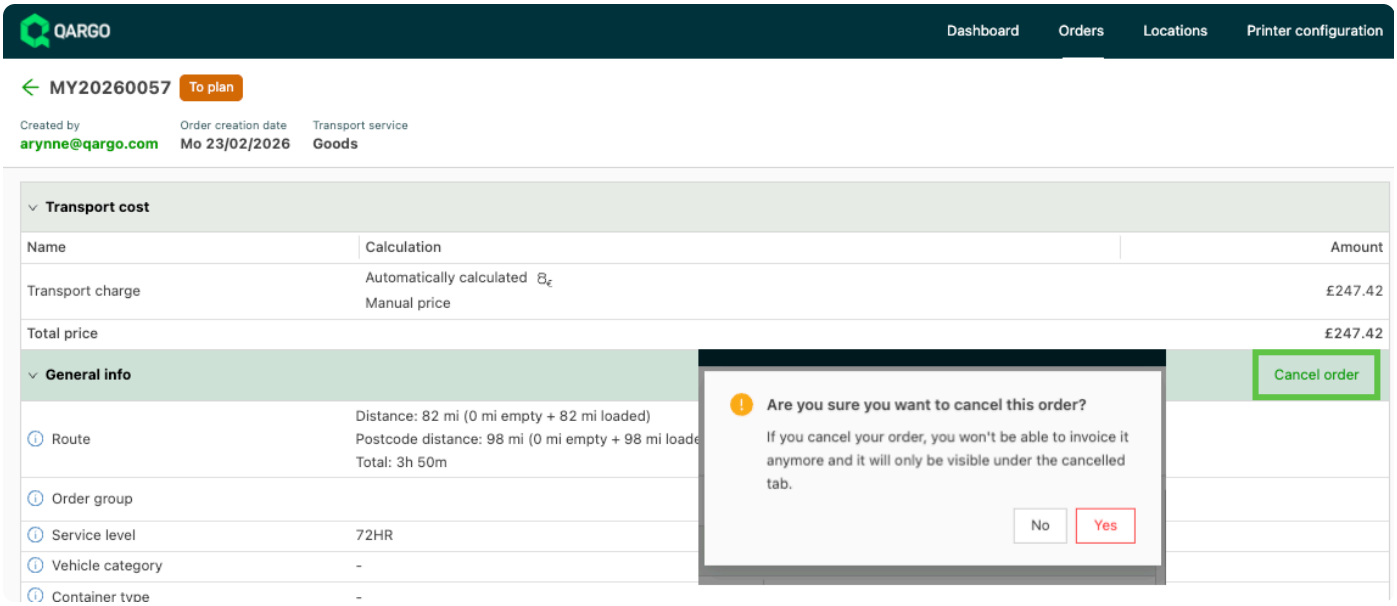
To view canceled orders in Qargo:

1. Go to the **Orders** section in the application.
2. Select the **Canceled** tab to see all orders that have been canceled.
3. To see canceled orders alongside other orders, create a custom view. For example:
    - Use the filter options to include canceled orders in the search results.
    - Save the filter as a custom view for quick access in the future. This approach allows the order display to be tailored to the workflow.

Identifying who canceled an order

To find out who canceled a specific order:

1. Open the order page for the canceled order.
2. Click the **History** button in the top right corner of the page.
3. Review the recent updates in the history log. This log includes details about who canceled the order and when the cancellation occurred. This feature provides transparency and accountability for order management.

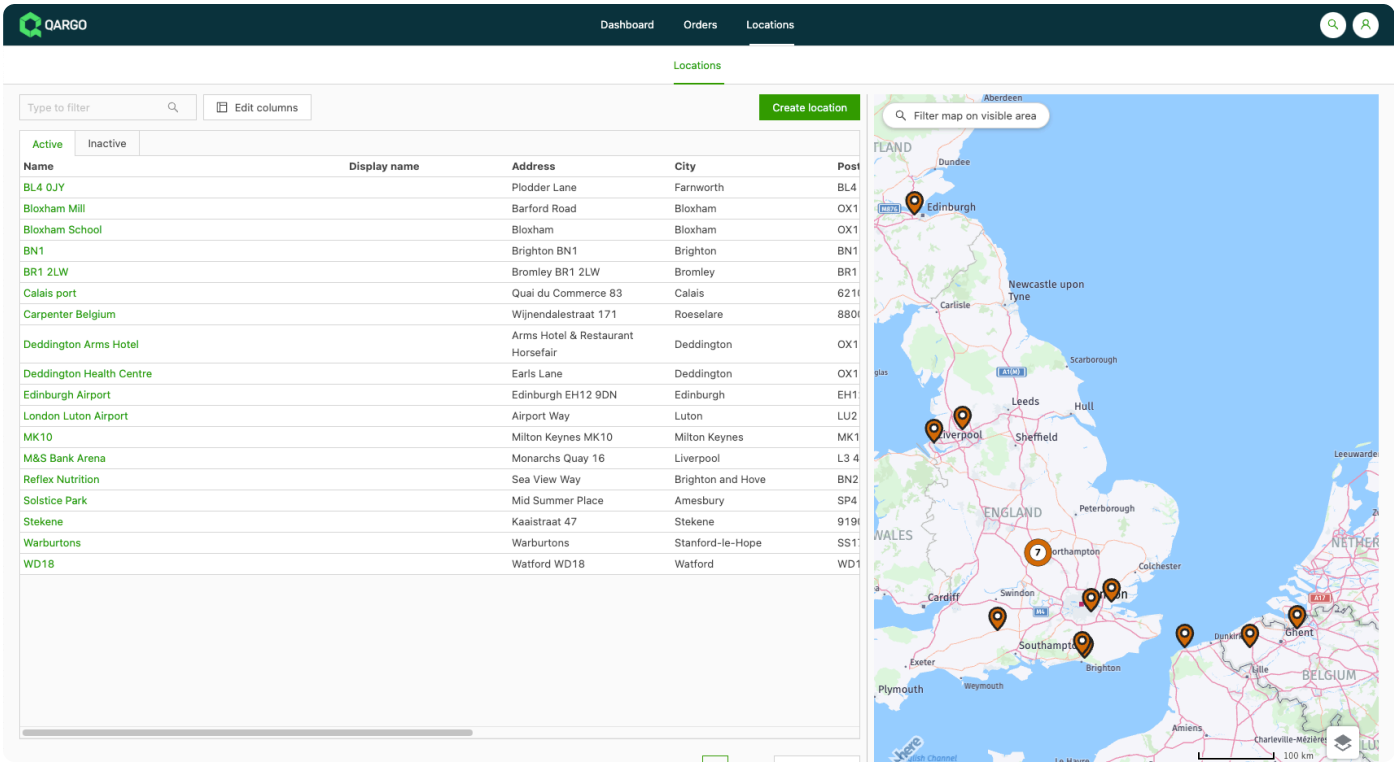


Click the video below👇 to see how to edit or cancel a submitted order.

▶ https://watchclueso.com/embed/safgar6wxlp1hevv

Locations

- Stop locations are consolidated in one place. They are easy to add directly from order capture if required, using Google search for quick and efficient additions.



- Click **Create location** to add new stop details.
- Location data includes:
  - Adjustable map location
  - Opening hours
  - Prefilled details by stop
  - Orders associated with the location

Tracking link for shipments

When a shipment is created, Qargo automatically generates a tracking link that can be sent by email to receivers, warehouse contacts or any delivery recipient.

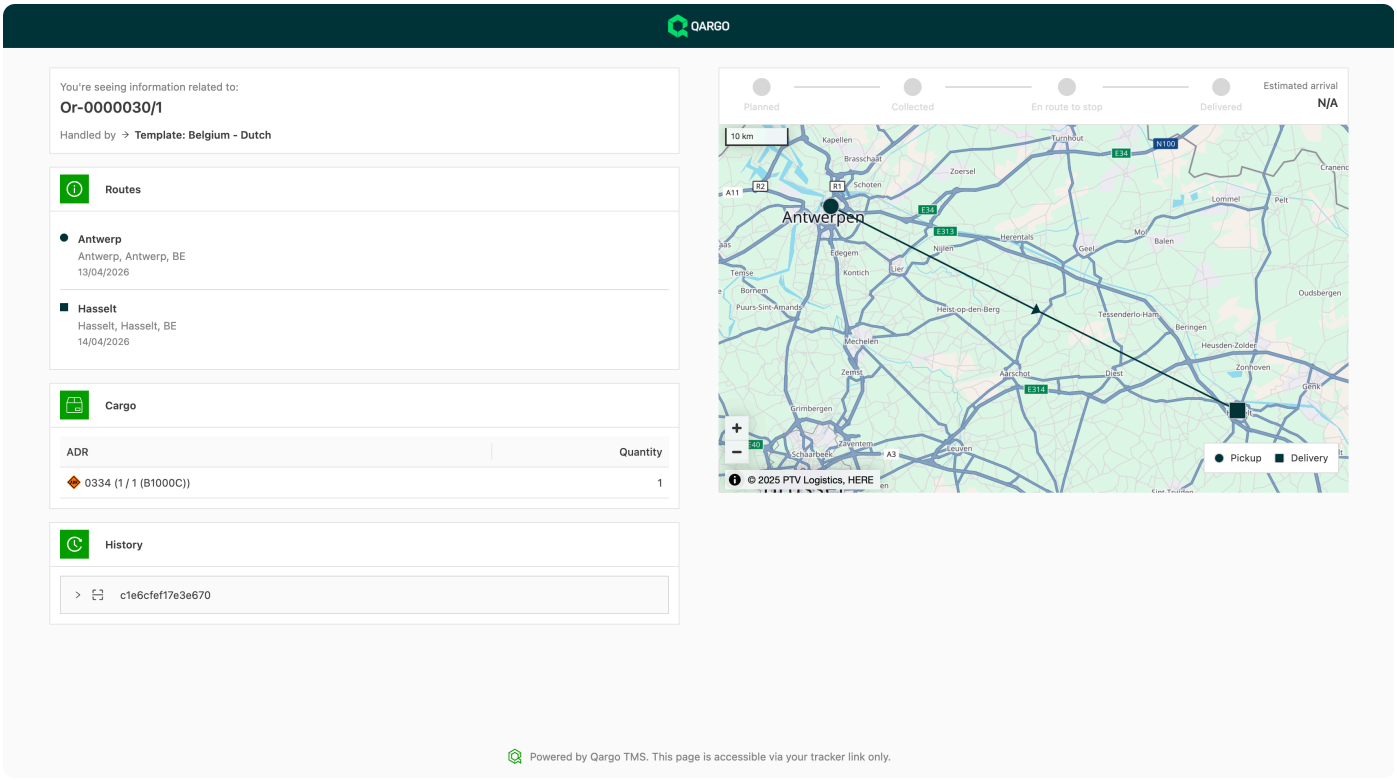
🎥 Watch a quick overview of tracking shipments via a one-time link

▶ https://watchclueso.com/embed/mp2iwk6dhv5bzrrf

What recipients see

Opening a tracking link takes recipients straight to a clean delivery overview: no login, no friction. The page includes:

- **Shipment status**: the current operations status of the shipment (e.g., *Planned*, *In transit*, *Delivered*).
- **Stop details**: pickup and delivery locations with references, and estimated arrival timestamps.
- **Freight details**: freight description, quantities, packaging types and pallet scan history.
- **Map**: shows the pickup and delivery locations on a map. When the driver is actively en route to the delivery stop, the driver's live position is also shown on the map.



Additional information sections (such as customer reference, container no., transportation service, custom fields and extra fields) can be made visible by configuring the **Tracking link template**. The tracking page is fully responsive and works on both desktop and mobile browsers.

📚 If an order has multiple shipments, each one gets its own separate link.

Show invoices and credit memos on the customer portal: walkthrough.

Customers can view and download their invoices and credit memos directly from the customer portal, including a charge breakdown and the invoice PDF, once a carrier enables the relevant per-customer toggles.

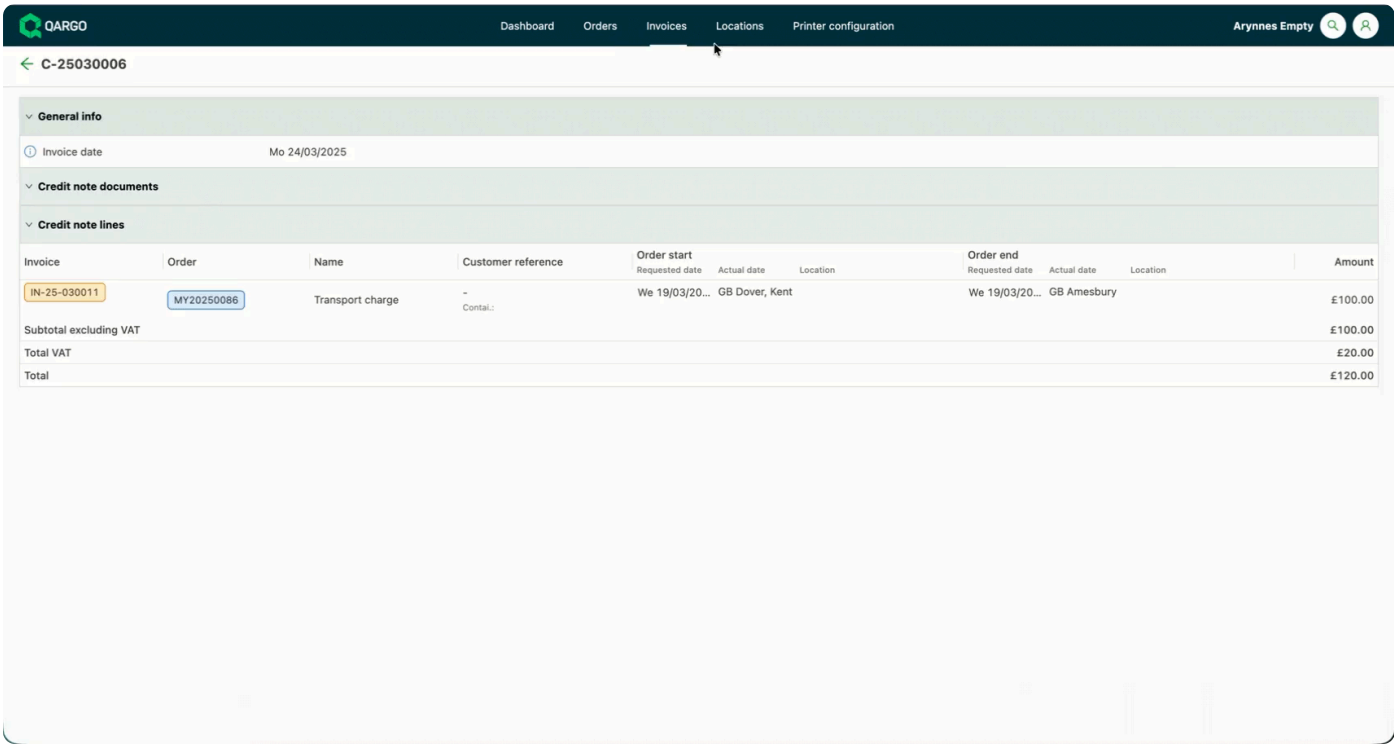
View invoices on the customer portal

1. **Open** the customer portal and select the **Invoices** tab, positioned after **Orders**. This tab only appears when **Show invoices on customer portal** is enabled for the customer.
2. **Review** the list of invoices and credit memos. Each row shows the invoice number, invoice date, due date and total amount excl. tax. Draft invoices are never shown.
3. **Click** any row to open the invoice detail view.
4. **Review** the invoice header and the individual charge lines in the detail view.
5. **Click Download** to save the invoice PDF and any attached documents.

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

View the order amount on the customer portal

- When **Show charges on customer portal** is enabled, the portal **Orders** list shows an **Amount (excl. tax)** column with the total charge per order.



Grant access to the customer portal

🎥 To learn how to grant access to the customer portal and some of its features, watch this video:

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

Troubleshooting

Issue	Resolution
The Invoices tab does not appear on the portal	Confirm that ***Show invoices on customer portal*** is enabled on the customer record. It requires ***Show charges on customer portal*** to be on.
An invoice PDF cannot be downloaded	Confirm that the ***Invoice and credit memo*** document types are exposed for that customer in ***Configuration > Documents configuration.***
An invoice is not appearing in the list	Confirm that the invoice has left Draft status. Draft invoices are never shown on the portal.