Configuration: custom fields / additional fields

Manage Qargo forms with default, active/inactive, or custom fields. Link fields to services, set visibility, and tailor them to business needs.

Updated September 7, 2026

Introduction

Default fields are built into Qargo, marked with the Qargo 'Q' icon, and appear automatically on the relevant pages. If a business needs a field that isn't shown yet, an existing standard field can be set to **Active**, or a **custom field** can be created and included on Orders, Invoices, Resources or Customers.
For example, the Customer Reference field can be activated so users can add a purchase order (PO) or customer reference number to transport orders. This also makes it appear on invoices.

Additional fields make it possible to:

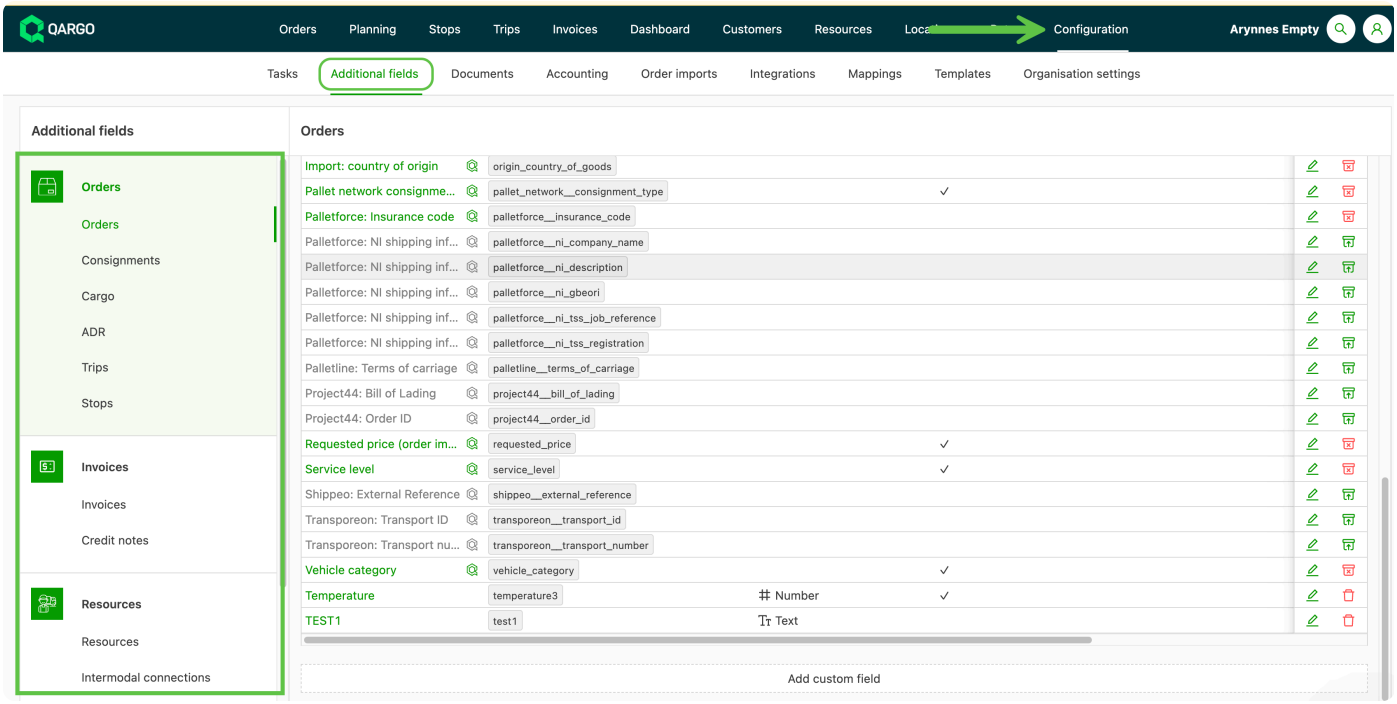
- Choose which fields are visible for each transportation service
- Set whether a field is required, or should always be shown in the form
- Add custom fields in different formats, including:
  - Text
  - Number
  - Toggle
  - Date
  - Dropdown
  - Tag
  - URL

Configuration

Go to **Configuration > Additional fields**.

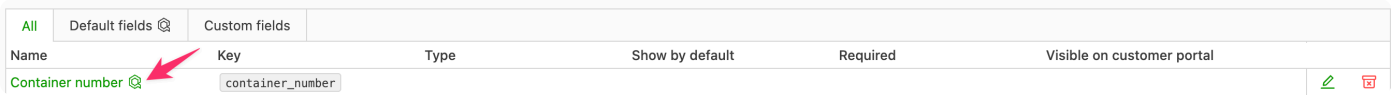
- From the left-hand menu, select the category: Orders, Invoices, Resources or Customers. Each category maps to the matching module pages.

For example, the Customer Reference field can be configured for specific transportation services such as General Haulage, European Road, Air and Sea.

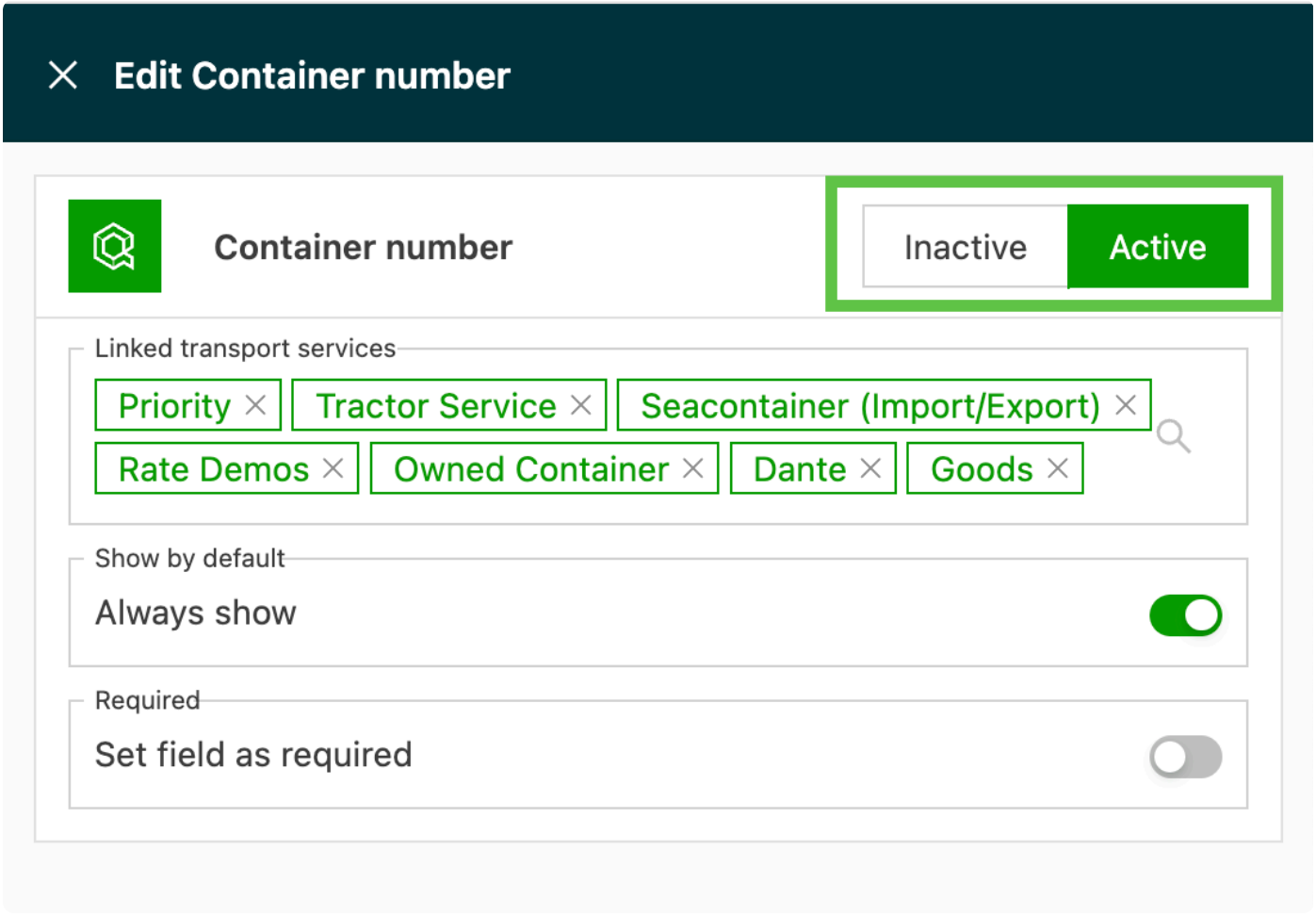


Additional fields (default fields (Q sign))

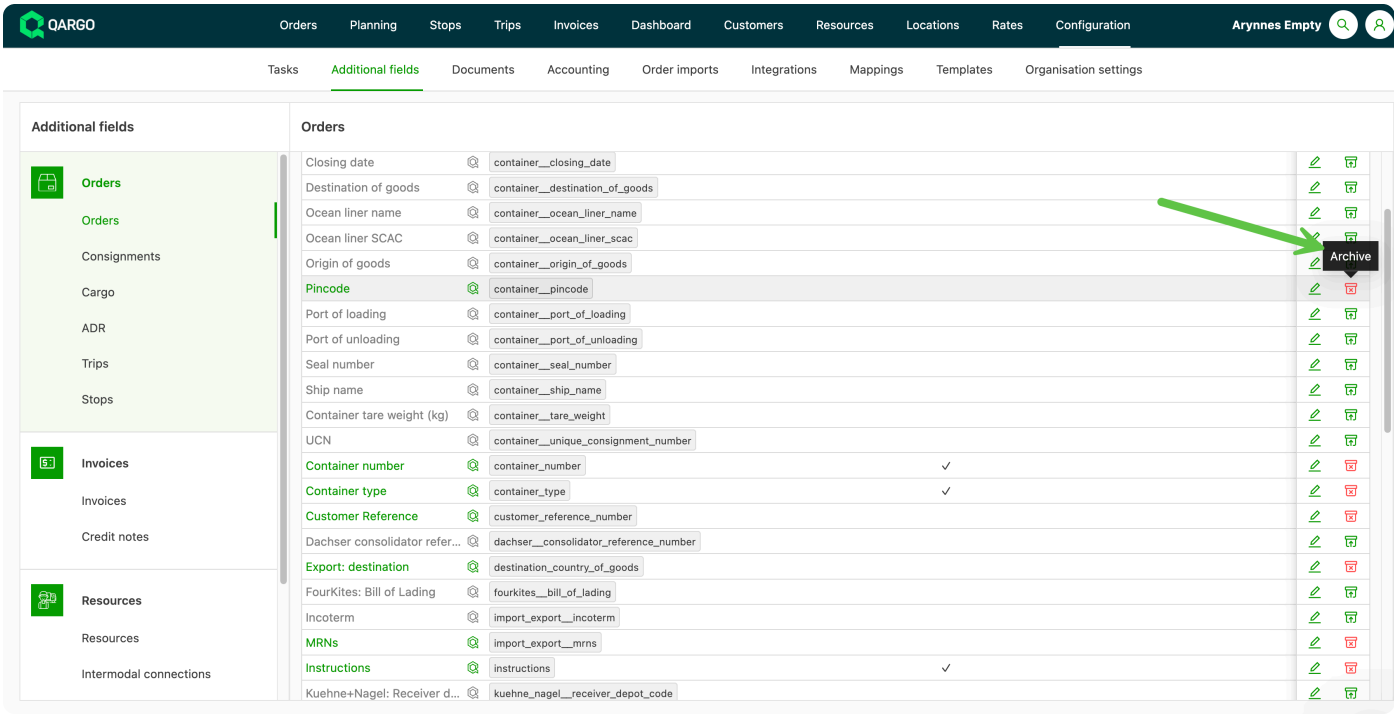
- Standard fields are the built-in fields available in the product, marked with the Qargo ‘Q’ icon.



- Set a standard field to **Active** to show it, or to **Inactive** to hide it. Setting a standard field to Inactive only hides it. It does not delete anything, and any data already entered is kept.
  - Active fields appear **green** in the list.
  - Inactive fields appear **gray** in the list.
- Link a field to specific transportation services with the **Linked transportation services** field, so it only appears where relevant (for example, Customer Reference linked to General Haulage, European Road, Air and Sea).

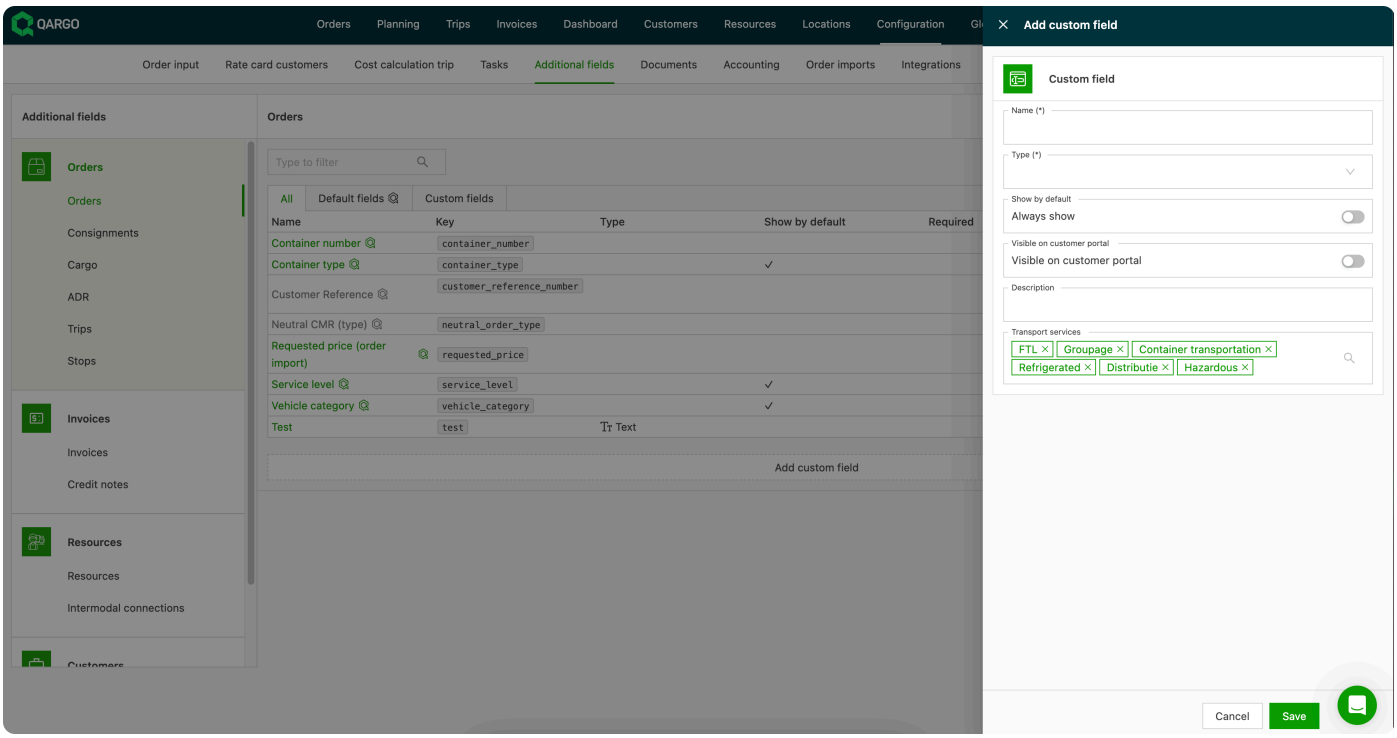


⚠️Standard fields **cannot** be deleted. If a standard field isn't needed, set it to Inactive (the information on older orders can be restored later if the field is set back to Active)

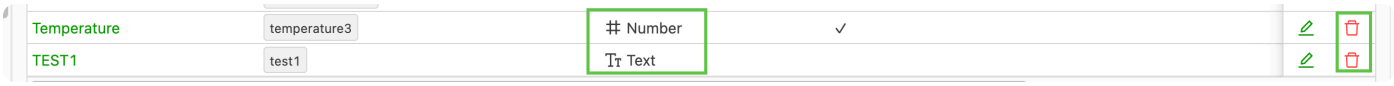


Custom fields

- When the required field isn't already available, use **Add custom field**.
- A side panel opens to enter the field's details.
- Choose the field format from the **Type** dropdown (Text, Number, Toggle, Date, Dropdown, Tag, URL).
- Link the custom field to transportation services if needed.
- Choose whether it should be visible in the customer portal.
- Click **Save**.



- In the list view, custom fields show their field type.



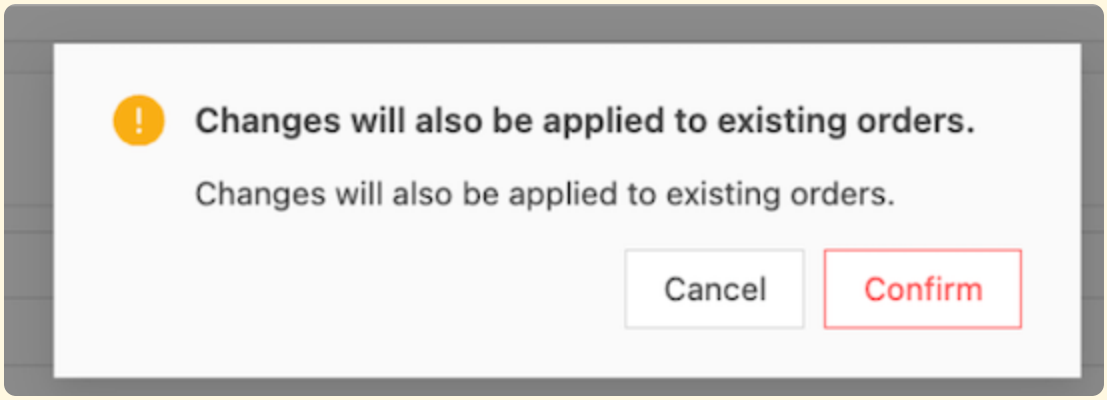
📚 The type of a custom field cannot be changed after it has been created. The workaround is to remove the existing field and recreate it with the required type. Before doing that, it is recommended to check whether the current field is already used in any orders, tasks, filters, exports or templates, as removing it may affect existing data or configuration

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Removing a custom field: read before deleting a custom additional field

Unlike standard fields, **custom fields cannot be set to Inactive or archived. The only way to remove a custom field is to delete it.** So for a custom field, the choice is to **keep** it or **delete** it.

‼️ **Deleting a custom field is permanent.** It removes the field and **all of the data stored in it from every record, including past/existing orders**, not just new ones. On deletion, Qargo shows **"Changes will also be applied to existing orders."** This is accurate: the data on existing orders **will be removed**, and this **cannot be undone**.



‼️ **Only delete a custom field when it is certain that none of its data is needed anymore, on any record.**

Workarounds: keep the data but stop using a custom field

Because a custom field can't be set to Inactive, follow these steps to stop using one without losing history:

1. **Create the new field** and start using it from now on.
2. **Move the existing values** from the old field into the new field on the records that need to be kept.
3. **Check that the old field isn't used in any PDF / document template** (removing a field that a template relies on can break document generation).
4. **Only then delete** the old field.

💬 To remove a custom field but keep its historical data, and if it is unclear how to do this, contact the Qargo account manager or support **before** deleting. Deletion cannot be reversed.

Practical example: enabling and configuring the Customer Reference field

Overview of the Customer Reference field

The Customer Reference field is a customizable field in Qargo that can be linked to specific transportation services. By enabling and configuring this field, users can make sure that the PO or customer reference number is visible on orders and invoices.

Steps to enable and configure the Customer Reference field

For General Haulage orders

To enable and configure the Customer Reference field for General Haulage orders:

1. **Make the field visible in the order**
    - Open the order.
    - Click the **Customize** button at the top of the screen.
    - Toggle the **Customer Reference** field to "on" (it should appear green).
2. **Configure the field globally**
    - Go to **Configuration > Additional fields**.
    - Find and edit the **Customer Reference** field.
    - Add **General Haulage** to **Linked transportation services** for this field.
    - Set the field to **Show by default / Always show**.

Once these steps are completed, the PO or customer reference number can be entered in the order's Customer Reference field, and it will appear on invoices.

For European Road, Air and Sea orders

To enable the Customer Reference field for European Road, Air or Sea orders:

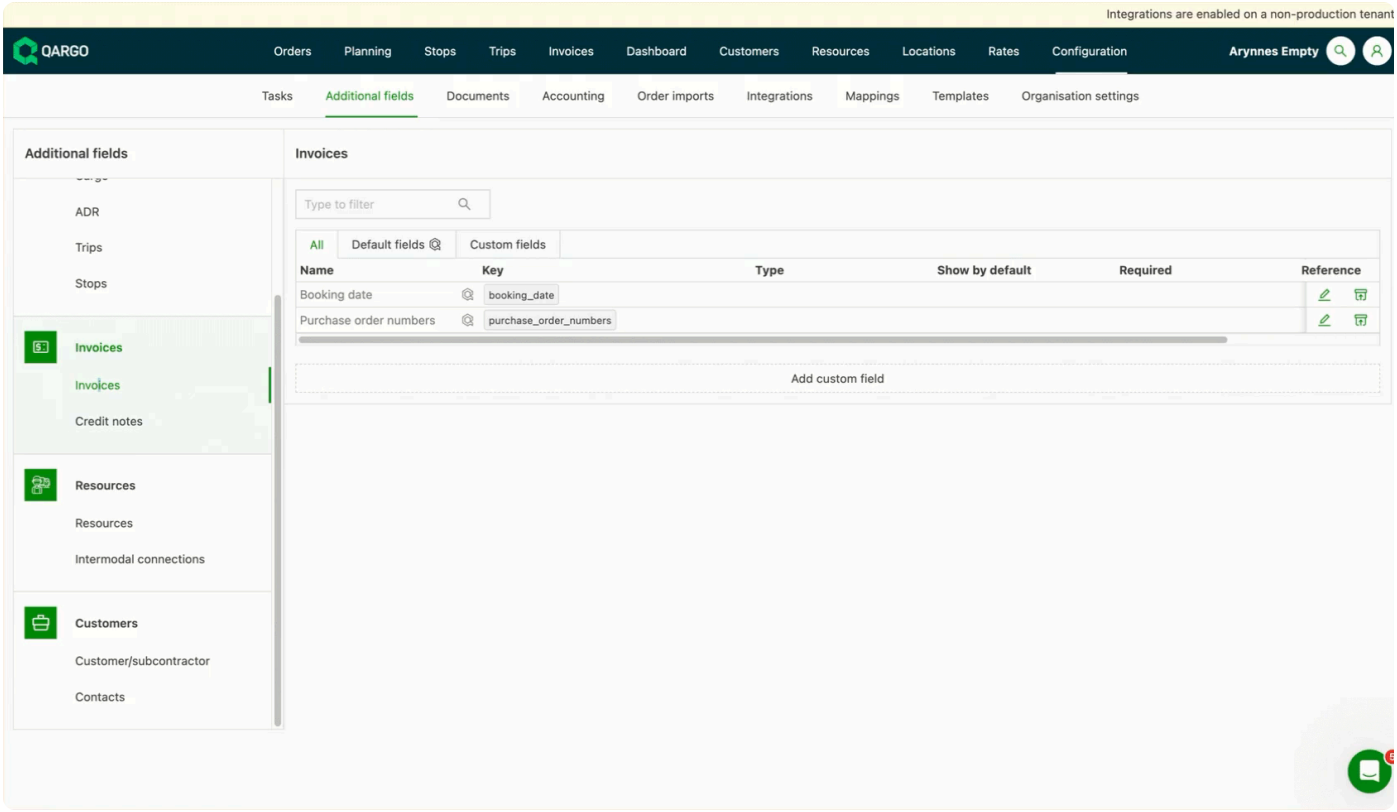
1. **Open the additional fields configuration**
    - Go to **Configuration > Additional fields**.
    - Select the **Orders** level.
2. **Edit the Customer Reference field**
    - Filter or search for the **Customer Reference** field and click the edit (pencil) icon.
    - By default, this field is active only for UK Road transportation services. Add **European Road, Air and Sea** to its configuration.
3. **Save the changes**
    - Save the updated configuration. The Customer Reference field now appears on orders for these transportation services.

Troubleshooting and FAQs

- **What if the Customer Reference field does not appear on invoices?**
    - Make sure that the field is enabled and linked to the appropriate transportation service in the additional fields configuration.

- **Can the Customer Reference field be enabled for multiple transportation services at once?**
    - Yes, multiple transportation services (e.g., General Haulage, European Road, Air, Sea) can be added to the **Linked transportation services** section when editing the field.

By following these steps, the Customer Reference field can be enabled and configured in Qargo to meet operational needs.



- **How many custom fields can be active at the same time?**
    - Up to 50 additional fields can be active per entity. This applies to all configurable entity types: Orders, Invoices, Resources and Customers.

> 📚 The 50-field limit counts all active fields combined: both standard additional fields and custom fields. Inactive or archived fields do not count toward the limit.

- What happens when the limit is reached?
    - Once 50 active fields are configured for an entity, no further fields can be activated or created for that entity until existing active fields are set to Inactive or archived.
- **Is the limit the same across all entity types?**
    - Yes, the limit of 50 active fields applies equally to Orders, Invoices, Resources and Customers.
- **Can the limit be increased beyond 50?**
    - The 50-field limit is a platform-wide setting and cannot be adjusted per account. If the current limit does not cover all required fields for a specific workflow, consider whether some fields can be consolidated or made conditional with

transportation service linking. Also consider whether the data is better captured elsewhere, for example in order notes or through an integration.

💬 For questions about field configuration or workflow design, contact the Qargo account manager.