User roles: Permission and visibility

Assign roles in Qargo to control user access. New roles, default permissions, and MFA setup streamline secure user management.

Updated November 9, 2026

Introduction

When new users are added in Qargo, they are assigned to a role. These roles determine which functionality the user can access and what is available for viewing only. In some cases, visibility of menu items or features is completely restricted based on these roles.

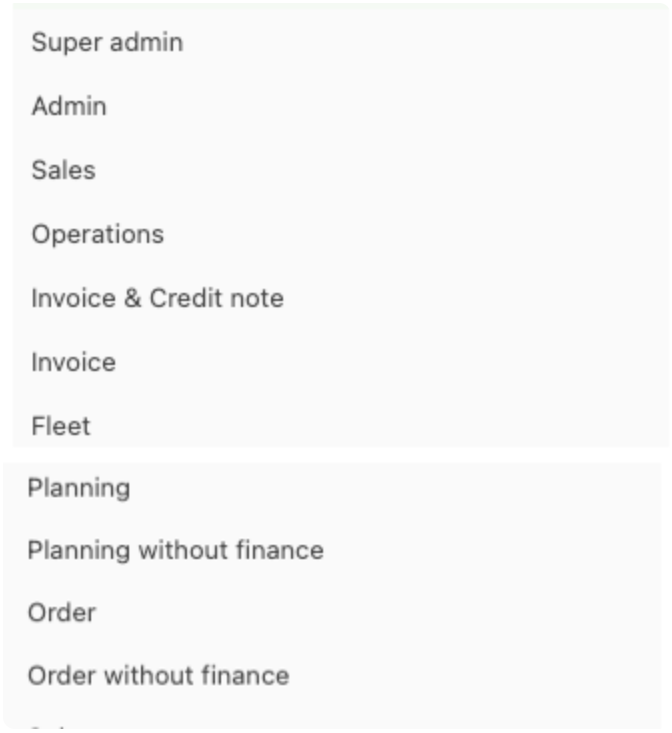
Each user role has core features and functions available by default. This gives the user a predetermined access level. For example, it restricts visibility of financial information for users who do not need to review or update this data. A user may need visibility of a tab or function that is not included in the default role. In that case, it may be possible to enable it in the user settings menu.

User roles and permissions This section discusses the extensive permissions of the Super admin role and restrictions such as the Integrations tab, which is limited to Qargo admins.

When a new user is added to the tenant, the standard user roles are: It is also possible to assign the Super admin role to a user by editing the user's role in **Organization settings** under the **Configuration** section.

- **Super admin**
- **Admin**
- **Sales**
- **Operations**
- **Invoice + credit memo**
- **Invoice only**
- **Fleet**
- **Planning**
- **Planning without finance**
- **Order**
- **Order without finance**
- **Warehouse operator**
- Note: The Super admin role provides extensive permissions. However, it does not include access to the **Integrations** tab in the **Configuration** section. For security reasons, this tab is reserved for Qargo admins.

'Add user' includes roles with default permissions that can be assigned when the new user is added.



Standard user role permissions.

	Super Admin	Admin	Sales	Operations	Invoice & Credit Note	Invoice	Fleet	Planning	Planning without finance	Order	Order without finance
Quotes	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
Order	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
Planning	✅	✅	❌	✅	❌	❌	✅	✅	✅	❌	❌
Read invoice	✅	✅	✅	✅	✅	✅	❌	✅	❌	✅	❌
Update invoice	✅	✅	✅	✅	✅	✅	❌	❌	❌	❌	❌
Unpost invoice	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌
Incoming E-invoices	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌
Credit note	✅	✅	✅	✅	✅	❌	❌	❌	❌	❌	❌
Read revenue & costs	✅	✅	✅	✅	✅	✅		✅	❌	✅	❌
Locations	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅	✅
Customers, incl contacts	✅	✅	✅	✅	✅	✅	✅	✅	❌	✅	❌
Intermodal operators, incl contacts	✅	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌
Resources	✅	✅	✅	❌	❌	❌	✅	✅	✅	❌	❌
Order input options	✅	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌
Cost calculation trip	✅	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌
Postcode zone groups	✅	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌
Accounting exchange rates	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Tasks	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Additional fields	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Documents	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Organistion settings	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Templates (PDF/XLSX)	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Accounting config	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌
Mappings	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌
User management	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌
Read dashboards	✅	✅	✅	✅	❌	❌	❌	❌	❌	❌	❌
Accounting (re)auth	✅	✅	❌	❌	❌	❌	❌	❌	❌	❌	❌
Integrations	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌	❌

Legend:

✅	Read & Write access
❌	Not available

Summary overview of roles and associated pages.

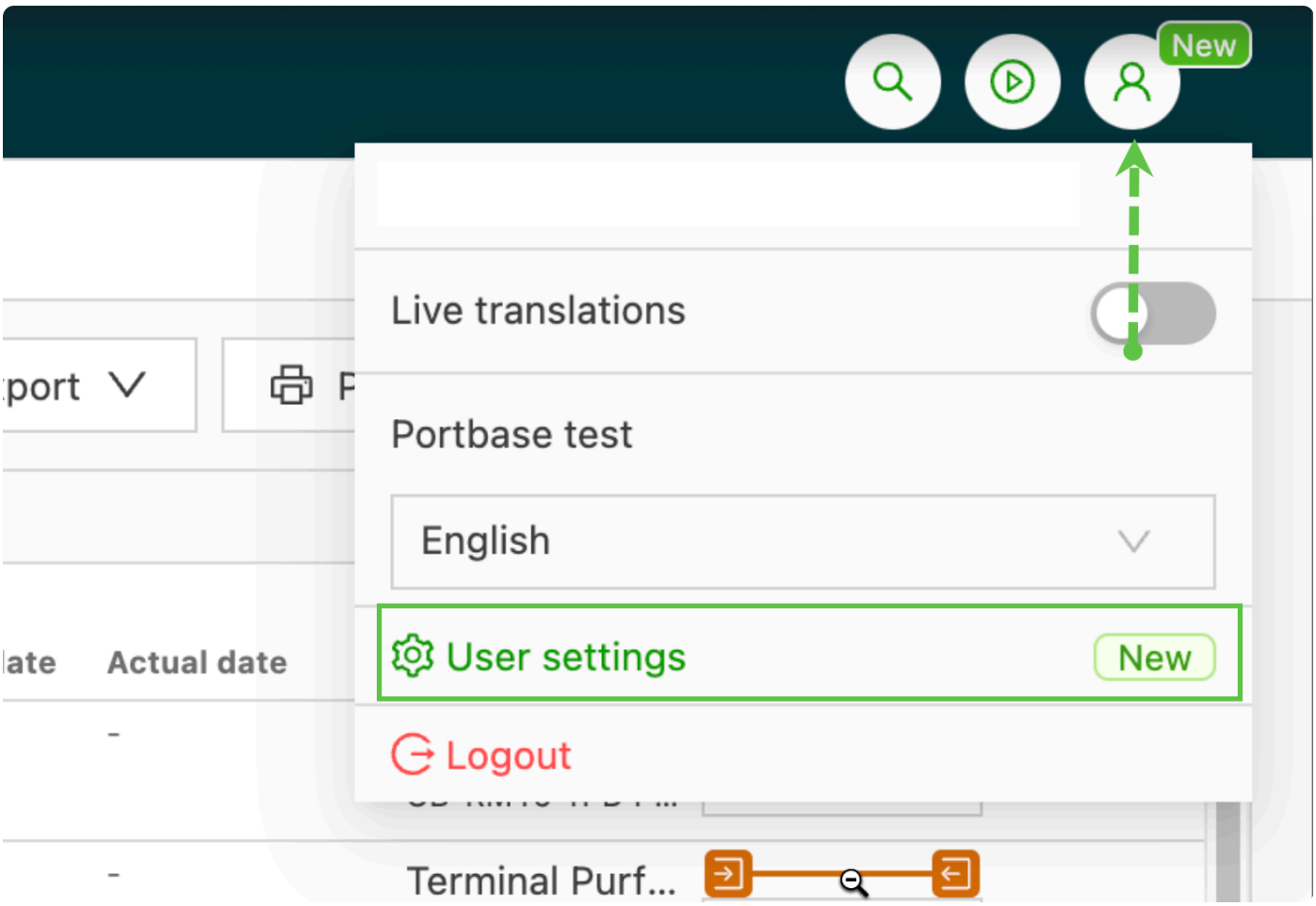
Role	Pages	Description
Super Admin		Superuser with access to everything. This is the only role that can manage the access of other users within the tenant, and see Incoming E-invoices.
Admin	Configuration	An administrator can manage most tenant configuration like rates, documents, tasks, additional fields, etc. with a few exceptions like accounting nominal codes, mappings and user management.
Sales	Order / Invoice / Credit Note / Customer / Subcontractors / Intermodal operators / Rates	This role can manage pricing configuration like surcharges and rate cards. Can perform invoicing and credit notes. As well as management of all resources like subcontractors, intermodal operators, etc.
Operations	Order / Planning / Invoice	This is a more broad role which has access to both the planning board as well as invoicing but unlike an administrator does not have access to manage tenant configuration.
Invoice + Credit Note	Order / Invoice / Credit Note	Same as the invoice role with the addition credit notes.
Invoice	Order / Invoice	This role can create and send out invoices, creating or updating order information is also available but the planning board is not.
Fleet	Planning / Resources	This role can manage drivers/vehicles as well as all the planning functionality. Finance related information like charges on an orders/shipments will be not be visible.
Planning	Order / Planning / Stops / Trips / Customer	This role has access to all the planning board and all other planning functionality like assigning resources, splitting and merging trips, etc. Updating the availability and documents of drivers and other resources is also available. Similar to the order role this role can also manage customers as well as charges and cost split.
Planning without finance	Order / Planning / Stops / Trips	This role has access to all the planning board and all other planning functionality like assigning resources, splitting and merging trips, etc. Updating the availability and documents of drivers and other resources is also available. Finance related information like charges on an orders/shipments will be not be visible.
Order	Order / Customer	This role can only create new orders and update order/consignment information or documents. But this role can also manage customers as well as charges and cost split.
Order without finance	Order	This role can only create new orders and update order/consignment information or documents. Finance related information like charges on an orders/shipments will be not be visible.

Permission to view

If a user needs visibility of data that is not displayed as part of the standard user role, it may be possible to provide access through the ***User setting*** permission. When the checkbox is selected, tabs and functions can be enabled as **read-only**.

This is a per-user setting. Each user configures their own view, and it has no effect on the accounts of other users with the same role. In addition, a Super admin cannot configure this setting. Only the user can.

> Not all tabs or functions are available in every role. If the required option is not displayed, it is not available in the assigned user role.



- [x] **Quotes***
  - [x] Spot quotes*
  - [x] Tender quotes*
- [x] **Orders***
  - [x] Orders*
  - [x] Order groups*
  - [x] Templates*
  - [x] Upload documents*
  - [x] Order imports*
- [x] **Planning***
- [x] **Stops***
- [x] **Trips***
  - [x] Trips*
  - [x] Trip groups*
  - [x] Subcontractor quotes*
  - [x] Trip imports*
- [x] **Invoices***
  - [x] Orders to invoice*
  - [x] Invoices*
  - [x] Credit notes*
  - [x] Trips to bill*
  - [x] Purchase invoices*
  - [x] Upload purchase invoices*
  - [ ] Incoming e-invoices
  - [x] Purchase credit notes*
  - [x] Invoice exports*
- [x] **Dashboard***
- [x] **Companies***
  - [ ] Buyers / Sellers
  - [x] Contacts*
  - [x] Customers*
  - [ ] Subcontractors
- [x] **Resources**
  - [x] Combinations*
  - [x] Shift schedules*
  - [ ] Drivers
  - [ ] Vehicles
  - [ ] Subcontractors
  - [ ] Containers
  - [ ] Intermodal operators
- [x] **Locations***
  - [x] Locations*
  - [x] Internal stop actions*
  - [ ] Postcode zone groups
  - [ ] Transport networks
- [ ] **Rates**
  - [ ] Order input
  - [ ] Rate card customers
  - [ ] Cost calculation trip
  - [ ] Charge templates
  - [ ] Chargeable weight conversion
- [x] **Configuration***
  - [x] Printer configuration*
  - [ ] Tasks
  - [ ] Rules
  - [ ] Additional fields
  - [ ] Documents
  - [ ] Accounting

Selecting an option will display the tab or function as READ ONLY.

Permission flags are not intended to be used to configure a user role. They provide **read-only access** to predetermined tabs and functions based on the assigned user role. See below to modify user roles across the platform.

Modifying user roles

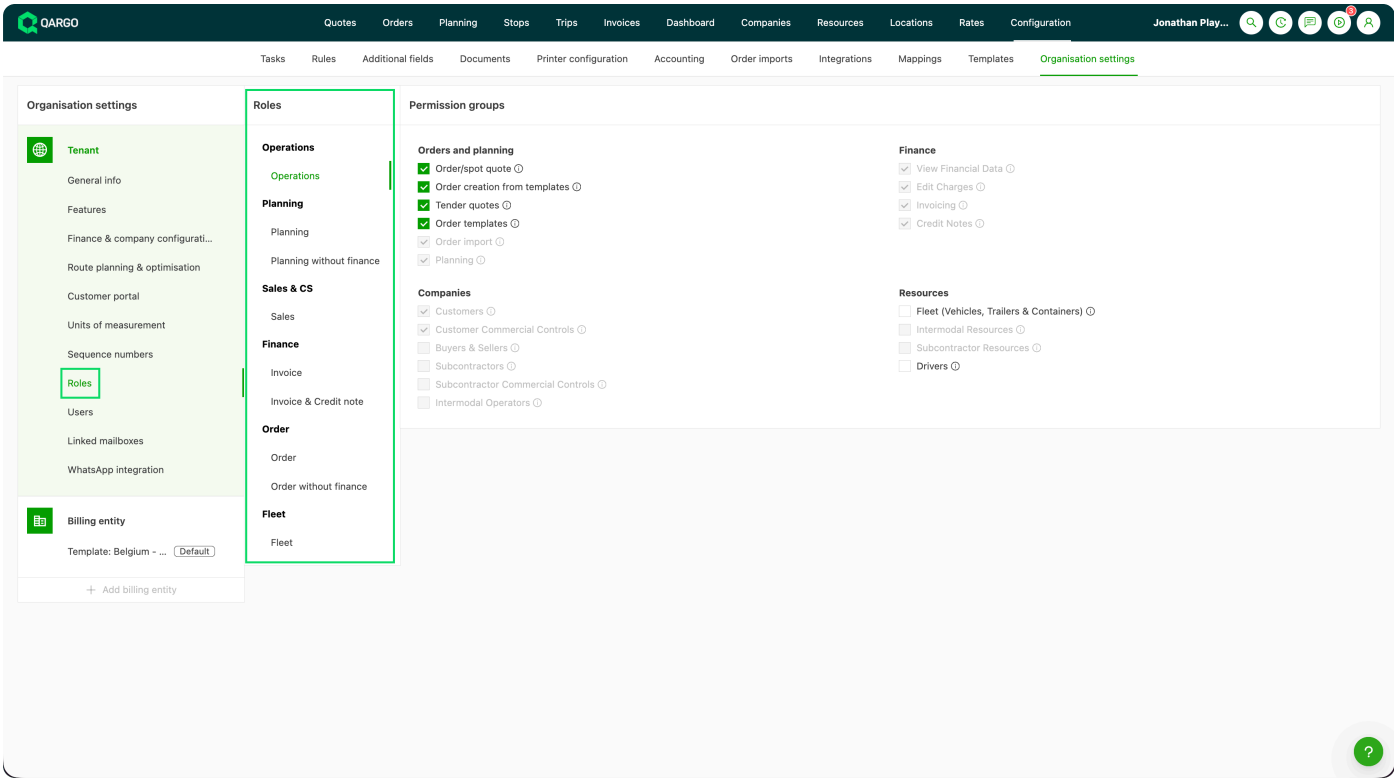
🧰 All permissions can be configured in **Configuration > Organization settings > Roles**. Only **Super admin** users can use this function.

If the existing role configuration does not meet user requirements, Super admin users can update the role permissions to allow or restrict functions.

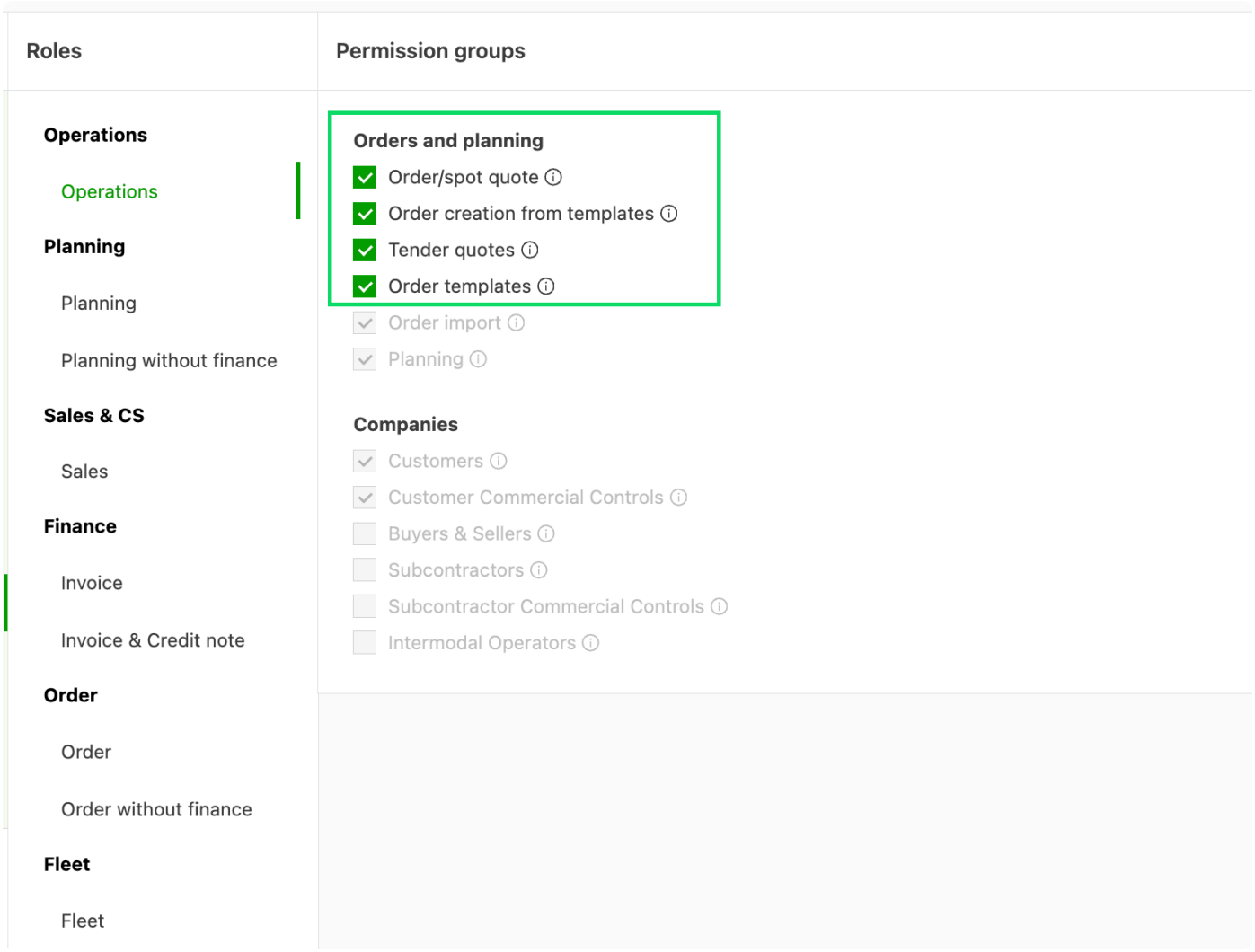
‼️ Changes made to roles here apply across the platform to **all users** assigned that role.

Access the Roles menu

1. Navigate to **Configuration > Organization settings > Roles**.
2. Select the role to configure from the list.



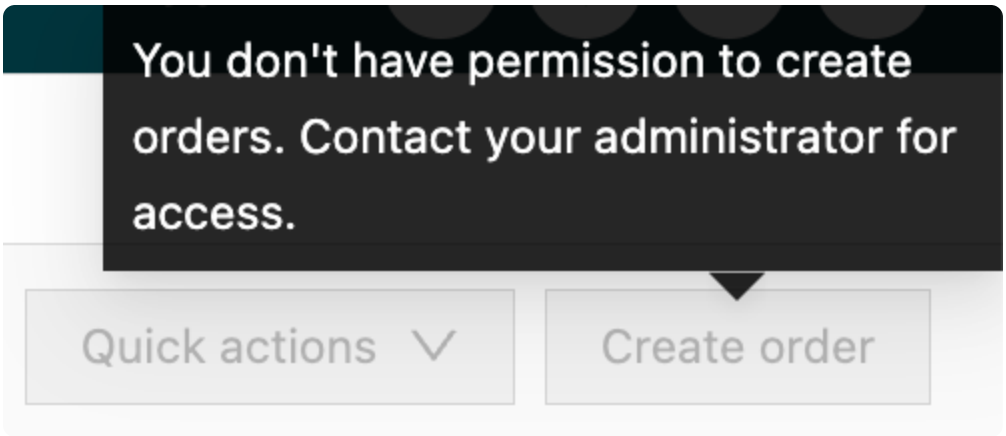
- Enable or disable each permission by selecting or clearing the relevant checkbox.



2. Save the configuration. Changes take effect immediately for all users assigned to that role.

When a permission is disabled for a role:

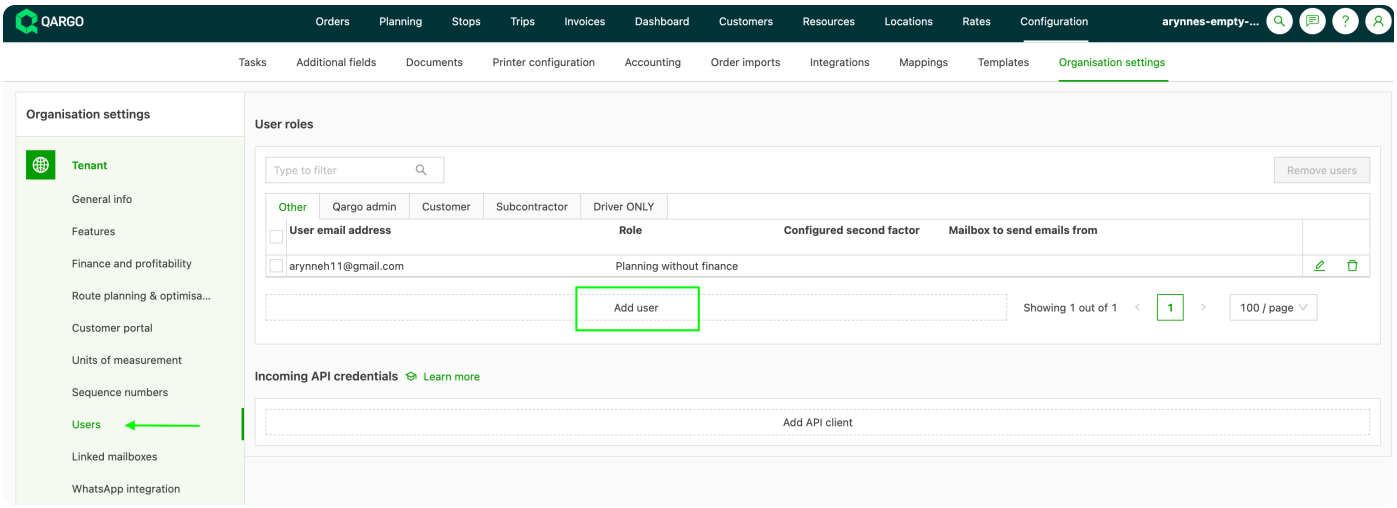
- The corresponding **Create** button or menu entry is hidden for users with that role across the web app and customer portal.
- If a user navigates directly to a page they no longer have permission to edit, a read-only banner explains the restriction.



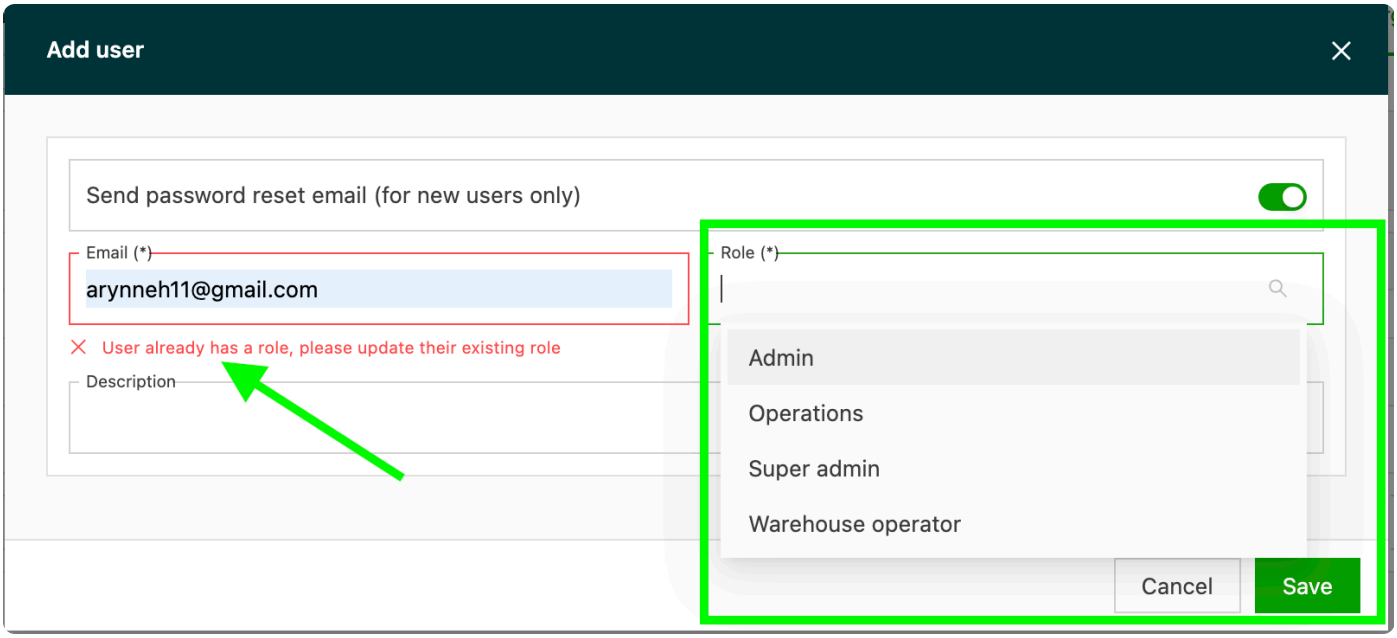
Learn how this works for order creation

Adding / creating new users.

- Only the Super admin role can create new users.
- Navigate to **Configuration > Organization settings**.
- In the **Organization settings** menu on the left, select **'User'**.

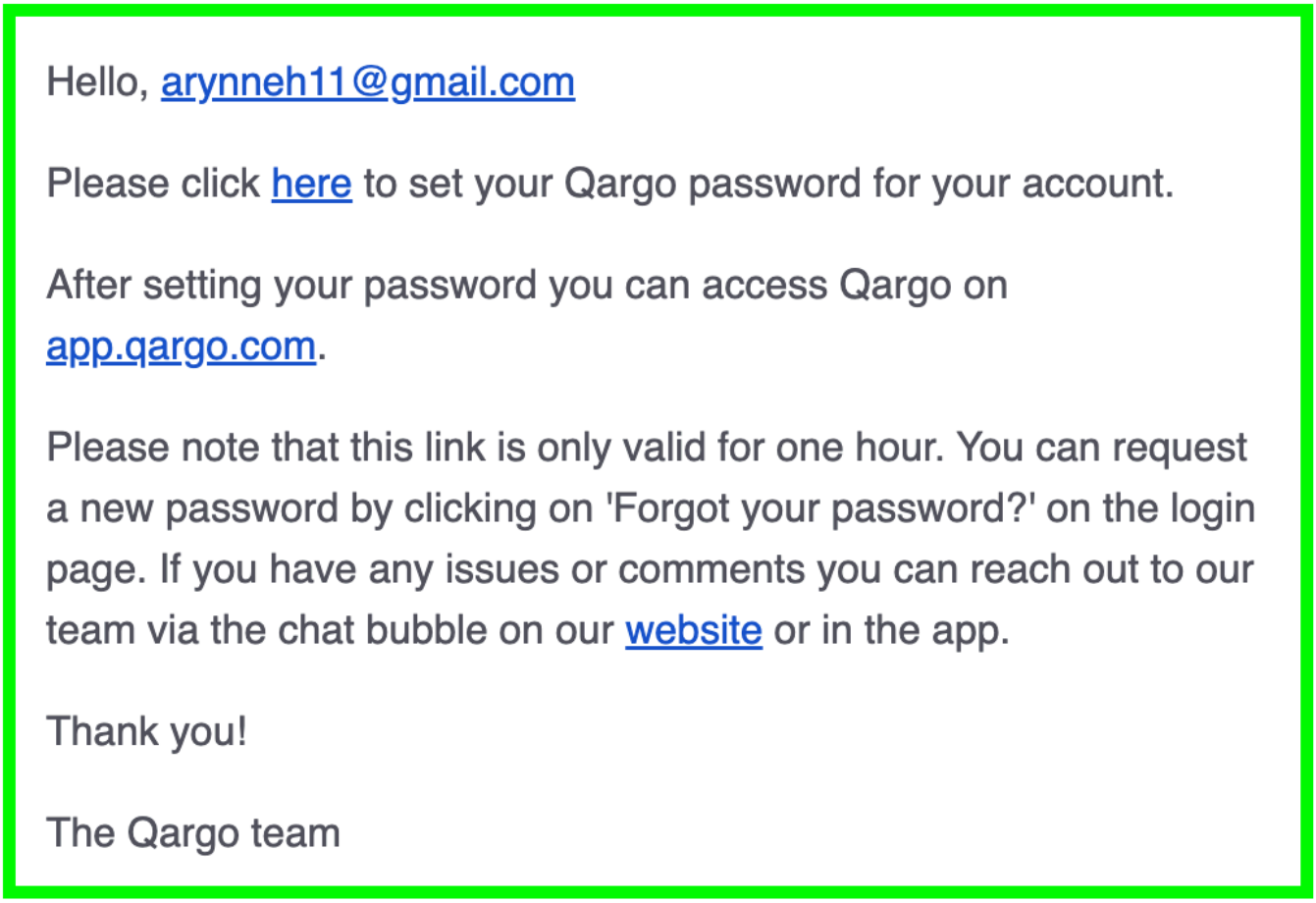


- Click ***'Add user'*** and enter the user's email address.
- Select the appropriate role from the drop-down menu.
- Enter a description for the user role, if appropriate.
- Click **Save**.

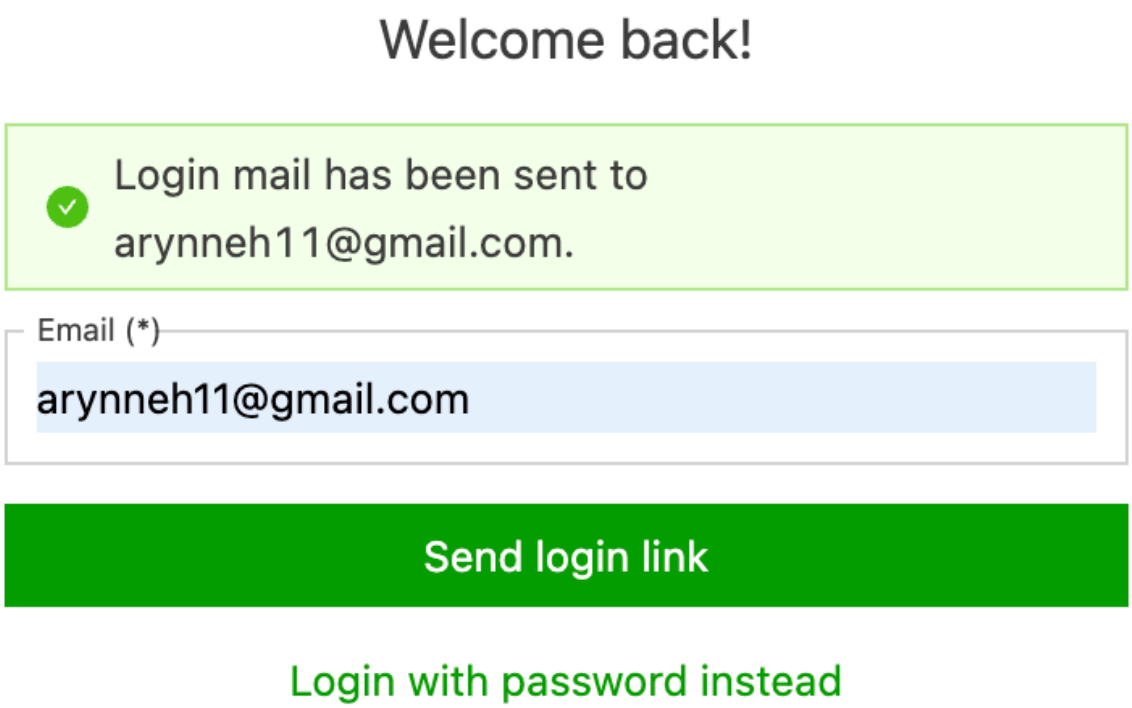


‼️ Avoid using group email addresses for individual users. Each email address can only be used for a single profile. If the email address has been used before, an error message is displayed.

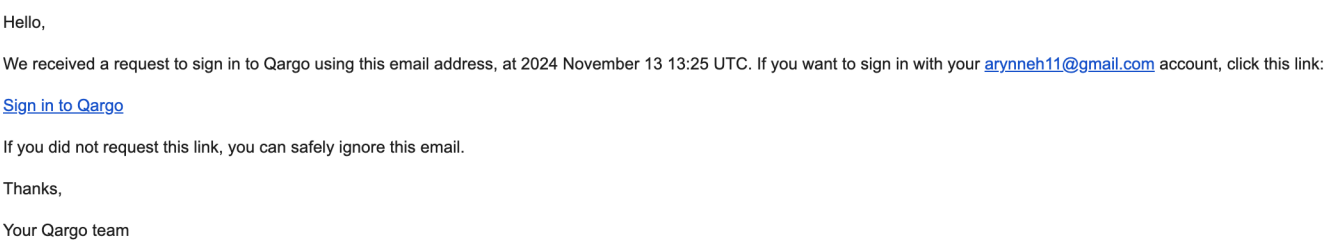
- Once the user has been added, the user receives an email with a link to set a password.



- When logging in, the user can either use the saved password or log in via a login link:



- When the link option is used, the user receives an email.
- Click the *'Sign in to Qargo'* link.


Hello,

We received a request to sign in to Qargo using this email address, at 2024 November 13 13:25 UTC. If you want to sign in with your arynneh11@gmail.com account, click this link:

Sign in to Qargo

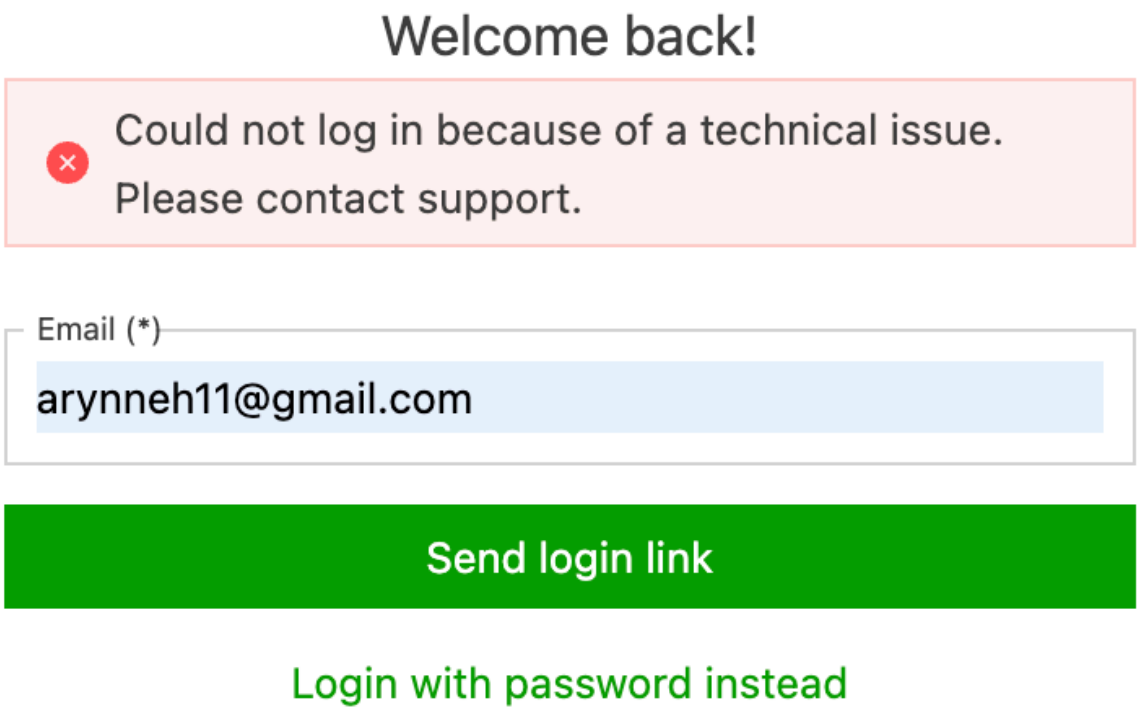
If you did not request this link, you can safely ignore this email.

Thanks,

Your Qargo team

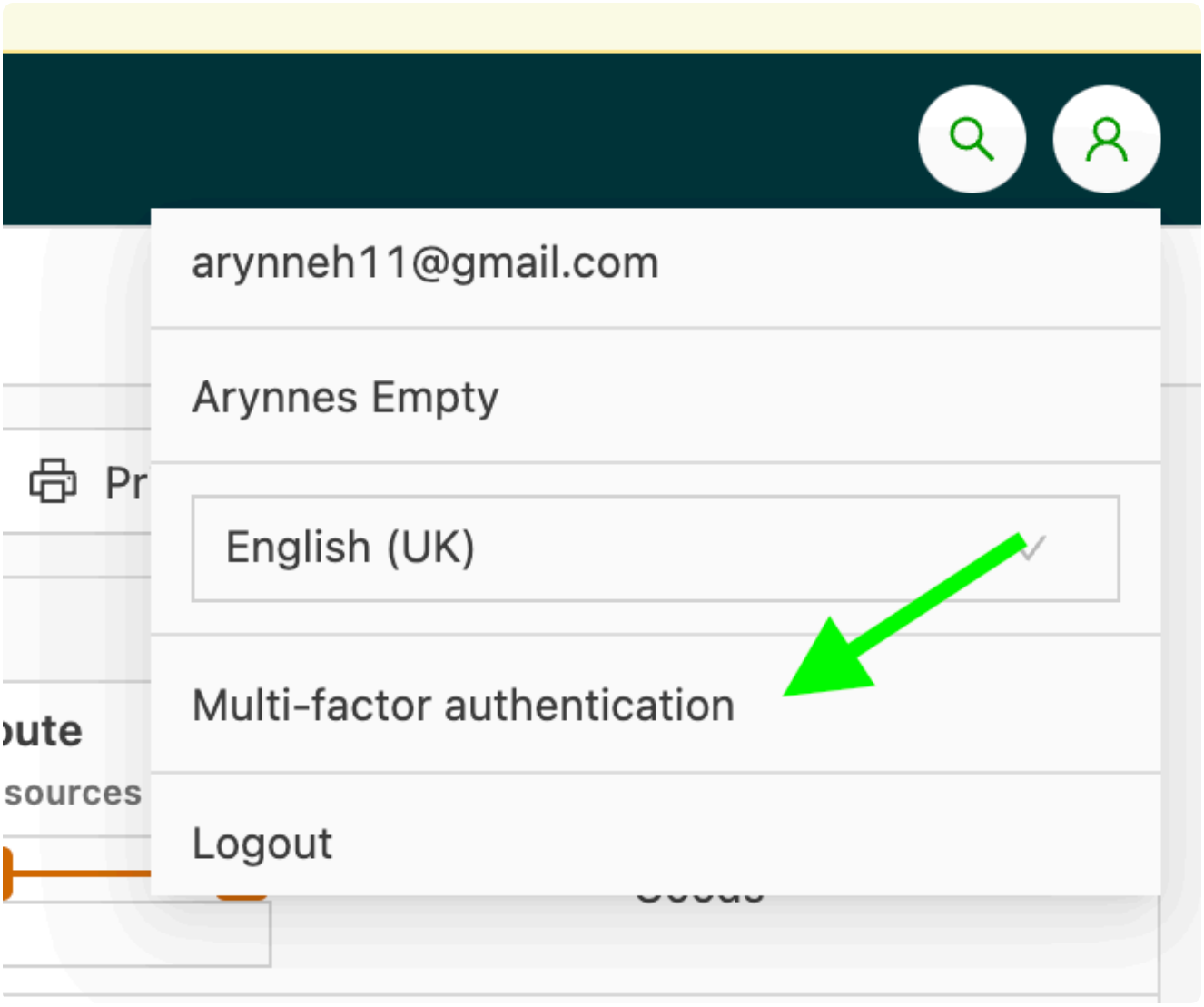
Troubleshooting

If an old emailed link is used, the user may receive this error. Verify that the user is using the most recent email link and try to log in again. If users encounter role-based access issues, they should first verify that their role includes the necessary permissions and contact a Super admin for assistance. Some sections, such as the Integrations tab, are restricted by design.

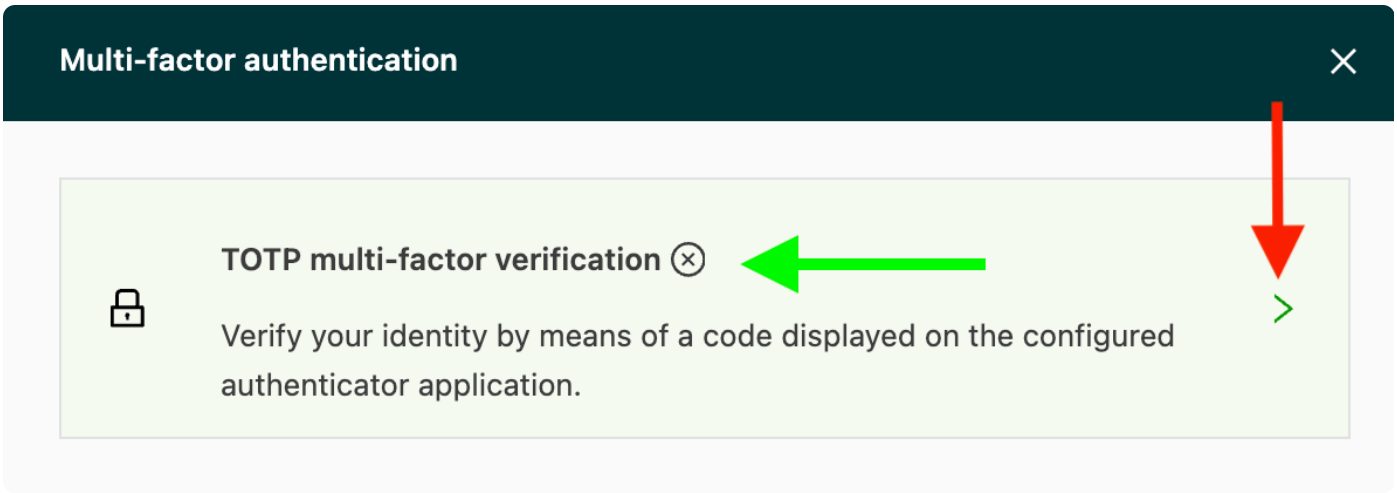


Multi-factor authentication (MFA)

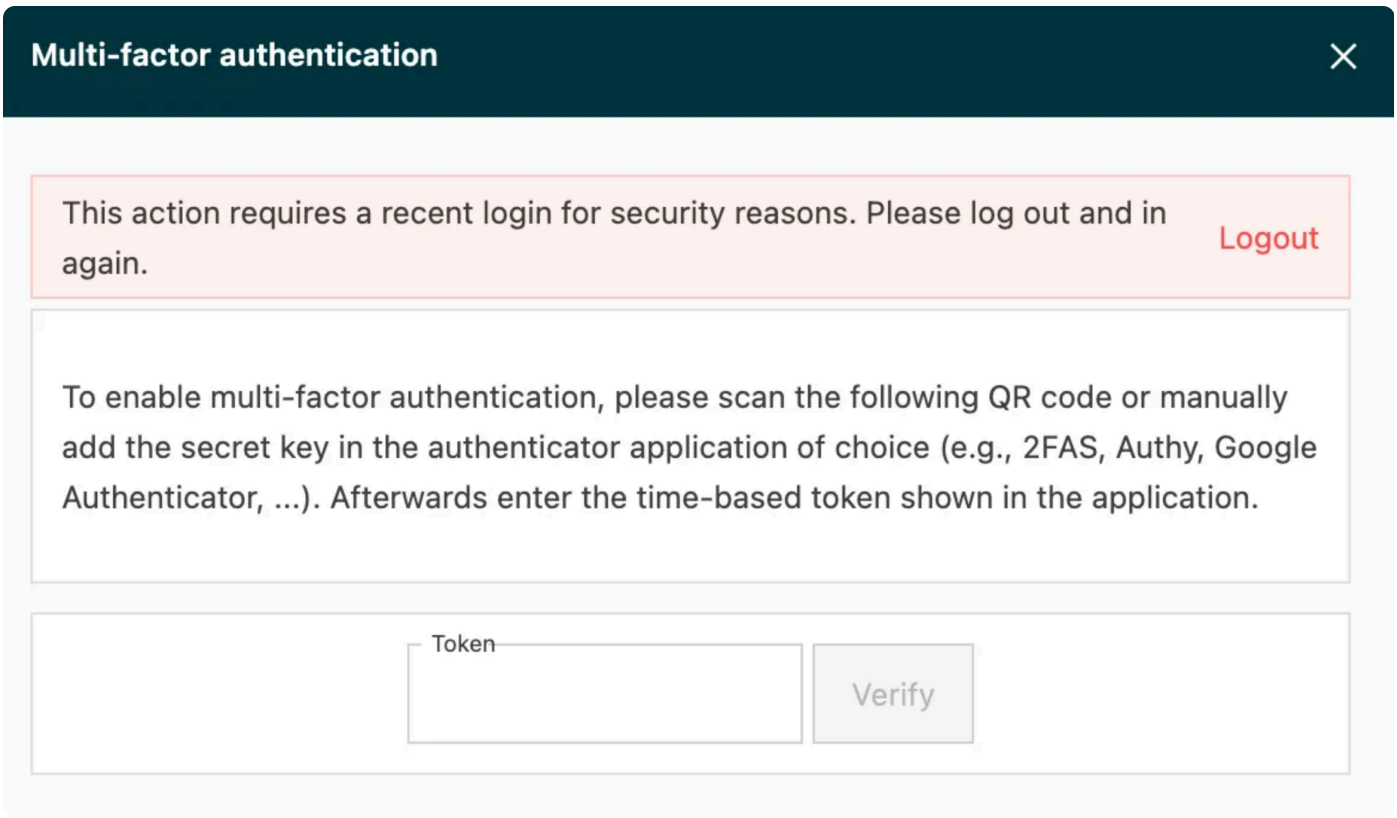
If required, users can set up multi-factor authentication (MFA). This is optional, and users are currently not required to complete it.

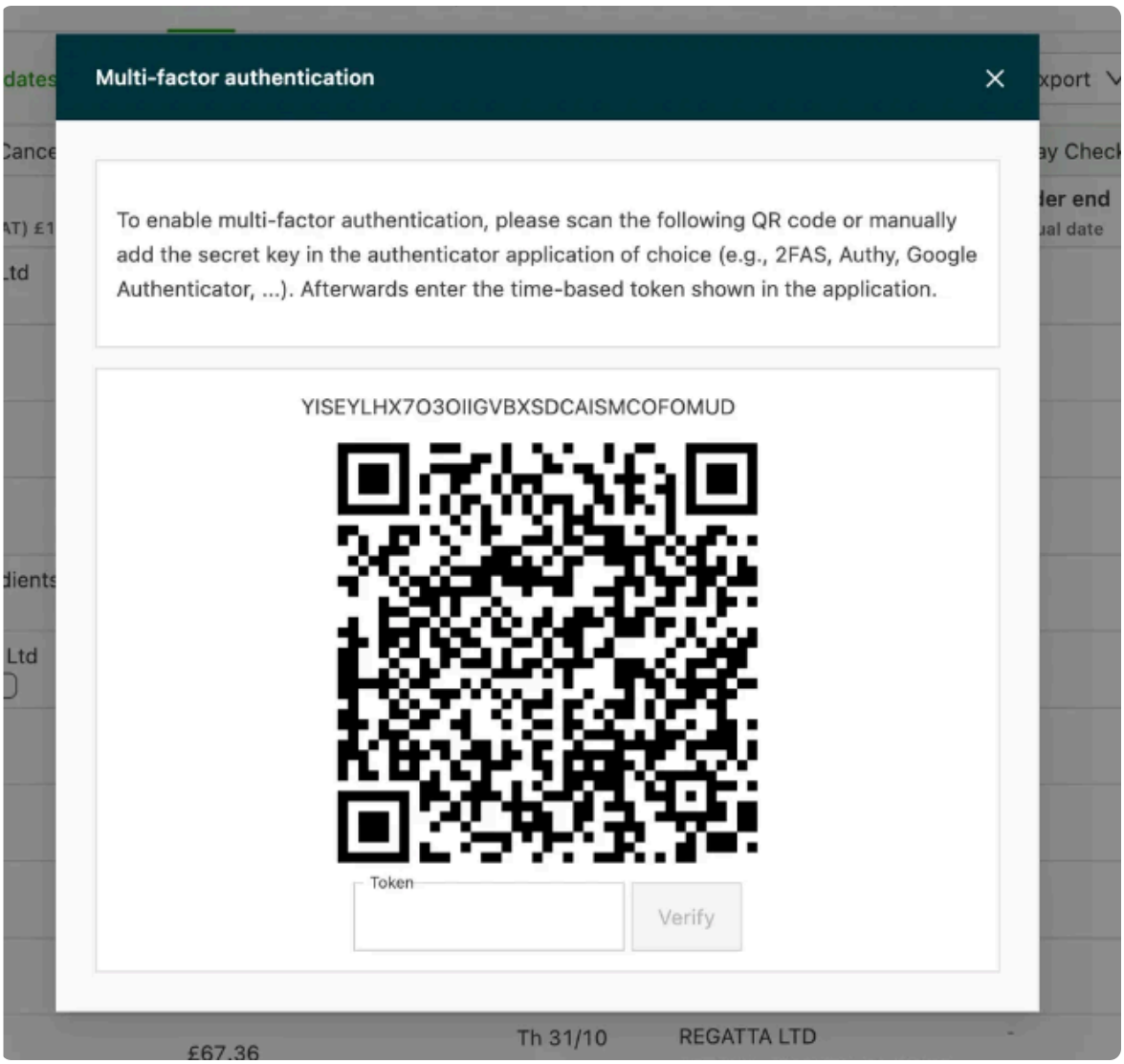


Click the arrow on the right to start the MFA setup process.

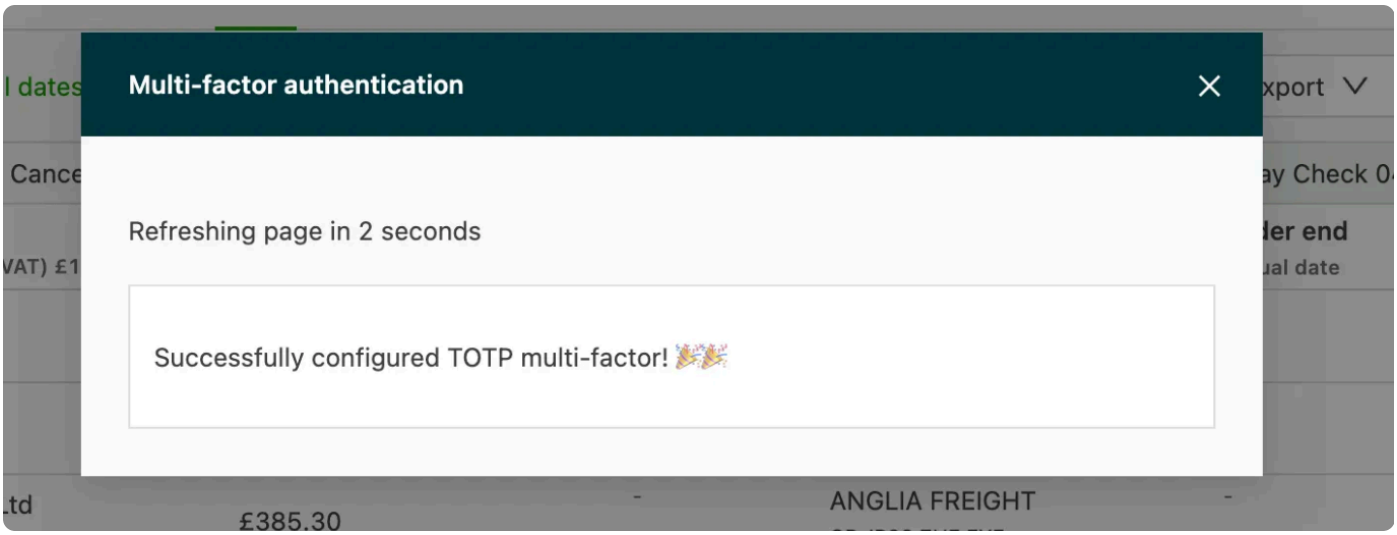


For security reasons, this process requires a recent login. The user may be prompted to log out and log back in to start the process. If the user has logged in recently, they are taken straight to the next step: scanning the QR code.


Multi-factor authentication
This action requires a recent login for security reasons. Please log out and in again.
Logout
To enable multi-factor authentication, please scan the following QR code or manually add the secret key in the authenticator application of choice (e.g., 2FAS, Authy, Google Authenticator, ...). Afterwards enter the time-based token shown in the application.
Token
Verify



The user receives a notification once the setup has been completed successfully.



Once MFA has been set up on the user profile, Qargo Support must be contacted to remove it for any reason.