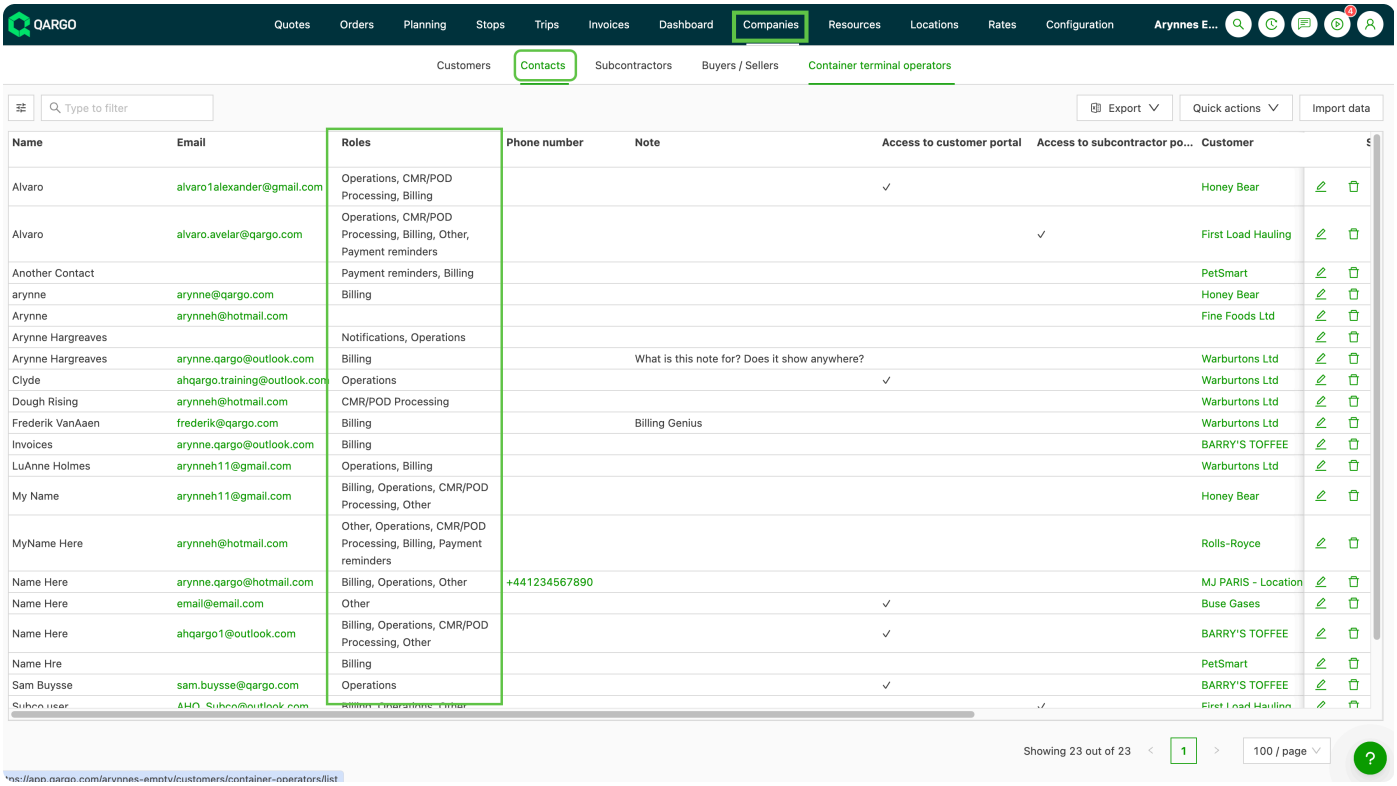
Contact roles

Company contacts can be assigned roles like Billing, Operations, Sales or Customs, so Qargo emails reach the right people and workflow tasks target the correct contacts.

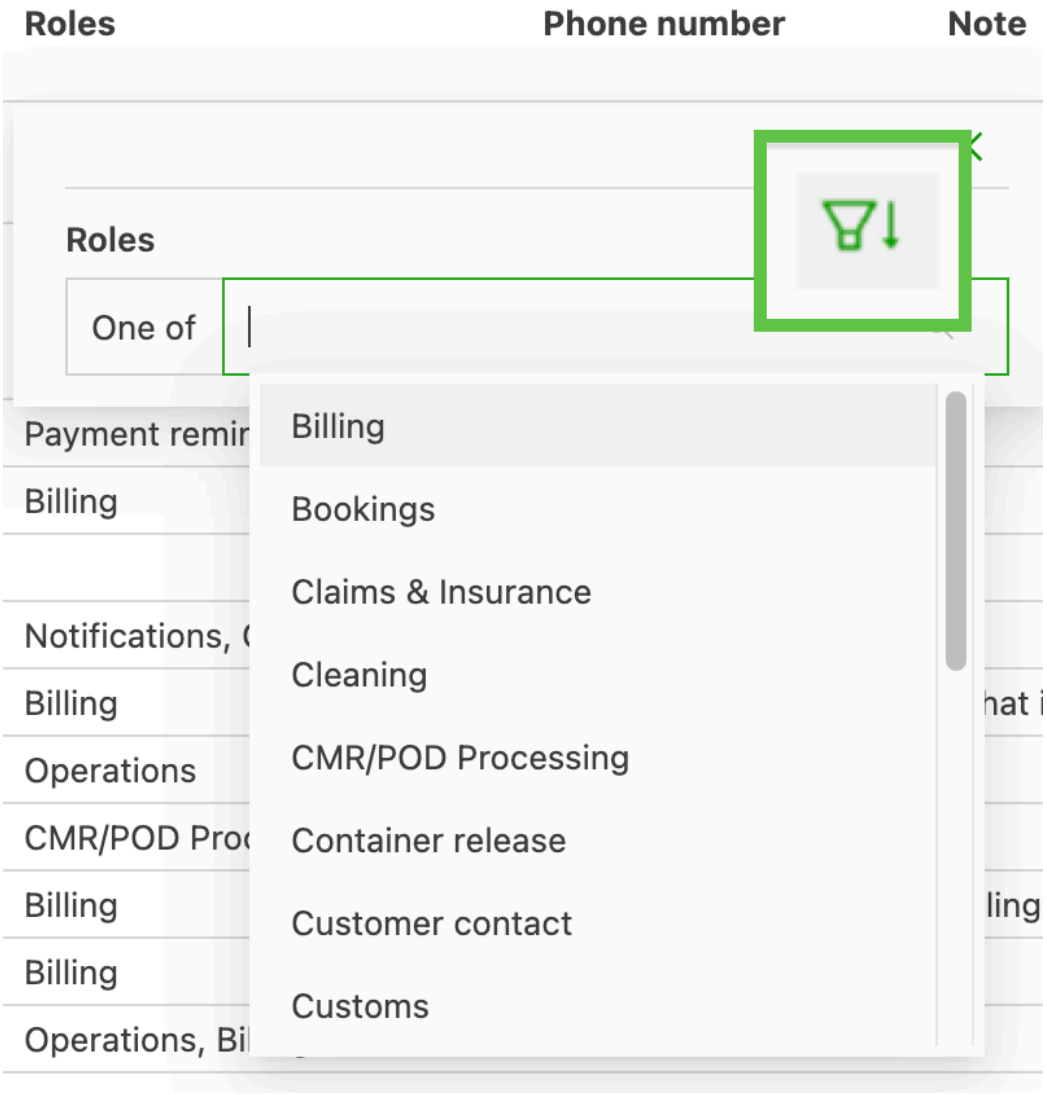
Updated June 2, 2026

Contacts can be added to company profiles. These contacts can be given certain roles, which are automatically pre-filled when certain emails are sent from Qargo. Once added, contact roles can be edited from the company or contact details.

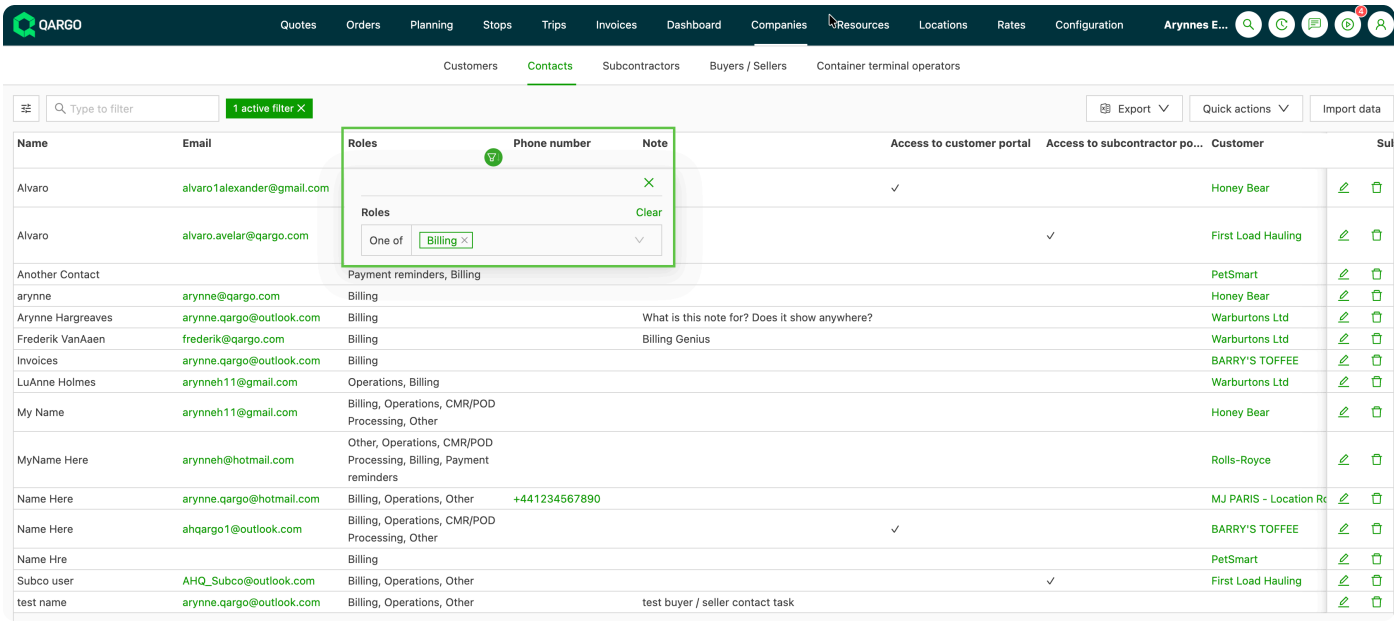


Name	Email	Roles	Phone number	Note	Access to customer portal	Access to subcontractor po...	Customer
Alvaro	alvaro1alexander@gmail.com	Operations, CMR/POD Processing, Billing			✓		Honey Bear
Alvaro	alvaro.avelar@qargo.com	Operations, CMR/POD Processing, Billing, Other, Payment reminders				✓	First Load Hauling
Another Contact		Payment reminders, Billing					PetSmart
arynne	arynne@qargo.com	Billing					Honey Bear
Arynne	arynneh@hotmail.com						Fine Foods Ltd
Arynne Hargreaves		Notifications, Operations					
Arynne Hargreaves	arynne.qargo@outlook.com	Billing		What is this note for? Does it show anywhere?			Warburtons Ltd
Clyde	ahqargo.training@outlook.com	Operations			✓		Warburtons Ltd
Dough Rising	arynneh@hotmail.com	CMR/POD Processing					Warburtons Ltd
Frederik VanAaen	frederik@qargo.com	Billing		Billing Genius			Warburtons Ltd
Invoices	arynne.qargo@outlook.com	Billing					BARRY'S TOFFEE
LuAnne Holmes	arynneh11@gmail.com	Operations, Billing					Warburtons Ltd
My Name	arynneh11@gmail.com	Billing, Operations, CMR/POD Processing, Other					Honey Bear
MyName Here	arynneh@hotmail.com	Other, Operations, CMR/POD Processing, Billing, Payment reminders					Rolls-Royce
Name Here	arynne.qargo@hotmail.com	Billing, Operations, Other	+441234567890				MJ PARIS - Location
Name Here	email@email.com	Other			✓		Buse Gases
Name Here	ahqargo1@outlook.com	Billing, Operations, CMR/POD Processing, Other			✓		BARRY'S TOFFEE
Name Hre		Billing					PetSmart
Sam Buysse	sam.buysse@qargo.com	Operations			✓		BARRY'S TOFFEE

- Each contact role on a customer is displayed in the **Roles** column in the contacts list view.



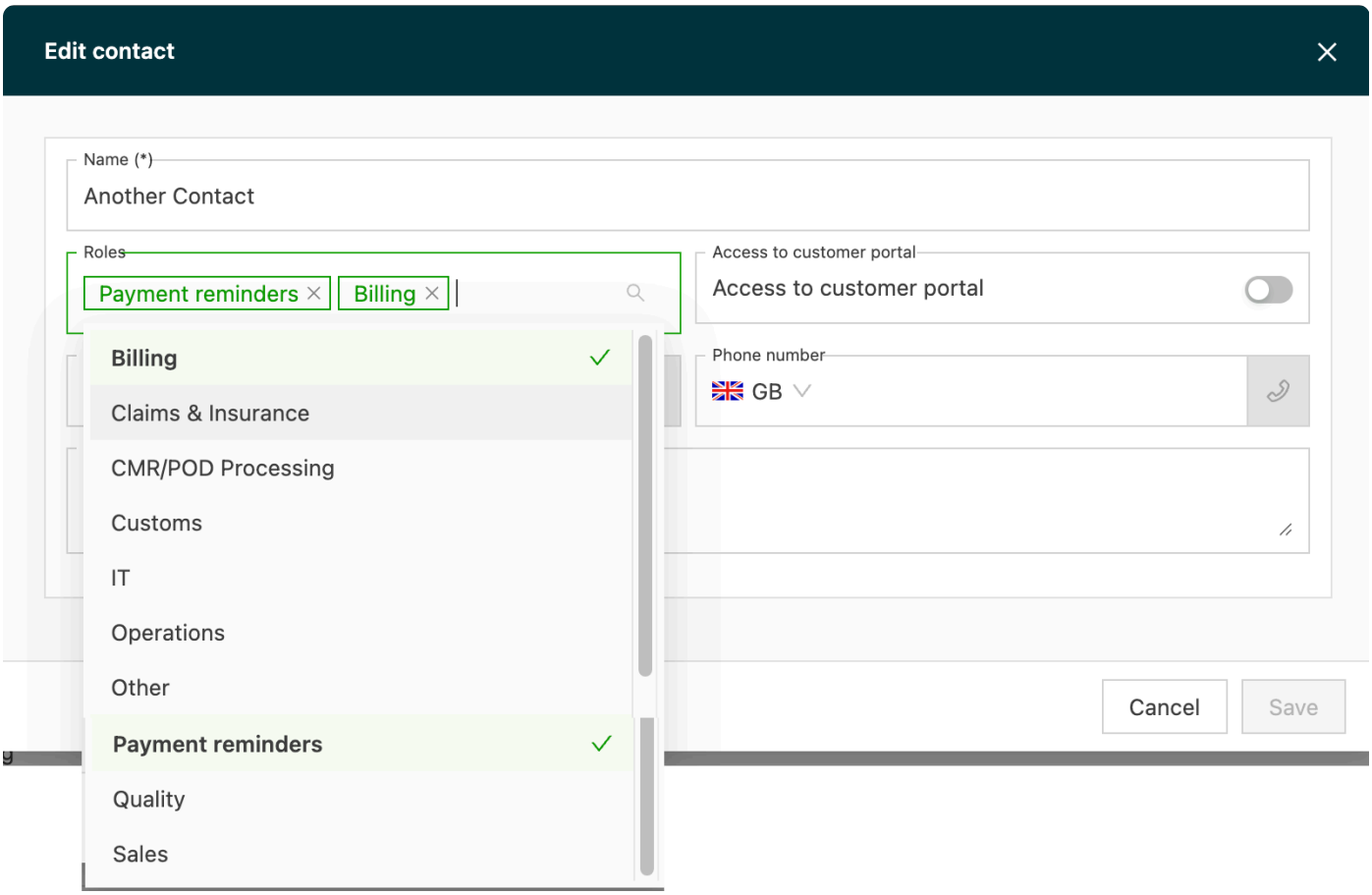
- Filtering the column by role shows the contacts assigned to that role across all companies.



The green check mark indicates that the role is assigned to the contacts. Contacts can have multiple roles assigned.

The roles available:

- Billing
- Claims & insurance
- CMR/POD processing
- Customs
- IT
- Operations
- Other
- Payment reminders
- Quality
- Sales

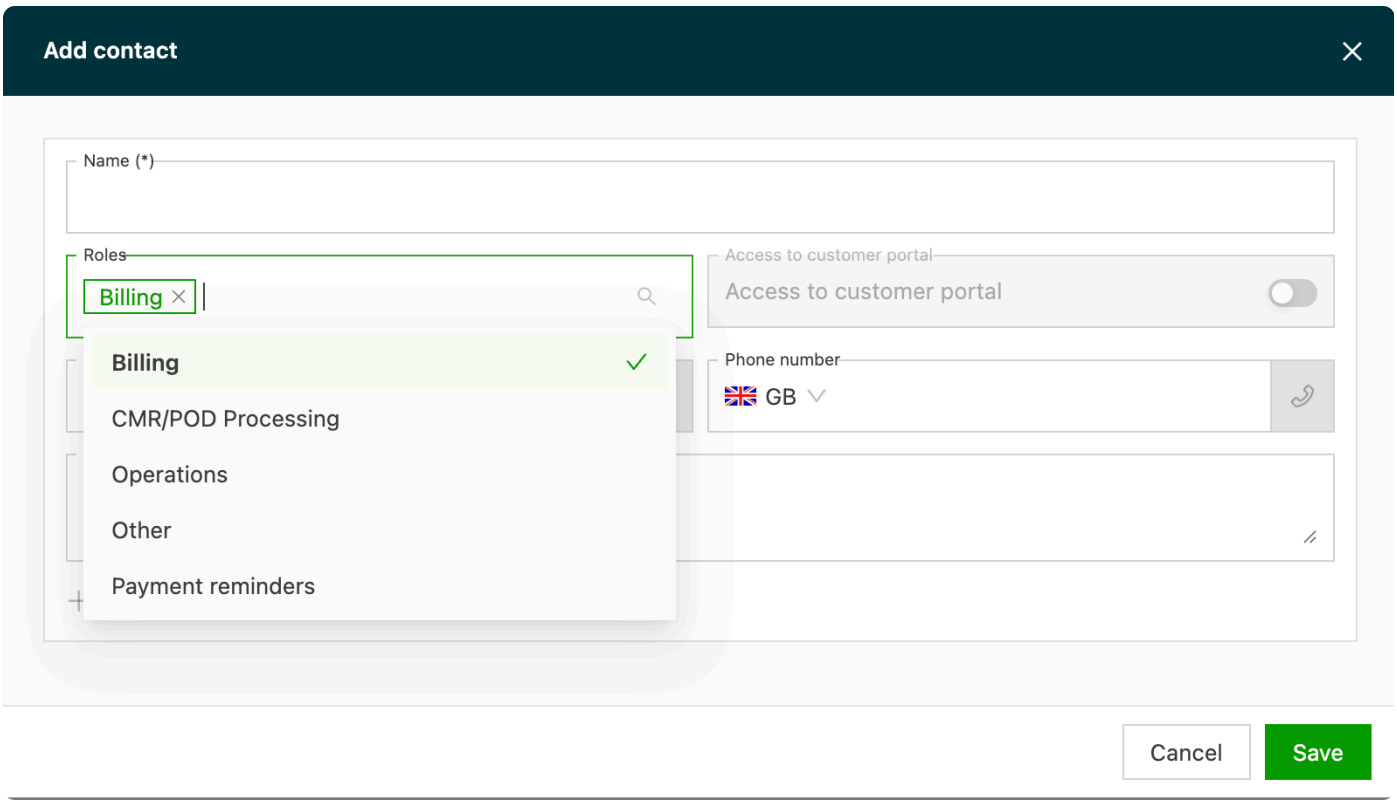


This video explains the purpose of each available **contact role**:

▶ https://watchclueso.com/embed/a9051qt61jzmfx83

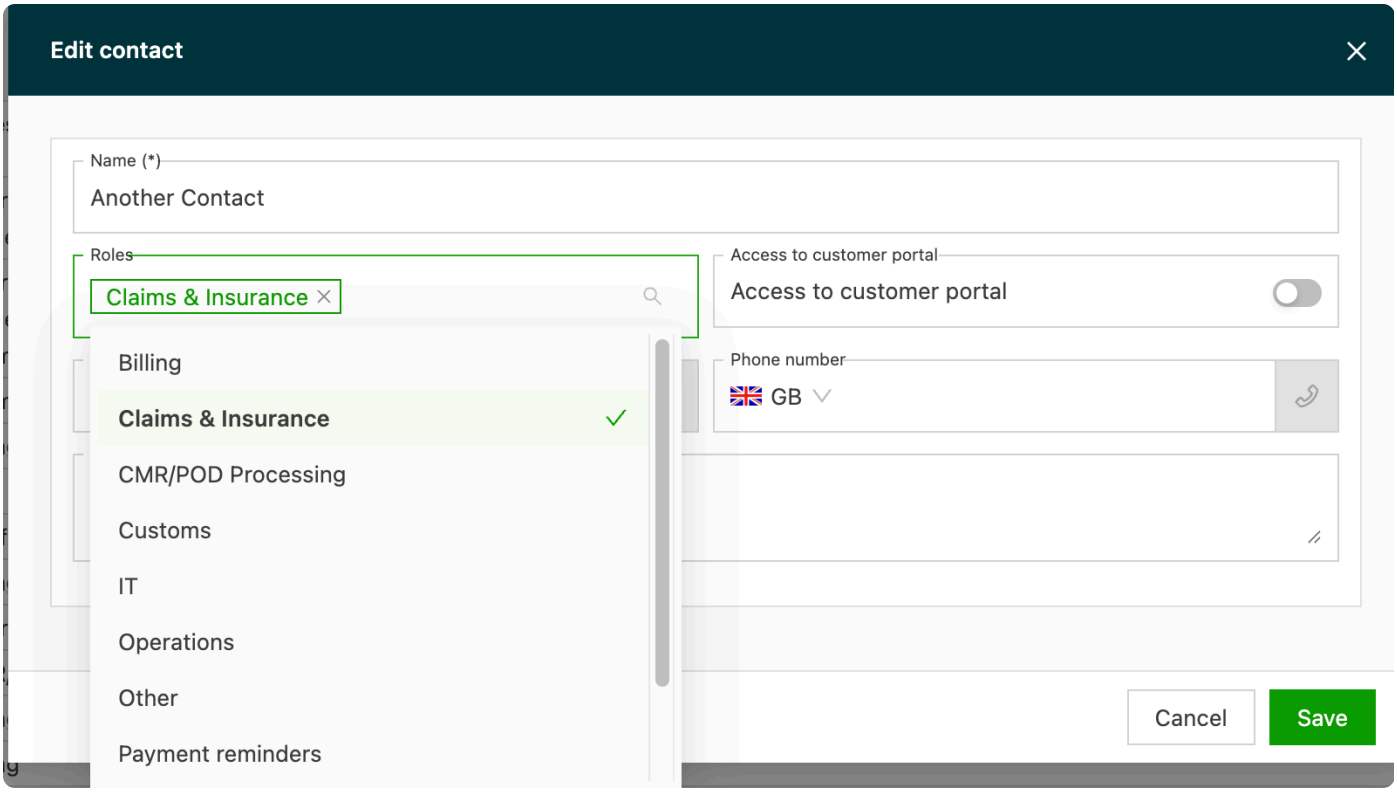
Billing

This role is used by default for tasks configured to send out invoices.

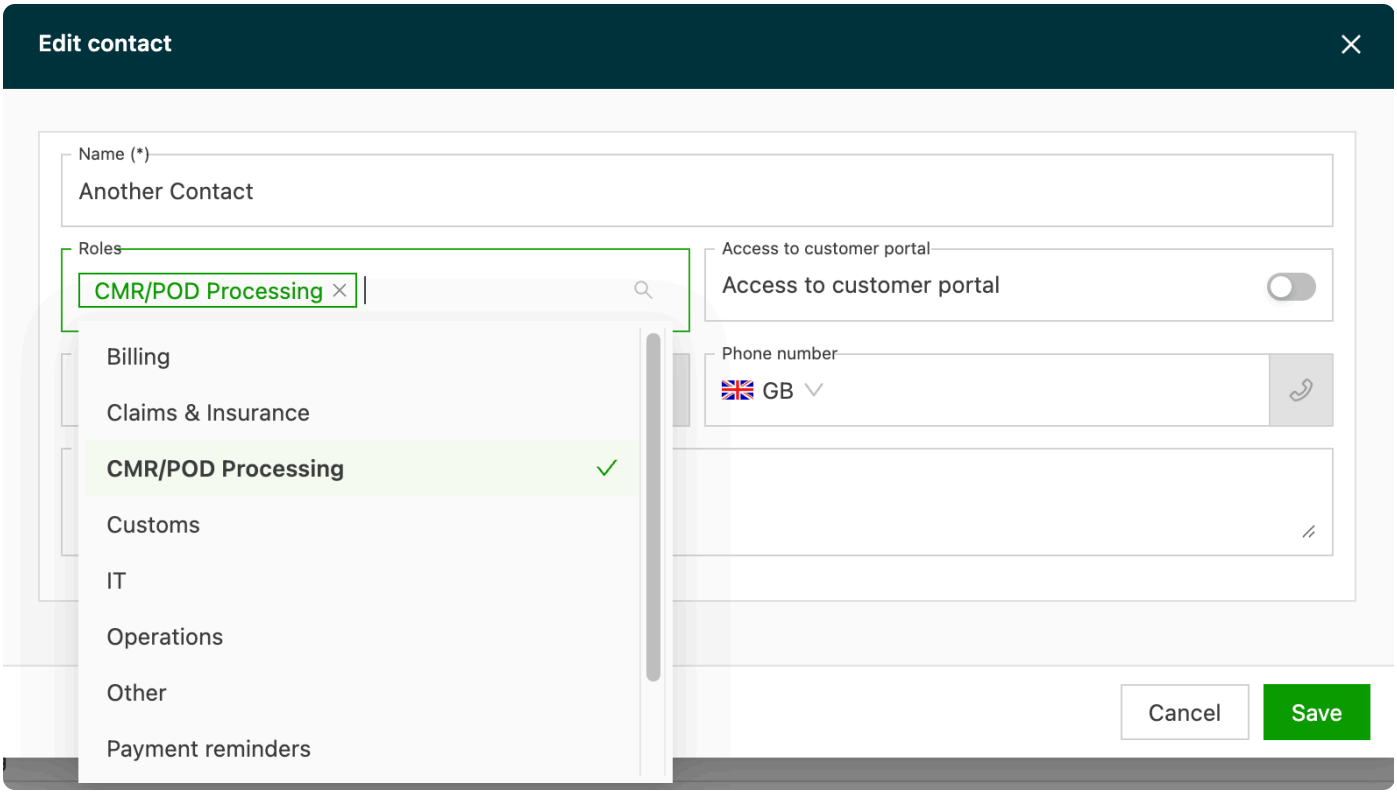


Claims & insurance

This role identifies the contact responsible for handling damage claims and insurance matters at the customer or contract carrier. Tasks configured to send claim notifications or insurance documents target the contacts assigned this role.



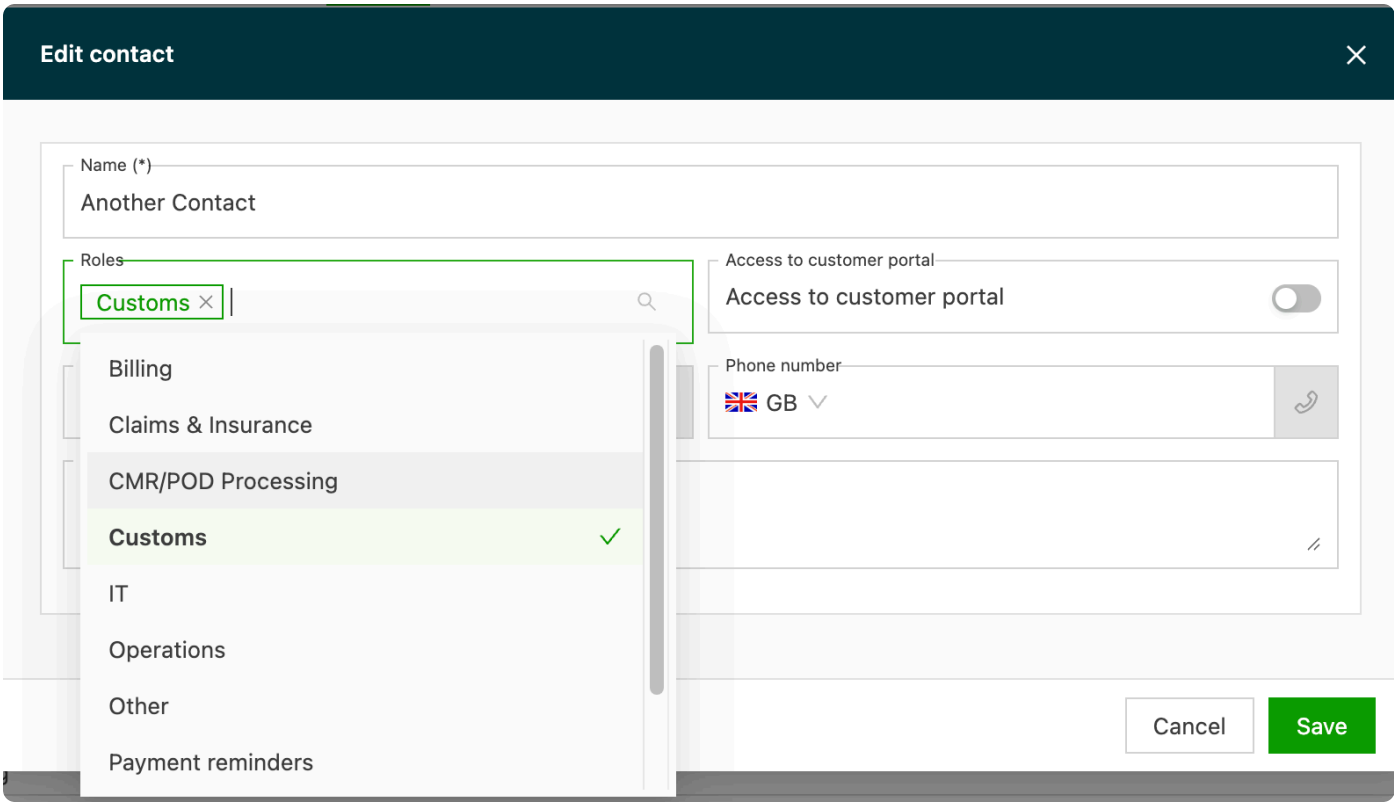
CMR/POD processing



- Direct all CMR/POD-related communications to the right contact and email.
- Tasks configured to send CMRs/PODs after upload or load completion use the contact(s) with this role as email recipients.
    - If no contact has this role, the email may go to a fallback contact, such as Billing (depending on the configuration).

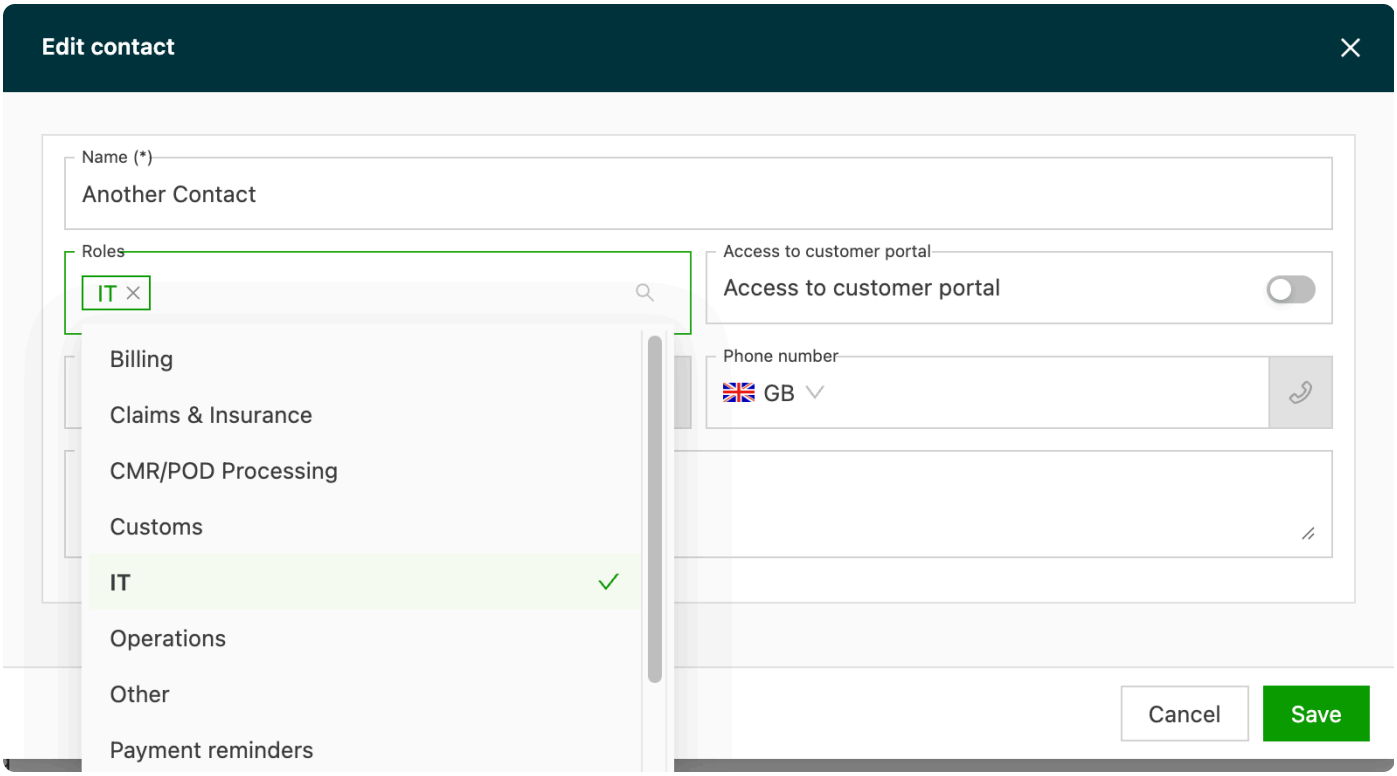
Customs

This role targets the contact responsible for customs clearance and compliance communication. It is useful for tasks that send customs documents, declarations or compliance updates.



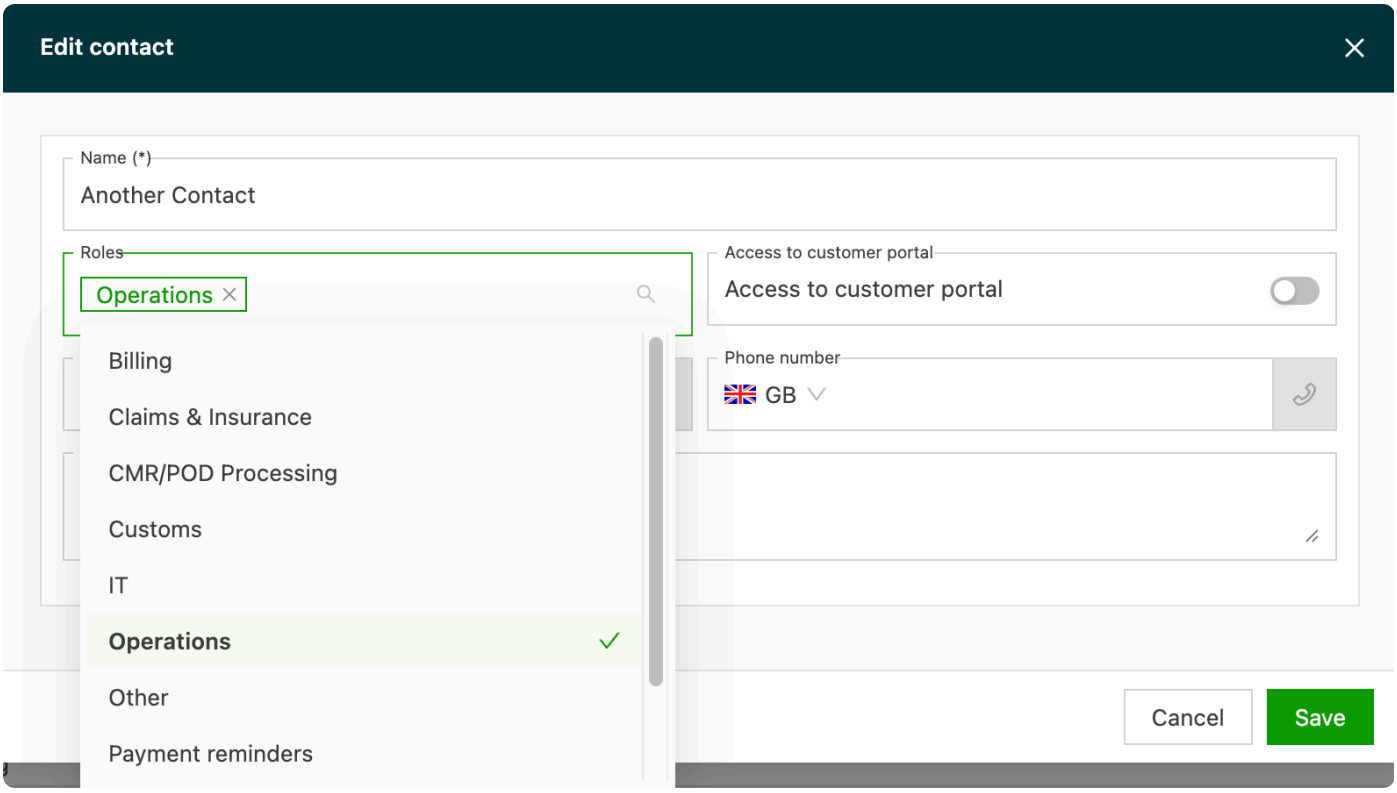
IT

This role identifies the technical contact at the customer or contract carrier. It is typically used for system integration, EDI setup or API-related communication.



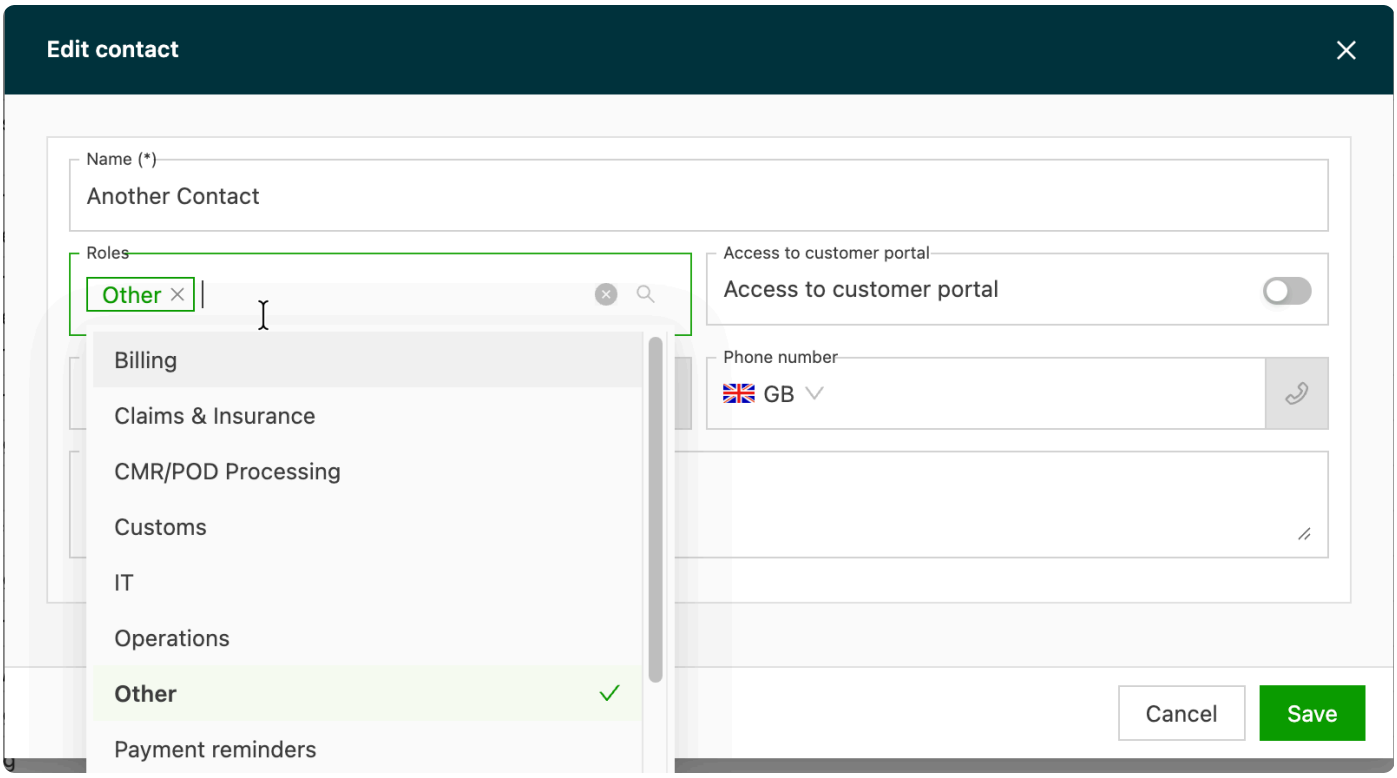
Operations

This role is used by default for tasks that send out transport orders to contract carriers.



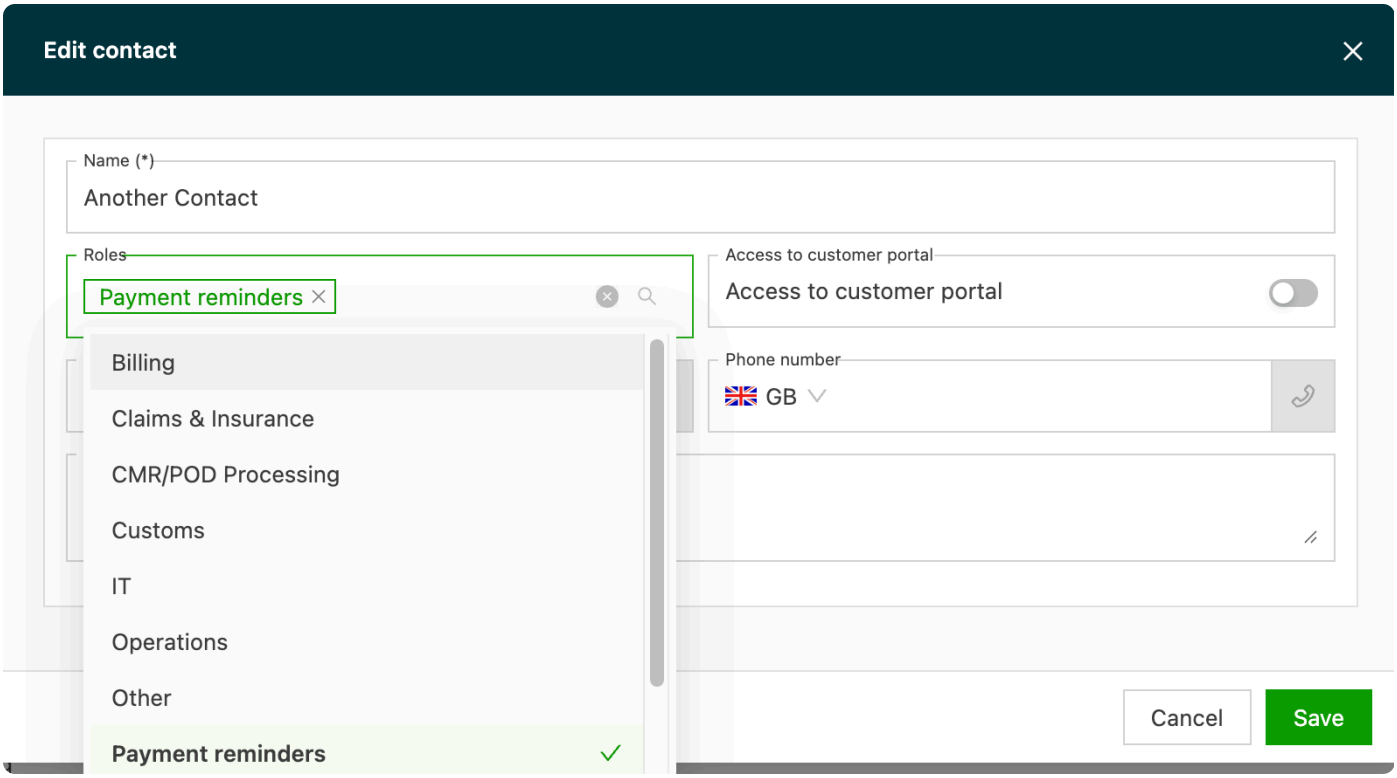
Other

This role can be configured for any other email tasks added to the system.



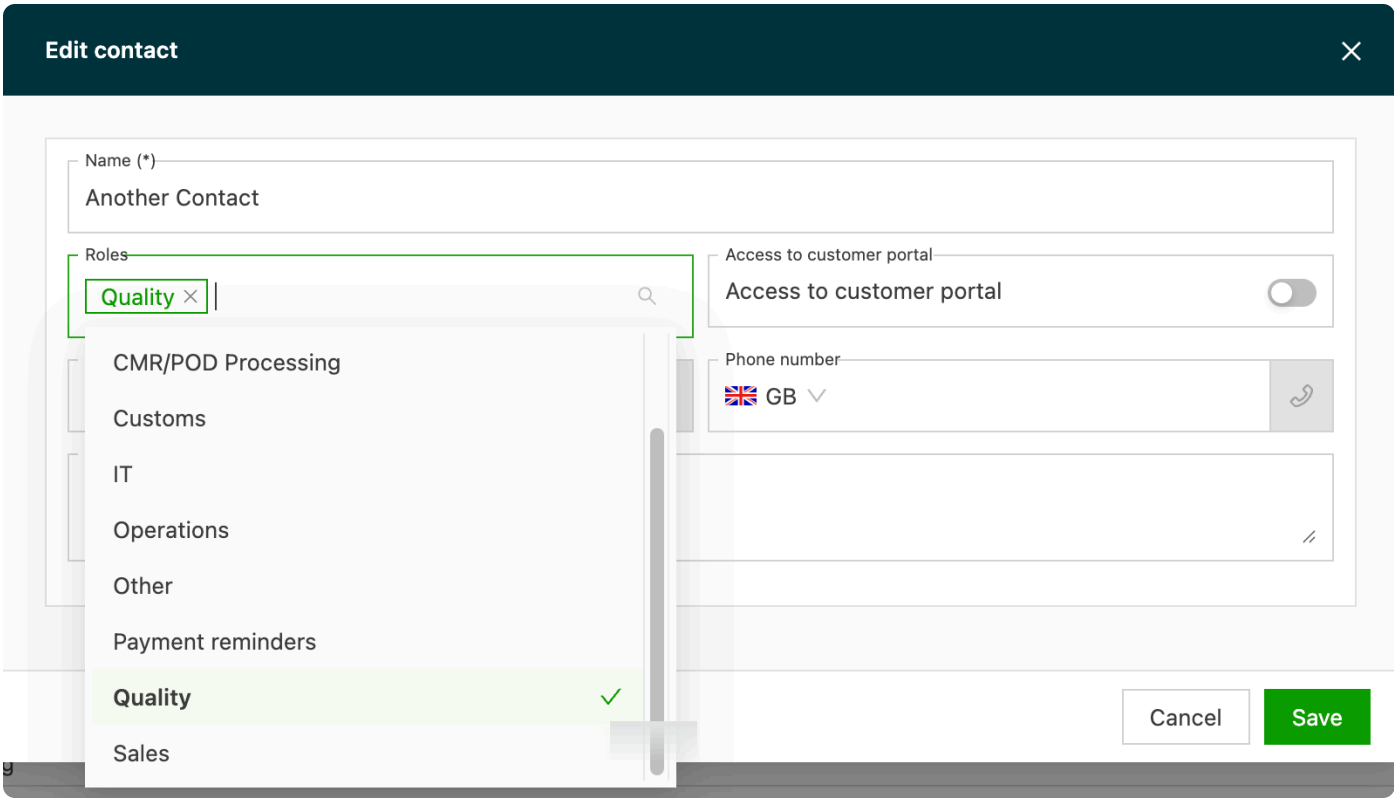
Payment reminders

This role makes it easy to send reminders to the person responsible for payments at the company.



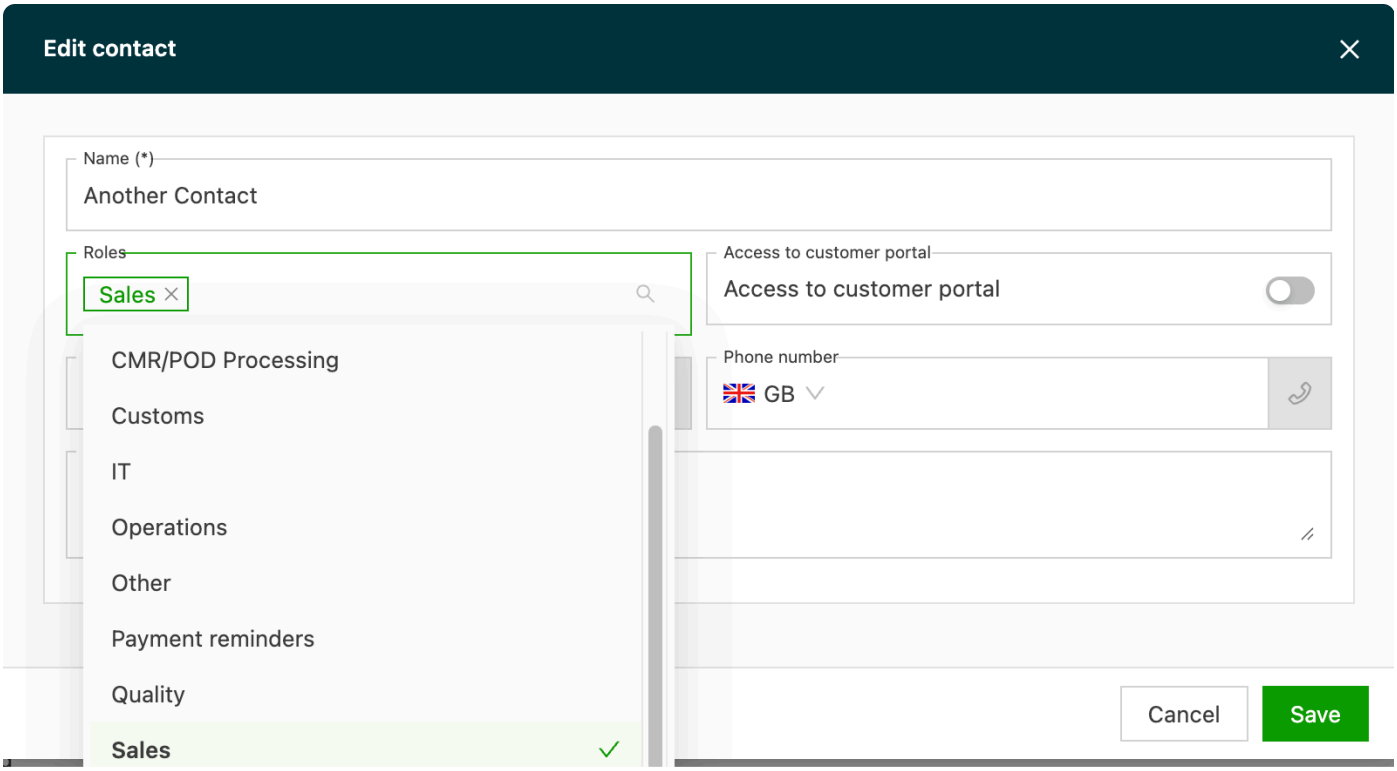
Quality

This role targets the contact responsible for quality control and compliance topics at the customer or contract carrier.

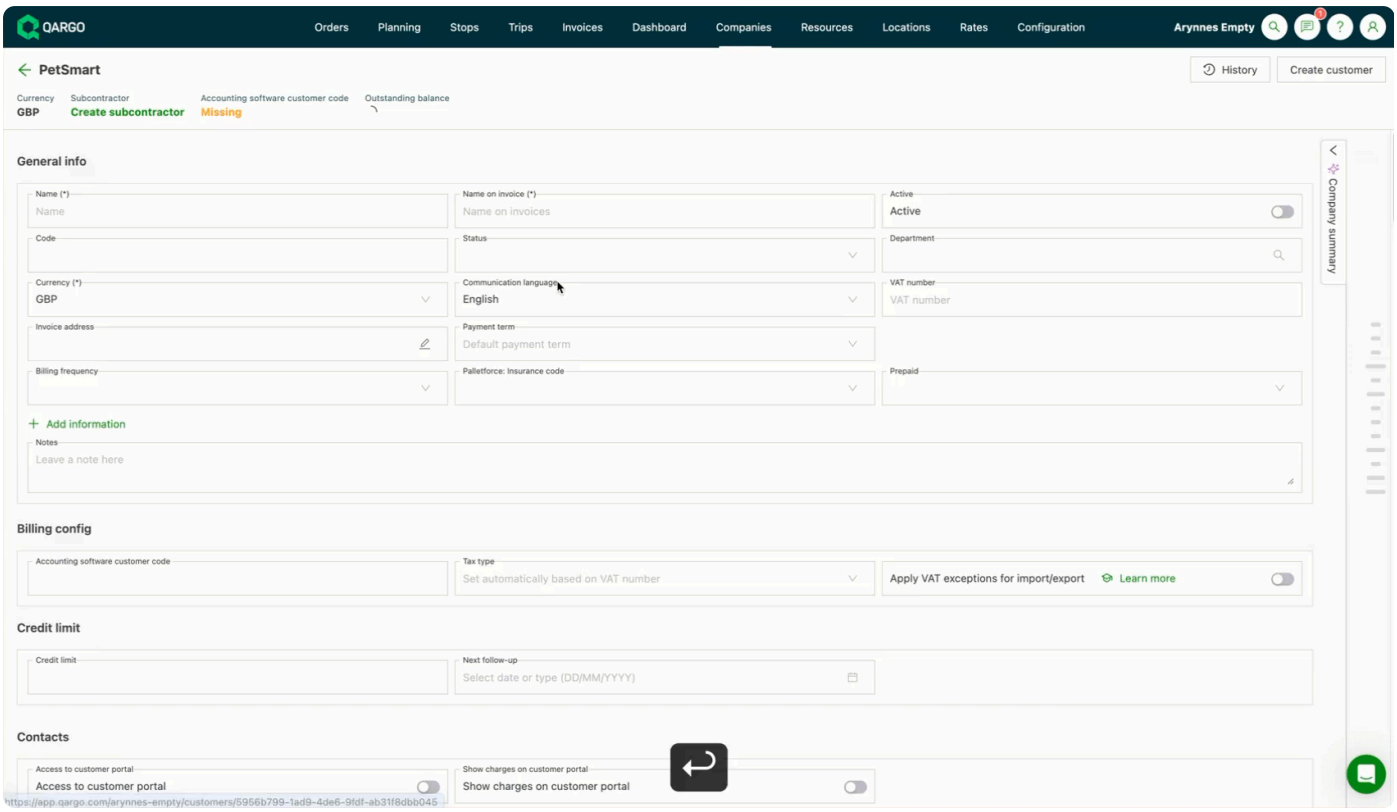


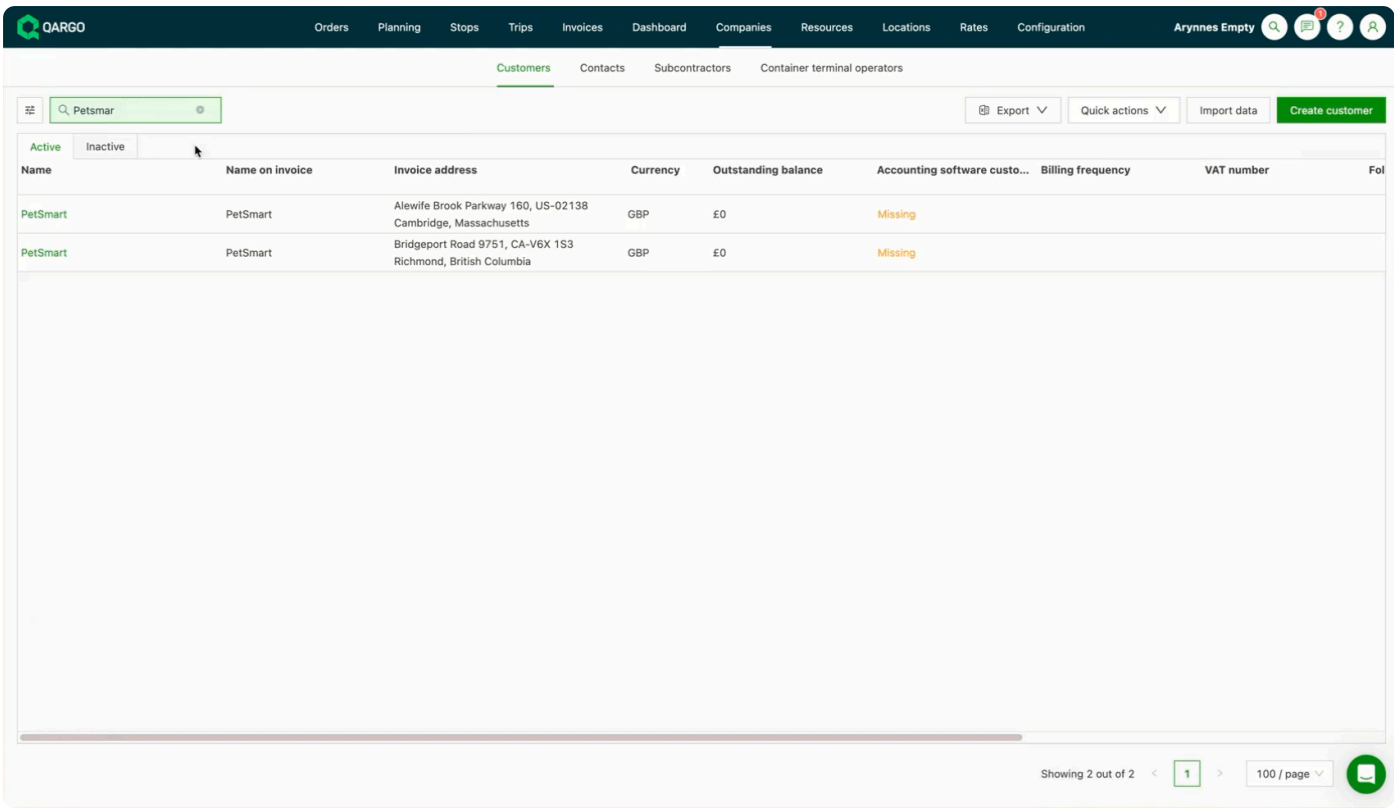
Sales

This role identifies the commercial contact at the customer or contract carrier. It is used for sales and procurement-related communication.



📚 The role can be assigned when creating a company contact or to an existing contact, as shown below. It applies to both customer and contract carrier contacts.


QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Arynnes Empty
PetSmart
History
Create customer
Currency
GBP
Subcontractor
Create subcontractor
Accounting software customer code
Missing
Outstanding balance
General info
Name (*)
Name
Name on invoice (*)
Name on invoices
Active
Active
Code
Status
Department
Currency (*)
GBP
Communication language
English
VAT number
VAT number
Invoice address
Payment term
Default payment term
Billing frequency
Palletforce: Insurance code
Prepaid
Add information
Notes
Leave a note here
Company summary
Billing config
Accounting software customer code
Tax type
Set automatically based on VAT number
Apply VAT exceptions for import/export
Learn more
Credit limit
Credit limit
Next follow-up
Select date or type (DD/MM/YYYY)
Contacts
Access to customer portal
Access to customer portal
Show charges on customer portal
Show charges on customer portal


QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Arynnes Empty
Customers
Contacts
Subcontractors
Container terminal operators
Petsmar
Export
Quick actions
Import data
Create customer
Active
Inactive
Name
Name on invoice
Invoice address
Currency
Outstanding balance
Accounting software custo...
Billing frequency
VAT number
PetSmart
PetSmart
Alewife Brook Parkway 160, US-02138
Cambridge, Massachusetts
GBP
£0
Missing
PetSmart
PetSmart
Bridgeport Road 9751, CA-V6X 1S3
Richmond, British Columbia
GBP
£0
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1
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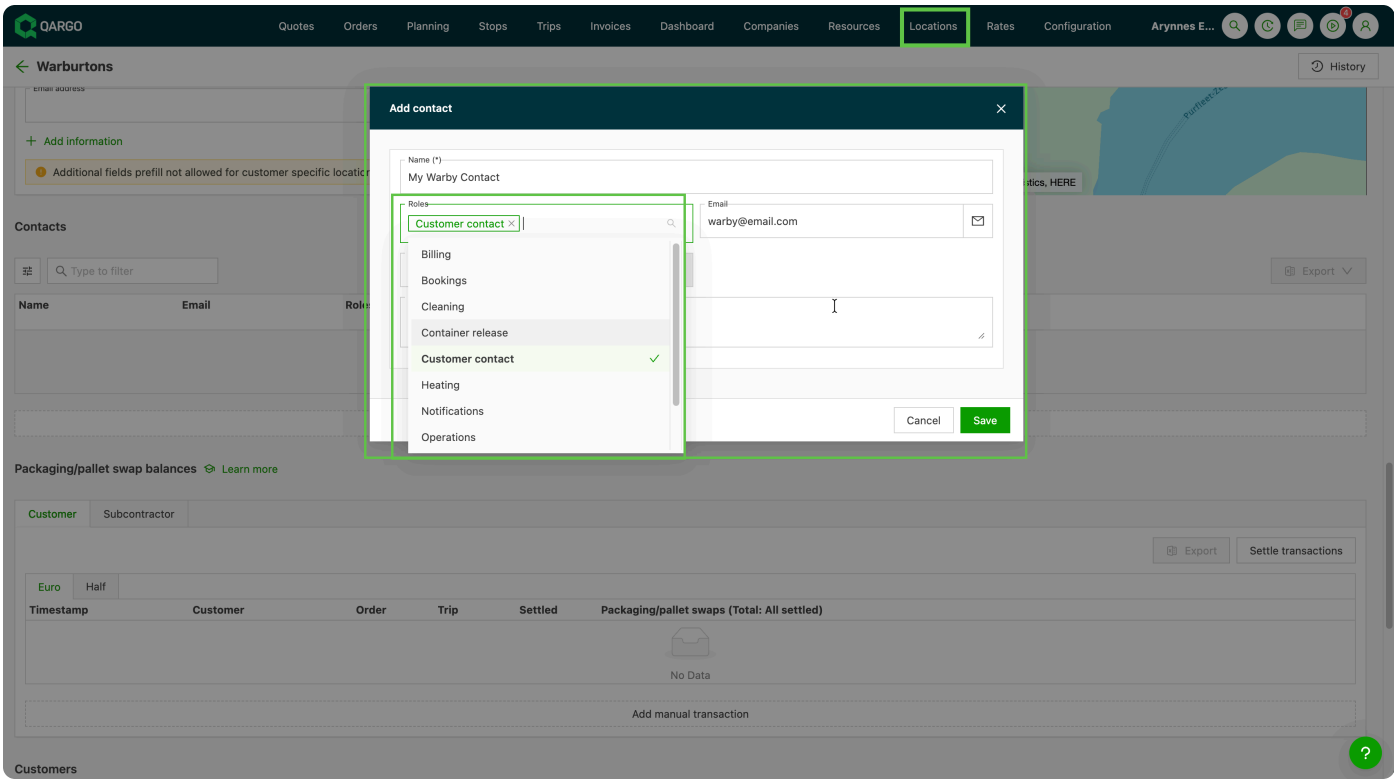
Roles for location contacts

Location contacts use a separate set of roles, distinct from those available on customer and contract carrier contacts. Some roles overlap (Billing, Operations, Other), but most are location-specific.
The roles available for location contacts:

- Billing
- Bookings
- Cleaning
- Container release
- Customer contact
- Heating
- Notifications
- Operations
- Other
- Storage

Location customer contact

The **Customer contact** role is a **general-purpose contact at the location level**. It is used for operational communication with the customer at that specific location. It can be selected when configuring location-targeted workflow tasks.



This video explains the purpose of each **location contact role** and how these roles differ from contact roles at the company level:

▶ https://watchclueso.com/embed/ub47zu8fqir6q80p

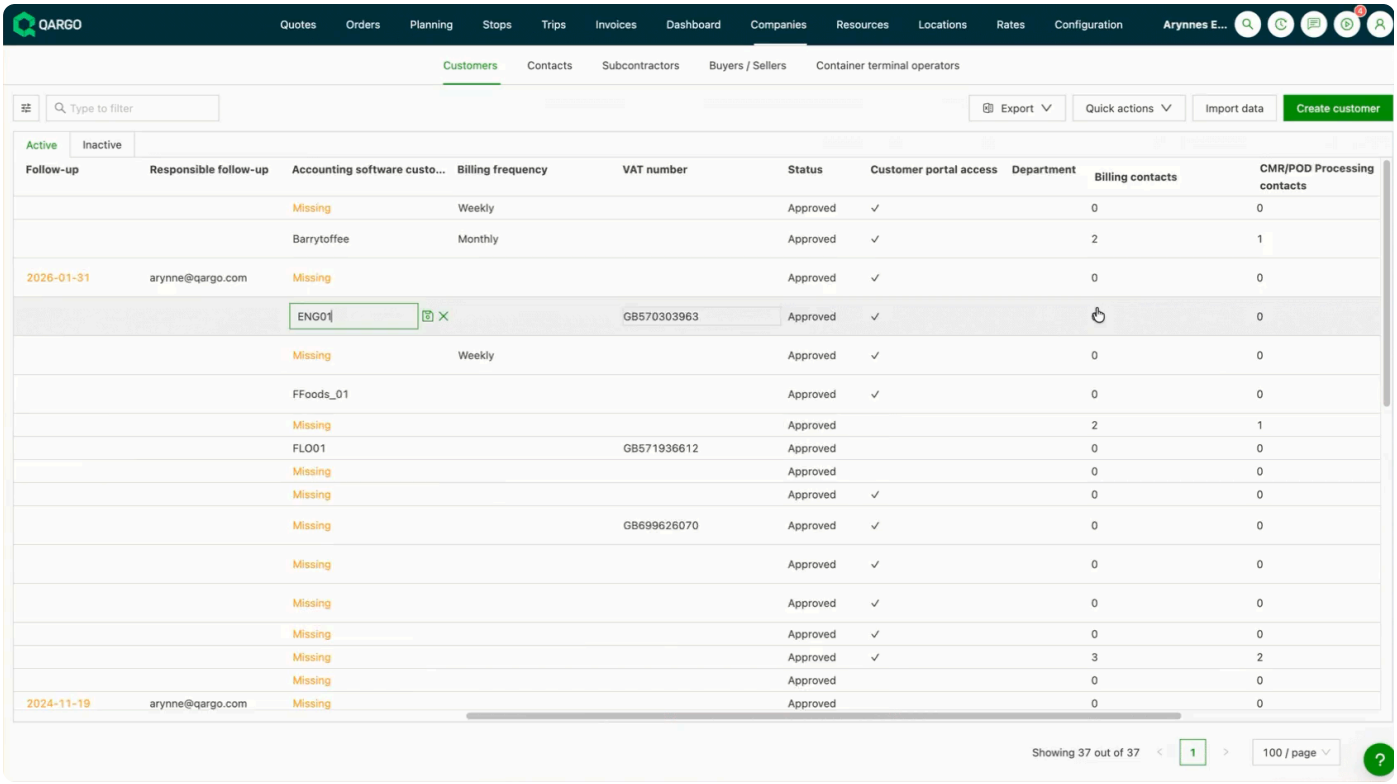
Customer list view columns

Each contact role on a customer can be displayed as a configurable column in the **customer list view**.

- The column shows how many contacts at that customer have the given role assigned. This makes it quick to spot gaps in role coverage.

To enable role columns:

1. Navigate to **Companies > Customers**
2. Open the **Edit column** menu
3. Select the role columns to display and toggle them on
4. Drag the columns to the preferred position in the table view (optional)

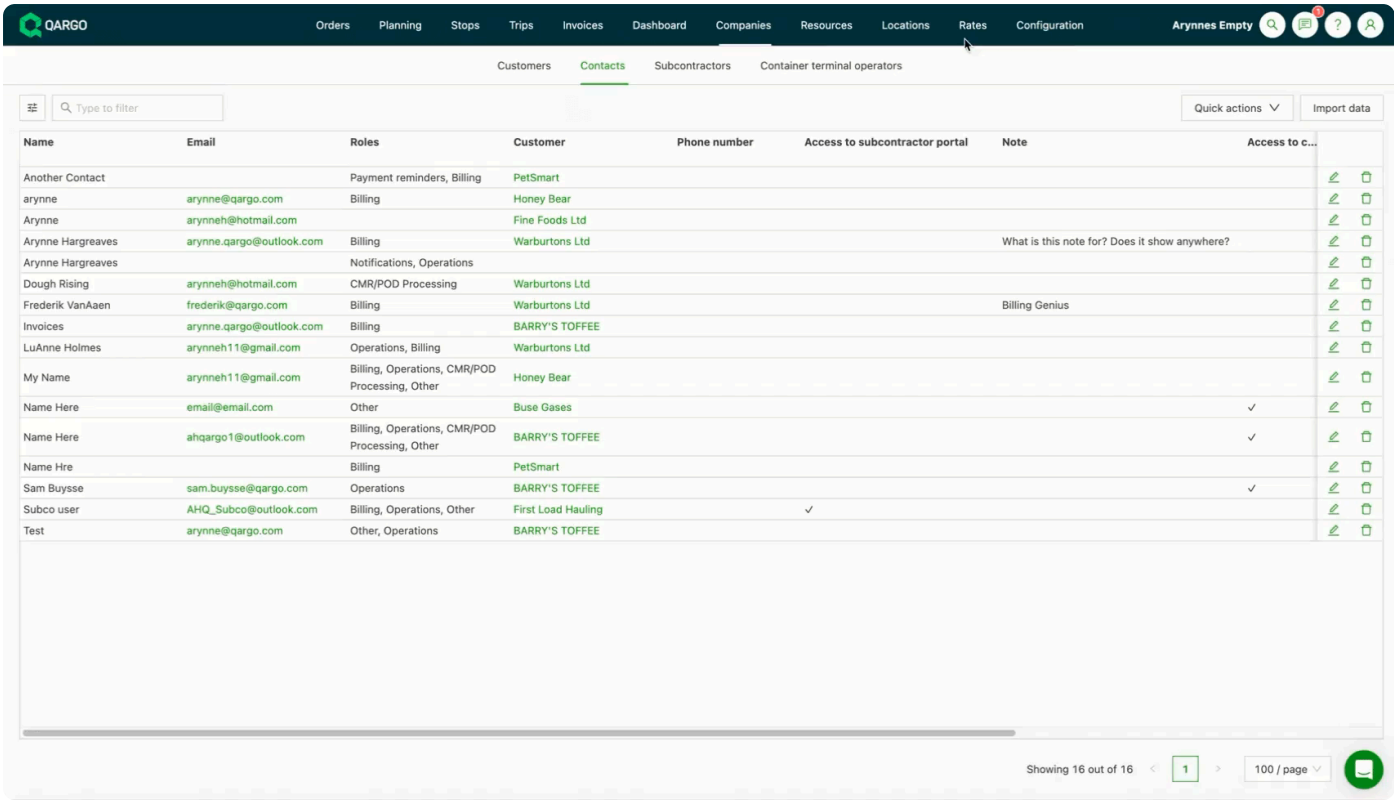


📚 Role columns help quickly spot customers with missing role coverage. Sorting by the **Billing** column with value 0 highlights customers without a billing contact, a common cause of failed invoice tasks.

Using contacts in tasks

‼️ If a contact does not have a role, it **cannot be targeted** by certain automated or manual contact tasks.

- To find which task uses which contact role, navigate to **Configuration > Tasks**
- Locate the related task:



The task example below indicates that invoices are sent to contacts that have **Billing** and/or **Payment reminders** assigned as a role:

