4. Create & link orders from emails and attachments

Link and create orders without manually keying in data, which increases efficiency and reduces data entry risk. The mailbox must be linked.

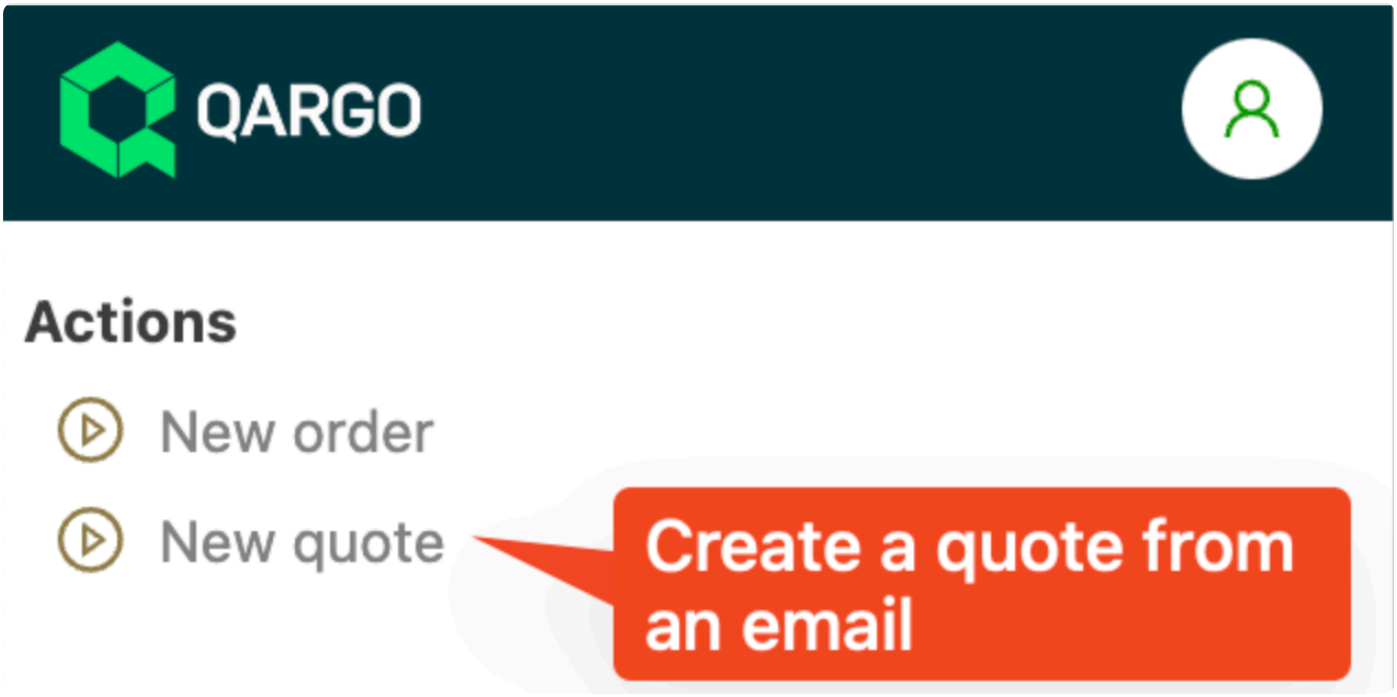
Updated January 6, 2025

Once the mailbox is linked and the Qargo Add-in for Outlook has been added, order communication can be integrated seamlessly, directly from the mailbox.

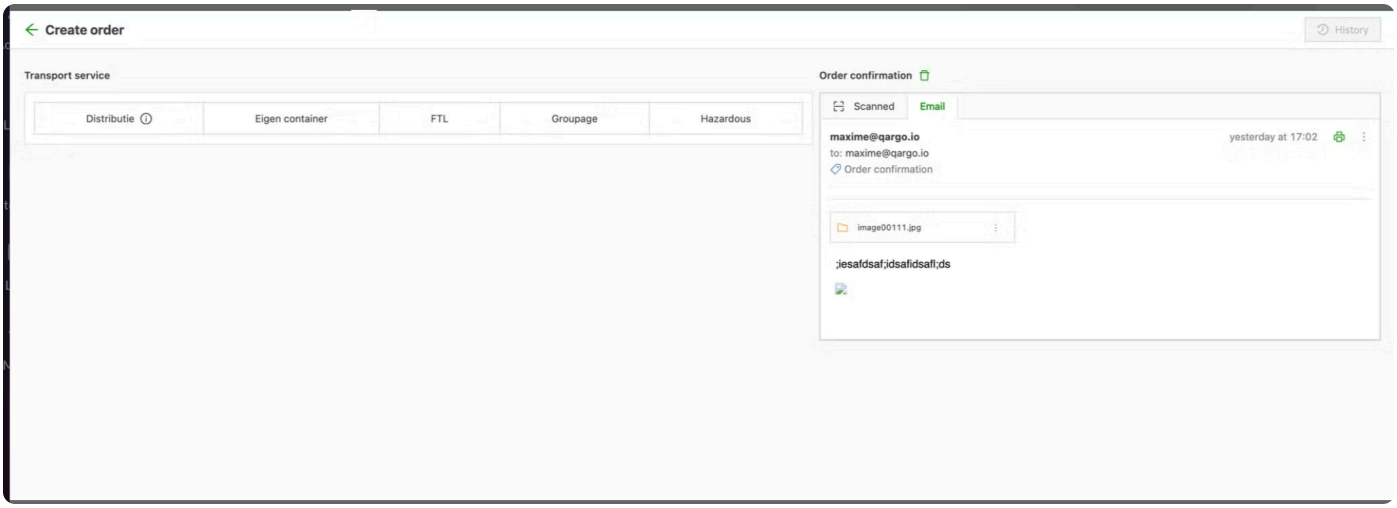
If the Qargo add-in is not installed, go to this link and click 'Get it now'. Contact the internal Super Admin user for help with any additional email setup that may be needed.

Create new order

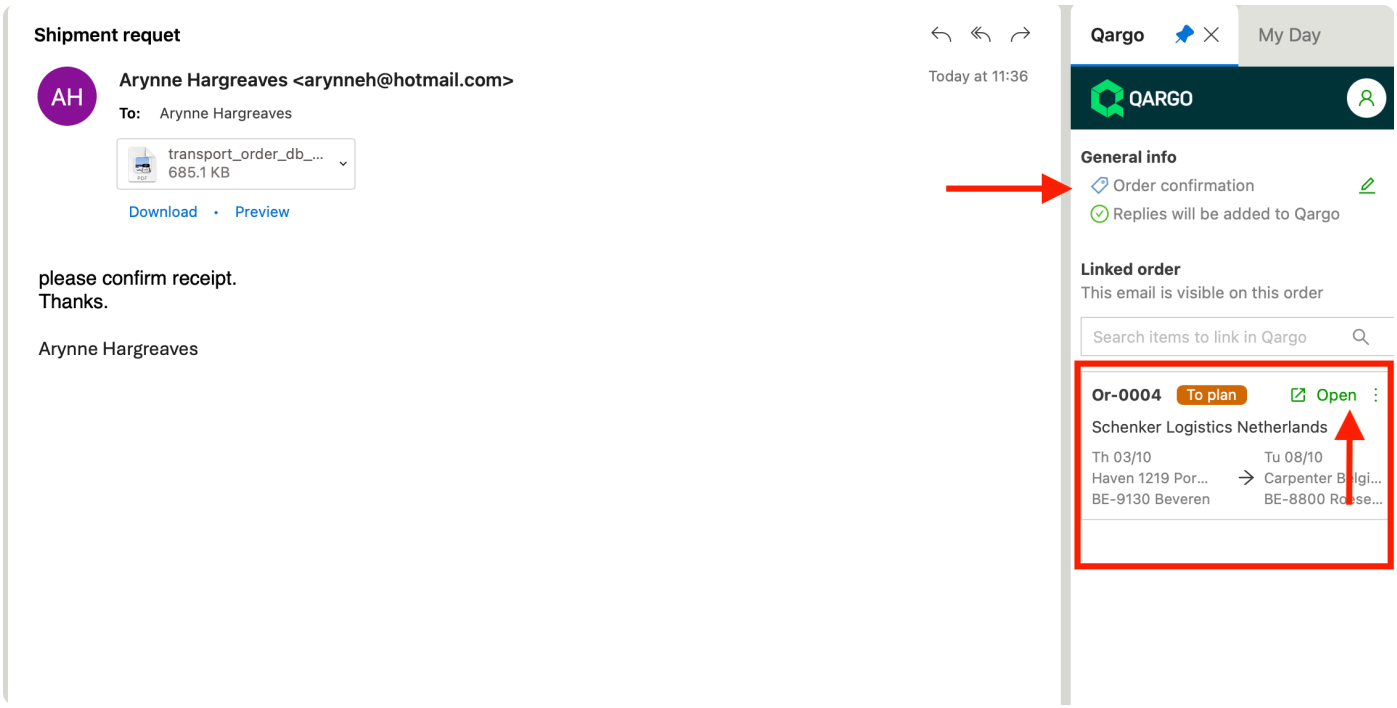
If an email is not yet linked to any order, a new **Actions** section appears at the top of the Qargo pane. It contains the available action **Create new order** or **Create quote**.



Clicking this action opens a new Qargo window in which the email is preloaded to be scanned. This works in the same way as the existing drag-and-drop function. From this point, enter the order using the existing process.

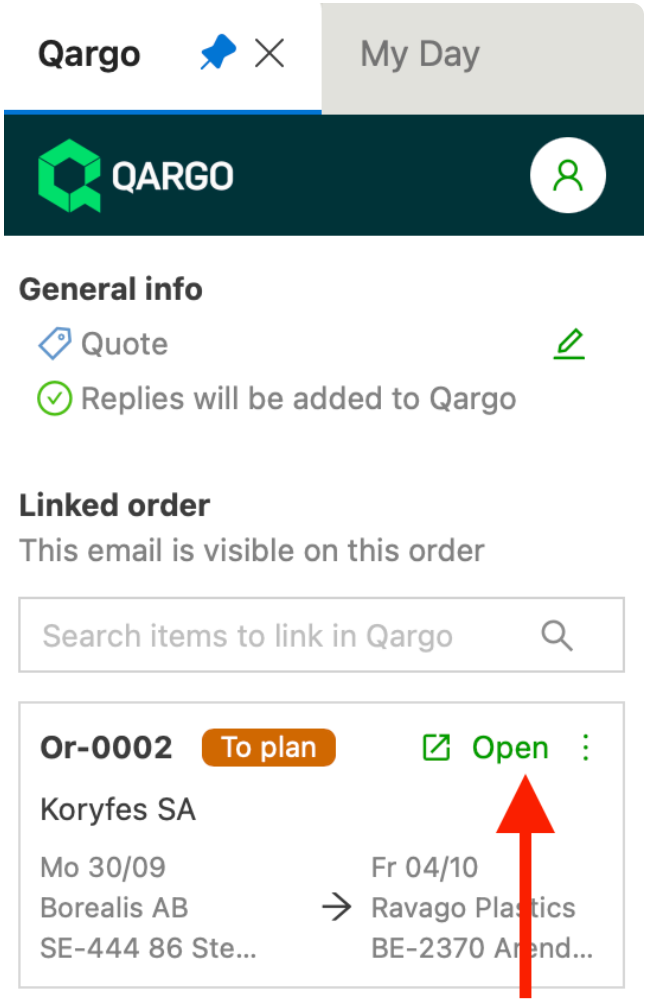


Once the order is created, it is linked to the email. In the Qargo pane, the email details appear under **General info**. To update the email type, click the pencil icon. The order information appears in the **Linked order** section.

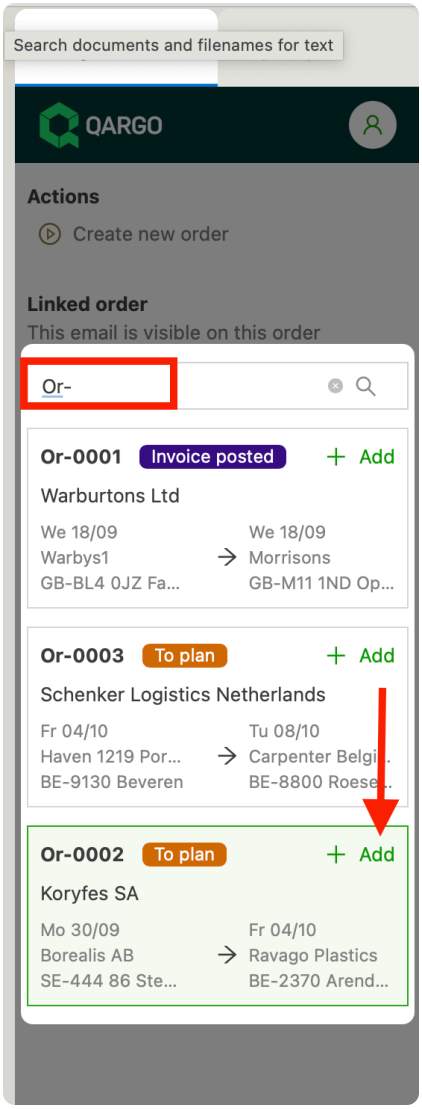


Linking an order

If the order was created from the email, the link is created automatically. The **Linked order** information includes the order number, order status, customer name, and pickup and delivery information. Clicking **Open** goes directly to the order in Qargo.

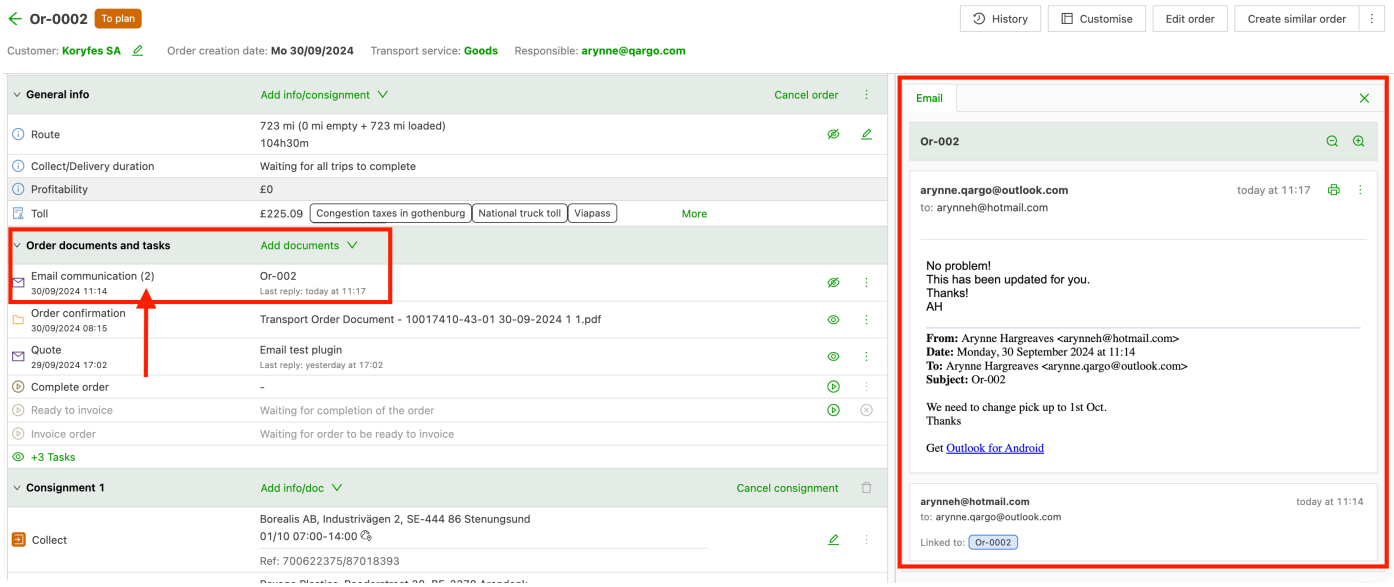


If an email arrives for an order that is already in Qargo, link it by searching for the order number under **Linked order**. Once the order is found, click **+Add** to link it.



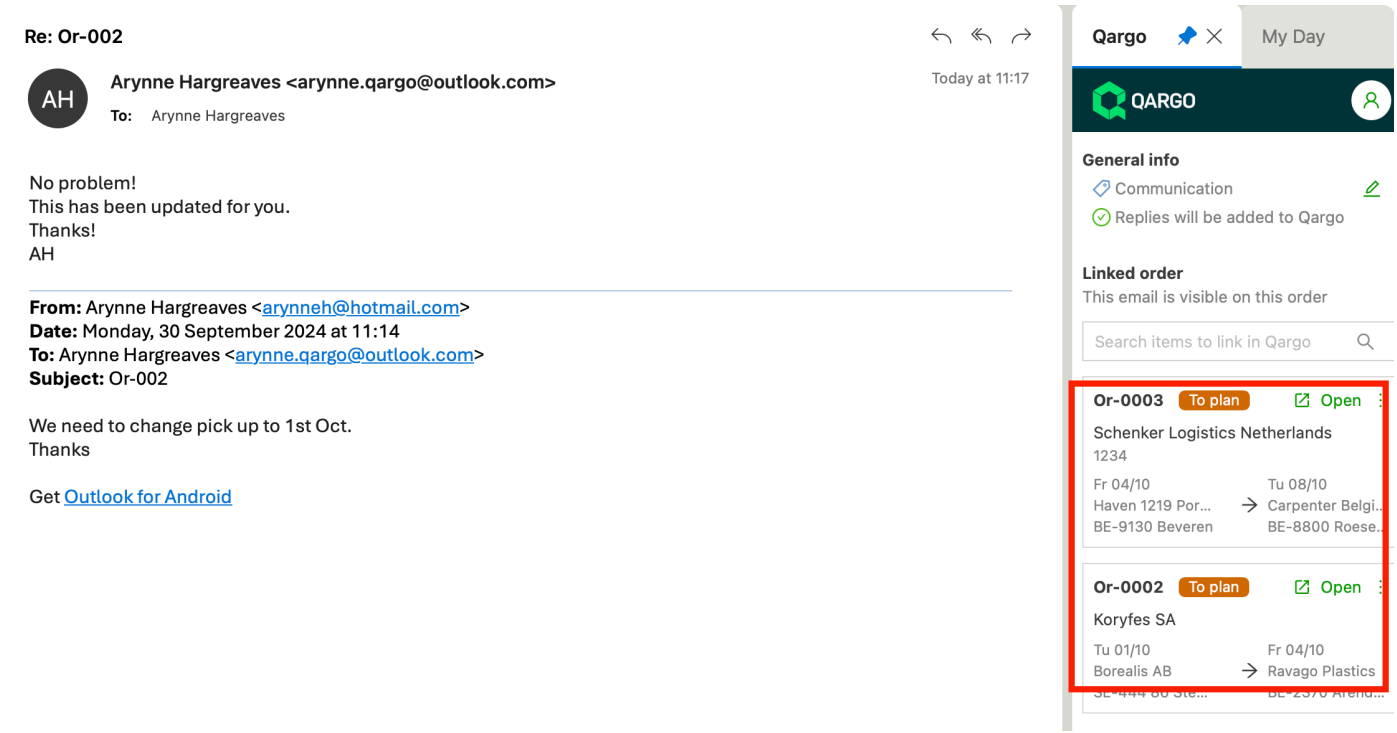
This links the email to the order, so any subsequent emails, both incoming and outgoing, are associated with the order.

The emails are visible directly in the order in Qargo. The number (x) next to **Email communication** shows how many emails have been received in that email chain.



Linking multiple orders to an email: now available!

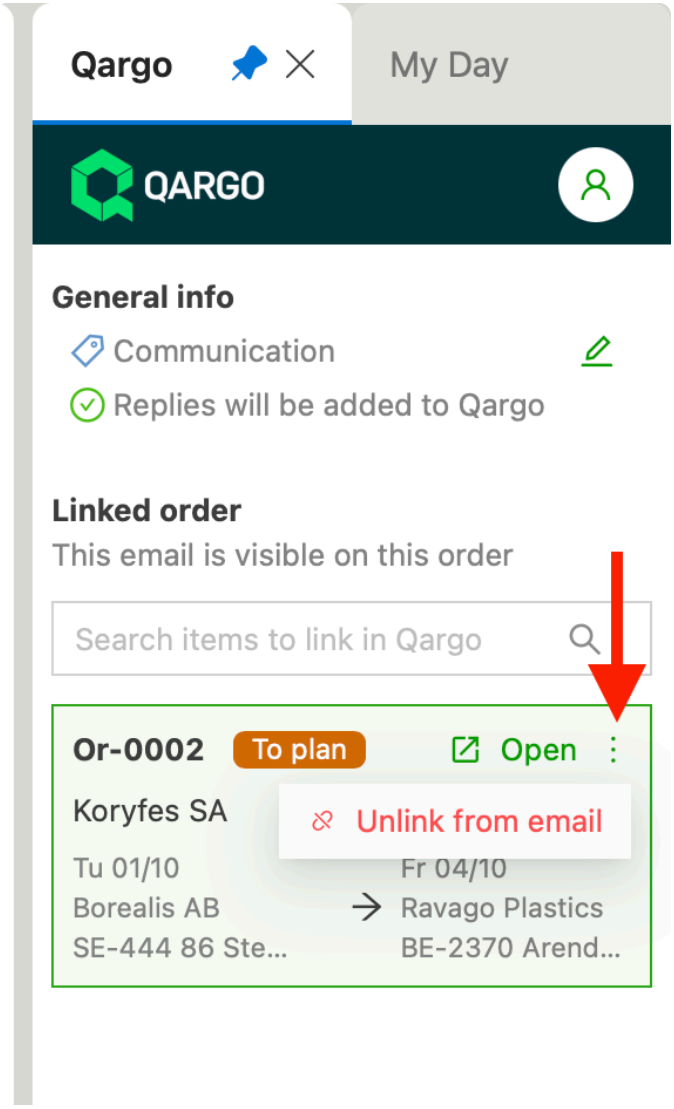
Click here for details.



Tips:

Unlink email thread

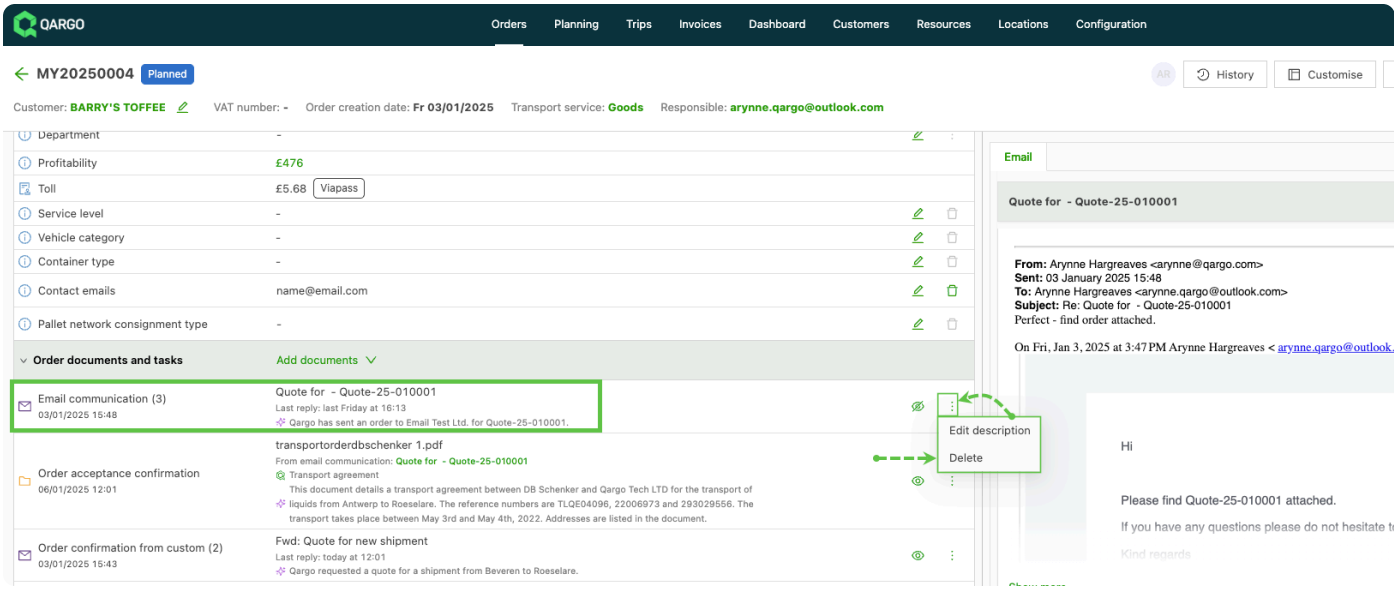
Emails can be unlinked from an order. Click the three vertical dots and then ***Unlink from email***. The thread remains visible in the order, but unlinking prevents any further email communications from being added.



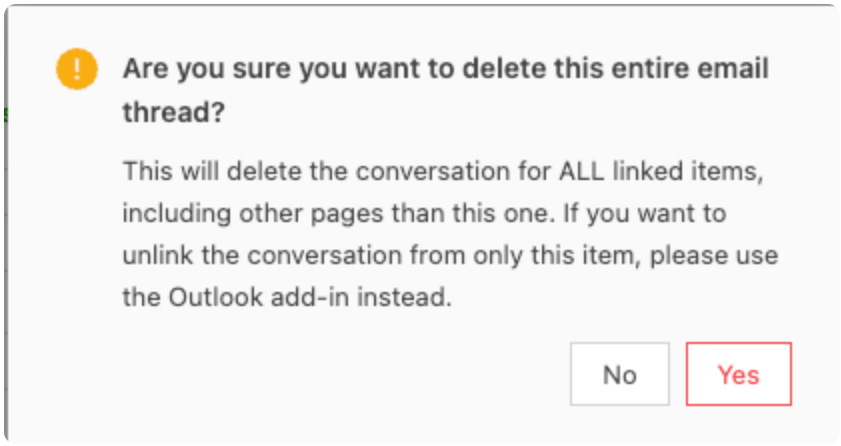
Delete email thread

If an email thread has been incorrectly associated with an order, the entire email thread that was linked to Qargo via the Outlook Add-in can be deleted.

- In Qargo, click the three-dot menu in the **Email communication** panel.
- Select ***Delete***.



- Click **Yes** to complete the deletion.

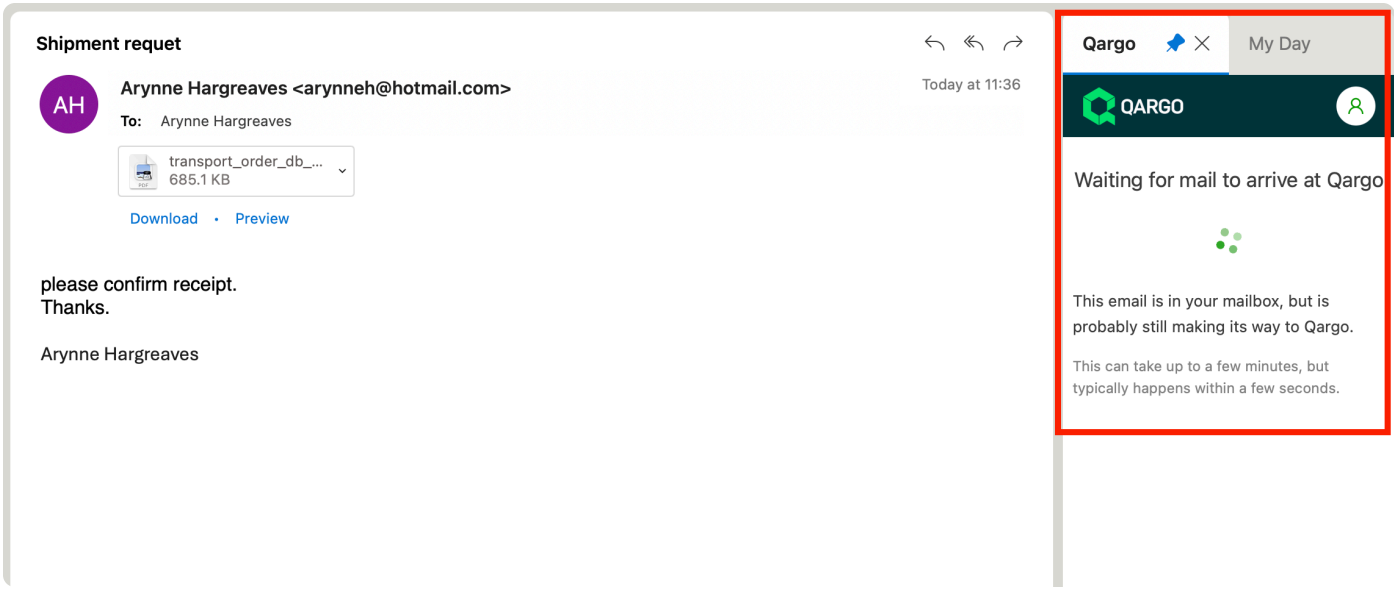


This **is not** the same as unlinking an order from a thread. Deleting the email thread removes it from the system entirely for **all** items linked to the messages, i.e., orders, shipments, invoices, etc.

> Only use the **Delete** option when the intention is to remove **all** email communication.

Where's my email?

It may take a moment for the email to be received in Qargo. The highlighted message appears while the email is processed.



Congratulations! Email Intelligence is now successfully in use in Qargo!