Email Intelligence: new features

This article details the latest features added to the Email Intelligence functionality.

Updated January 29, 2025

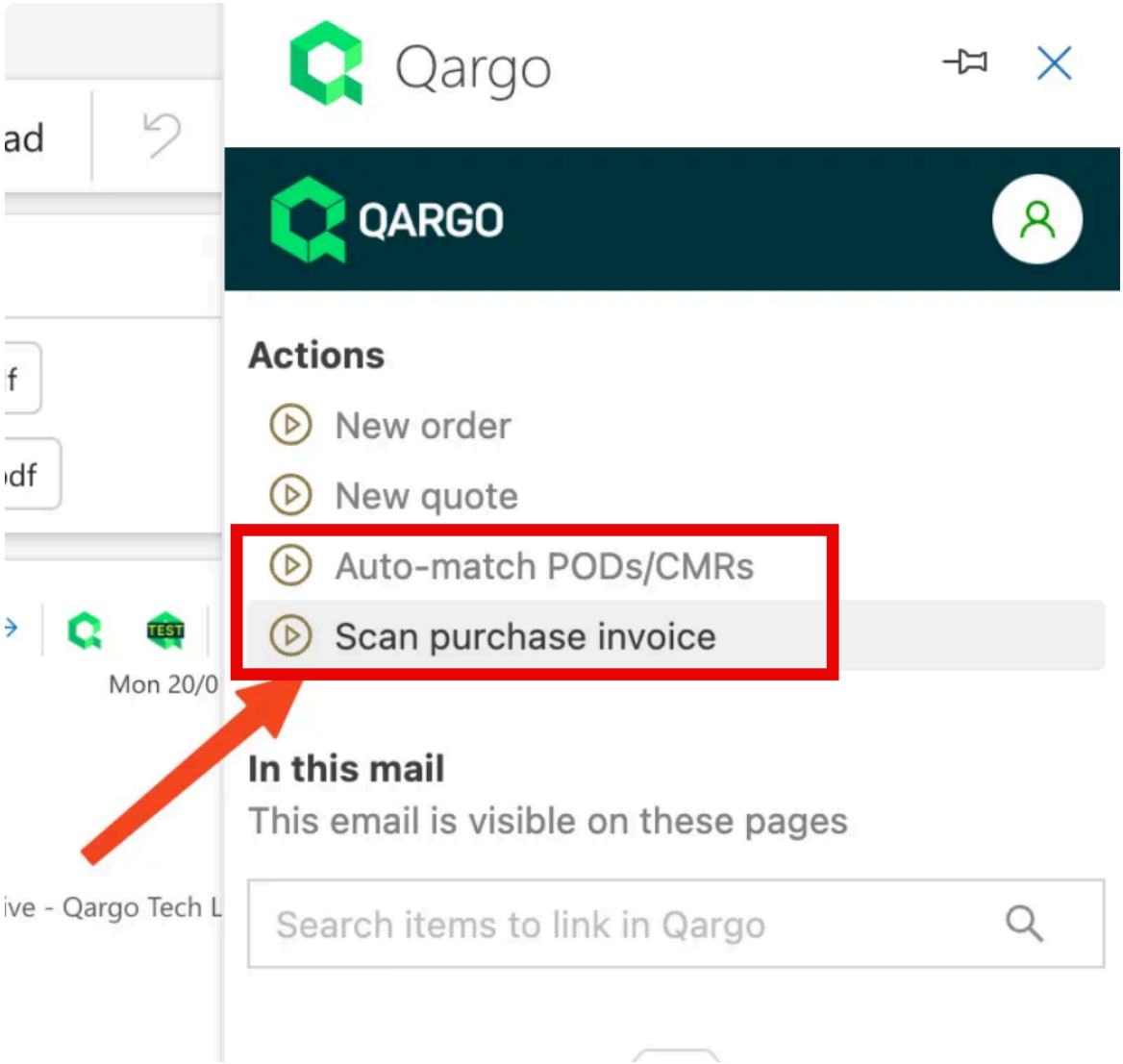
The Email Intelligence functionality in Qargo will continue to grow and develop. As enhancements to this tool are introduced, this page will be updated with the latest information. Check back often to see what is new.

Document matching (POD/CMR) via Outlook add-in
Scan carrier invoices to upload directly from email
Linking multiple orders to an email
Email images
Adding email attachments as documents
Email summaries by AI
Task executor email address

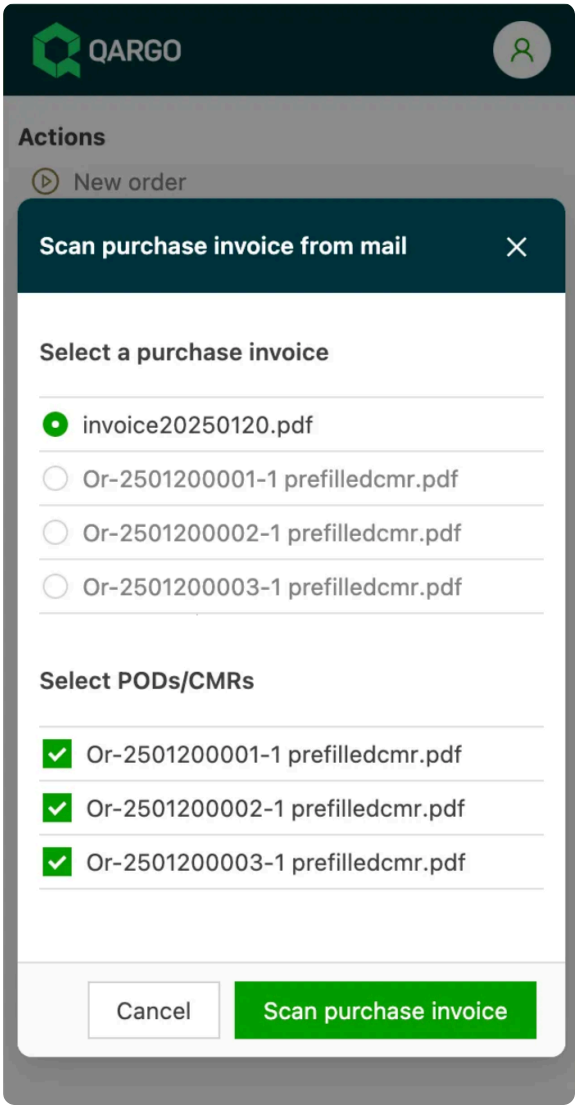
Document matching (POD/CMR) via Outlook add-in.

The **Qargo Outlook add-in** has been enhanced to streamline invoice and POD uploads, saving time and reducing manual steps.

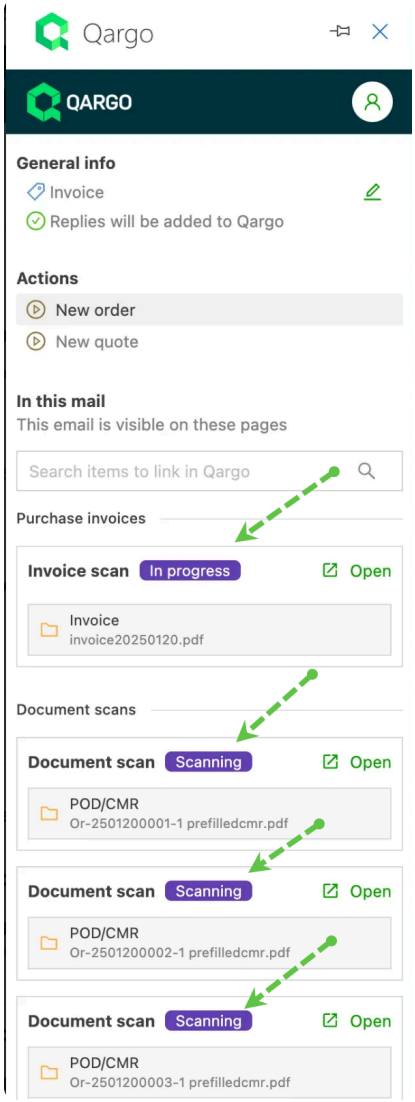
To use this feature, click **“Scan carrier invoice”**:



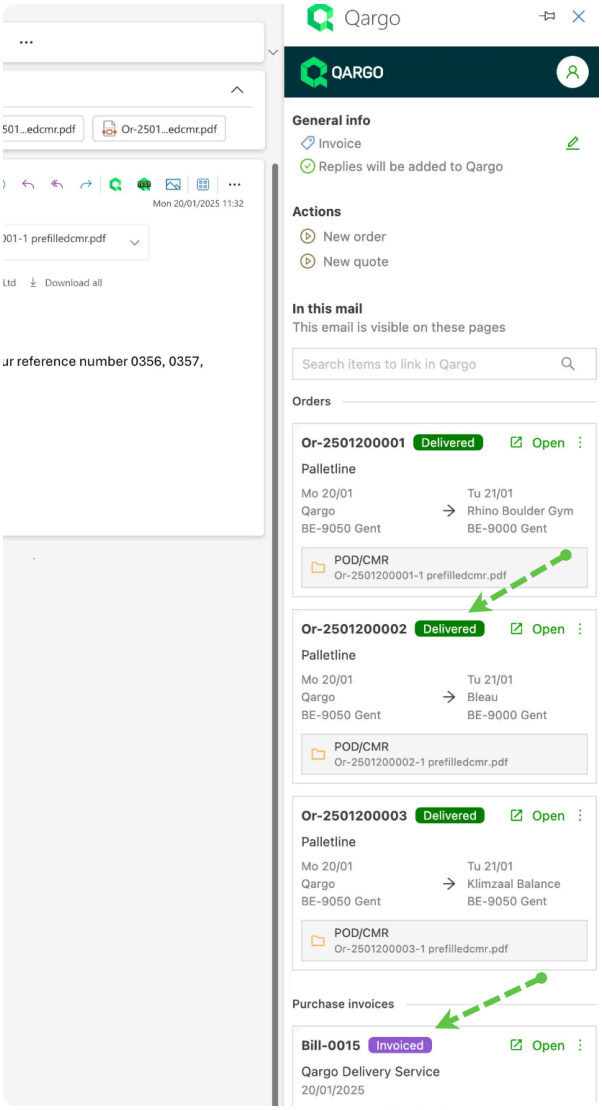
Select the carrier invoice PDF, then choose which attachments should be added as POD/CMR:



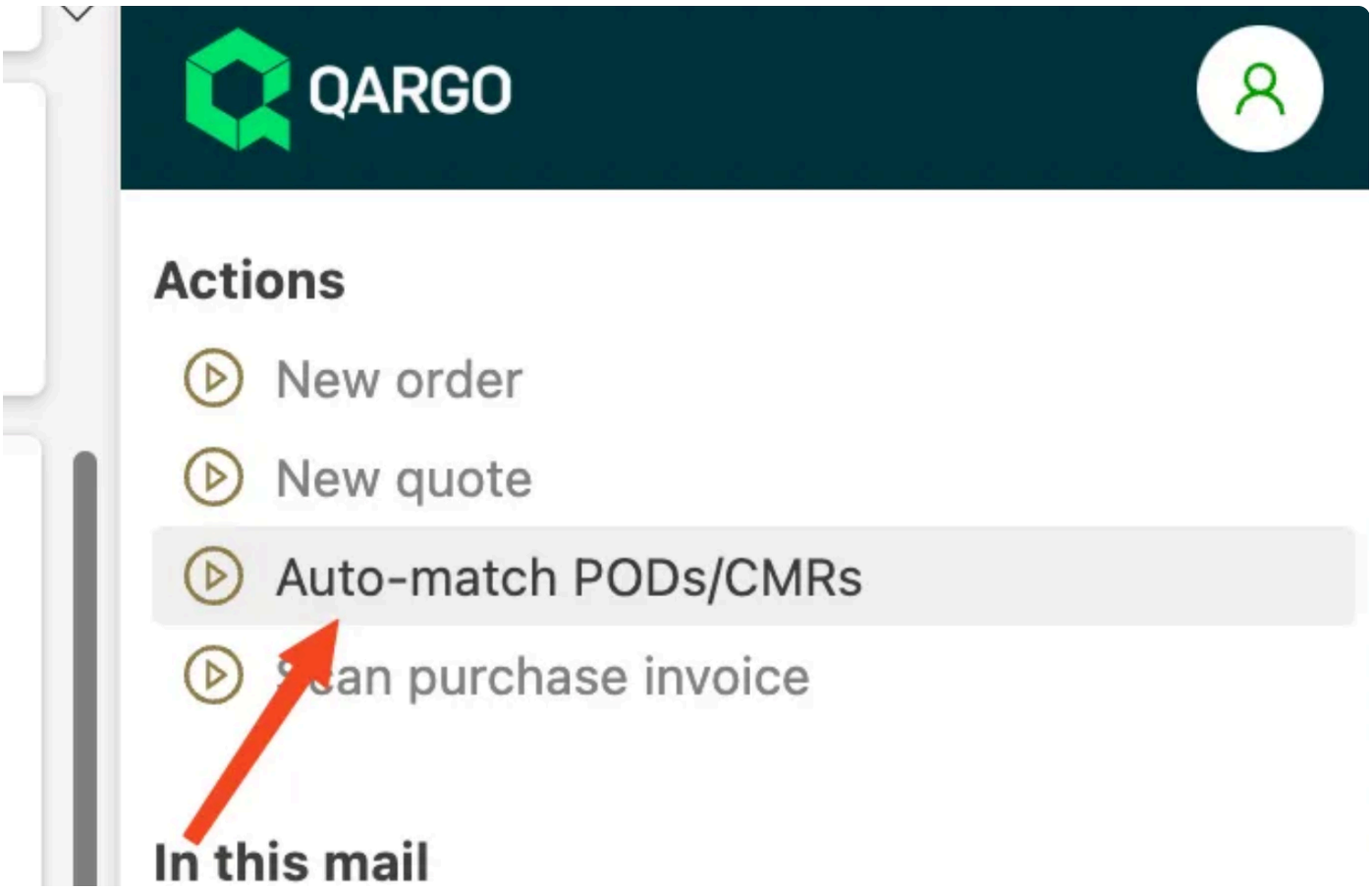
Monitor the scan progress in the Outlook side panel.



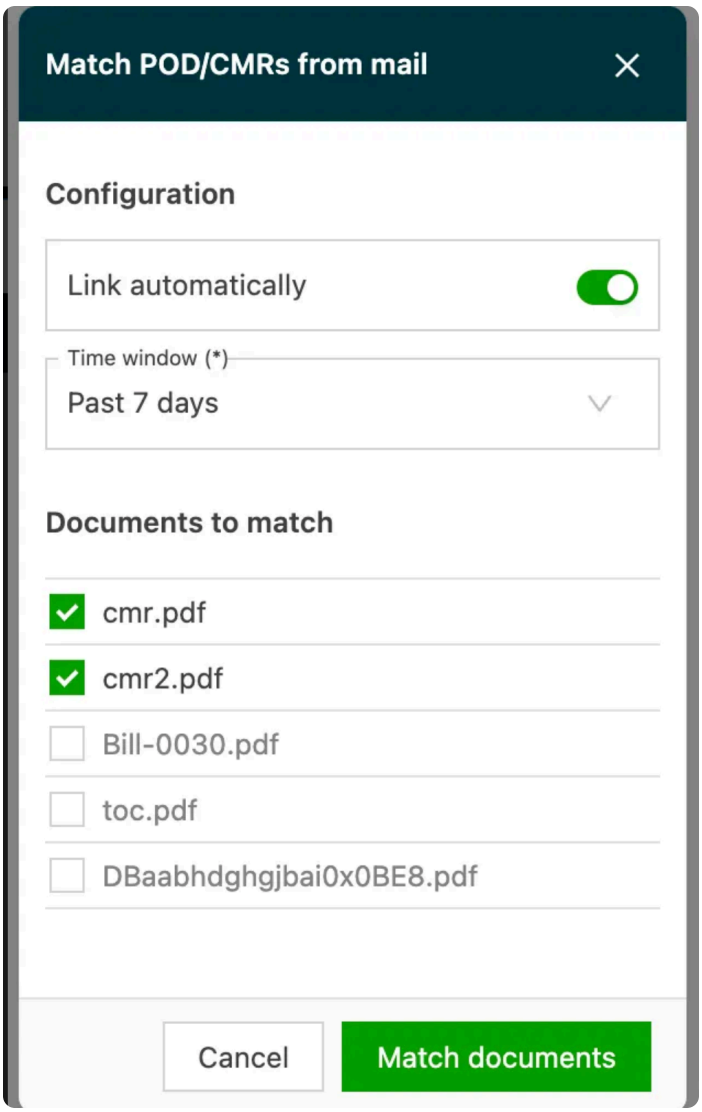
Once matched to the correct shipments, the relevant orders appear in the side panel, and the email thread is linked to the order in the Qargo app, providing visibility on both sides.



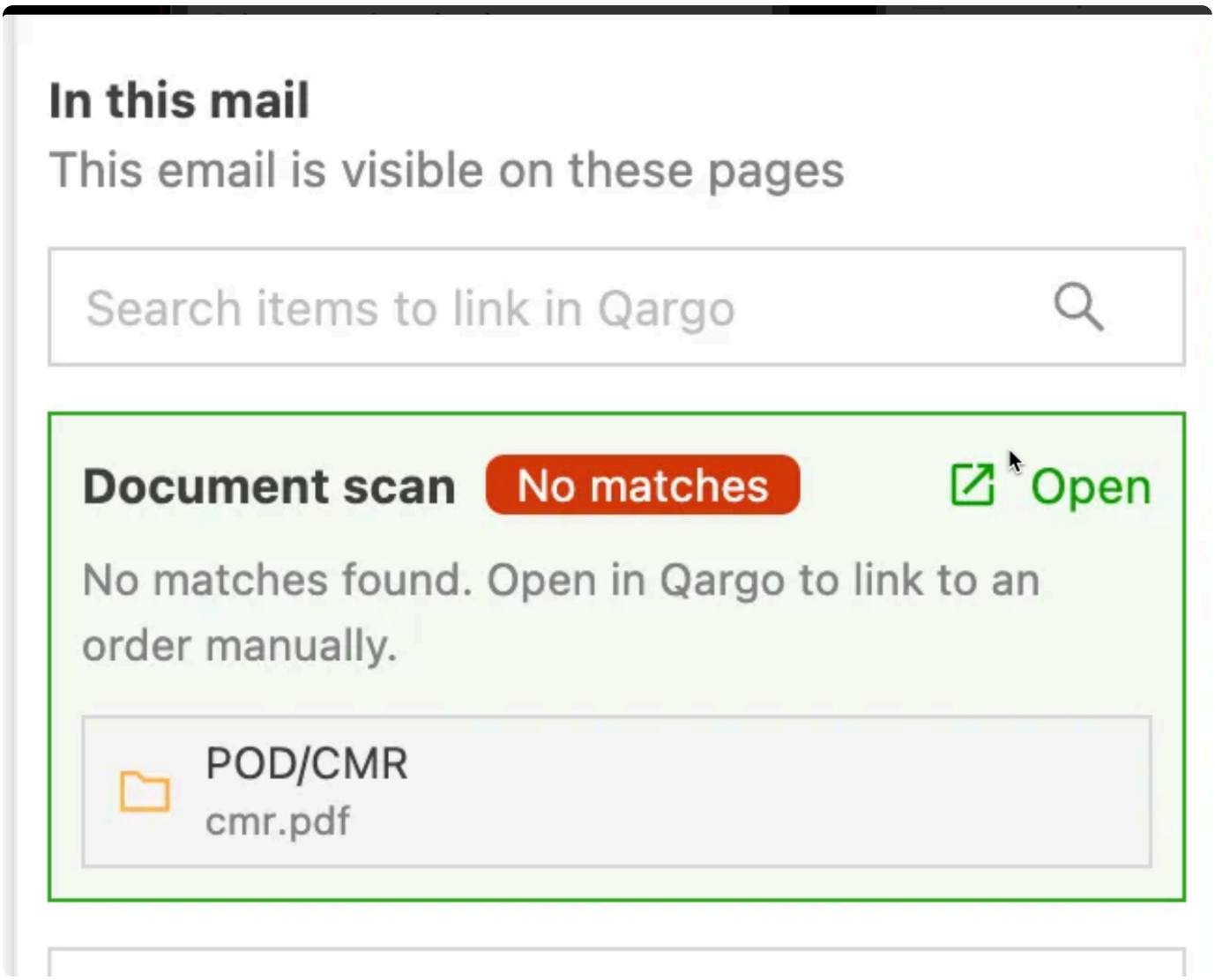
It is also possible to upload POD documents directly from the Outlook add-in, similar to the **Upload documents** tab in the app.



Users can select multiple PDF attachments and configure matching settings.

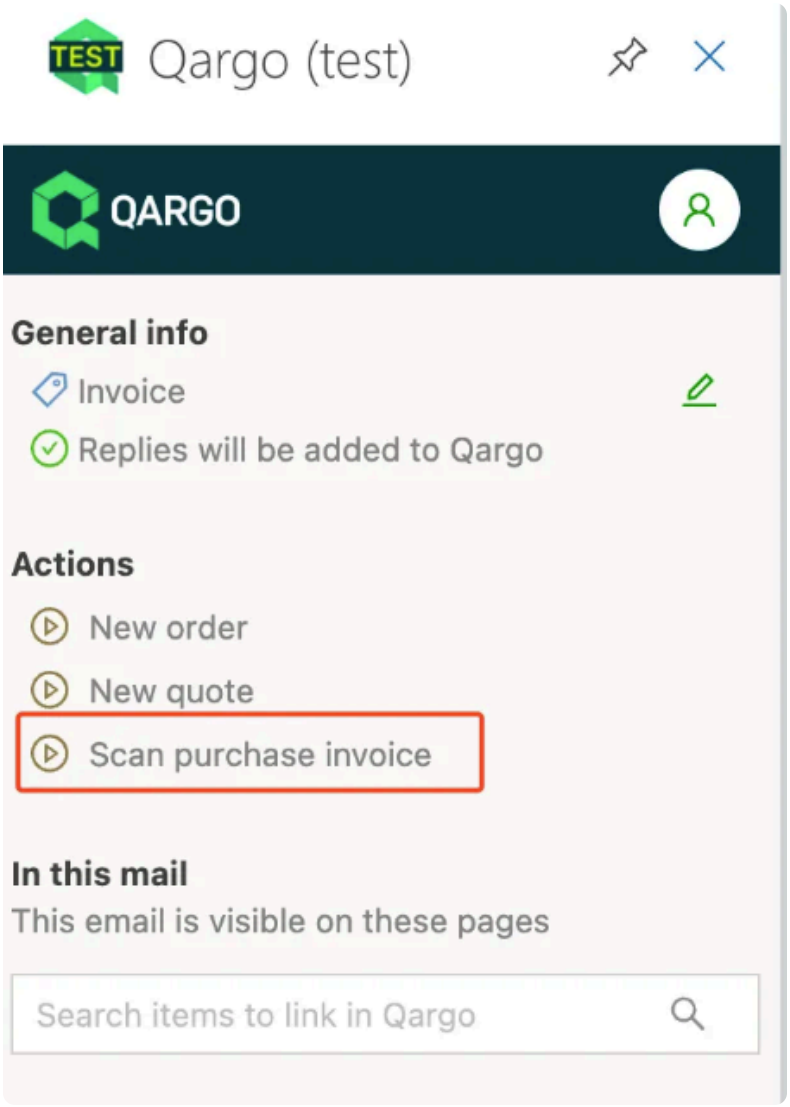


If matching fails, users see this status in the Outlook side panel. Click the **Open** option to open the **Upload documents** page in Qargo and complete linking the document.

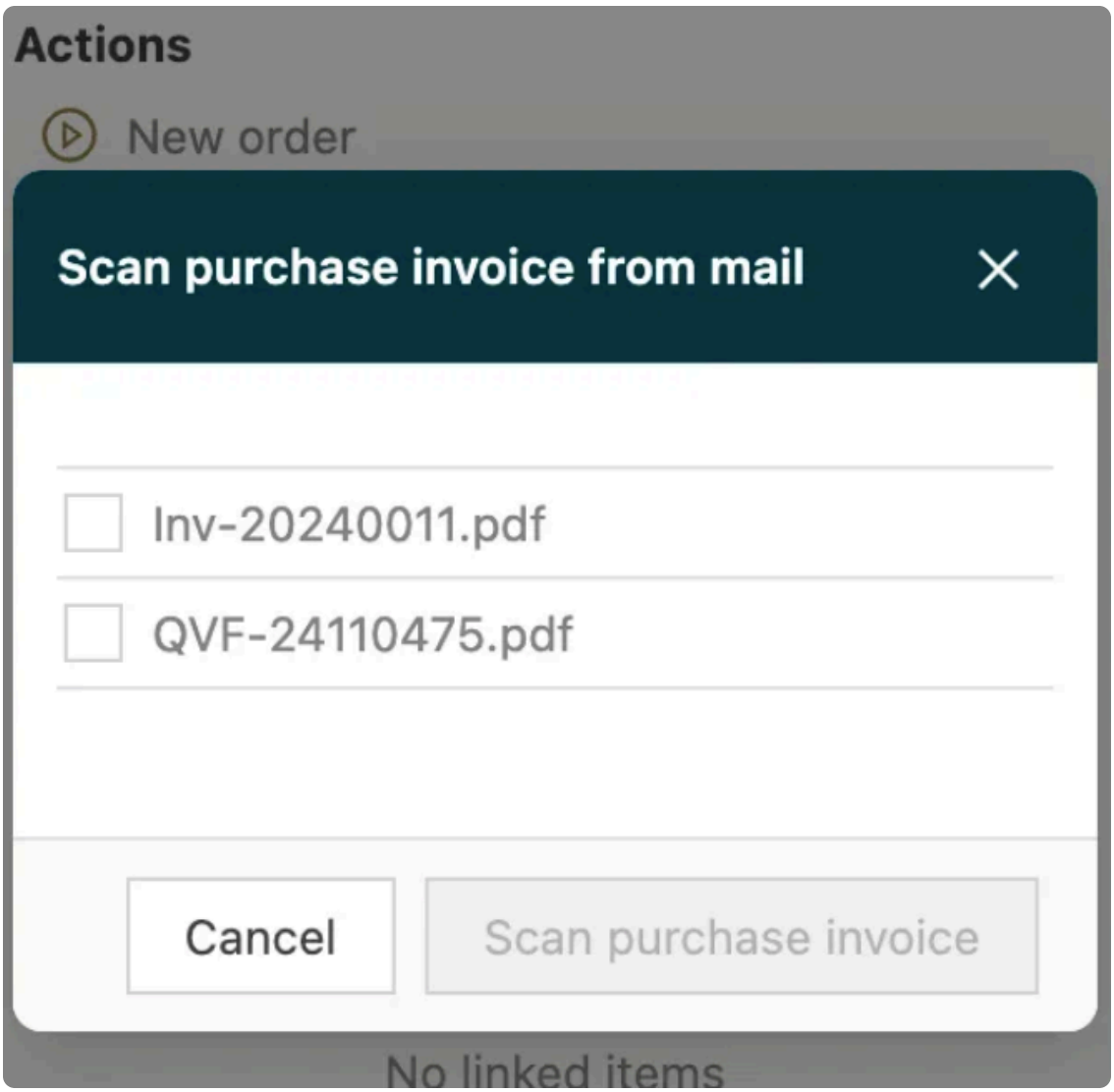


Scan carrier invoices to upload directly from email.

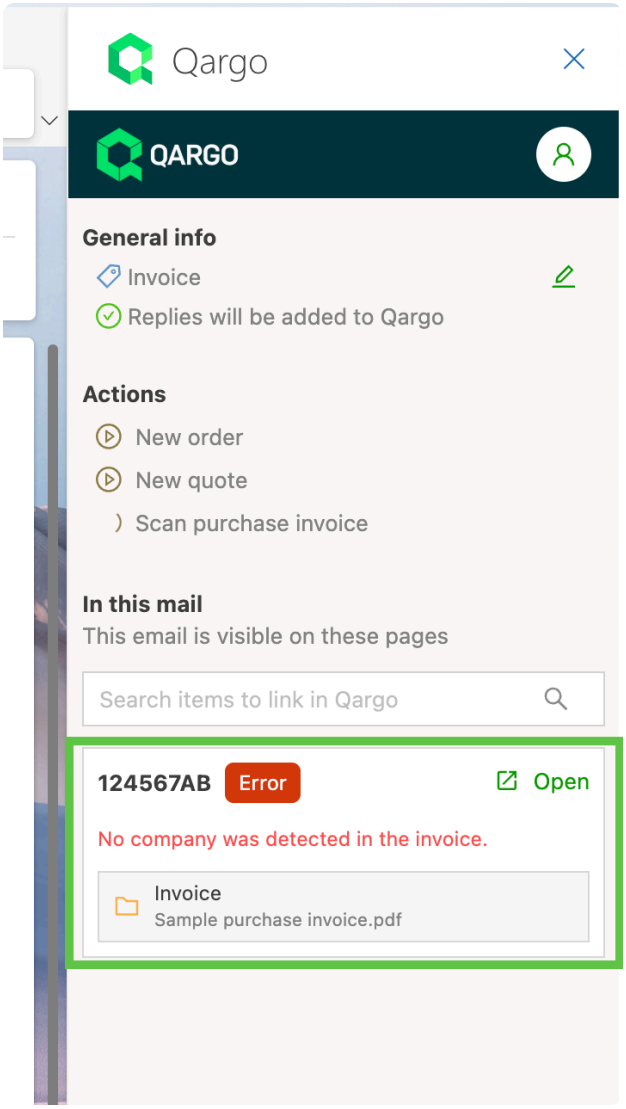
It is now possible to scan attached carrier invoices directly from the Qargo Email Intelligence add-in. Open the email and select the action **"Scan carrier invoice"**.

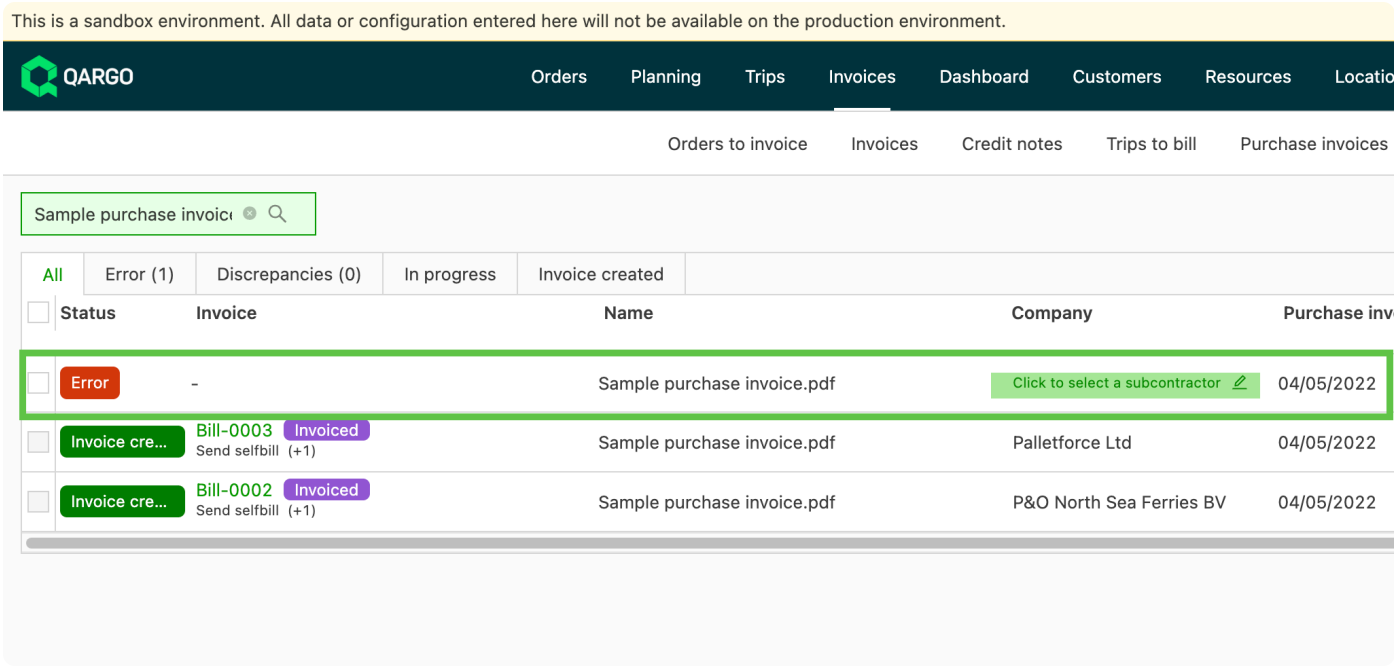


If more than one attachment is linked to the email, this action opens a pop-up that allows the user to choose which document(s) to scan as a carrier invoice.

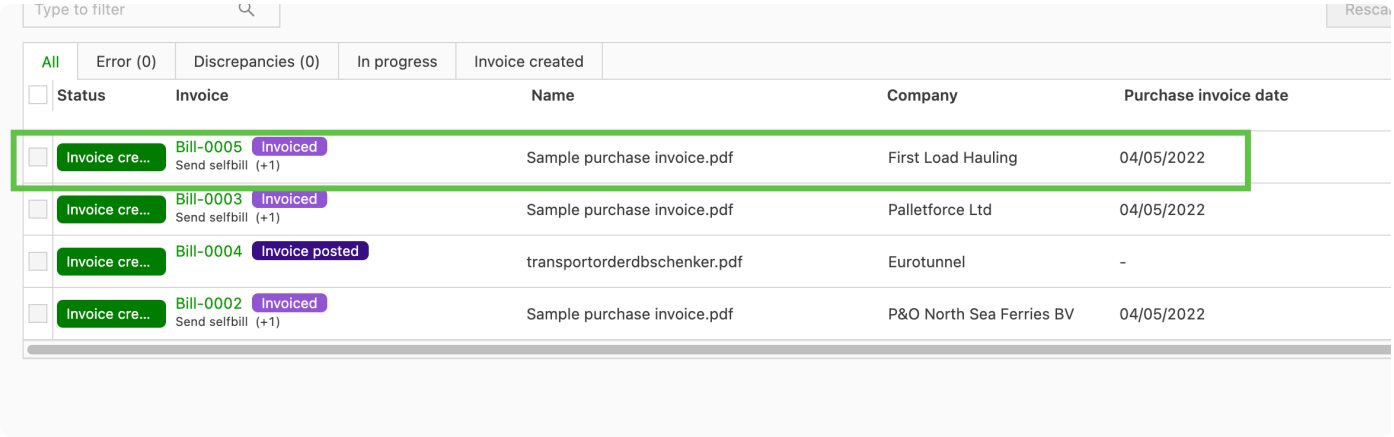


If there is a problem uploading, an error is shown. Click the **"Open"** link to open the interface with the TMS and resolve the error.

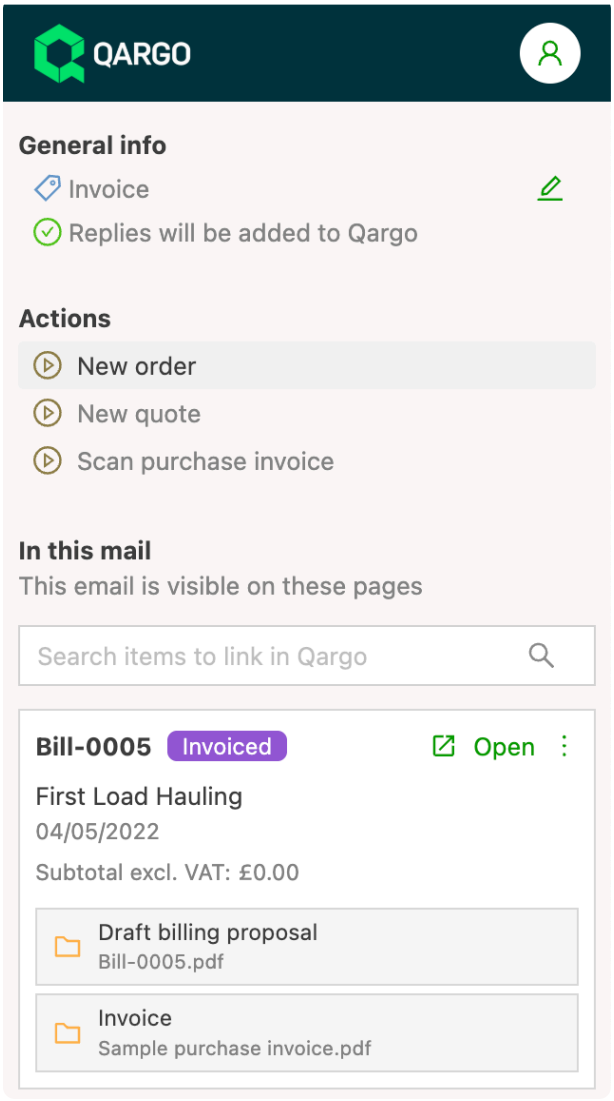

Qargo
QARGO
General info
Invoice
Replies will be added to Qargo
Actions
New order
New quote
Scan purchase invoice
In this mail
This email is visible on these pages
Search items to link in Qargo
124567AB
Error
Open
No company was detected in the invoice.
Invoice
Sample purchase invoice.pdf


This is a sandbox environment. All data or configuration entered here will not be available on the production environment.
QARGO
Orders
Planning
Trips
Invoices
Dashboard
Customers
Resources
Orders to invoice
Invoices
Credit notes
Trips to bill
Purchase invoices
Sample purchase invoic
All
Error (1)
Discrepancies (0)
In progress
Invoice created
Status
Invoice
Name
Company
Purchase inv
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-
Sample purchase invoice.pdf
Click to select a subcontractor
04/05/2022
Invoice cre...
Bill-0003
Invoiced
Send selfbill (+1)
Sample purchase invoice.pdf
Palletforce Ltd
04/05/2022
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Bill-0002
Invoiced
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Sample purchase invoice.pdf
P&O North Sea Ferries BV
04/05/2022

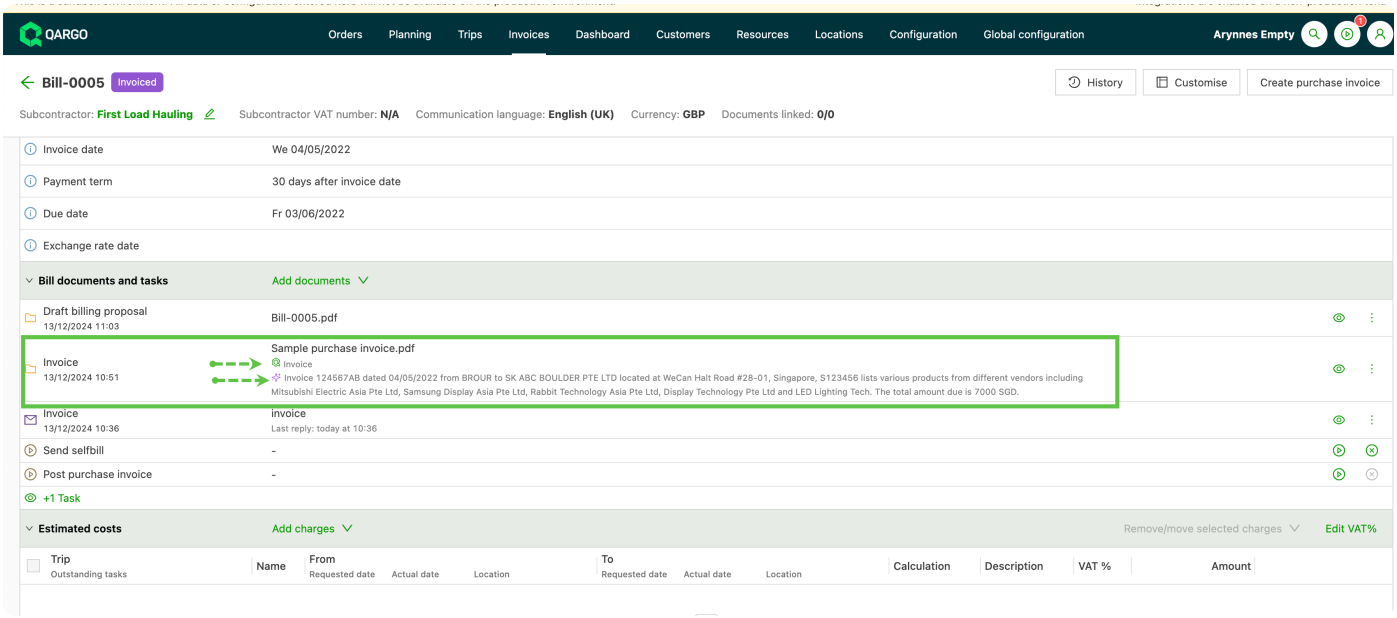
The system opens at the **Upload carrier invoice** page. Once the error is resolved, the invoice is created.



The Qargo add-in also updates to show the new status. It consolidates any threads for associated emails, with links to open the TMS.

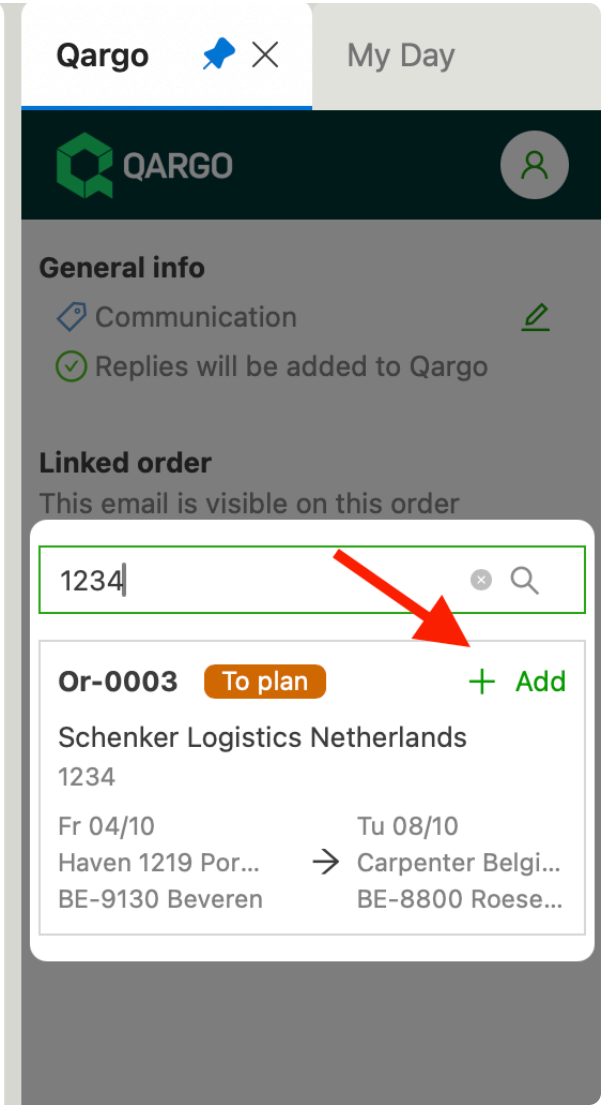


Qargo Intelligence also provides a summary on the details pages, including an indication of document quality using the color-coded “Q”. The summary line expands to show a summary of the document.

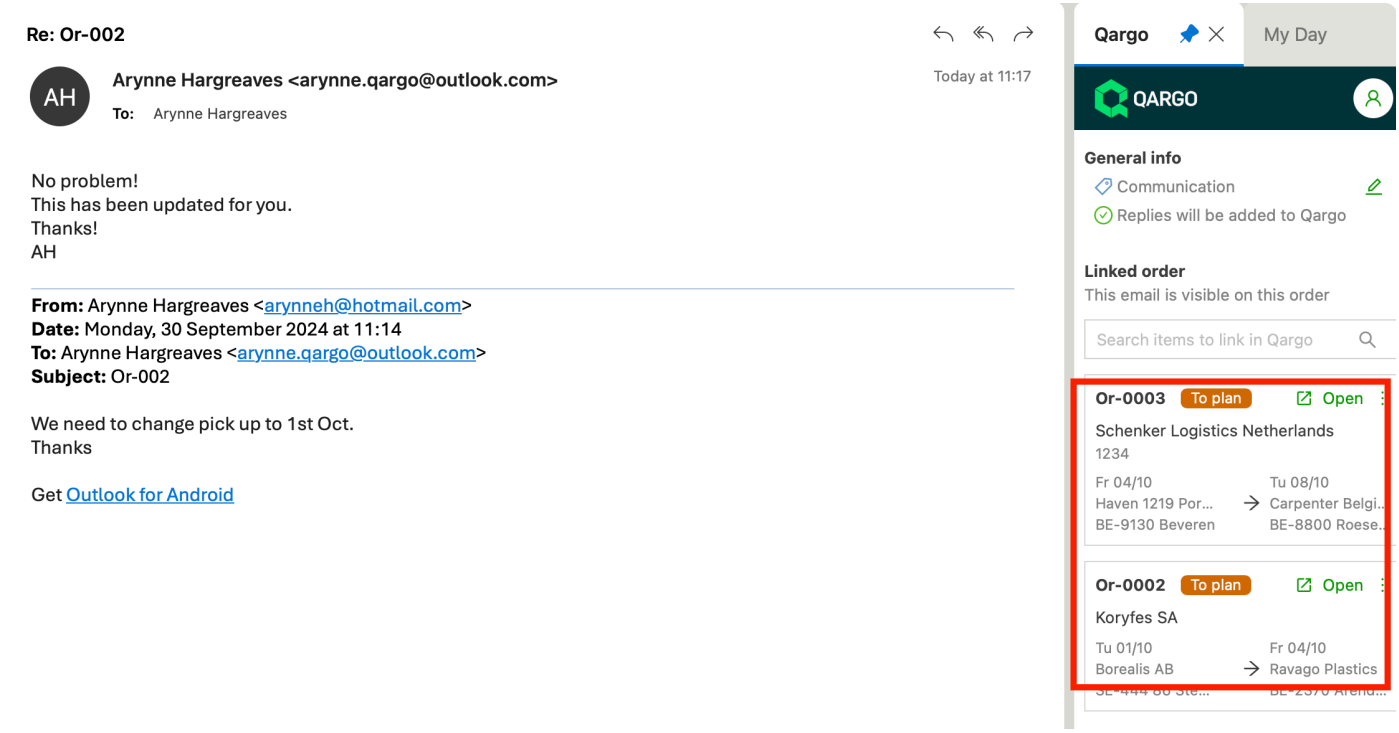


Linking multiple orders to an email.

To link more than one order to an email, go to the email in the mailbox and open the Qargo pane.
Search for another customer reference number, and the order should appear.
Click **+Add** to link the order to the email chain.

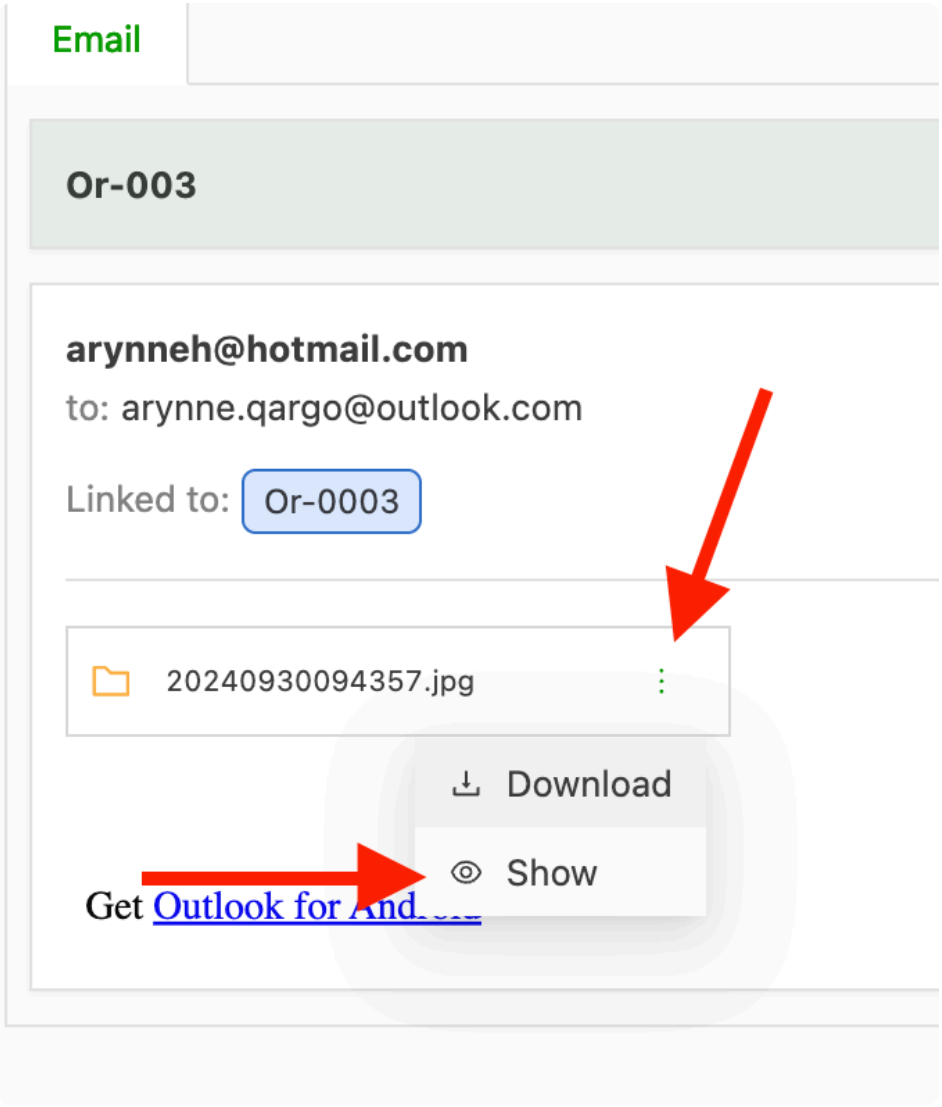


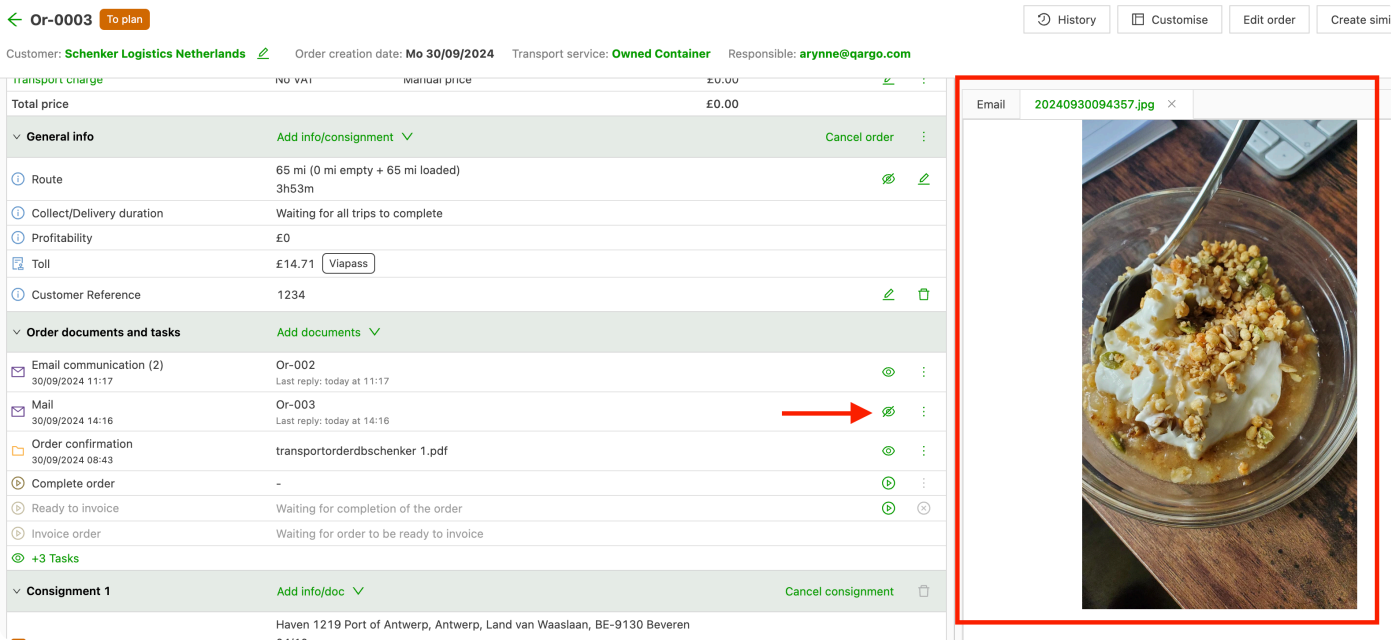
Both orders are now associated with the email.



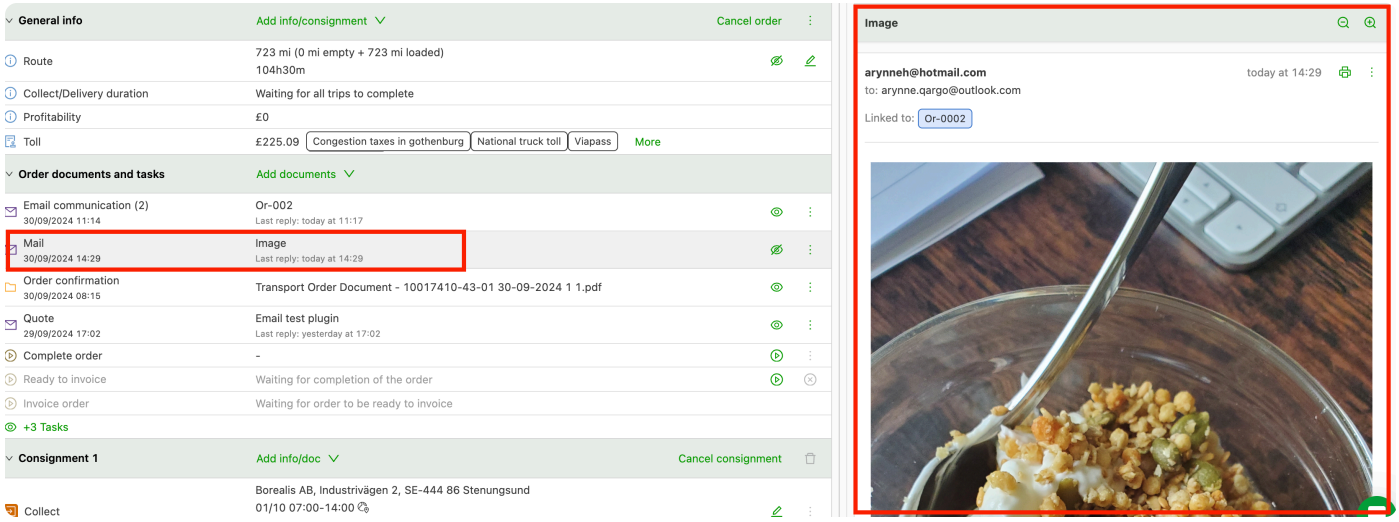
Email images.

When an email is received with an image as an attachment, it is possible to click the three dots to download or view the image.





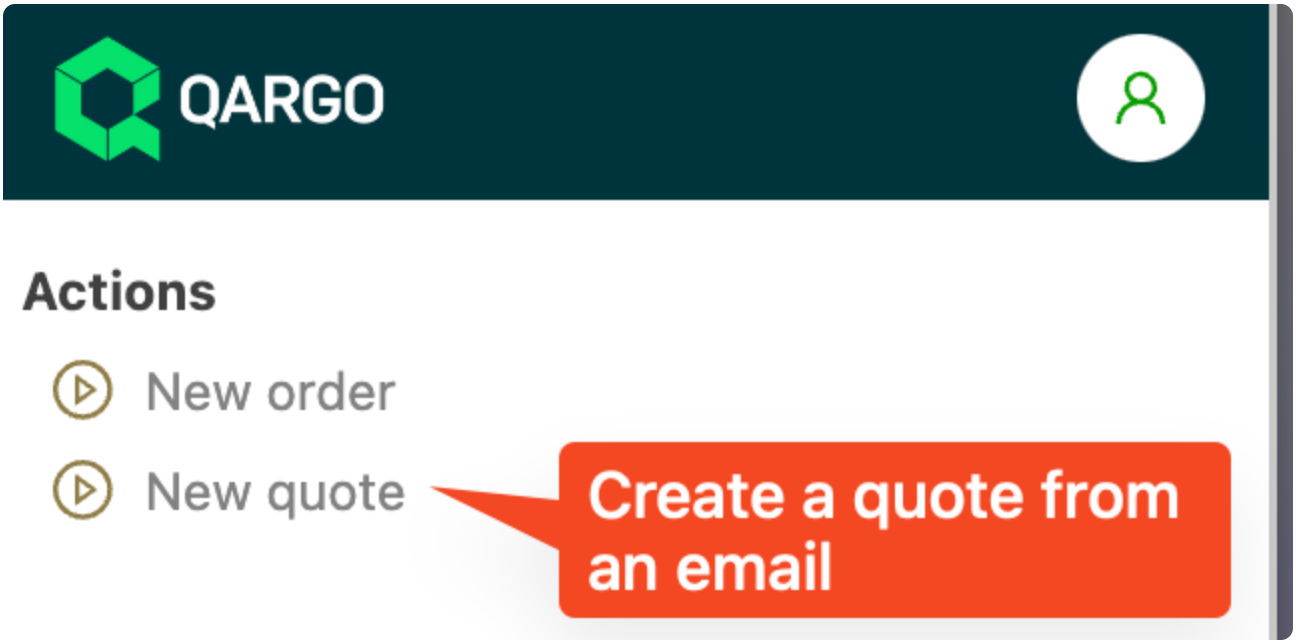
It is now also possible to view the image immediately when it is sent in the body of the email.



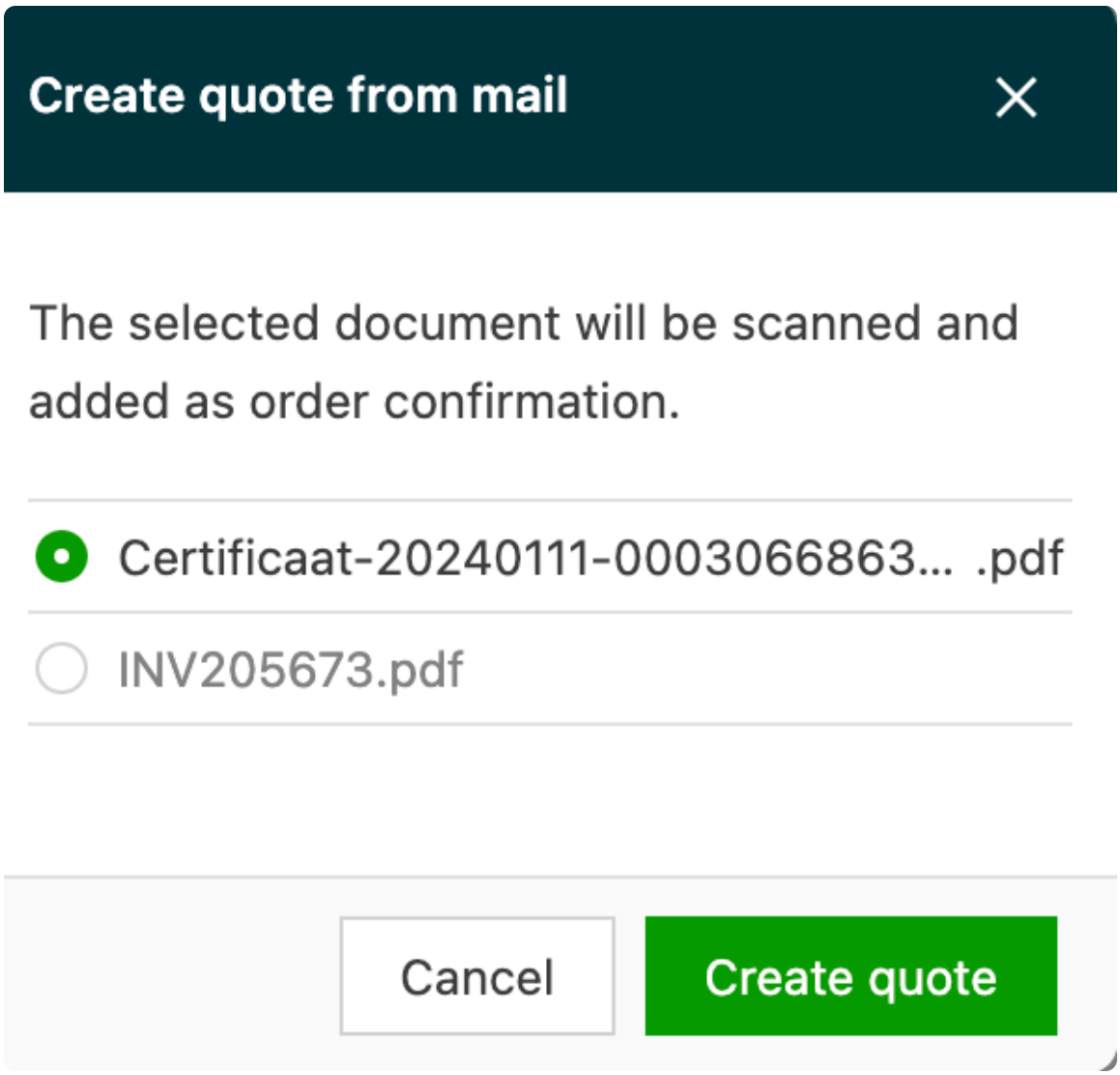
Adding email attachments as documents

New functionality has been added to the Outlook add-in to improve working with email attachments.
A summary of the new functionality:

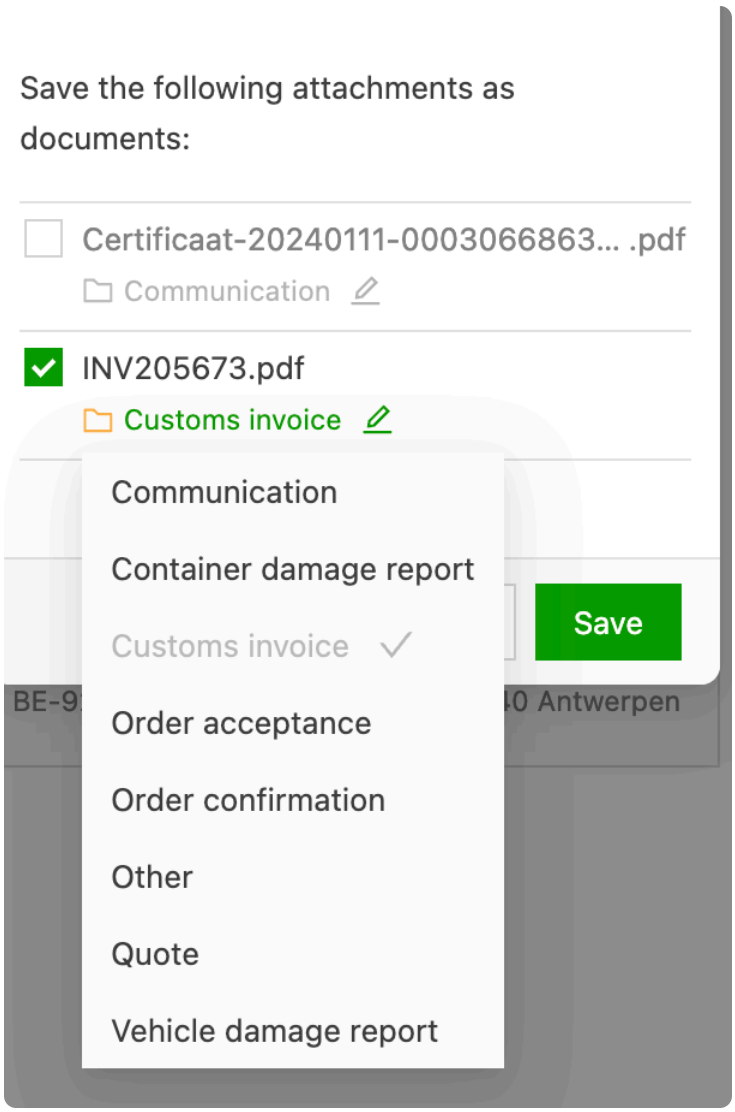
1. It is now possible to create a quote from an email. Previously, orders created from emails defaulted to **To plan**.



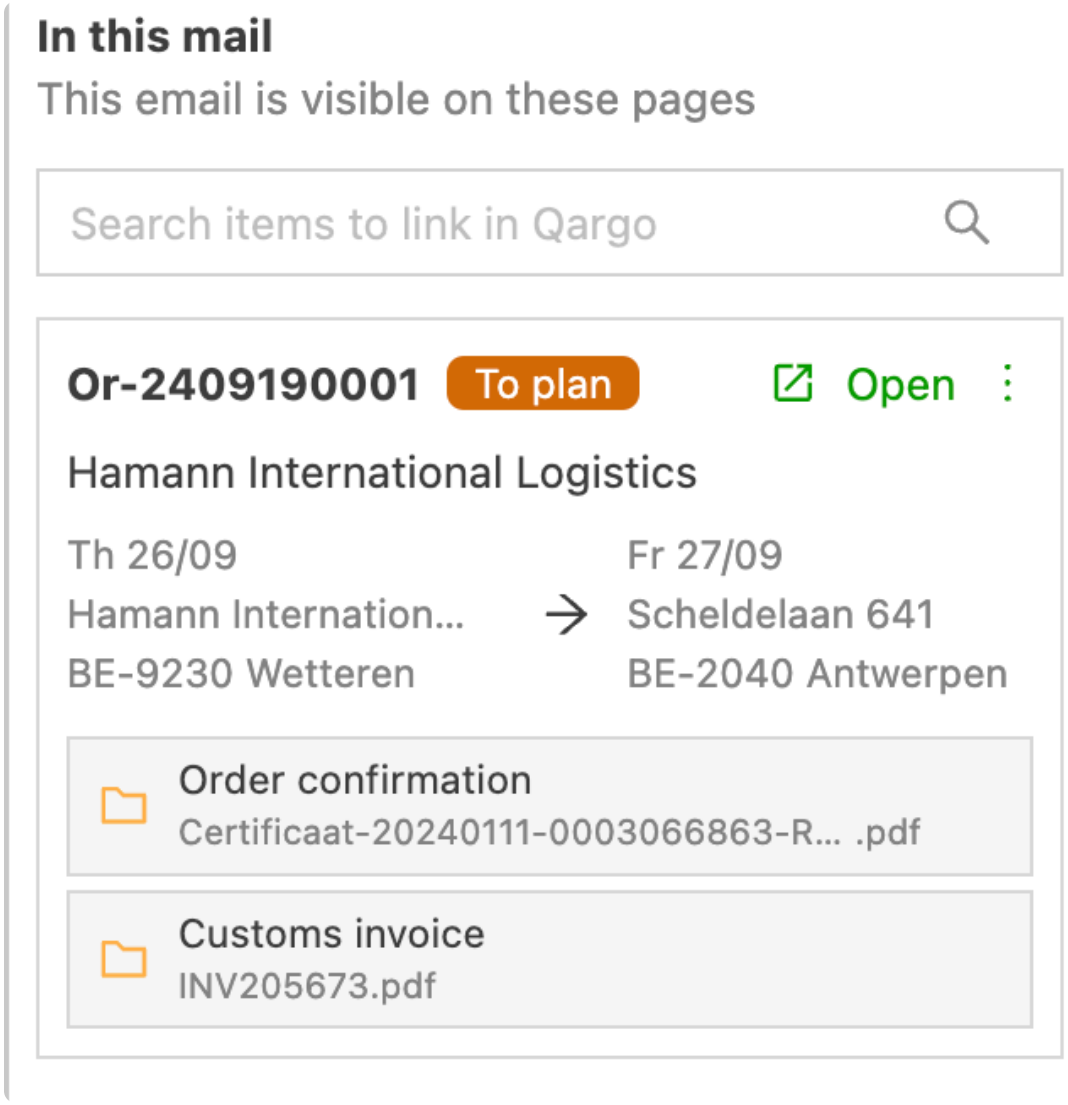
2. If the email contains multiple PDF attachments, the user is now prompted to select which document to scan.



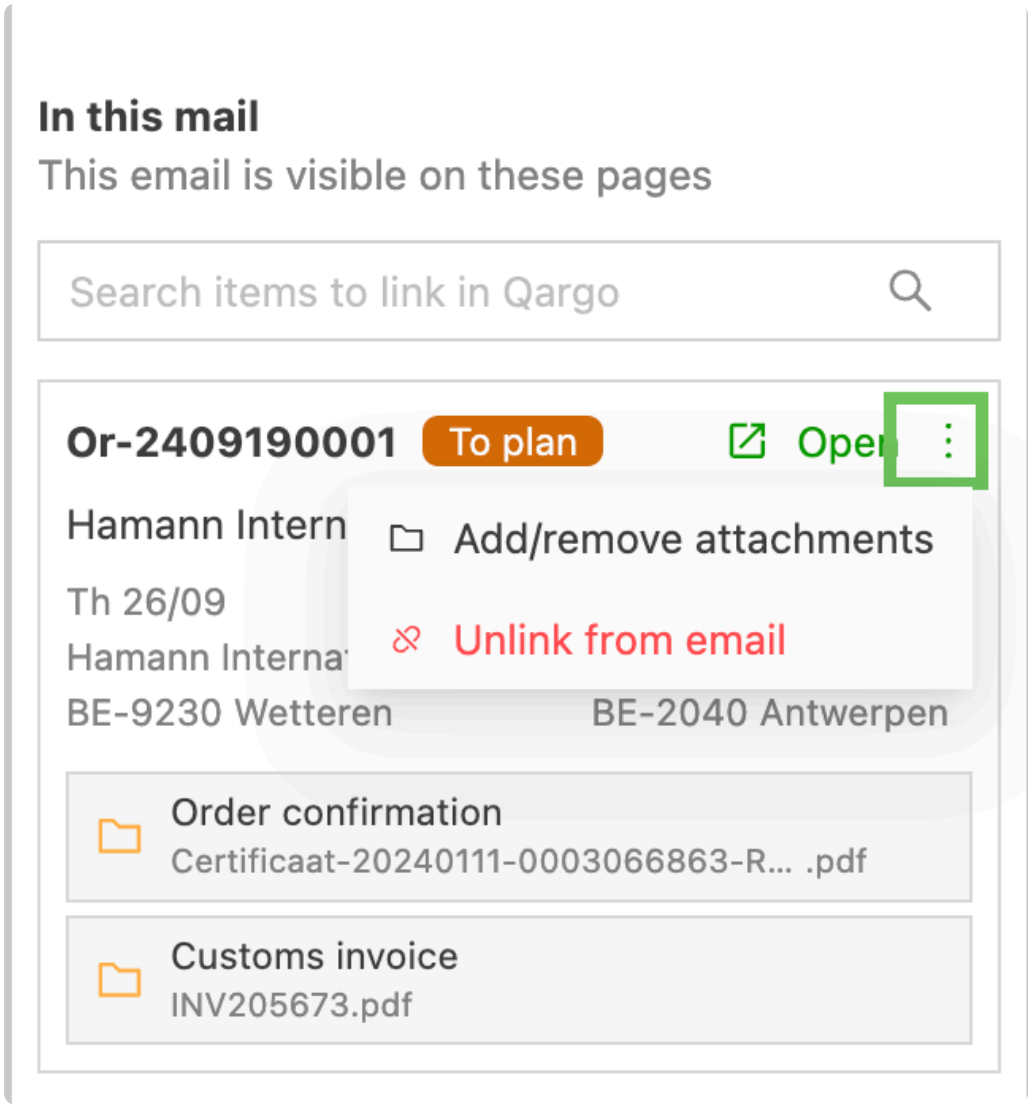
3. When linking to an order, the user is prompted to select which PDF attachments to add. By default, all are selected, and the document type is set to that of the email. Using **Edit** (pencil icon), the user can change the document type.



4. Linked attachments and their document type are shown in the order sidebar view.

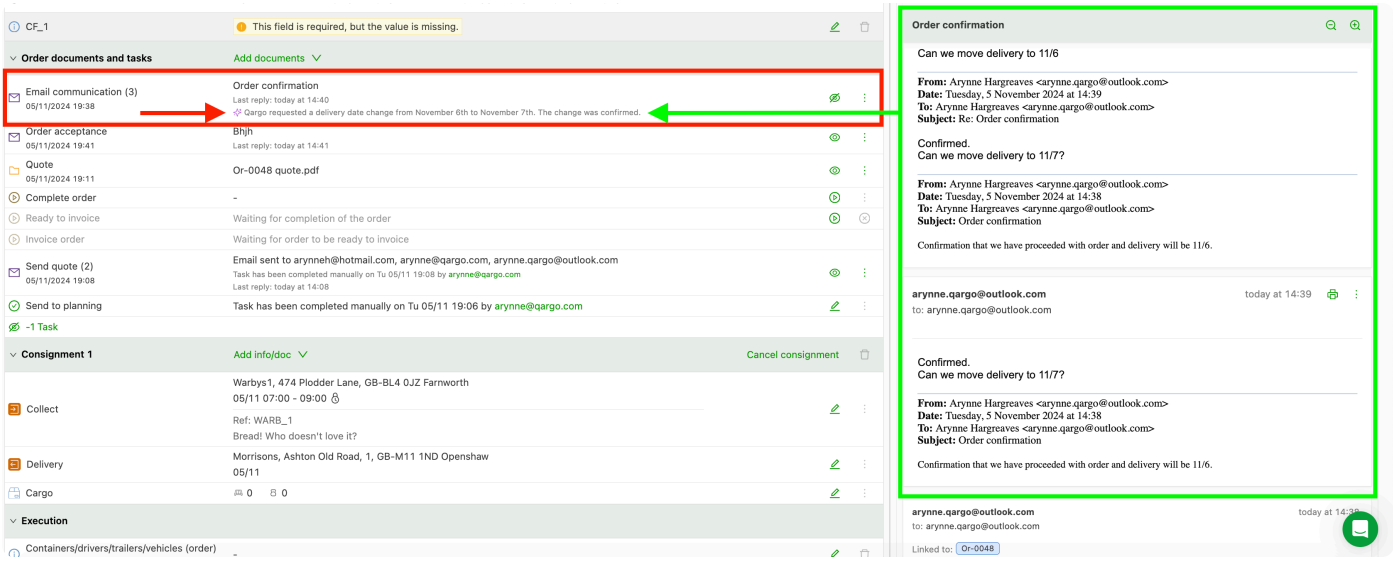


5. Attachments can be added or removed by clicking the menu (three dots) in the top right of the card. This menu can also be accessed quickly by clicking an already linked attachment in the order's card.

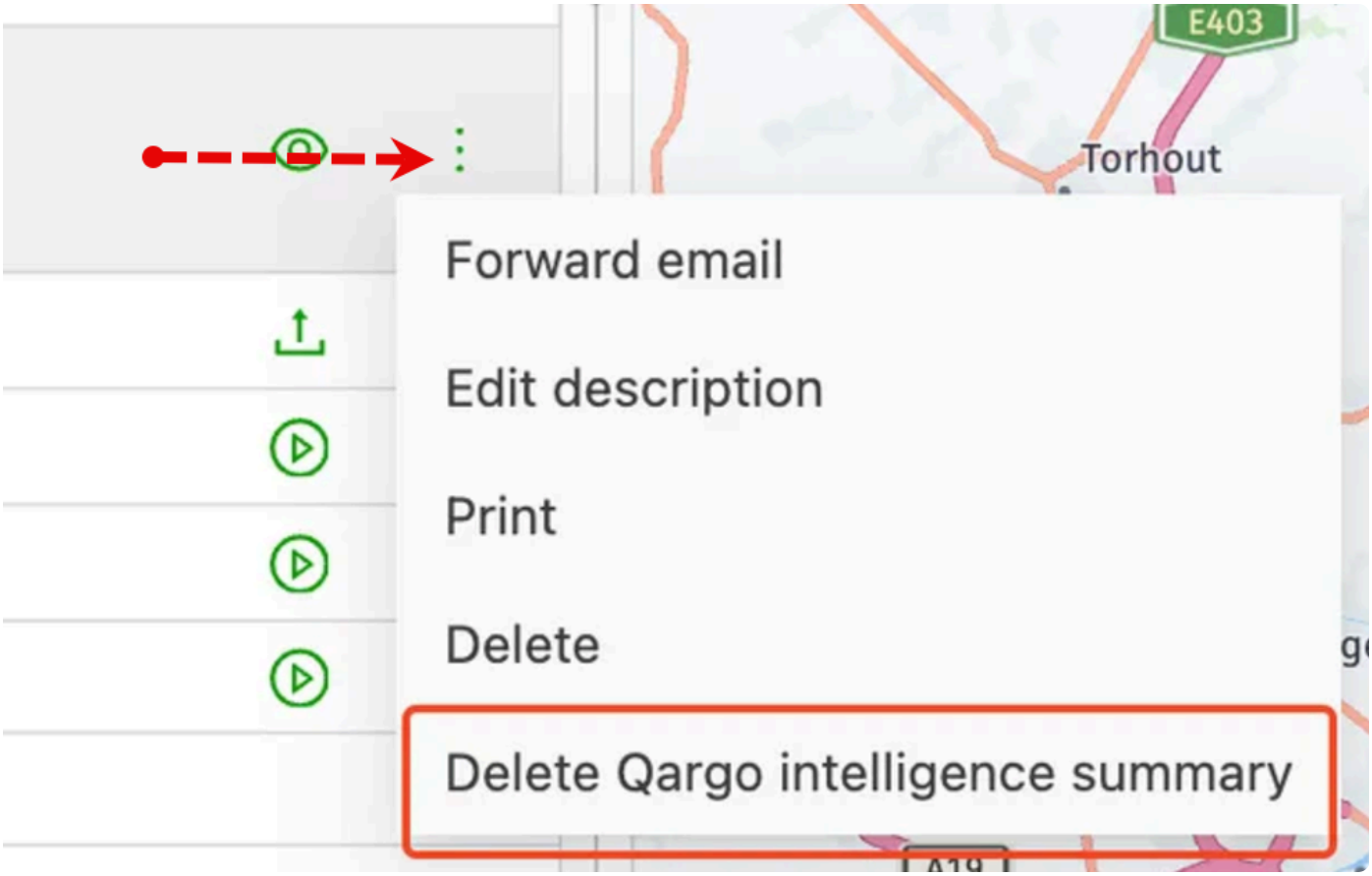


Email summaries by AI.

The summary is based on the whole email thread if it is linked to Qargo, or on the single email if no thread is linked. The summary is shown in the email communication row. Email summaries can now also be collapsed and expanded by clicking the summary.



Additionally, email summaries can now be deleted using the action dots on the right of the detail row.



The AI summary respects user language settings and is presented in the browser language set by the user.

Task executor email

When a task that uses an email is initiated in Qargo, there is now the option to set up an additional mailbox that can be used instead of the user's individual address. The recipient receives the email from the **Mailbox to send emails from** address, and

any replies are sent to that inbox rather than to the user's email. This alternate mailbox can be a group or distribution list, to give more visibility of incoming replies.

