Customer portal: creating and planning orders shown in customer portal views

Set the order status in organization settings, on the transportation service or in the customer profile. Let portal customers edit and cancel orders with the customer portal order import feature.

Updated September 7, 2026

Introduction

The customer portal gives customers a seamless order capture experience for the orders they submit. However, customers can select only some of the order parameters.

To keep order capture consistent, default or pre-filled order details can be configured. The order status for newly submitted orders (Quote / To plan) can also be set.

> 📚 By default, orders submitted through the portal cannot be edited once submitted. If the tenant has the **Customer portal order import** feature enabled, portal customers can be allowed to edit and cancel their own orders.
> See below 👉 Enabling order edit and cancel

- The order status can be set in 3 locations:
  - ***Organization settings***: This is the default setting. It applies if no other settings are added. *Set this as a minimum.*
  - ***Transportation service***: This takes priority over the default setting.
  - ***Customer profile***: This is the primary setting if included.
- Order status options:
  - ***Quote:*** When the customer submits the order through the portal, it is created and shown as a **Quote** until it is processed further.
    - The customer sees the assigned quote number in the portal under the All tab.
    - In the tenant, the quote appears in the Quote tab rather than under orders.
    - Once the quote is accepted and sent to planning, a new order number is generated.
  - ***To plan:*** When the customer submits the order through the portal, it is created and shown as an order with the status **'To plan'**.
    - The order number stays the same for the duration of the load.

The system uses *fallback logic* to decide which customer portal status field applies when an order is created in the customer portal:

1. **Status on customer**: If the customer has a value, the system uses it.
2. **Status on transportation service**: If the customer field is empty, the system falls back to the value on the transportation service.
3. **Status on tenant**: If both the customer field and the transportation service field are empty, the system uses the value set for the tenant.

Configure order defaults

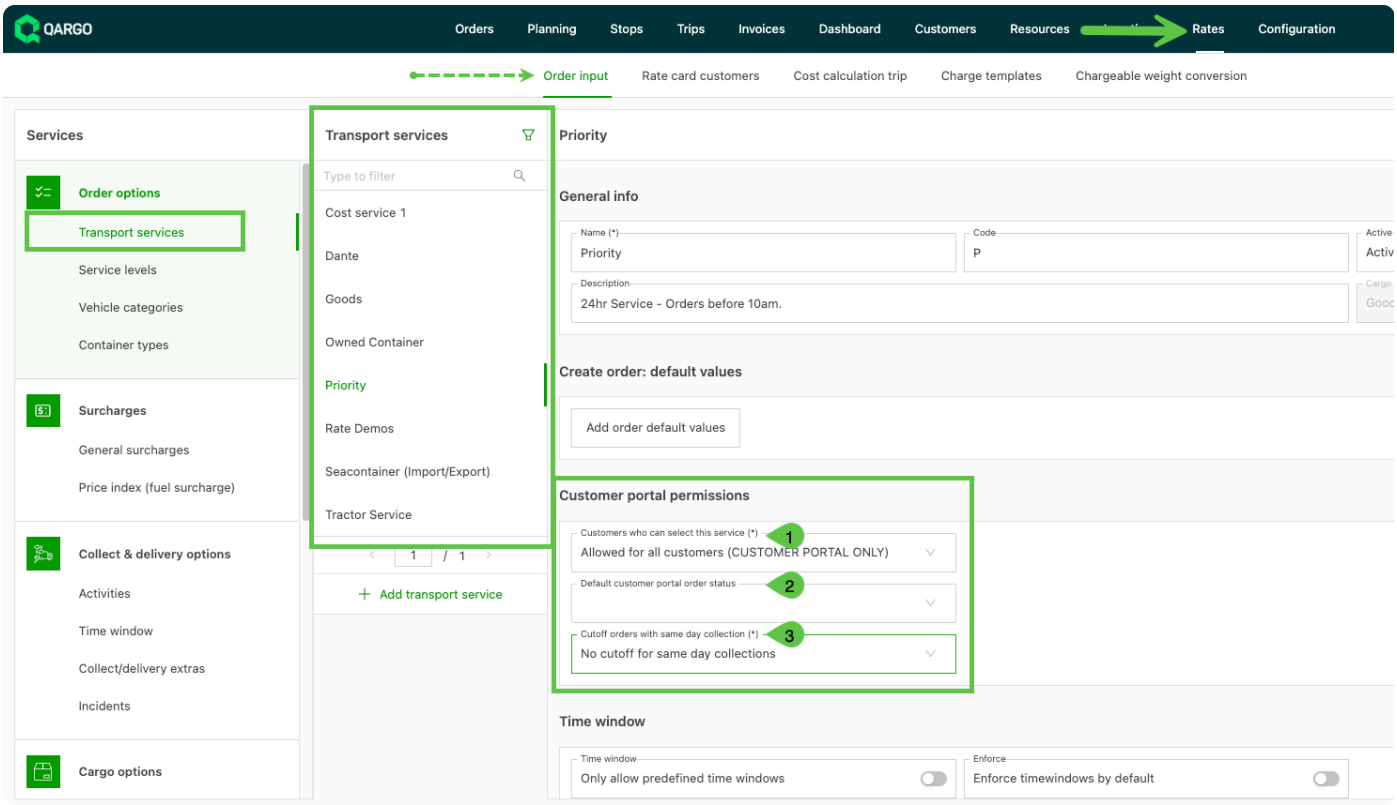
Organization settings

- Navigate to **Configuration > Organization settings > Customer portal**

- Under *Customer portal order creation statuses*, select how orders are created when a customer submits an order in the portal.
    - Options: Quote / To plan, as described above.

Transportation service

- Navigate to **Rates > Order input**
- In the left-hand menu, select **Transportation services**. This shows all configured services.
- Click the service. Navigate to **Customer portal permissions**.



1. Customers who can select this service. Make the service available to all customers with portal access, or to specific customers only.

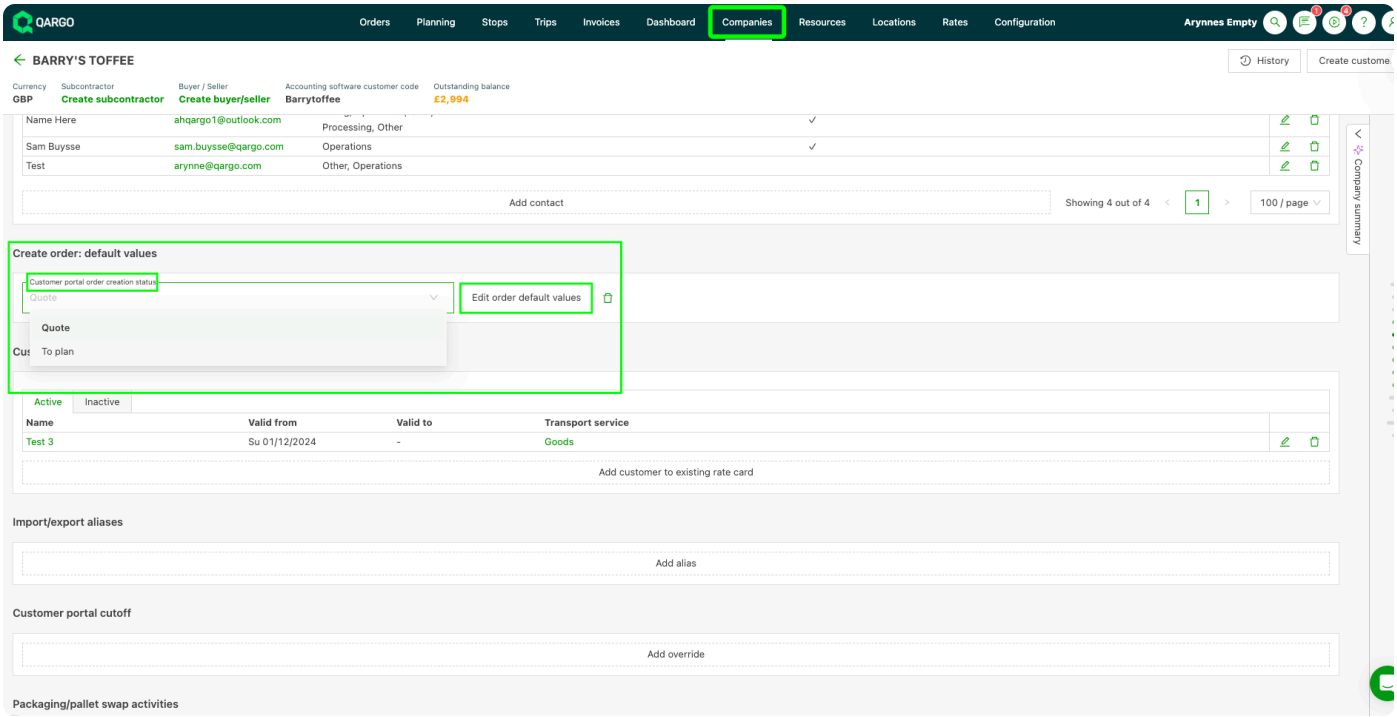
2. Default customer portal order status. Select the default status for orders that customers submit through the portal: **Quote** or **To plan**.

3. Cutoff for orders with same-day pickup.

    1. No cutoff for same-day pickups. Customers can submit orders with any date and time for same-day pickup.
    2. Orders must be entered 1 day before pickup. A cutoff time must also be specified. Customers cannot submit an order for pickup on the same day.
    3. Define a cutoff time for same-day orders. A cutoff time must be specified. Customers can submit an order for same-day pickup, provided they submit it before the cutoff time.

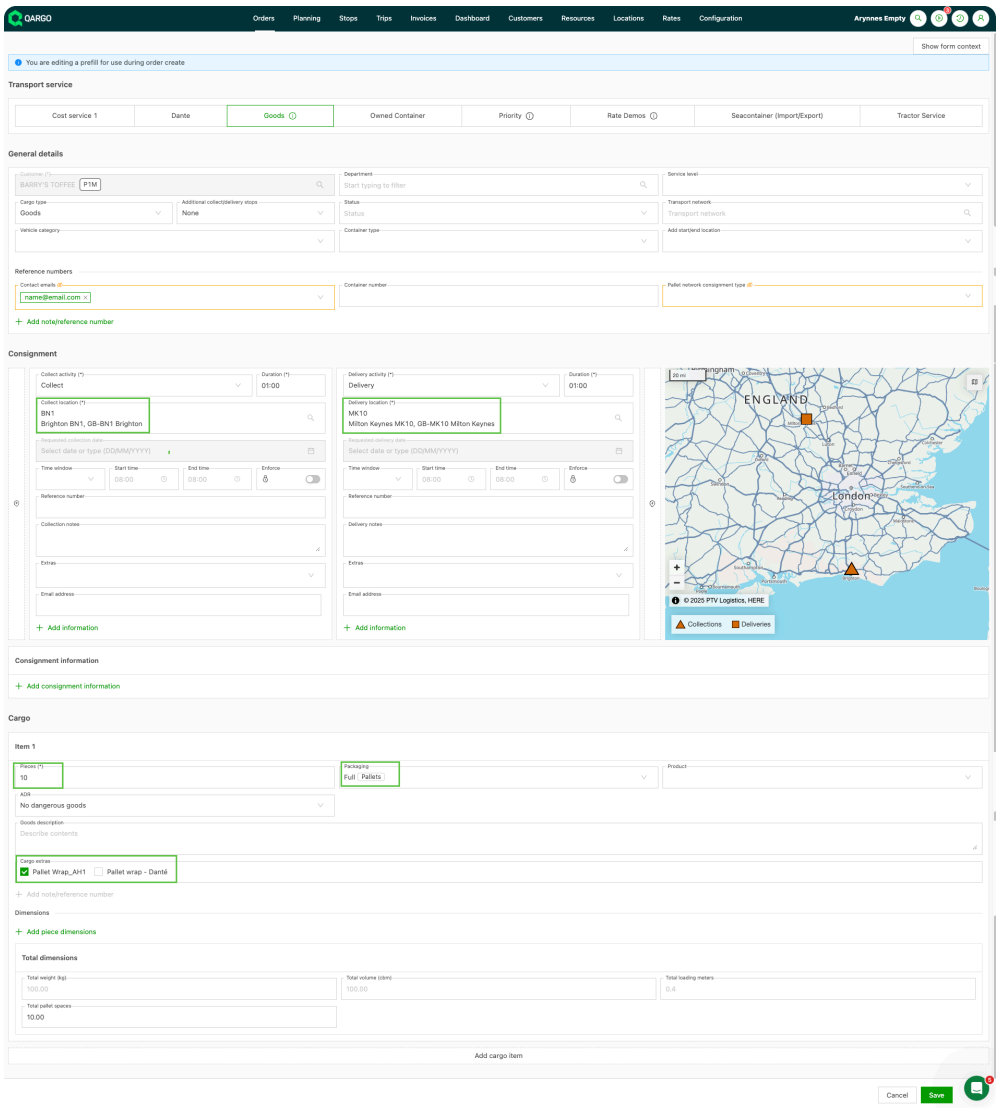
Customer profile

- Navigate to **Companies > Customers**
- Click the customer name to open the profile. If the customer is not in the list, find the customer with the search box.
- In the customer profile, scroll to *Create order: default values*. Select the preferred status from the dropdown menu.



Set order default values

- ***Default order values*** can also be added here.
    - These can include order details that are the same every time an order is submitted.
    - Once all the details are added, click **Save**.



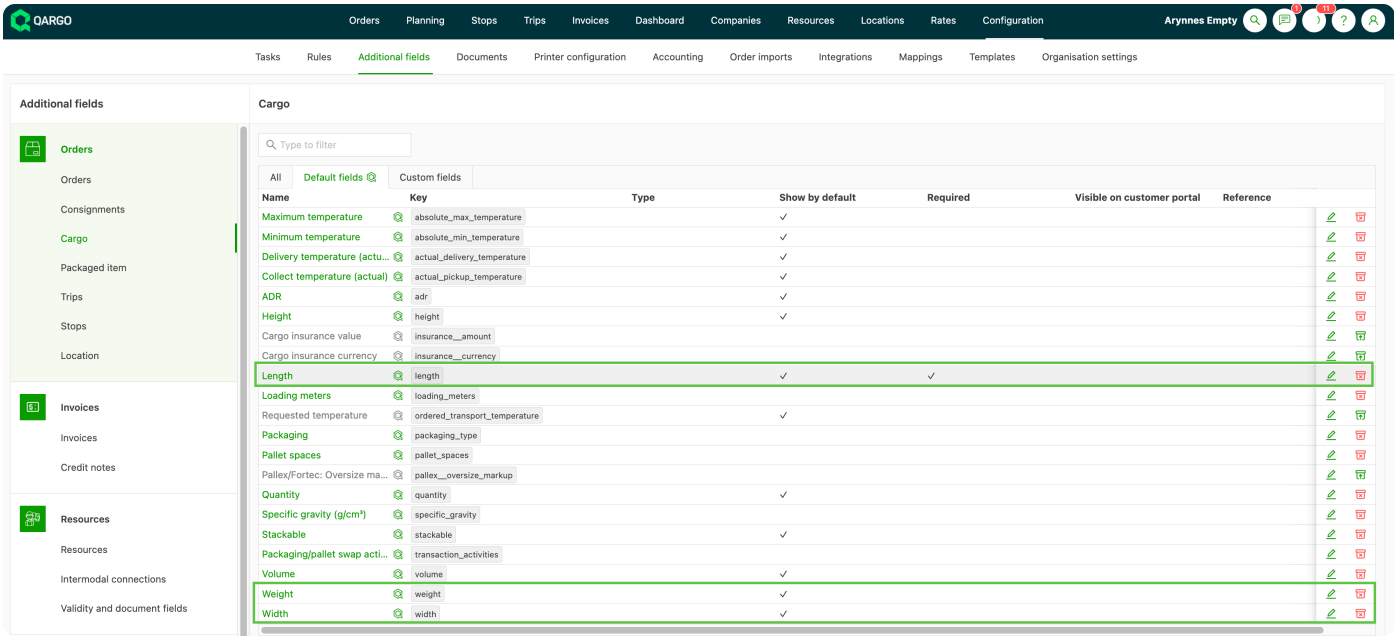
- When a customer creates an order in the portal, the order details are pre-filled. This further reduces the data entry the user has to do.

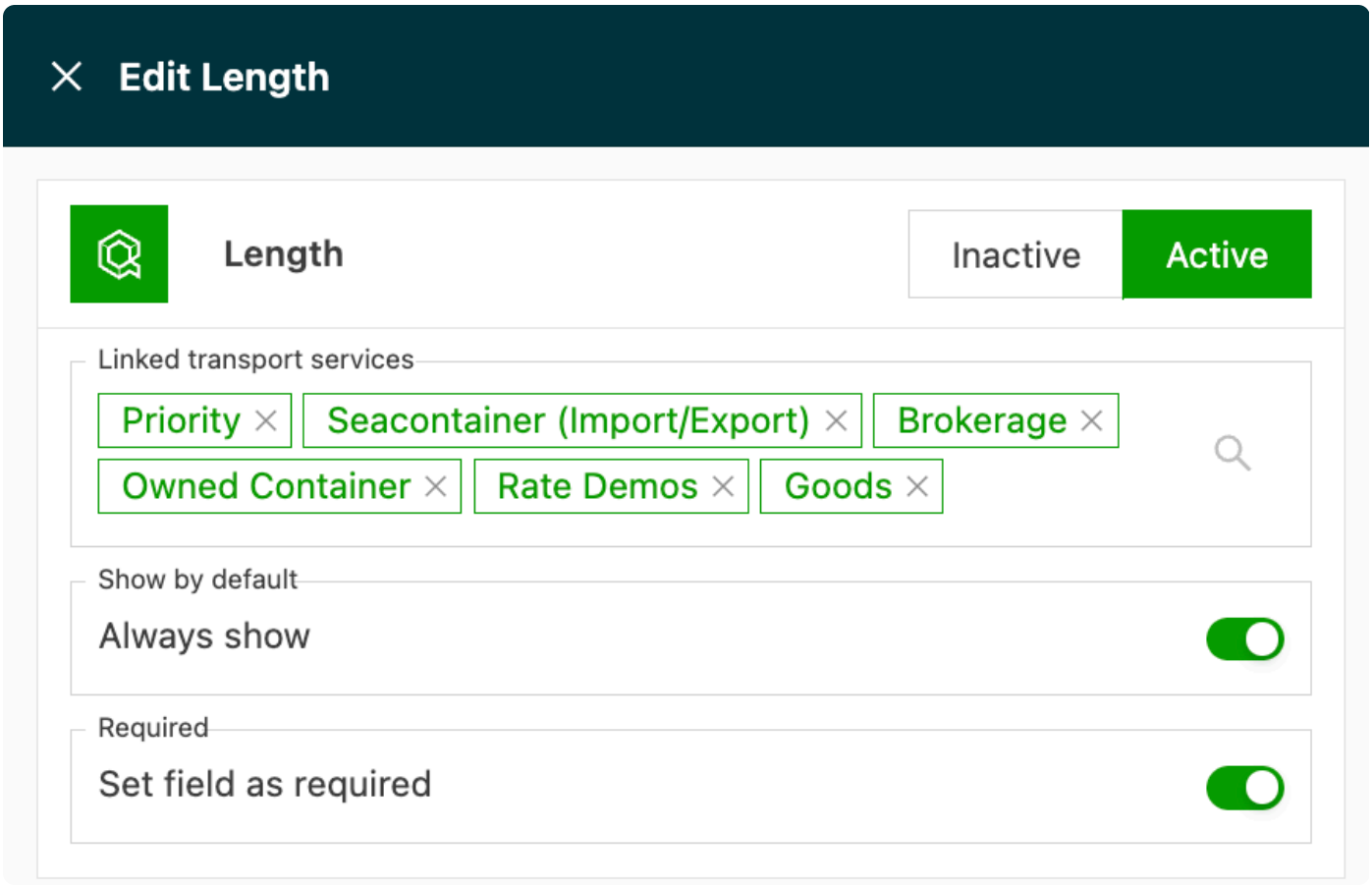
Carriers using Qargo's customer portal for groupage orders can now make piece dimensions (length, width, height) mandatory when shippers place orders. This ensures complete data and accurate loading meter calculations.

Configure required freight details

📚 Make sure the additional fields are enabled under **Configuration > Additional fields > Orders > Freight**.

1. In the **Default fields** section, locate the **Width**, **Length**, and **Height** fields.
2. For each dimension to **make mandatory**, click the field and turn on the **Required** toggle.



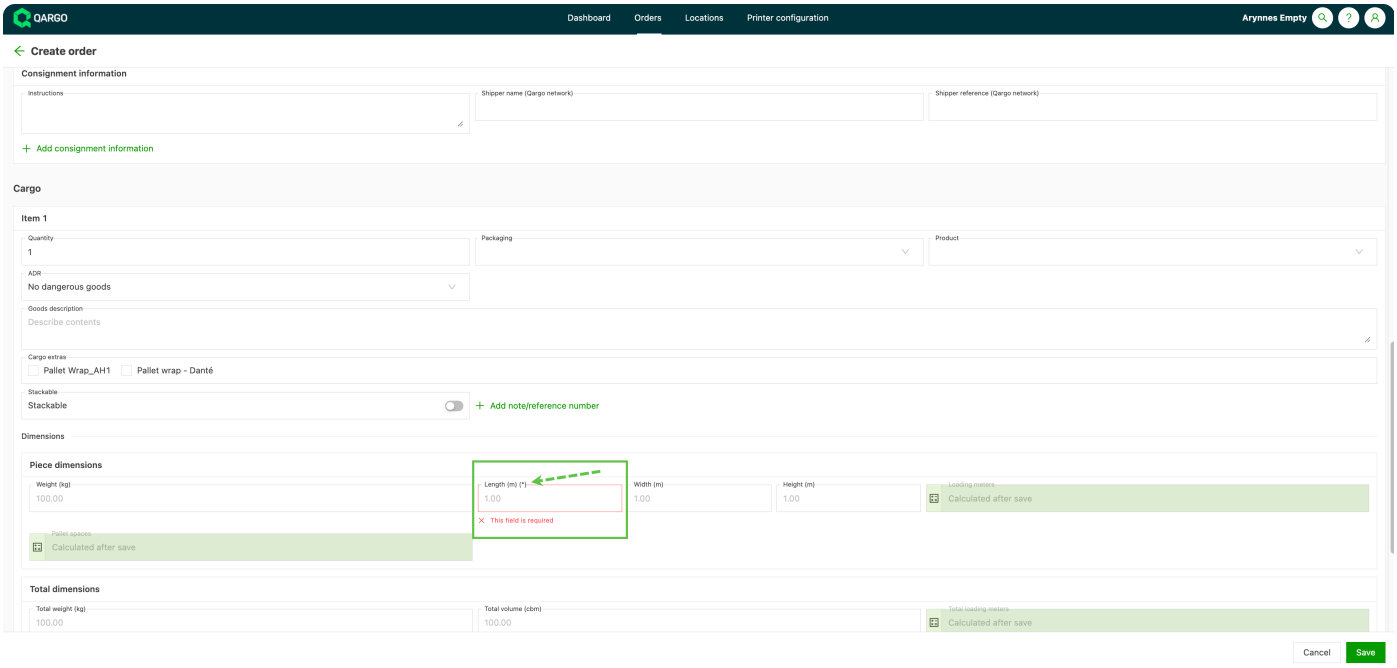


How it works for customers

Once at least one dimension is marked as **Required**:

- The **piece dimensions panel** (with the Length, Width and Height fields) is **automatically displayed** to customers when they place an order in the portal, even if they would not normally see it.

- Customers cannot submit the order until they fill in the required dimension fields.



Limitations

- **Global configuration only.** The required dimension settings **apply to all customer** portal users. Dimensions cannot be required for one customer and optional for another.
- **Customer portal only.** This requirement applies to orders placed through the customer portal. It does **not** apply to:
  - Orders created through the **mobile app or carrier portal**
  - Orders imported through **order import**
  - Orders created directly in the Qargo web interface

Disabling the fields

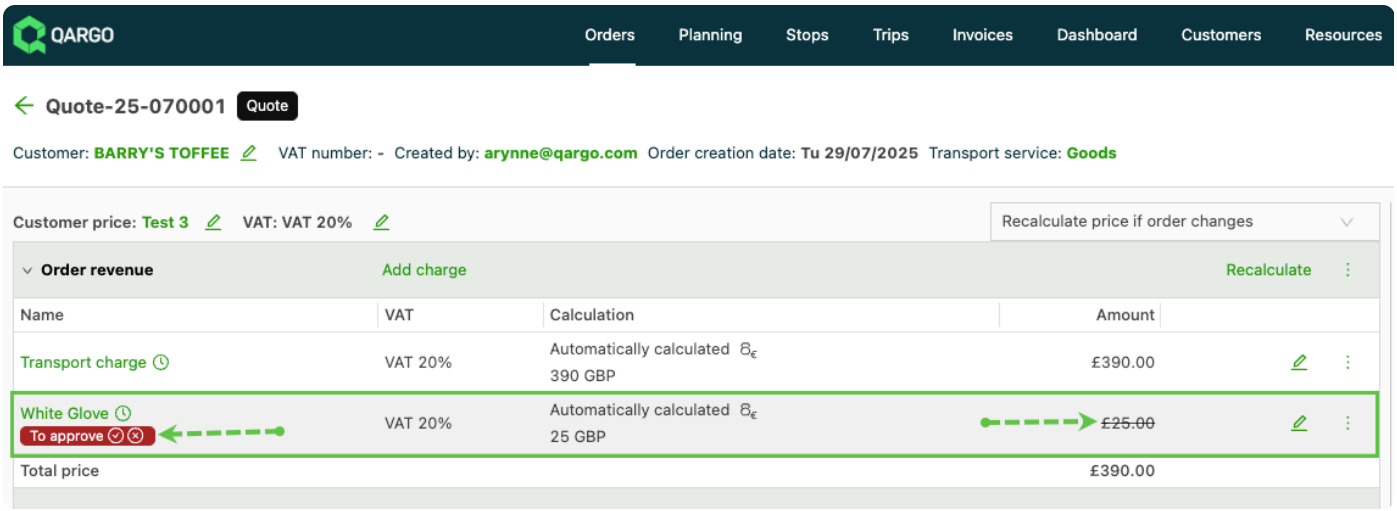
Besides being enabled or required, dimension fields can also be **disabled** entirely. A disabled dimension field does not appear in the portal and is not pre-filled on the order.

- Disabling a dimension field does not affect existing orders that already have dimensions entered.

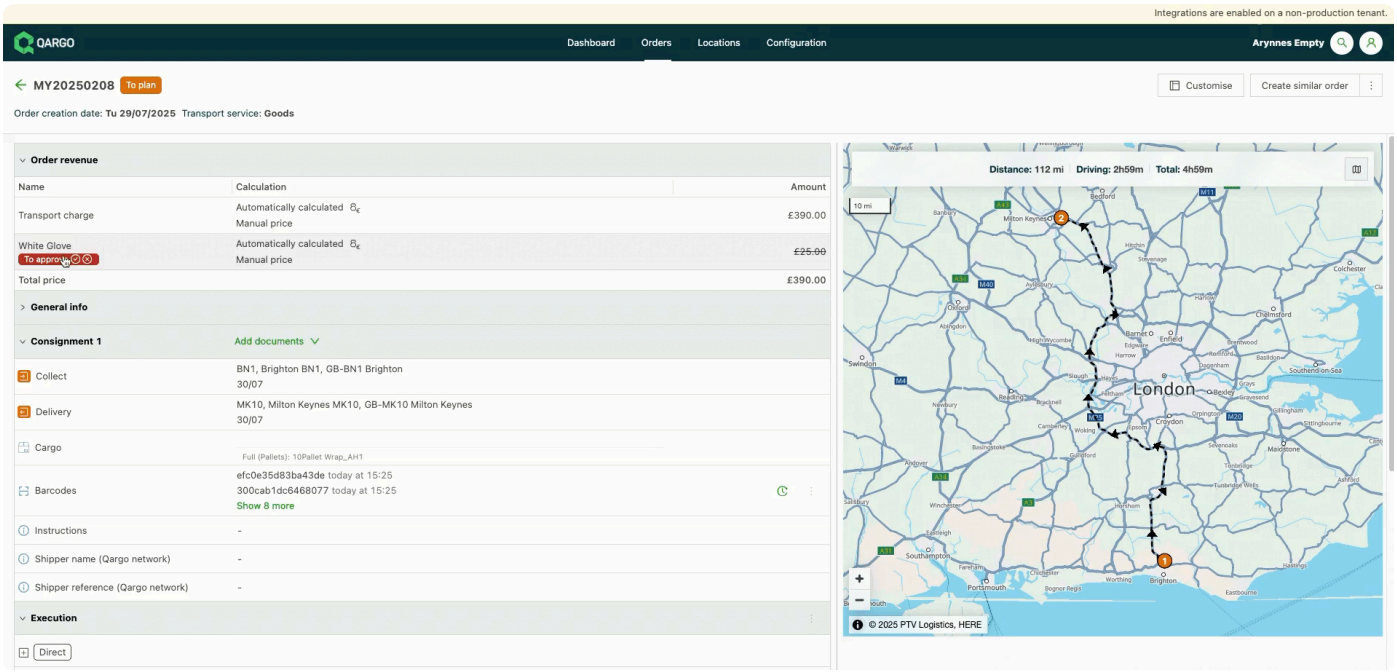
Display charges

- In the customer profile, scroll down to the *Contacts* panel.
- Turn on the ***Show charges on customer portal*** option.
- Navigate to the relevant price list and set the invoice process to **Approval request sent to customer**.
- With this option turned on, the user can **view** the charges on the order in the portal.
- Charges that require approval can also be handled in the portal.
- Approved or rejectable charges are visible for all orders, not only during billing. This keeps every stage of the order process transparent.
- Where approval is required, a ‘To approve’ label is displayed.

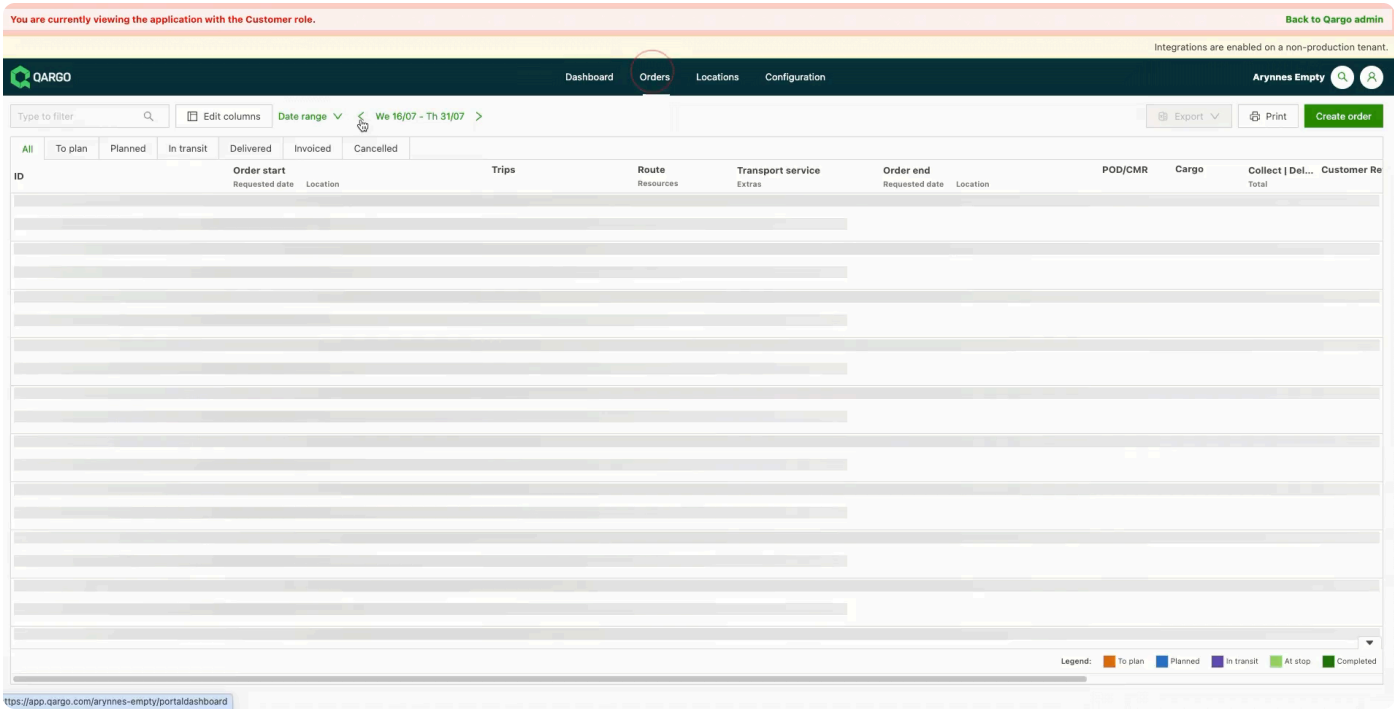
- Hovering over the label shows the option to approve or reject the charge.
- Once handled, the charge updates in both the portal and the tenant.



Approve a charge:



Reject a charge:



Customer portal: hide excluded stops and the Empty option

The route planning and optimization settings already control which stops are excluded from the price calculation. This now extends to the customer portal: the selected stop types can also be hidden from the portal route timeline.

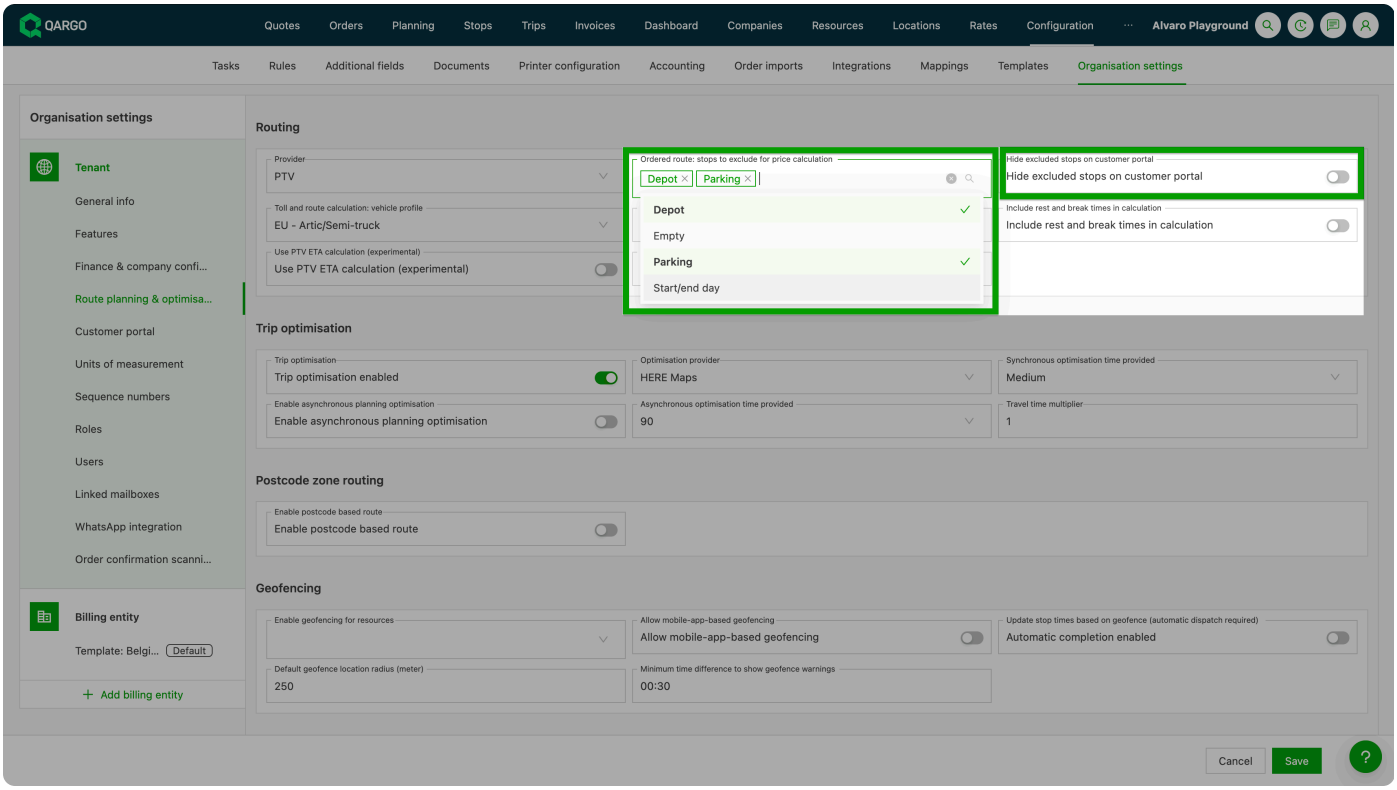
A new *Empty* option has been added to the *Ordered route: stops to exclude* dropdown. It covers stop activities marked as empty, such as hooking an empty trailer or picking up and dropping an empty container.

Previously, the customer portal showed end customers every operational stop. This included terminal stops, parking, hook and drop activities, empty container moves and day-boundary stops.

The new *Hide excluded stops on customer portal* toggle removes the selected stop types from the portal timeline entirely. The timeline then matches the visualized order route.

To configure the setting:

1. **Open Configuration > Organization settings > Route planning & optimization**.
2. **Select** the stop types to hide in *Ordered route: stops to exclude for price calculation*, including the new *Empty* option.
3. **Turn on** the *Hide excluded stops on customer portal* toggle.

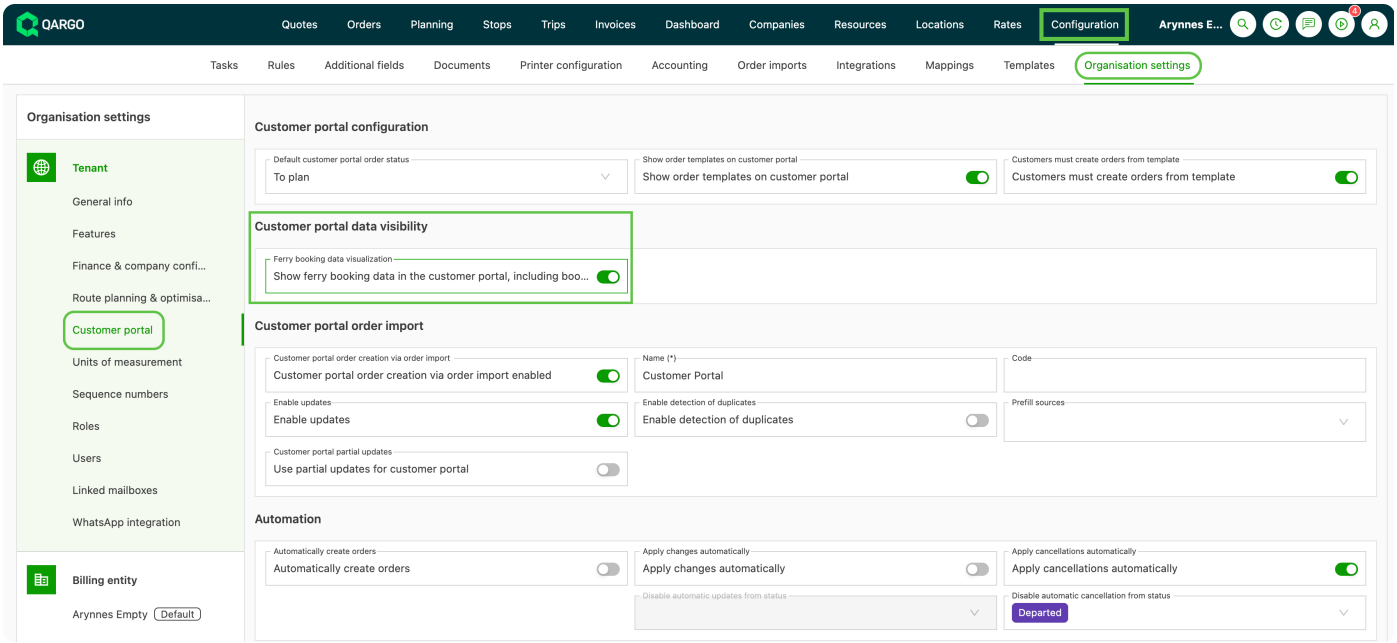


The toggle is off by default for existing tenants and on by default for new tenants. The setting applies during route calculation. It takes effect on new orders, or when an existing order route is updated.

> ‼️ When the toggle is on, the selected stop types are removed entirely from the customer portal route timeline, with no gaps or grayed-out placeholders. Portal users can also no longer create orders that contain those stop types. Hiding applies to the selected stop types across the whole tenant and cannot be configured for individual end customers.

Enabling intermodal booking visibility

1. **Navigate** to **Configuration > Organization settings > Customer portal settings**
2. **Turn on** the *Show ferry booking data* toggle
3. **Save**. The *Booking* section is now visible to all portal users on this tenant



🧰 The toggle is off by default. When it is off, no *Booking* section or empty placeholder appears in the portal.

What end customers see

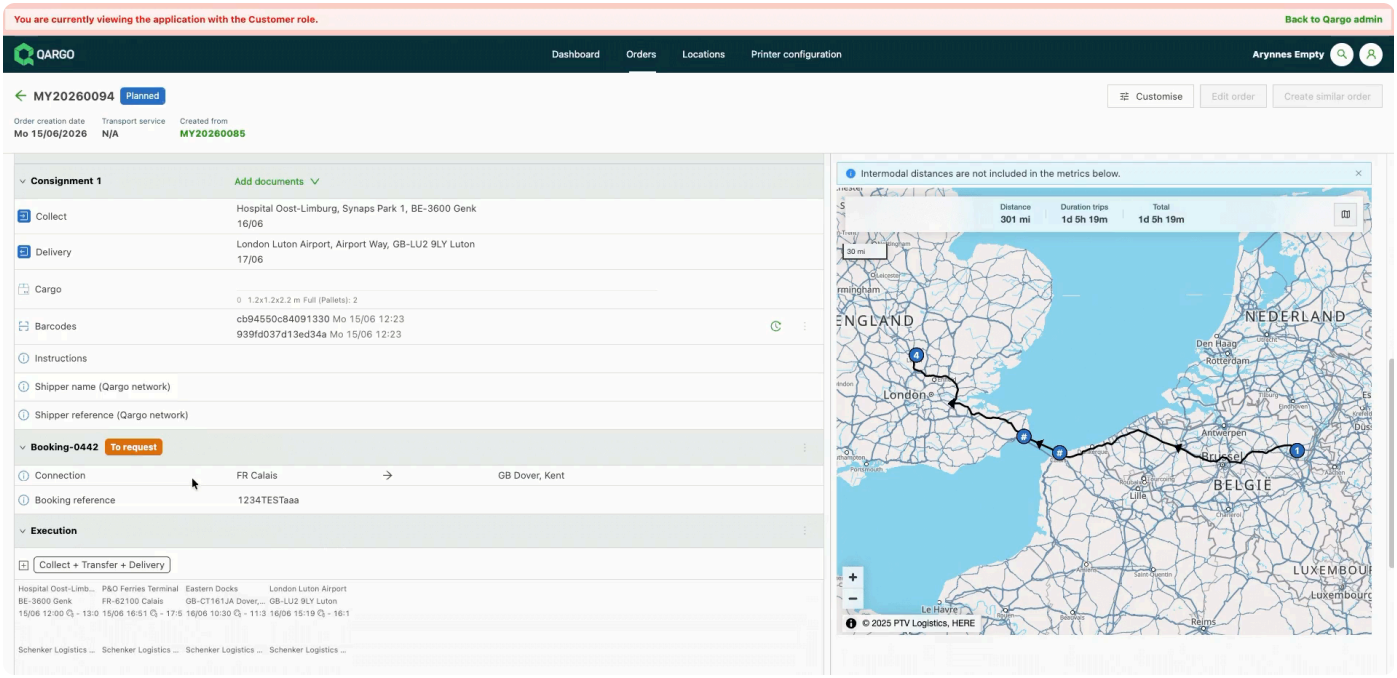
When the toggle is on, a read-only *Booking* section appears on the order detail page in the customer portal. It appears for orders with an active intermodal booking. The section shows:

- *Booking name*
- *Booking status* (e.g., Requested, Booked)
- *Booking reference*: the reference number assigned by the carrier
- The from and to stop locations of the intermodal connection

The section is hidden automatically when:

- The toggle is off
- The order has no active intermodal booking
- The booking is canceled

End customers cannot edit any booking fields in the portal.



Limitations

- The operations status (e.g., Checked in, On board, Sailed) is not shown. Planners can view it in **Planning > Intermodal**
- Departure and arrival times are not shown, only the from and to stop locations
- The setting applies to the whole tenant and cannot be turned on or off for individual end customers
- Only intermodal bookings are visible. Warehouse bookings and customs pre-notifications are excluded
- The displayed fields cannot be configured

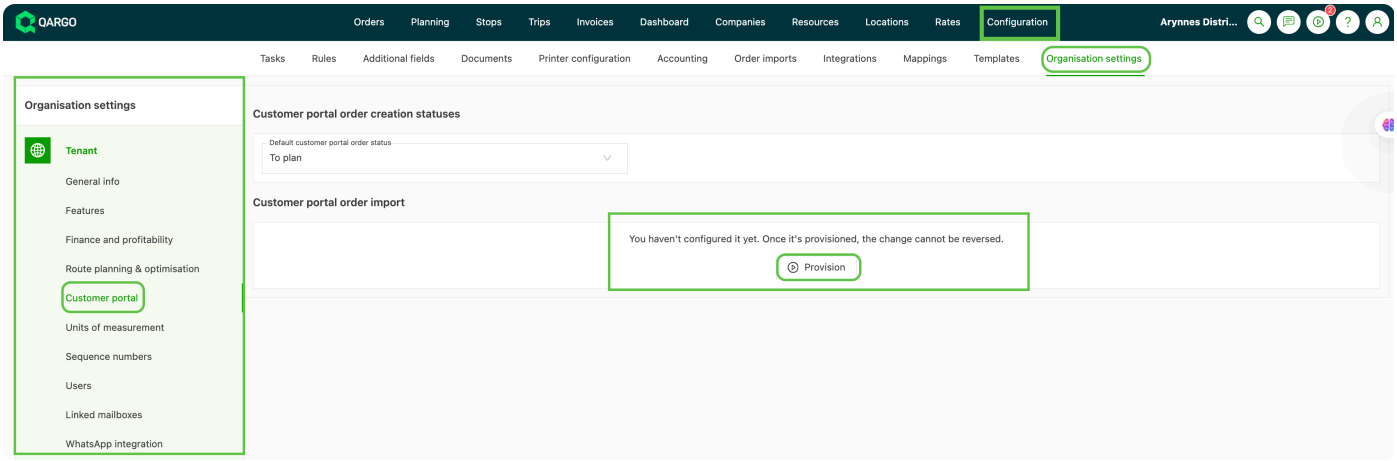
Troubleshooting

Issue	Likely cause and resolution
Booking section not visible in the portal	The toggle is off.\
Turn on the *Show intermodal booking on customer portal* toggle under **Organization settings > Customer portal settings**	
Booking section not visible although the toggle is on	The order has no active intermodal booking, or the booking is canceled.\
Check in **Planning > Intermodal** that the order has an active intermodal booking that is not canceled	
Warehouse or customs pre-notification bookings not shown	Only intermodal bookings are shown.\
Warehouse bookings and customs pre-notifications are excluded in this version	

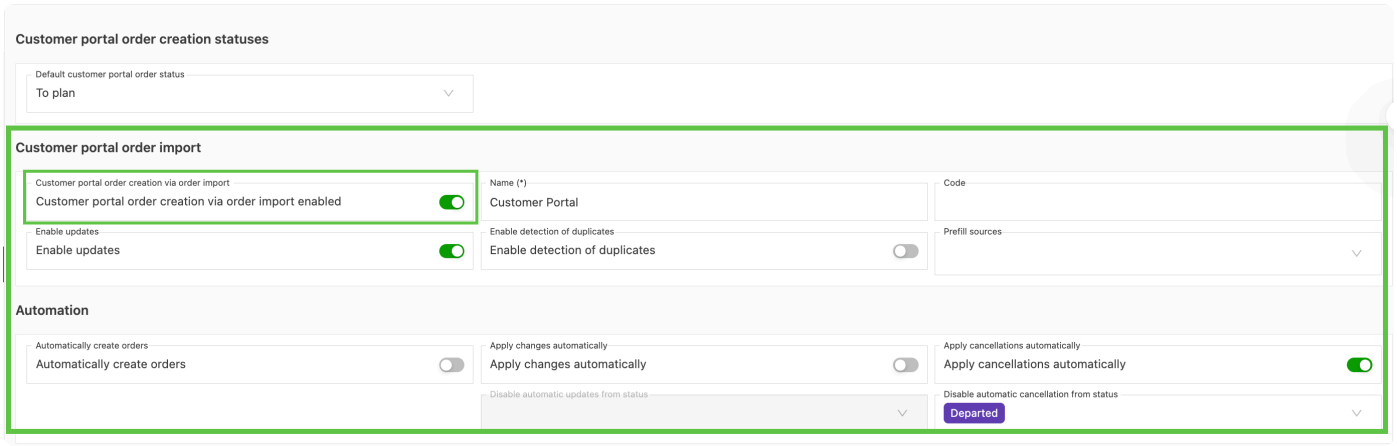
Provision order import features (Qargo and Super Admin only)

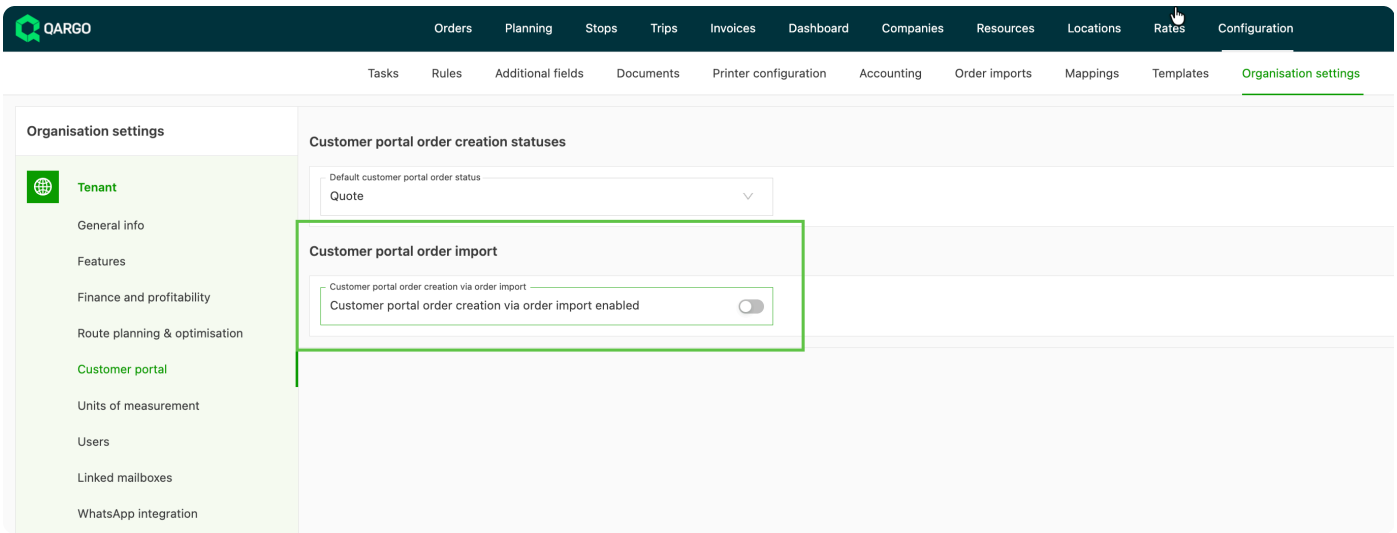
- Select:

- ***Customer portal order import*** **> Provision**



‼️ Once the feature is **provisioned**, the fields that configure the order import functions are displayed.
Turn off ***'Customer portal order creation via order import enabled'*** to return to the previous order behavior.





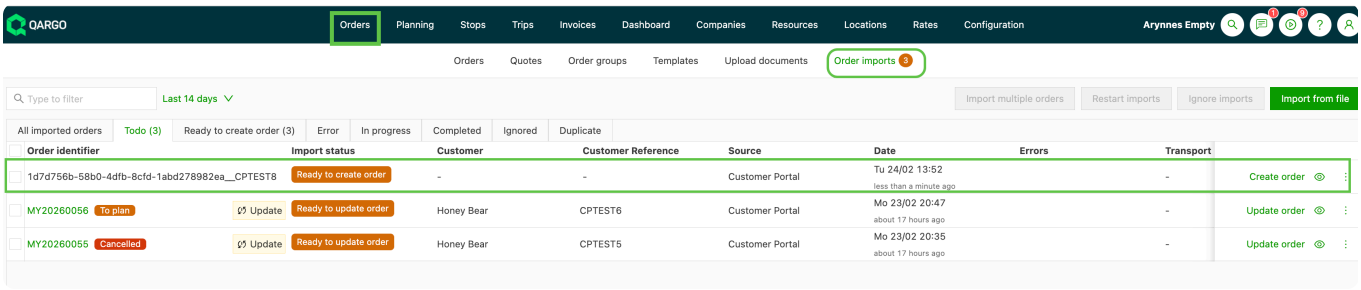
🧰 This cannot be configured for individual customers. Once enabled, it is available to all customer portal users.

Enabling order edit and cancel

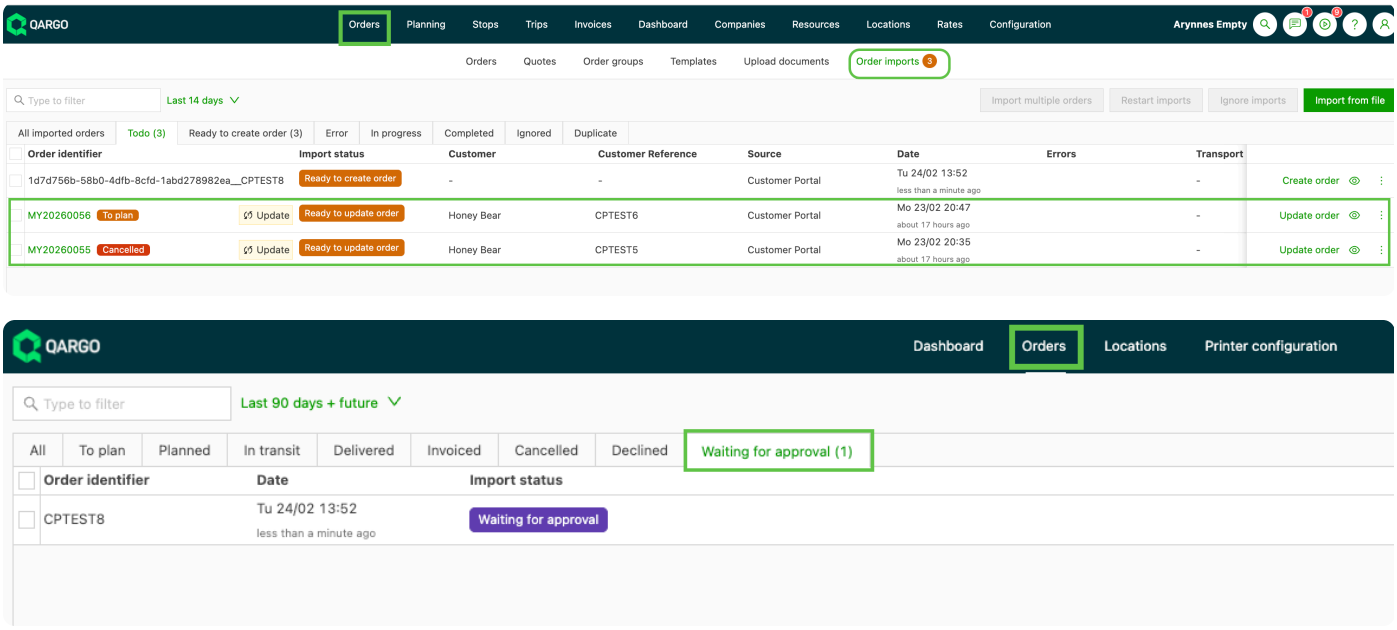
📚 To train customers on these new features, share the training walkthrough article Customer portal walkthrough.

Once enabled, this feature gives **portal customers the ability to edit or cancel orders they have already submitted**.

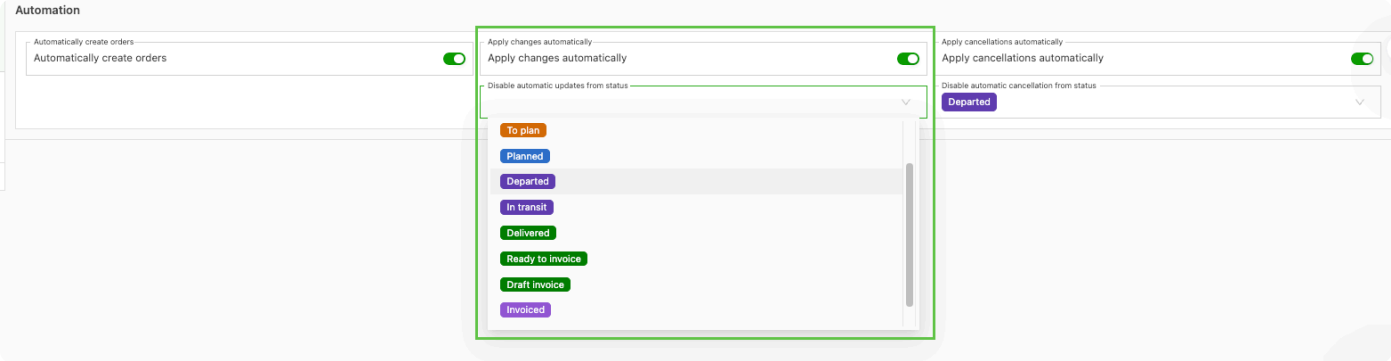
- Under **Customer portal order import**, users can set the preferred order import workflow.
- To let customers update submitted orders, turn **the 'Enable updates' toggle on**.
- The **Automation** panel has three new toggles:
  - *Automatically create orders:* Portal orders are automatically created as transportation orders
    - When this is off, users must manually approve customer-submitted orders on the ***'Order imports' page***
    - Click ***'Create order'*** to verify and save the order



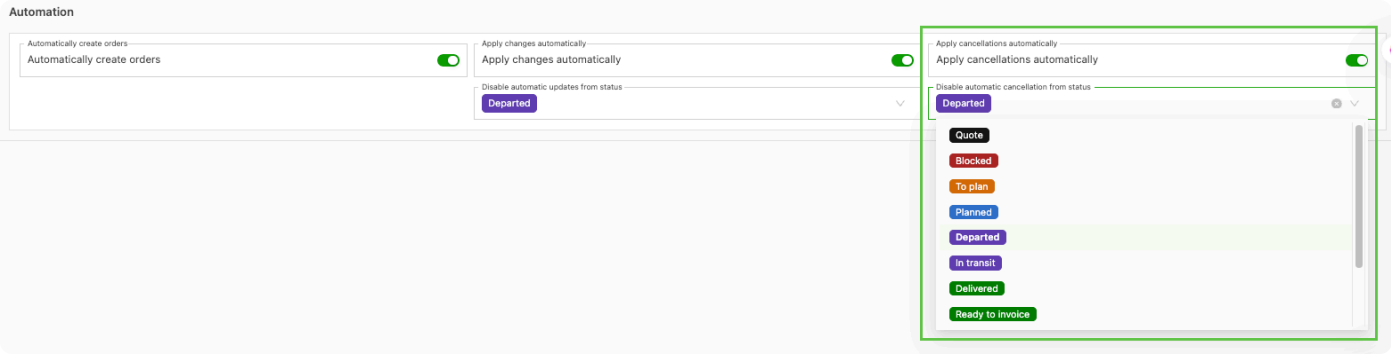
  - *Apply changes automatically:* Portal customers can edit the details of a submitted order, provided it has not been picked up yet
    - Only available if ***'Enable updates'*** is turned on.
    - Where updates are not accepted automatically, users must approve them on the ***'Order imports'*** page
    - Customer portal users see update requests as *'Update awaiting approval'* and under the ***'Waiting for approval'*** tab



- Set a status to block updates beyond a specific point in the workflow:

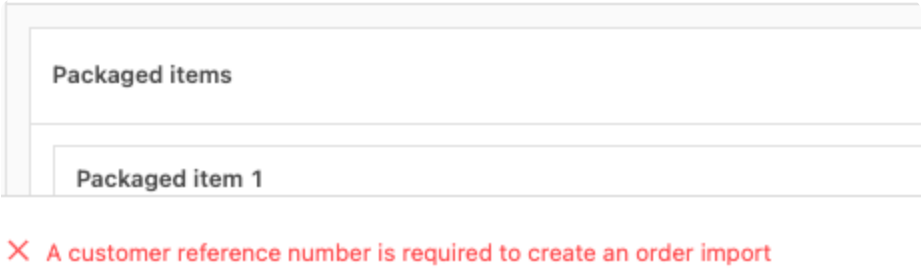


- *Apply cancellations automatically:* Portal customers can cancel a submitted order, provided it has not been picked up yet.
    - Set a status to block updates beyond a specific point in the workflow:



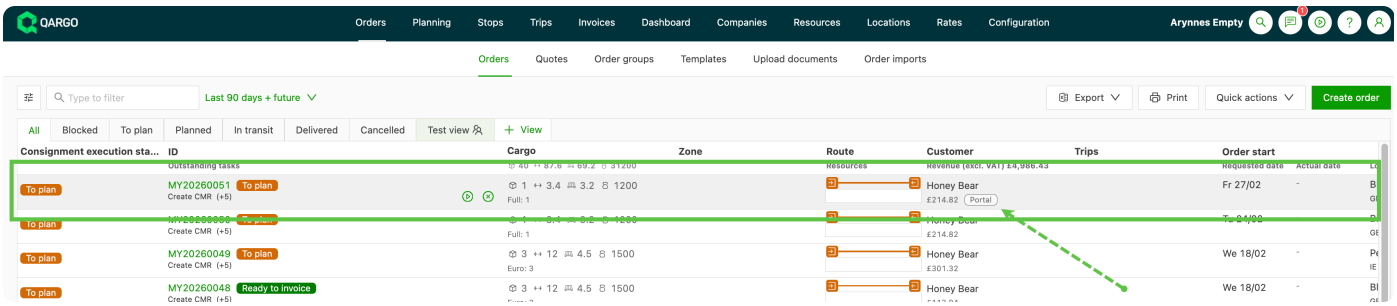
How it works

- To submit a new order, portal customers **must use a unique customer reference**. Otherwise, the user sees an error
    - This reference number links the portal order to the TMS order.

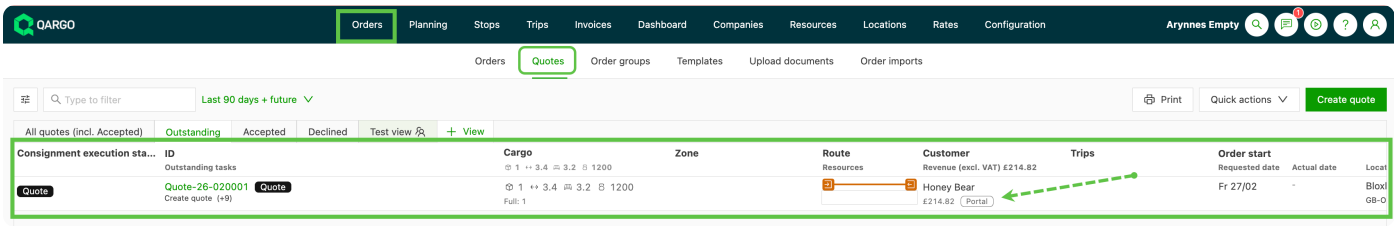


📚 Set the customer reference number field to ‘Always show’ on the order form. This helps customer portal users fill in the required information.

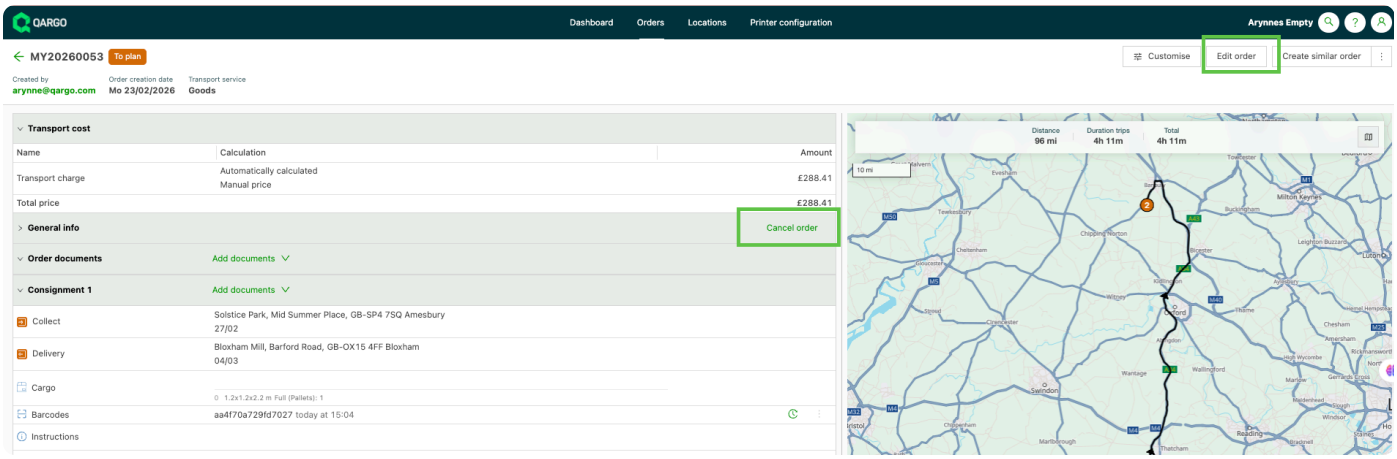
- Once submitted successfully, the order appears in the order list view with the ‘Portal’ label.
    - If ***‘Automatically create orders’*** is **not set**, all orders must be updated manually in the ‘Order import’ tab



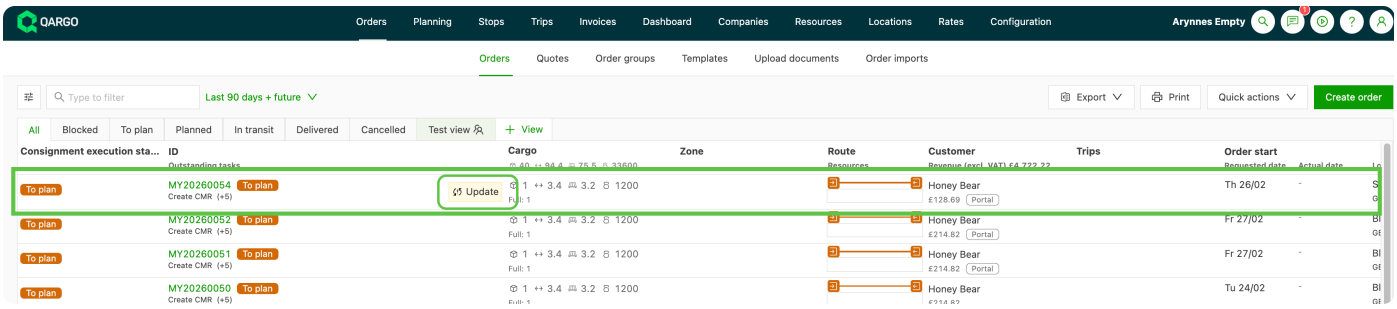
- If orders submitted by customers generate a quote first, the quotes appear in the Quote tab with the 'Portal' label.

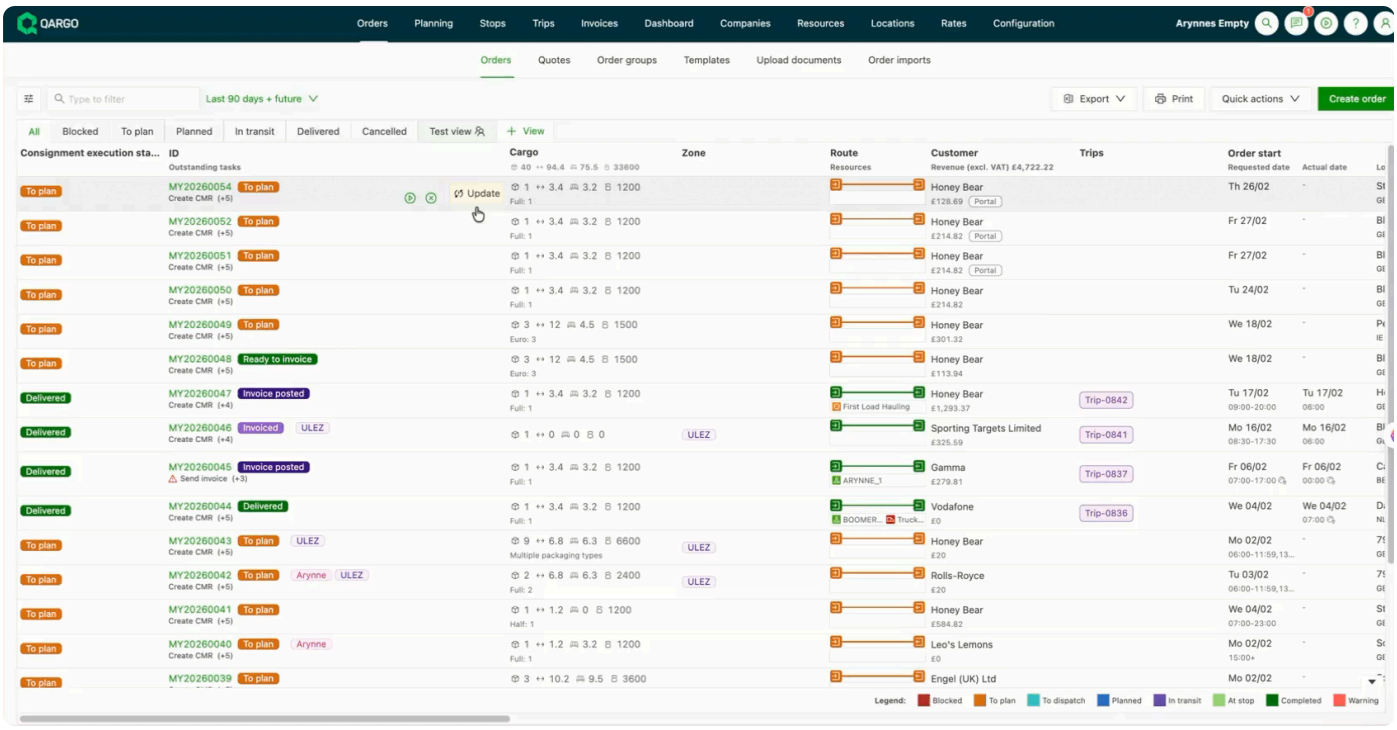


- Portal customers see **'Edit' and 'Cancel' options on eligible orders.**

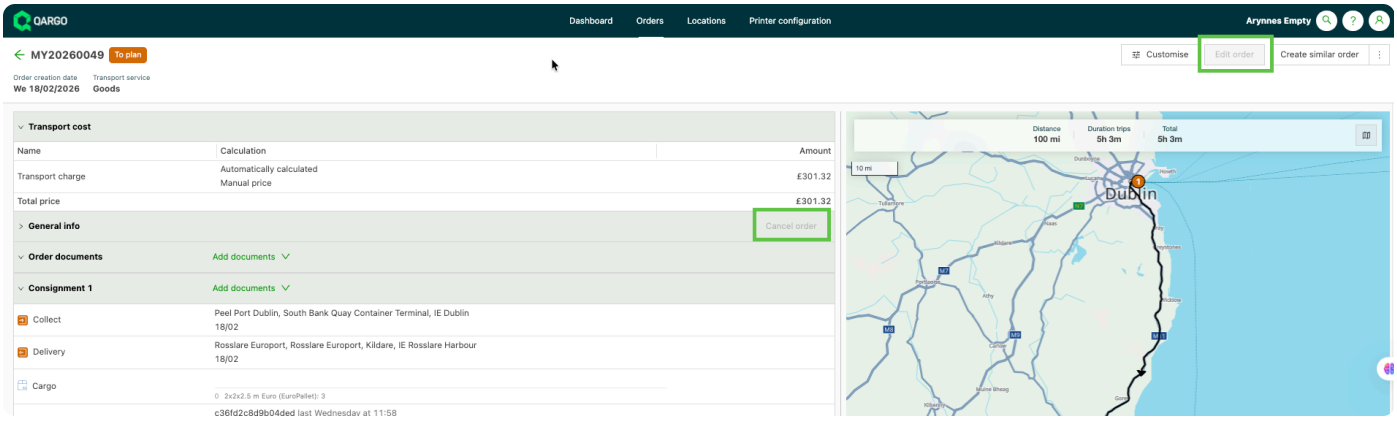


- When automatic updates are enabled, changes submitted by the customer update the order in the TMS automatically.
    - Portal users see the label *'Update awaiting approval'* until the order is opened in the carrier account. Opening the order 'approves' the update.
- Where automatic updates **are not enabled**, customers can still edit the order. The carrier then sees an **'Update'** label on the order
    - Click the update to open the revised order.
    - Validate and save the update.



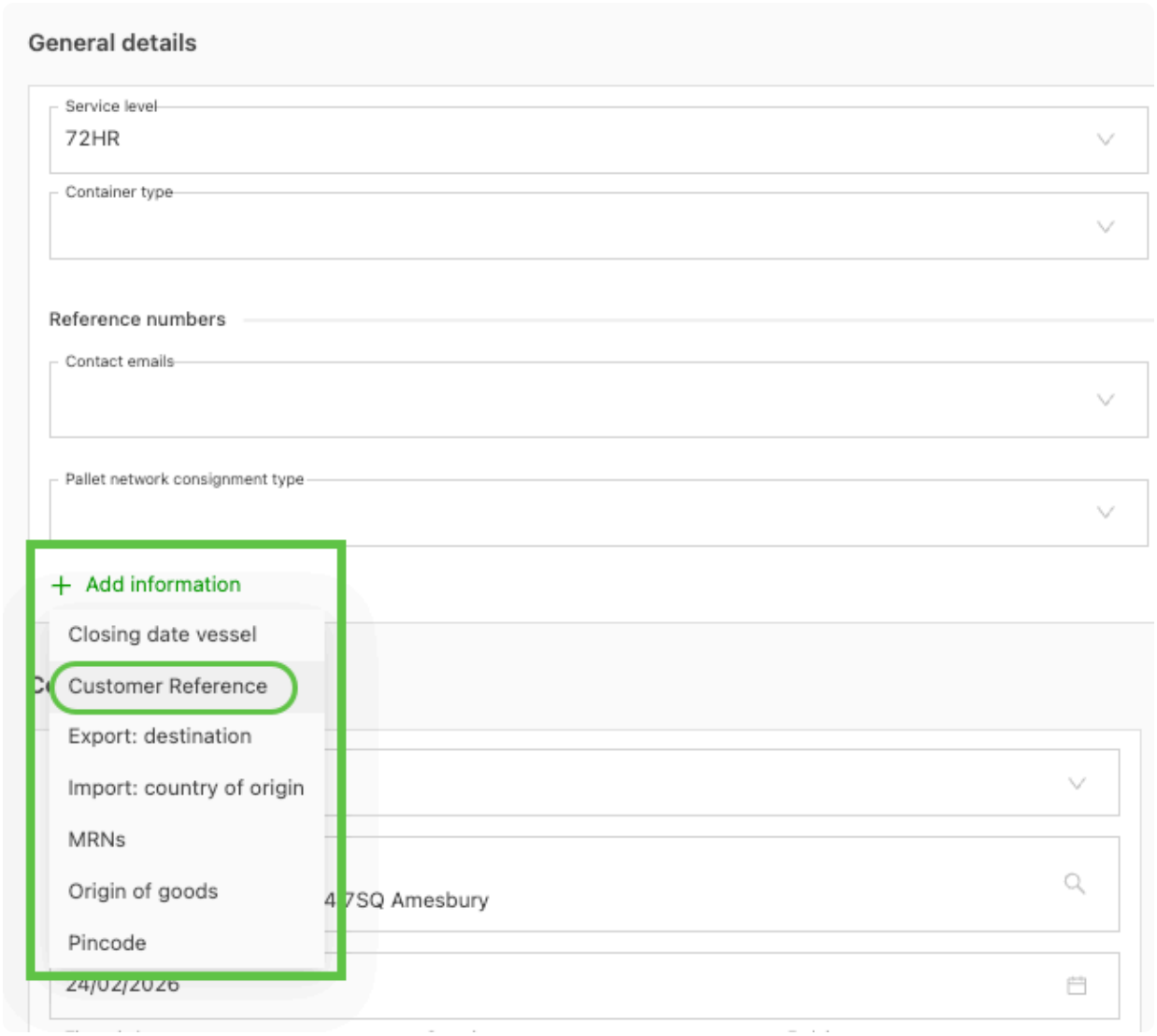


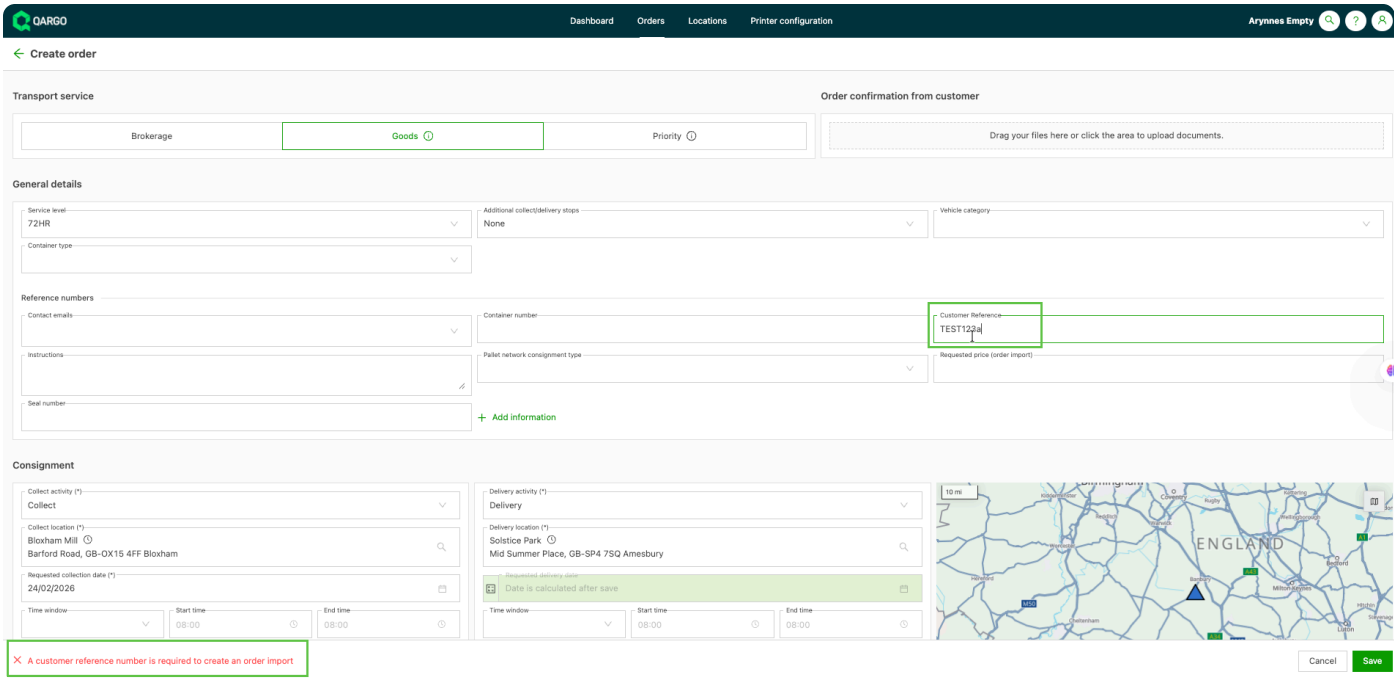
📚 Only orders created through the new order import flow can be edited or canceled this way. Orders created through the previous portal flow remain non-editable. New orders submitted through a third-party integration also **cannot be edited or canceled** by the portal user. These options are 'grayed out'.



Troubleshooting order import

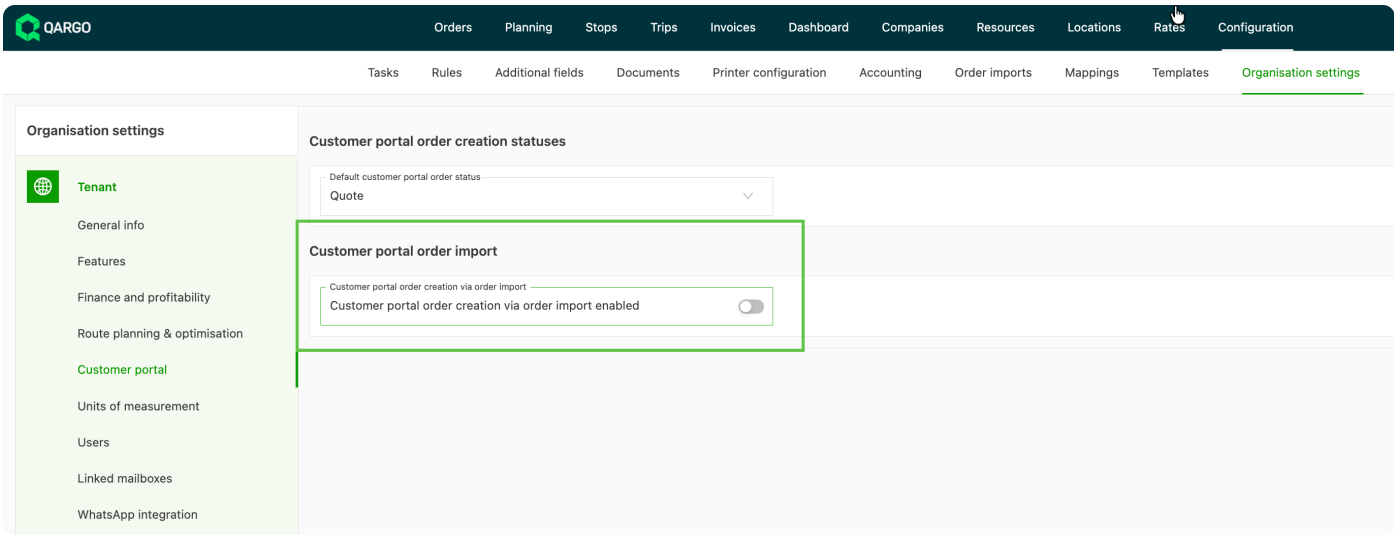
The customer reference error appears, but there is no visible place to enter the reference number.
Unless the field is set to 'Always show', the customer reference field is under the **'+ Add information' link** in General details on the order form. The recommendation is to set this field to **'Always show'**, so that it appears as a field on the order form.


General details
Service level
72HR
Container type
Reference numbers
Contact emails
Pallet network consignment type
+ Add information
Closing date vessel
Customer Reference
Export: destination
Import: country of origin
MRNs
Origin of goods
Pincode
24/02/2026


QARGO
Dashboard
Orders
Locations
Printer configuration
Arynnes Empty
Create order
Transport service
Brokerage
Goods
Priority
Order confirmation from customer
Drag your files here or click the area to upload documents.
General details
Service level
72HR
Additional collect/delivery stops
None
Vehicle category
Container type
Reference numbers
Contact emails
Container number
Customer Reference
TEST123a
Instructions
Pallet network consignment type
Requested price (order import)
Seal number
+ Add information
Consignment
Collect activity (*)
Collect
Collect location (*)
Bloxham Mill
Barford Road, GB-OX15 4FF Bloxham
Requested collection date (*)
24/02/2026
Time window
Start time
08:00
End time
08:00
Delivery activity (*)
Delivery
Delivery location (*)
Solstice Park
Mid Summer Place, GB-SP4 7SQ Amesbury
Requested delivery date
Date is calculated after save
Time window
Start time
08:00
End time
08:00
10 mi
ENGLAND
A customer reference number is required to create an order import
Cancel
Save

Customers cannot autoprint labels after creating an order in the customer portal. This used to work. Why does it no longer work?

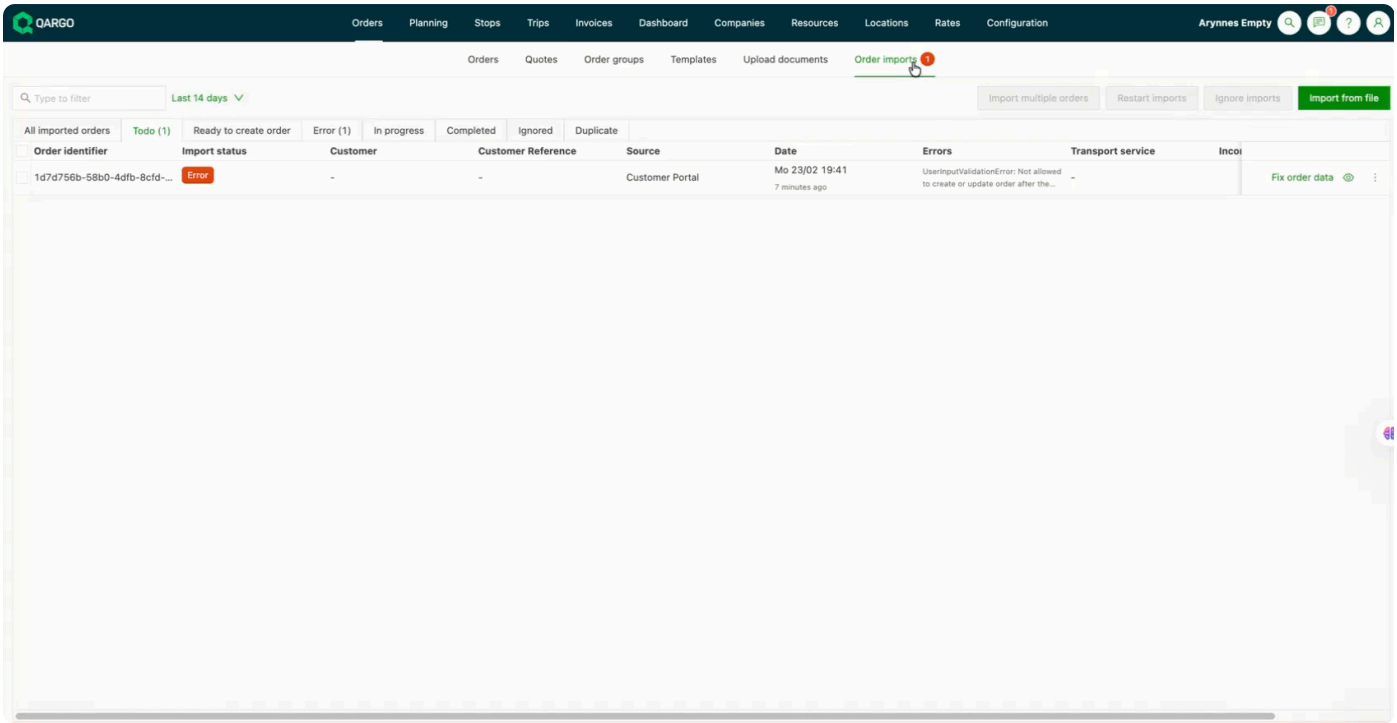
When the order import workflow is enabled and a customer submits an order in the portal, the order is not created in the customer portal immediately; this depends on approvals. The order import workflow includes approval automation for the order, which can cause a delay. Once the order is approved, the customer portal user can download the label manually. If this affects autoprinting and the customer wants to return to the previous behavior, **turn off *'Customer portal order creation via order import enabled'*.** This restores the previous order behavior, including autoprinting. However, the customer **will not** be able to **edit or cancel orders.**



Order import error showing *'Not allowed to create or update the order after the cutoff time'*. How can this be fixed?

This error appears because a lead time applies to the transportation service or service level selected on the order. The customer submitting the order does not see this error, so users can decide whether to override the lead time.

Click the *'Fix the error'* option. This opens the order capture page so the user can correct the data and save the order.



A customer submitted an order, then made a change that needs manual approval. On review, the location was outside the delivery area, so the order cannot be accepted. The order was canceled, but how does the customer find out?

When the customer portal is not set up to accept automatic order creation, orders go to the Waiting for approval tab. If the carrier then decides not to carry out the order, it moves to the Canceled tab.

When the customer cancels an order that is in the Waiting for approval tab, it also appears in the Canceled tab.

Share planned and actual load times via a task flag

Control which loads share planned and actual times in the customer portal by turning on a task flag. Estimates and confirmed times then appear only when they are reliable.

🎥 This video explains how to share load times, and also how to grant access to the customer portal and enable exports for customer portal users:

▶ https://watchclueso.com/embed/jxzf2fbdu0fbw2qu

Prerequisites

- A resource-allocation load task must exist under **Configuration > Tasks > Loads**.
- Super Admin rights are required to edit tasks in Configuration.

Use cases

- A carrier wants end customers to see a *confirmed delivery time* only after a planner has verified the load. This avoids calls triggered by rough planning estimates.
- A logistics team shares actual completion times for delivered loads. Customers get an accurate record without seeing unconfirmed estimates.

Enable time sharing on a load task

1. **Navigate** to **Configuration > Tasks > Loads**.
2. **Open** the resource-allocation task that runs when a load is planned, or create one.
3. **Turn on** the **Share load planned/actual times to the customer portal/API** toggle, next to **Re-dispatch automatically if load changes**.
4. **Save** the task configuration.

> Once enabled, this toggle shows the full planned times for each leg: the date and time together. It is not currently possible to show the date only.

Share times for a specific load

1. **Plan** the load and assign resources as usual.
2. **Complete** the load task that carries the **Share load planned/actual times to the customer portal/API** flag. Completing this task starts sharing the load's times with the customer.
3. **Check** the customer portal order list. It now shows the planned date and time for the load.

What the customer sees in the portal

By default, the portal shows no estimated times: the customer sees only the requested time. Once a flagged load task is completed, the portal shows the shared times:

- The order list shows the planned date and time for the load.
- On the order detail, while the load is still planned and not yet confirmed, only the date is shown, with a ‘To confirm’ tag.
- If the flagged task has been completed but the load is not yet completed, the actual date and time are shown.
- Once a stop is completed, the exact completion time is shown. A completed load always shows the completion times, even if the flagged task was not run.

📚 This shares the planned and actual times that Qargo already holds. It does not add a live-updating ETA. A shared planned time is the time set during planning and does not update while the load is in progress.