Qi: validation tasks

Qargo Intelligence uses AI to spot errors or issues through simple questions and clear tags, saving time and improving accuracy.

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Introduction

In trucking and logistics, small mistakes can create big problems. An unchecked invoice or a shipment routed incorrectly to a contract carrier can delay payments, upset customers or even create compliance risks. These are often routine checks that take up valuable time for planners, dispatchers and finance teams.
Qargo Intelligence helps reduce these errors. The idea is simple: the system automatically checks the data using plain-language questions, then highlights issues with clear tags so teams can act quickly.

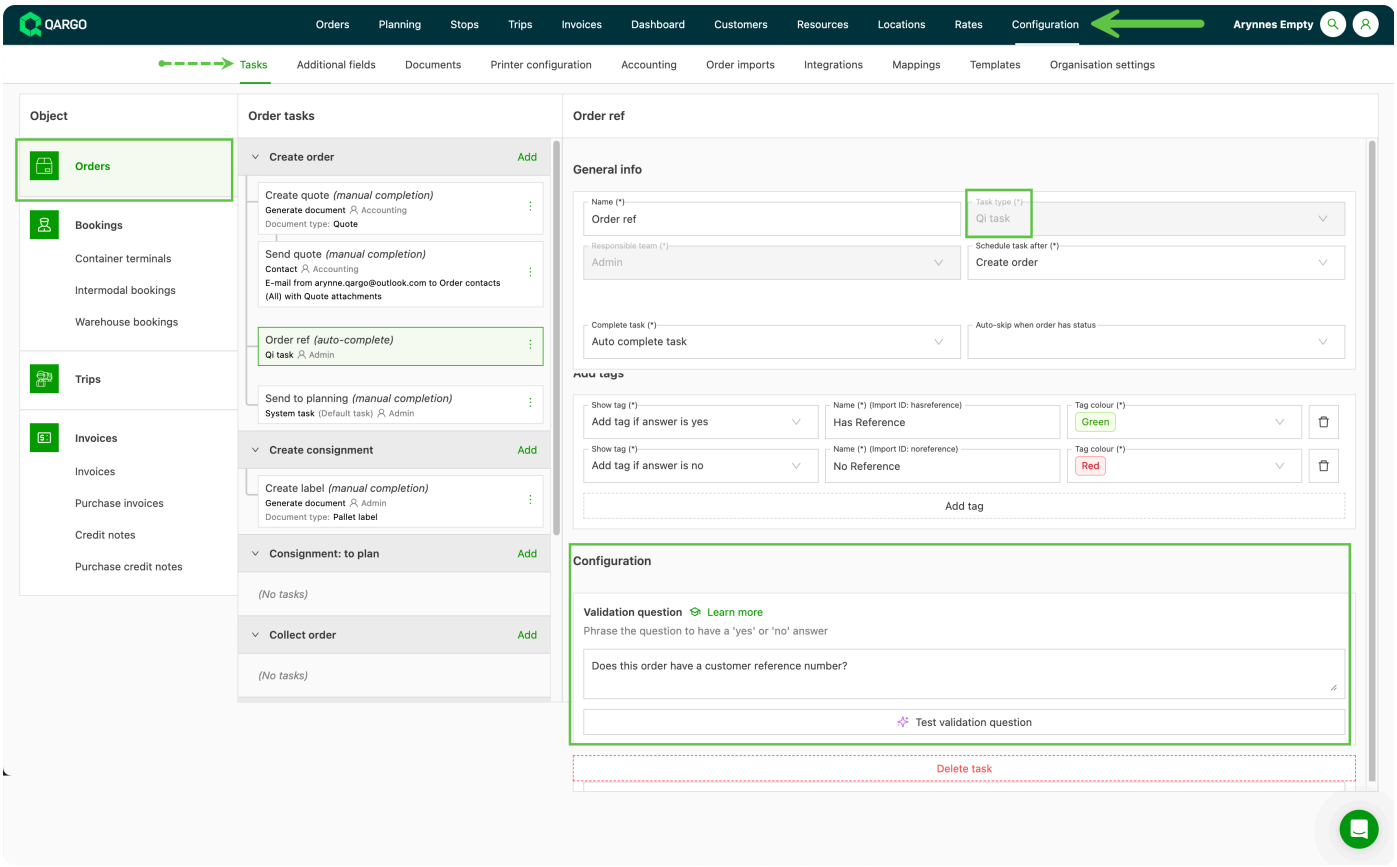
> 📚 **Use Quick Actions to run tasks in bulk and maximize efficiency.**

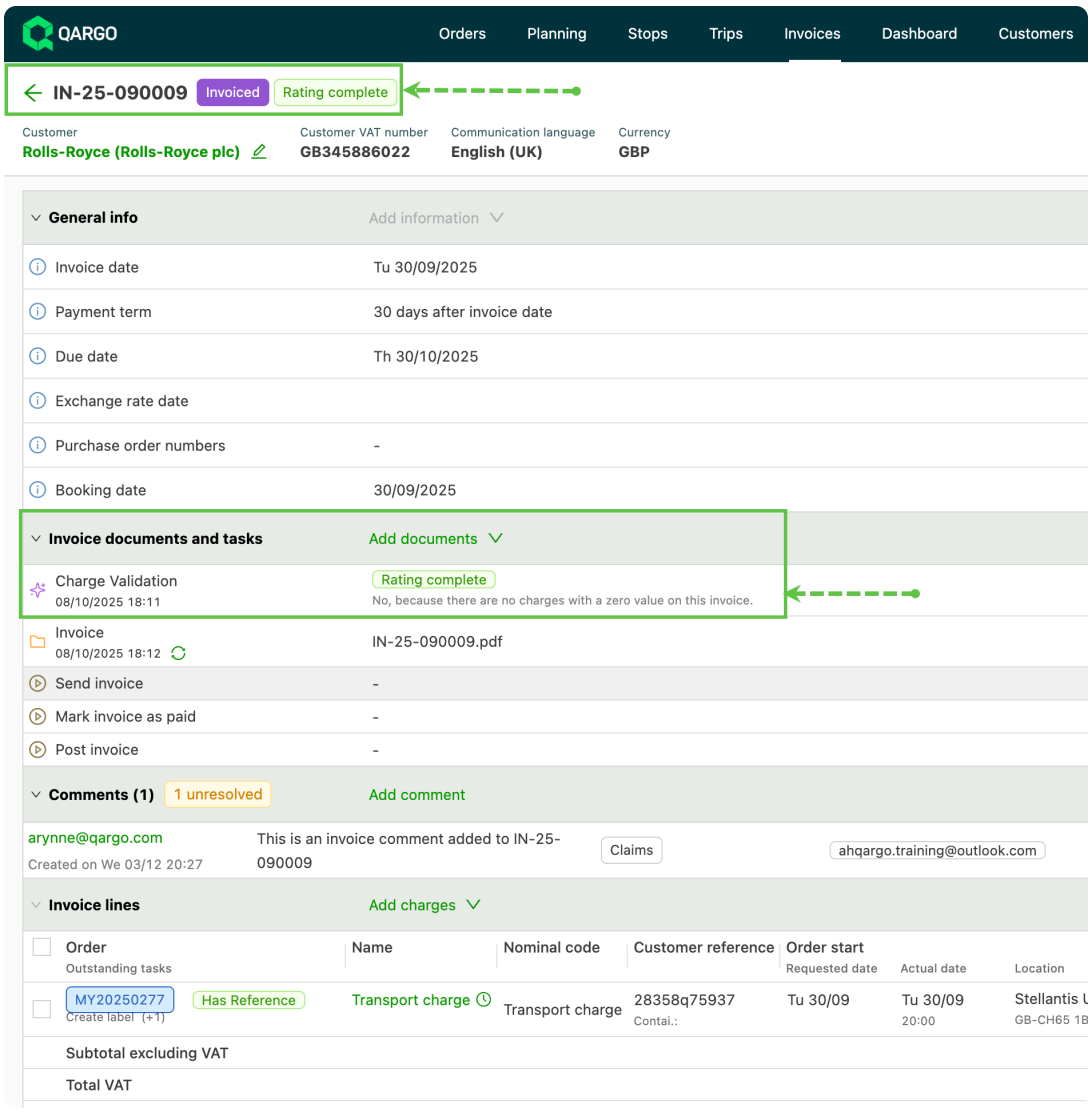
Terminology

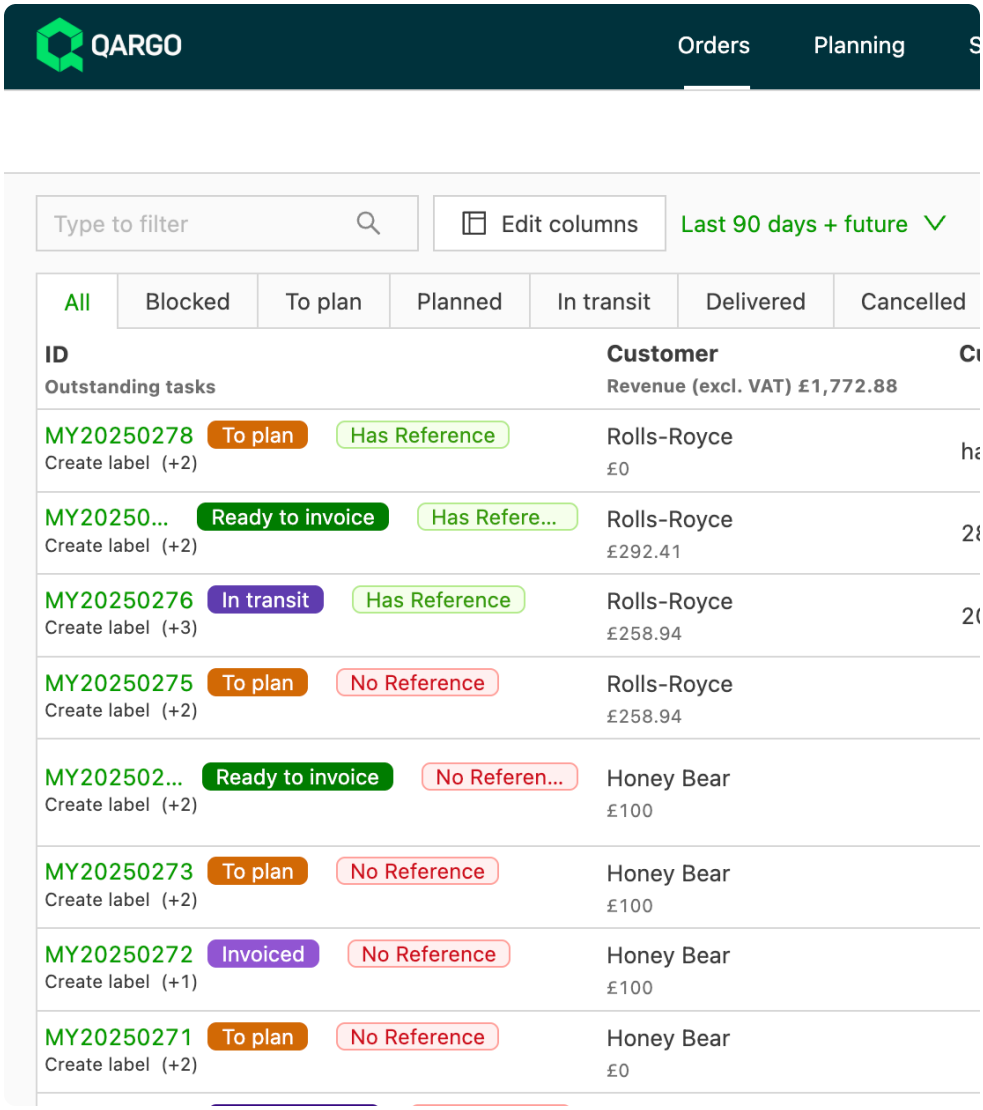
- **Qargo Intelligence (Qi):** A function in Qargo that uses AI to provide smarter insights and automation.
- **Validation task:** A configurable check set up in plain language, such as “Is the customer reference missing for this order?”
- **Tags:** Visual indicators (e.g., red or green labels) added to orders, shipments or invoices depending on the AI task outcome.

Key features

1. **Plain-language checks**
   Instead of writing complex rules, users can simply ask a yes/no question such as:
   “Is there a zero price on this invoice?” or *“Is the customer reference number present?”*
2. **Flexible testing and setup**
   The question can be tested on real examples before it is rolled out. This helps ensure the AI understands the intent and gives the right results.
3. **Automatic or manual triggers**
   AI tasks can run automatically in the background or be launched manually to double-check something important.




QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Customers
IN-25-090009
Invoiced
Rating complete
Customer
Rolls-Royce (Rolls-Royce plc)
Customer VAT number
GB345886022
Communication language
English (UK)
Currency
GBP
General info
Add information
Invoice date
Tu 30/09/2025
Payment term
30 days after invoice date
Due date
Th 30/10/2025
Exchange rate date
Purchase order numbers
-
Booking date
30/09/2025
Invoice documents and tasks
Add documents
Charge Validation
08/10/2025 18:11
Rating complete
No, because there are no charges with a zero value on this invoice.
Invoice
08/10/2025 18:12
IN-25-090009.pdf
Send invoice
-
Mark invoice as paid
-
Post invoice
-
Comments (1)
1 unresolved
Add comment
arynne@qargo.com
Created on We 03/12 20:27
This is an invoice comment added to IN-25-090009
Claims
ahqargo.training@outlook.com
Invoice lines
Add charges
Order
Outstanding tasks
Name
Nominal code
Customer reference
Order start
Requested date
Actual date
Location
MY20250277
Has Reference
Create label (+1)
Transport charge
Transport charge
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Contai.:
Tu 30/09
Tu 30/09
20:00
Stellantis
GB-CH65 1B
Subtotal excluding VAT
Total VAT

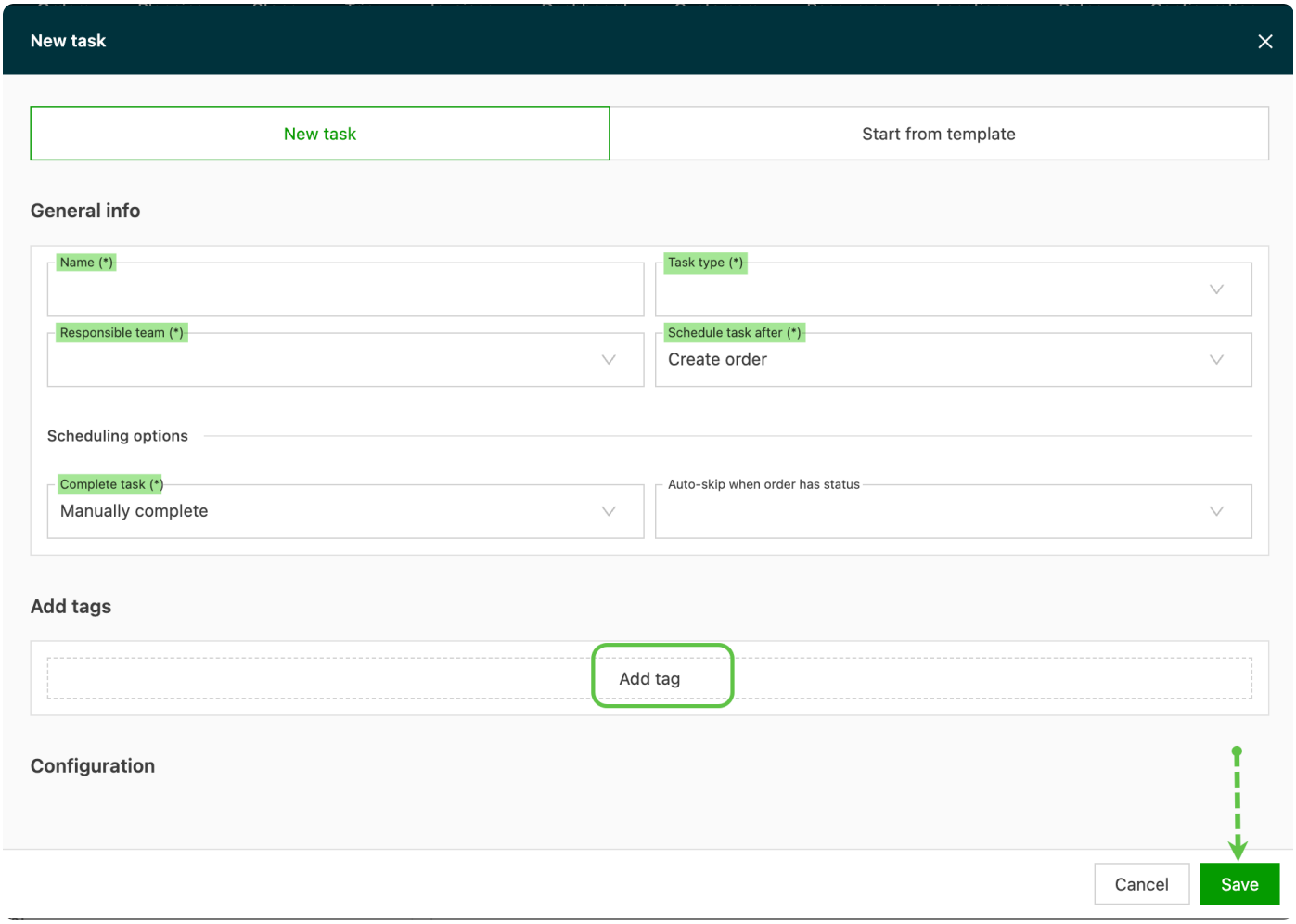


Configuration

🧰 Requires Super Admin or Admin user permissions.

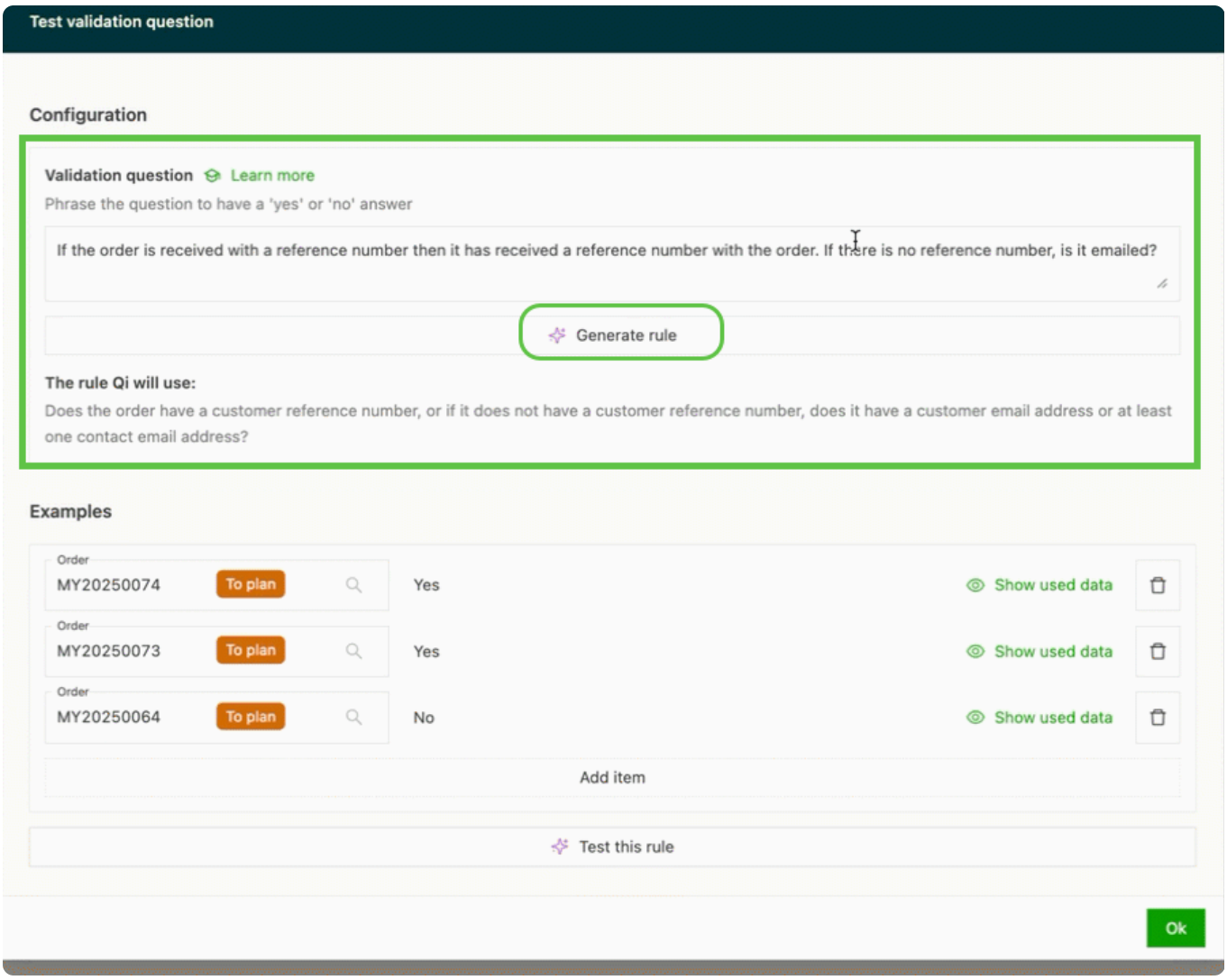
- Go to **Configuration > Tasks**
- Select the object the task applies to, for example orders, loads or invoices
- Click ***'Add'*** to start entering the new task
- Complete the required fields:
  - Name – make it easy to identify
  - Task type – select **Qi task**
  - Responsible team – who in the organization is responsible for completing the task
  - Schedule task – where in the workflow this validation check should be performed
  - Complete task – select whether the task should complete automatically or whether a user needs to do a final review and complete it.
  - Select the tags to display

- Click **Save**



Validation questions

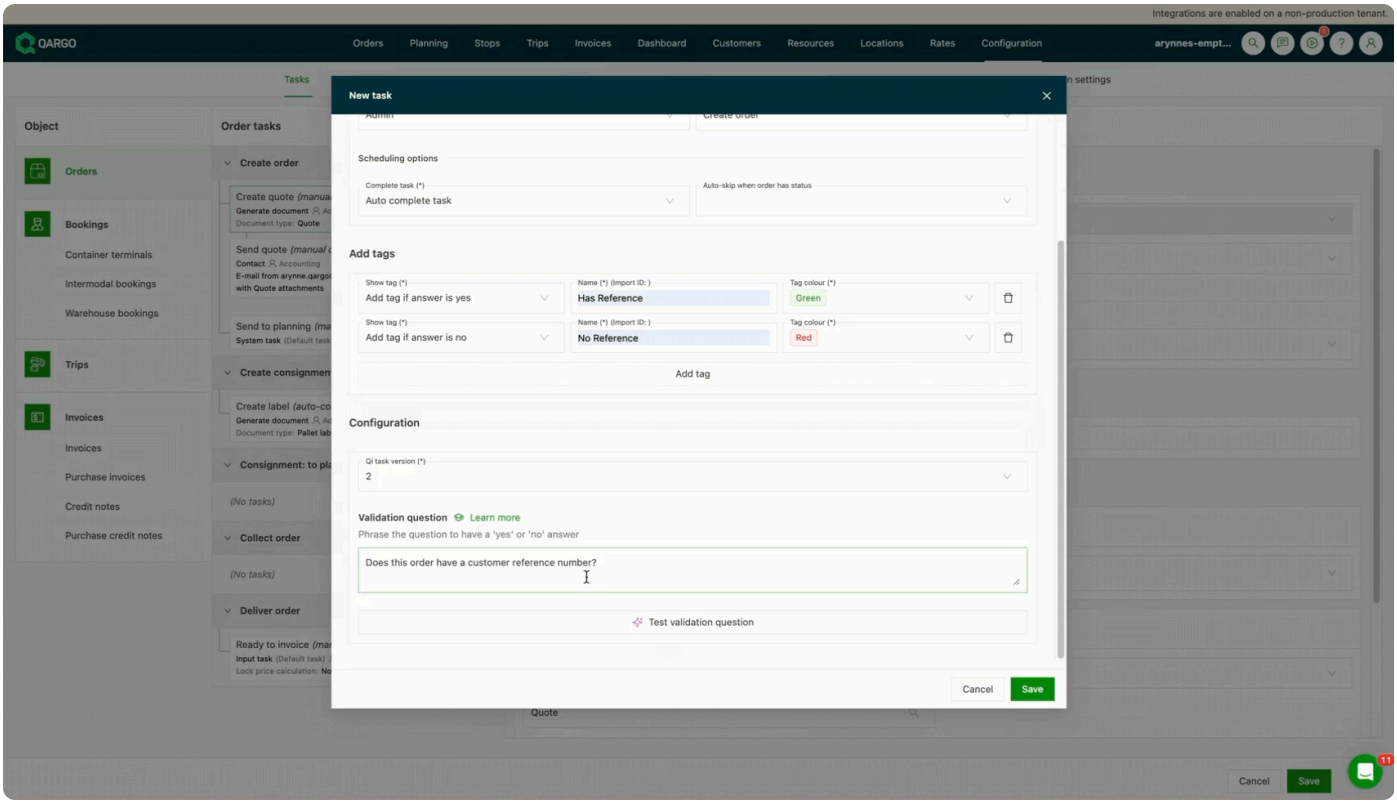
- Once the validation question is added, click ***'Generate rule'***



- The system 'reads' the question and shows the ***'Rule Qi will use'*** to the user. Where complex language is used, the system rephrases the question.

‼️ Always read the ***'Rule Qi will use'*** to make sure it is accurate.

- Add example data to test the rule
- Click ***'Test this rule'*** to validate the data
- Confirm that the rule returns the expected data, and make any necessary changes if it does not.



Set a field instead of a tag

Qi tasks can also fill in fields, not only add tags. The *Assign fields* Qi task type checks a condition and writes a value, such as a container no. or a booking instruction, into a field on the order, load or stop.

📚 See Qi: assign fields tasks (what, why and how) for setup steps.

Limitations

- **AI can make mistakes:** Human oversight remains important. If something looks wrong, the AI task result can be dismissed.
- **Document checks not supported:** The AI task cannot read attached documents such as PDFs, so it cannot verify details inside a POD file itself.

💬 **Availability:** Only works if the company has Qargo Intelligence enabled as an add-on. Contact the Account Manager to learn more about the Qargo Intelligence feature.

Troubleshooting tips

- **Phrase questions clearly:** Use simple yes/no wording such as *"Is the customer reference missing?"*
- **Test before rollout:** Always test the AI task on several examples to confirm accuracy.
- **Refine over time:** If the AI result does not look right, try rephrasing the question.

- **Use tags wisely:** Configure tags so they are easy to spot (red for errors, green for OK), so planners and finance teams know what to focus on.

By introducing AI tasks into Qargo Intelligence, trucking companies can save time, reduce errors and create smoother operations. While the feature is still experimental, it is already proving useful for everything from checking PODs to identifying risky shipments.