Orders – Departments: overview

This article explains what departments are in Qargo, who uses them, how to set them up, and how to get the most out of them. It also includes common use cases and troubleshooting tips.

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Introduction

Departments in Qargo make it possible to segment orders by business unit or workstream, such as Transport, Warehouse, or Containers. Departments serve three purposes:

- Operate with clarity: filter work, tailor workflows, and separate reporting by line of business.
- Rate accurately: apply different rate logic, conditions, and surcharges by department.
- Identify at a glance: include a department code in order numbers to make ownership and flows obvious.

In practice, the typical steps are:

- Create departments that mirror how the operation is structured.
- Configure rate cards and conditions so that rating automatically reflects the department of the order.
- Optionally add a department identifier to order names for quick recognition and tracking.

Terminology

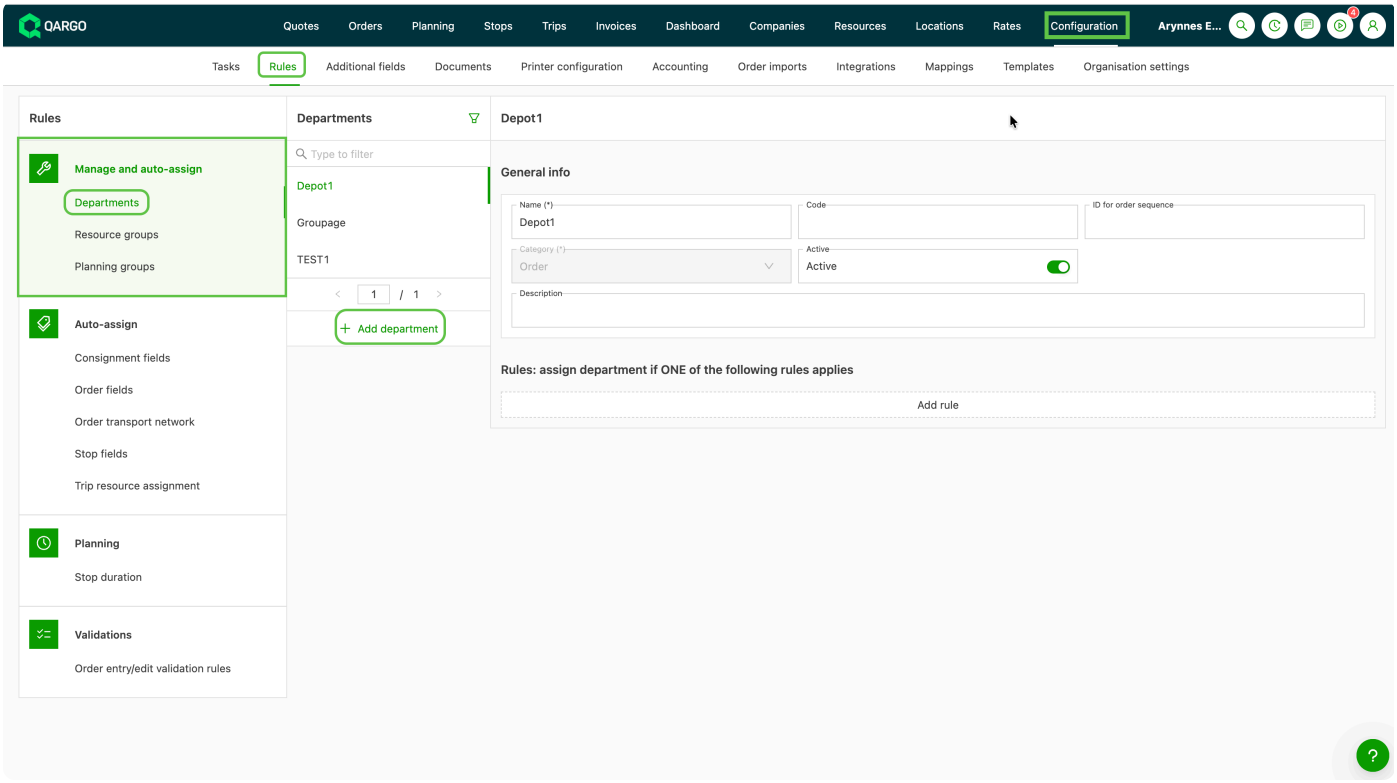
Term	Definition
Department	A business unit used to classify orders. Common examples include Transport, Warehouse, Containers, etc
Department identifier (code)	A short, unique code that can be assigned to a department. It can be injected into order names using the #DEP# placeholder.
Order name pattern	A configurable pattern that defines how order numbers are generated. #DEP# can be included to insert the department identifier
Rate card	A rating configuration. Conditions can be added so a rate or surcharge applies only when **Order > Department** equals a specific department
Transportation service	A service category (for example, Warehouse or General Haulage) that a department can be linked to as part of the operational setup.

Configure departments under rates

Follow these steps to set up departments and use them in rating:

1. Create or update a department

- Navigate to **Configuration > Rules**
- Select **Departments** from the **Manage and auto-assign** menu
- Click **+Add department** or select an existing department to update

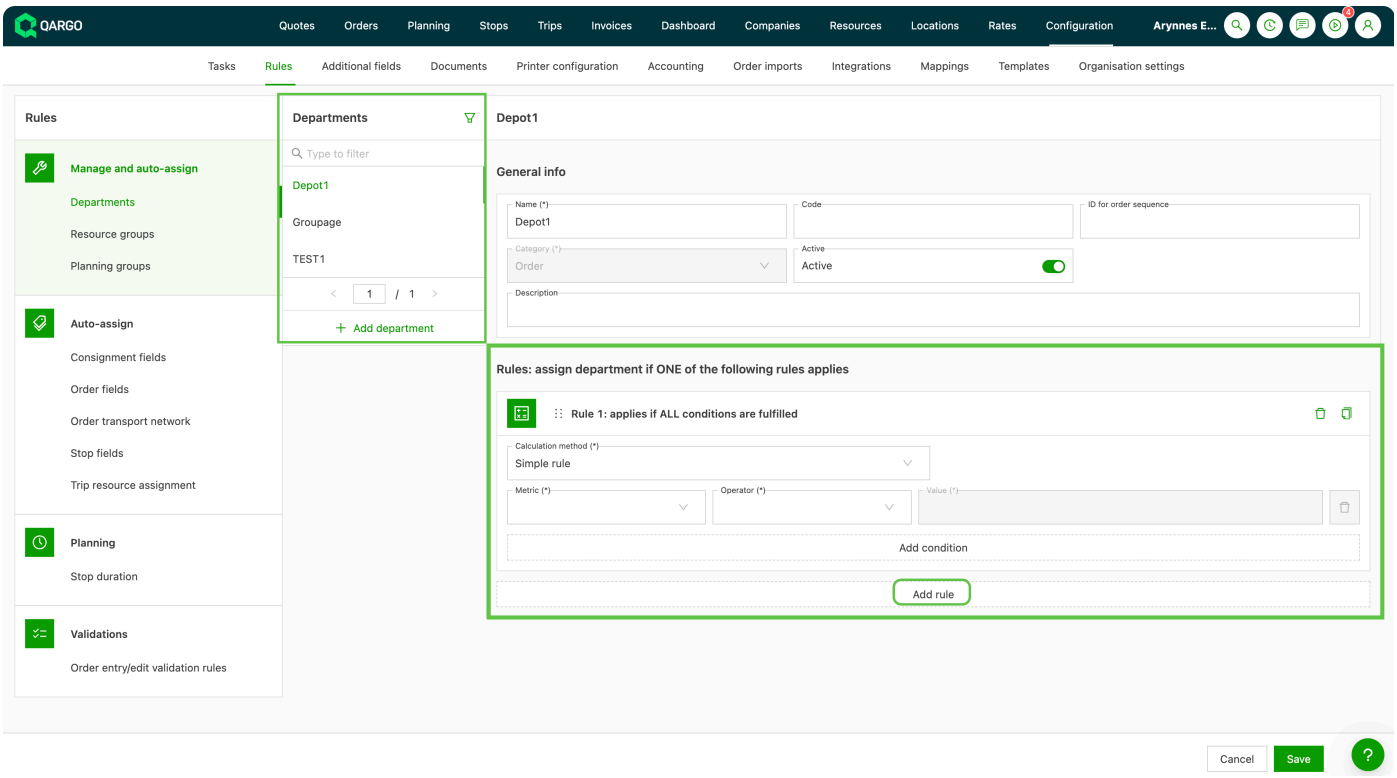


- Define a clear name and, if desired, **set a short identifier code** to appear in order names.
- Keep identifiers concise and unique.
    - A maximum of 10 characters is supported in the identifier field.

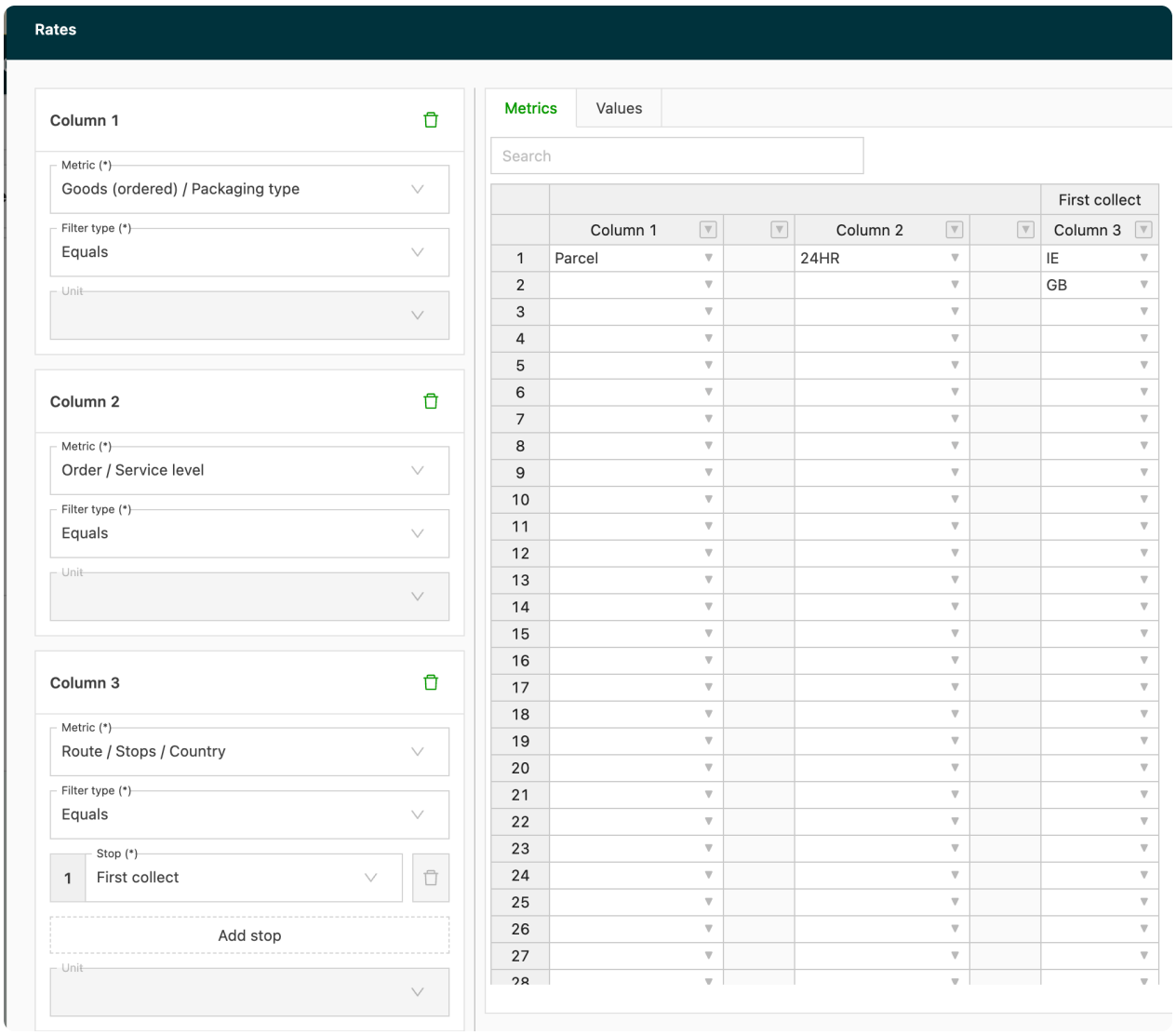
2. Rules: create auto-assignment rules

Create assignment rules by adding conditions that, when met, automatically assign orders to specific departments.

- Click **Add rule**



- Complete the metric, operator, and value as required
  - Set the calculation method. Two options are available:
    - *Simple rule:* Single-line condition using a defined metric, operator, and value
    - *Excel table:* Multiple conditions in combination that need to be met

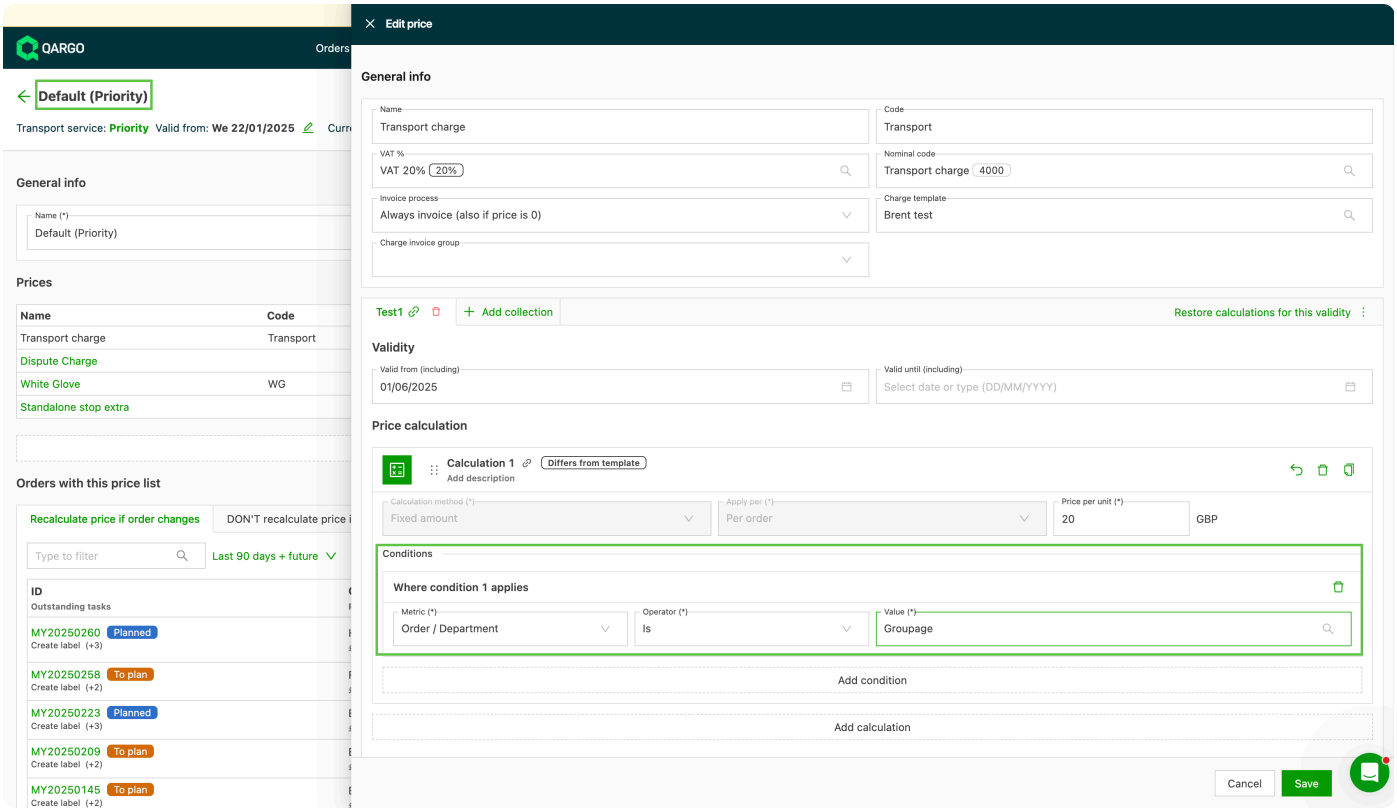


📚 If a department is only relevant for certain work types (for example, a “Priority” department for next-day delivery), **link it to the corresponding transportation service** so planning and filtering stay clean.

- Click **Save**

3. Use the department in rate cards

- Open the rate card and add a condition using **Order > Department**, then select the department(s).
- This scopes the rate, price list, or surcharge to the chosen department(s) only.



Example
Different rating by business line

- “Containers” and “General Haulage” departments with identifiers “CNTR” and “GH”.
- Two rate sections on one card or separate cards, each with **Order > Department** pointing to the relevant unit.

4. Add the department code to order names (optional but recommended)

> 💬 Contact Qargo Support or the account manager to update naming conventions for orders in the account.

Example patterns:

- Pattern: Order#-DEP#-#SEQ4#
  - With identifier “WH”: Order-WH-0123
  - Without identifier: Order-0123

Restrict order visibility per department

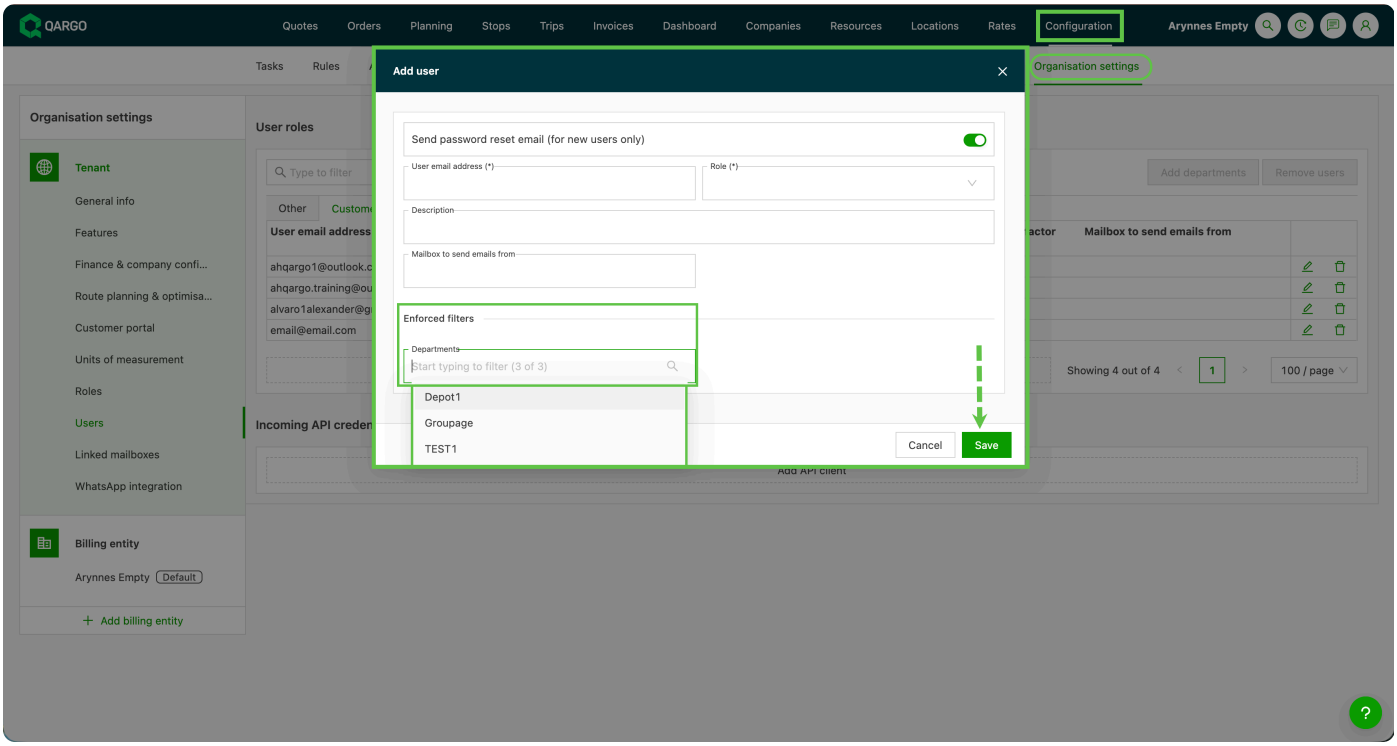
Departments can also control which records each user sees. When a tenant runs multiple business units, terminals, or legal entities, a ***Super Admin*** can limit each user to the departments they work in, so staff at one site no longer see, or accidentally edit, another site’s work.

🎥 This video explains how to restrict visibility and what that looks like for users:

▶ https://watchclueso.com/embed/wsxjbp6j0ji2sjgl

Set a user's departments

1. Navigate to **Configuration > Organization settings > Users**.
2. Open the user to restrict and find the new **Departments** field.
3. Select one or more departments the user may see. Leaving the field blank applies no restriction, so the user keeps full visibility.
4. Click **Save**. The change takes effect from the user's next session.

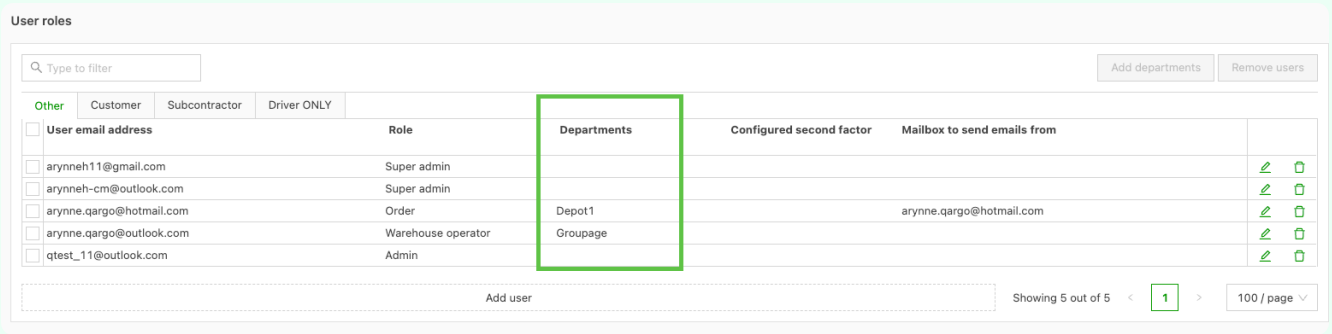


Apply departments to several users at once

1. Select multiple users in the user list.
2. Choose the **Add departments** bulk action.
3. Pick the departments to add, then confirm. The action adds to each user's existing departments; it does not replace them.



📚 A **Departments** column on the user list shows each user's restriction at a glance.



What gets filtered

Once a user has departments set, Qargo scopes what they see by the department on each record:

- Orders, templates, and orders to invoice: by the order's department.
- Customers and quotes: by the customer's prefill department, plus any department set on the quote.
- Order groups: visible when at least one order in the group falls in the user's department.

This applies to list pages, detail views, global search, and in-UI exports.

🧰 Before switching restrictions on, a Super Admin should backfill the correct department on existing orders, customers, and templates. **Any record left blank stays visible to everyone.** Set the **Departments** field per user afterward.

Limitations

- Visibility only, not edit-blocking: users can fully edit anything they can see.
- A shared link to a specific order still opens.
- A customer without a department is not hidden: the customer record stays visible to everyone, and only the orders on their page are scoped. Give the customer a department to hide it too.
- Not applied to BigQuery/Lightdash, the External API, the customer, contract carrier, and mobile portals, dashboard and report aggregations, or audit logs.
- Covers the department dimension only.

Best practices and tips

- Keep department names operationally meaningful
  - Mirror the lines of business that leaders actually use: Transport, Containers, Warehouse, region-specific units, etc.
- Always set the department on order creation
  - If rating depends on department conditions, make sure the department is present when the order is created so the right rates apply automatically.
- Use short, memorable identifiers
  - Aim for a 2–5 character code that staff recognize instantly. Keep it unique.
- Embed the identifier in order names

- This improves downstream clarity for finance, planning, and customer service. Use #-DEP# style to avoid double separators when a department has no identifier.

- Link departments to relevant transportation services
  - If a department is specific to a workflow, link it so filters and planning views remain scoped to the right work type.
- Start simple with rate conditions
  - Add a single "**Order > Department** is X" condition first. Then iterate with additional conditions like lane, distance, or packaging as needed.

Troubleshooting

Issue	Resolution
Department not affecting rating	Check the rate card condition: make sure the rule uses **Order > Department** and that the order actually has that department set at the time of calculation.
Department visible in overview but empty in edit view	If the department shows in the order overview and detail view but appears empty when editing, reselect it before saving. This behavior has been observed, and reselecting ensures downstream rules apply correctly.
Double dashes in order names	Caused by -#DEP# when a department has no identifier. Update the pattern to #-DEP# or #DEP-# to avoid double separators.
Department identifier missing or too long	Set a value and keep it within the 10-character limit. When #DEP# is used in the order name pattern, identifiers are optional but recommended.
Order name didn't update after changing department	By design, order names do not retroactively change when the department changes later. Consider maintaining a clear process to set the department at creation time.
Unsure where to add department-based rating	In the rate card, look for a condition on **Order > Department** and select the relevant department. If the option is missing, confirm that the correct rate card and view are being edited, then try again.

FAQs

- Are identifiers required?
  - No. If no identifier is set, #DEP# will be omitted in the order name. Use #-DEP# formatting to avoid extra separators.
- Can order names be changed after creation?
  - No. Order names follow the sequence pattern at creation time and do not retro-update when departments change.
- Where exactly is the department condition in a rate card?
  - In the rate card conditions, select **Order > Department**, then choose the department(s). This condition is supported for rate and cost logic.
- Do auto-assign rules for departments work when transport networks are also auto-assigned?
  - If `Order > Department` is used as a metric in transport network rules, it won't work for departments that are set automatically using other rules.

Transport network rules are currently evaluated before the department rules.