Configuration - Use rules to auto-assign fields.

Automate field values and extras on orders, stops, shipments and freight with auto-assign rules. Rules can add stop and freight extras and can overwrite existing field values.

Updated November 5, 2026

Introduction

The Auto-assign feature automatically fills in field values across orders, shipments and stops based on configurable rules. This helps to:

- Standardize data
- Speed up planning
- Reduce manual data entry.

The feature is flexible and can be used for various applications, such as routing decisions, customer references, region codes and planning guides. Rules are defined once, and the system applies them consistently to new or updated items.

Terminology

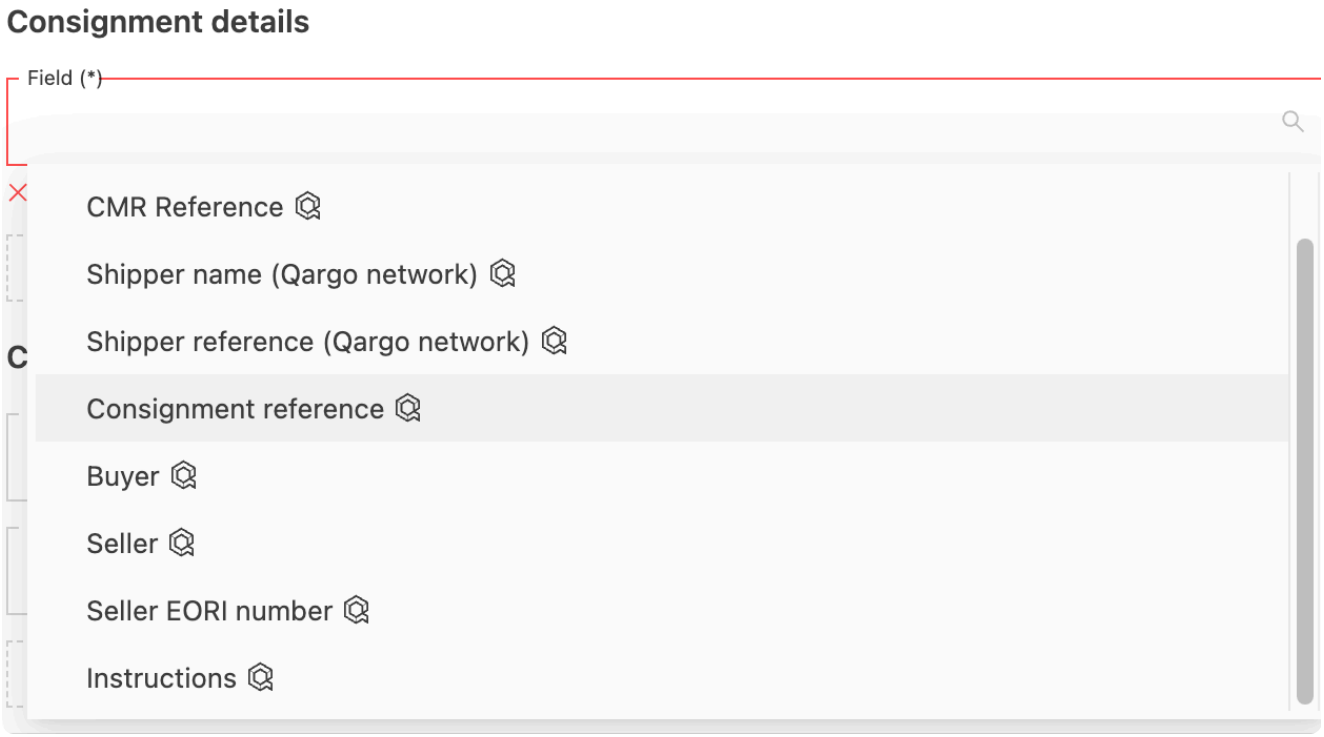
Term	Definition
Rule	A set of conditions and resulting field values. Rules determine which fields are automatically populated and when.
Configuration > Rules	The central area where users create, manage and organize auto-assign rules.
Field	Any data item on an order, shipment, stop or freight line that can be populated (e.g., customer reference, region code, vehicle category, extras).
Default field	A standard field provided by the system that can be auto-filled.
Custom field	A user-defined field that can also be auto-filled with rules.
Trigger	An event that causes rule evaluation, such as creating a new order, shipment or stop.
Planning group	A grouping used to organize planning resources and rules for easier management.
Resource	People or assets (e.g., drivers, vehicles, departments) that can be assigned or referenced in rules.
Asynchronous	Operations that run in the background after the initial creation. The main workflow continues without waiting for the rule evaluation.
Synchronous	Operations that run immediately in the same process. They can delay the initial action until rule evaluation completes.
Extra	An additional service or item added to a stop or freight line, such as liftgate, cleaning or ADR handling. Extras can trigger charges on the rate card.
Stop extra	An extra that belongs to a stop. Configured under **Rates > Order input**, with a setting for which stop types it applies to (**Pickup**, **Delivery**, **Other stops**).
Freight extra	An extra that belongs to a freight line (goods) on an order. Configured under **Rates > Order input**.
Freight fields	The auto-assign category used to create rules that add freight extras.
Do not dispatch	A stop setting. Qargo keeps the stop on the load but does not send it to the driver mobile app or fleet system.

Create a rule

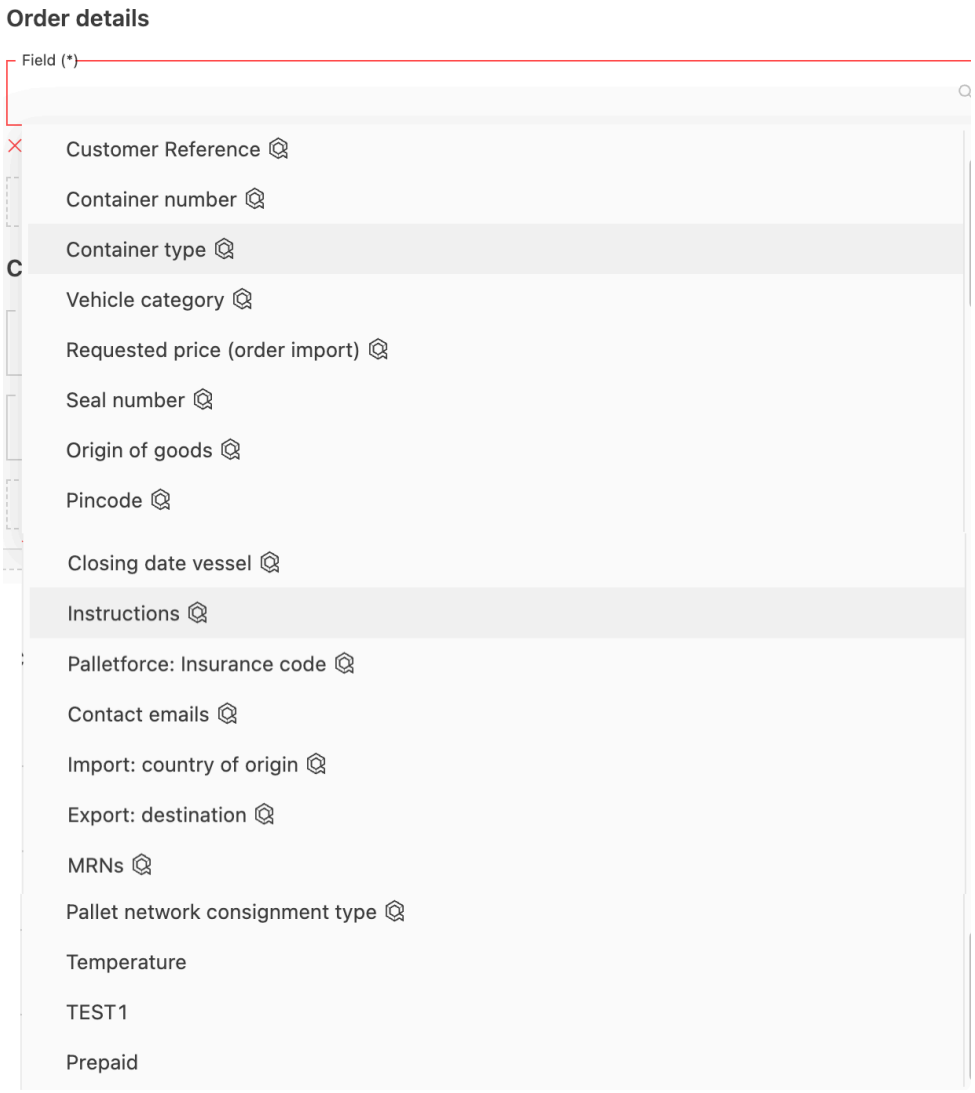
🧰 Activate custom fields before creating rules that use them.
Click the link to learn more about 👉 Configuring custom and additional fields.

- Navigate to **Configuration > Rules**.
- From the **Auto-assign** side menu:
- Select the field to create the rule on
- **Options include:**

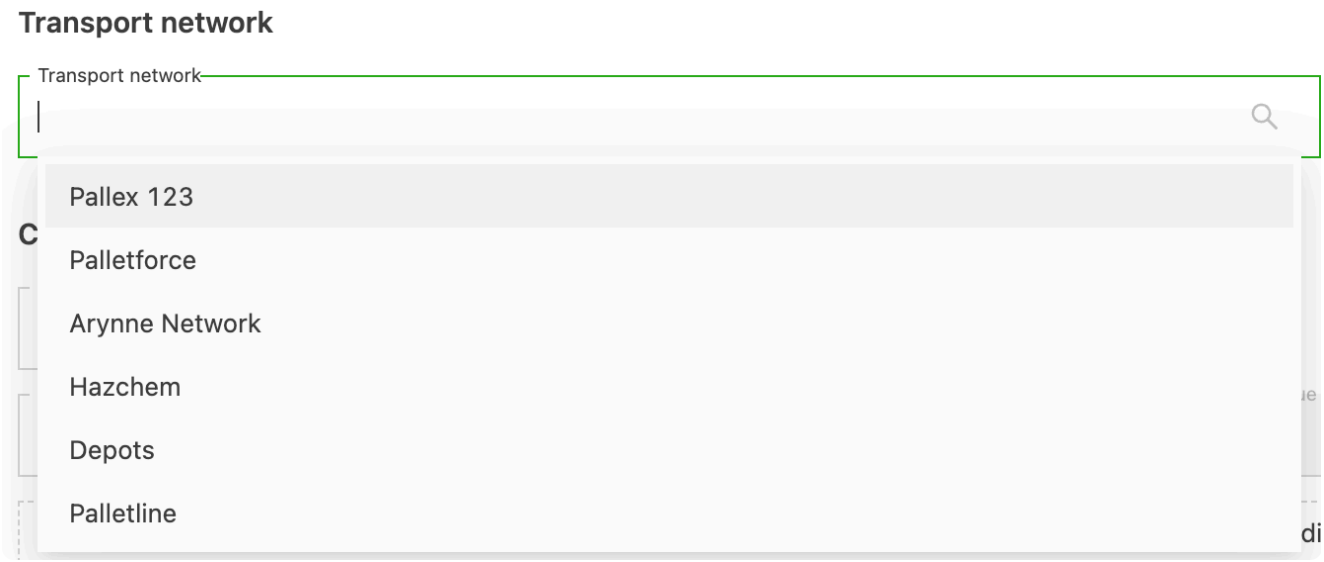
- **Shipment fields**: default & custom fields associated with the shipment



- **Order fields**: default & custom fields associated with the order

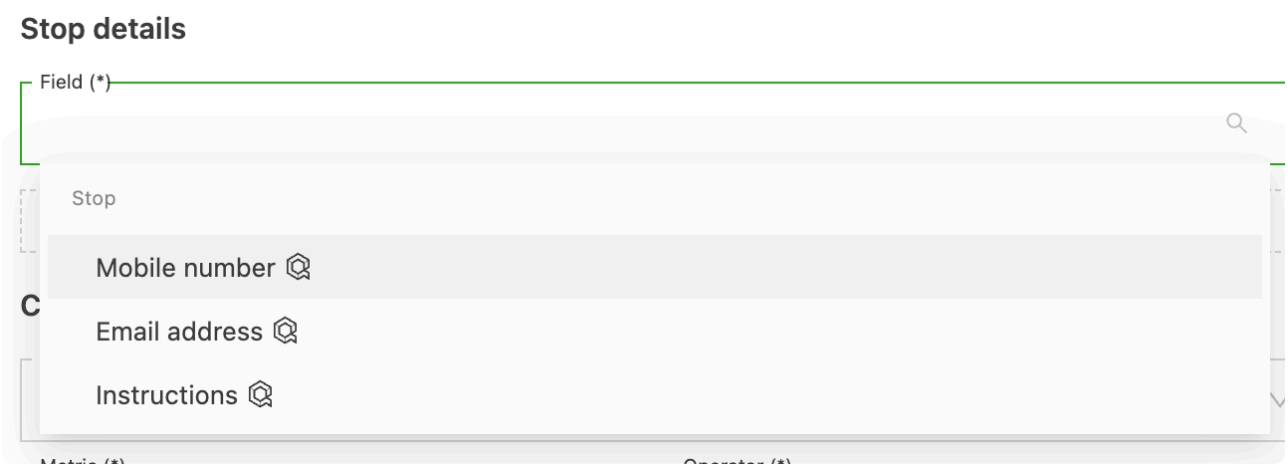


- **Order transport network**: shows the networks active on the tenant

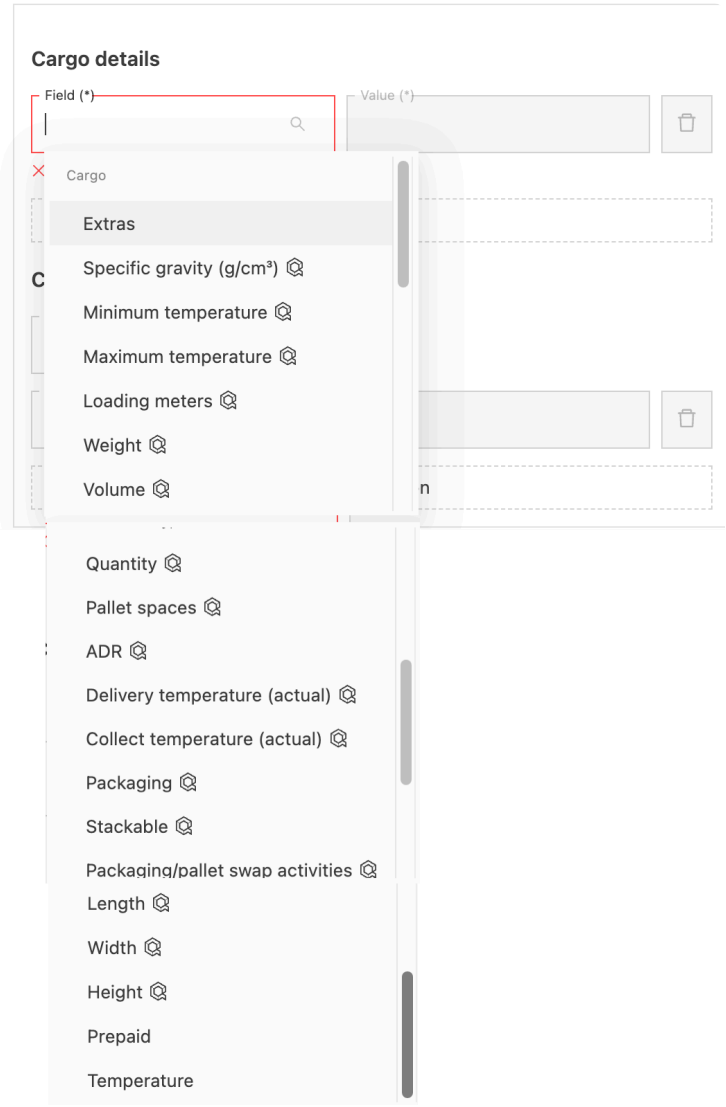


- **Stop fields**: default and custom fields associated with the stop

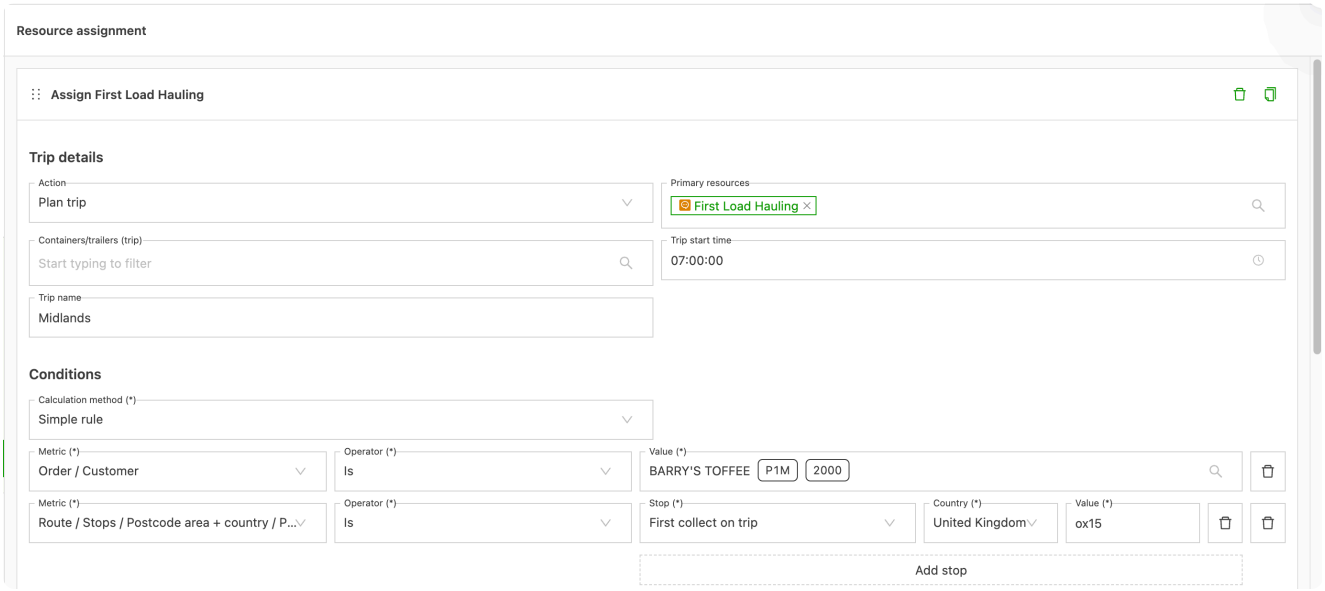
- Stop fields also offer **Extras** in the **Field** dropdown. See *Auto-assign stop and freight extras* below.



- **Freight fields**: extras associated with the freight (goods) on an order. This category only shows when freight extras are configured on the account.

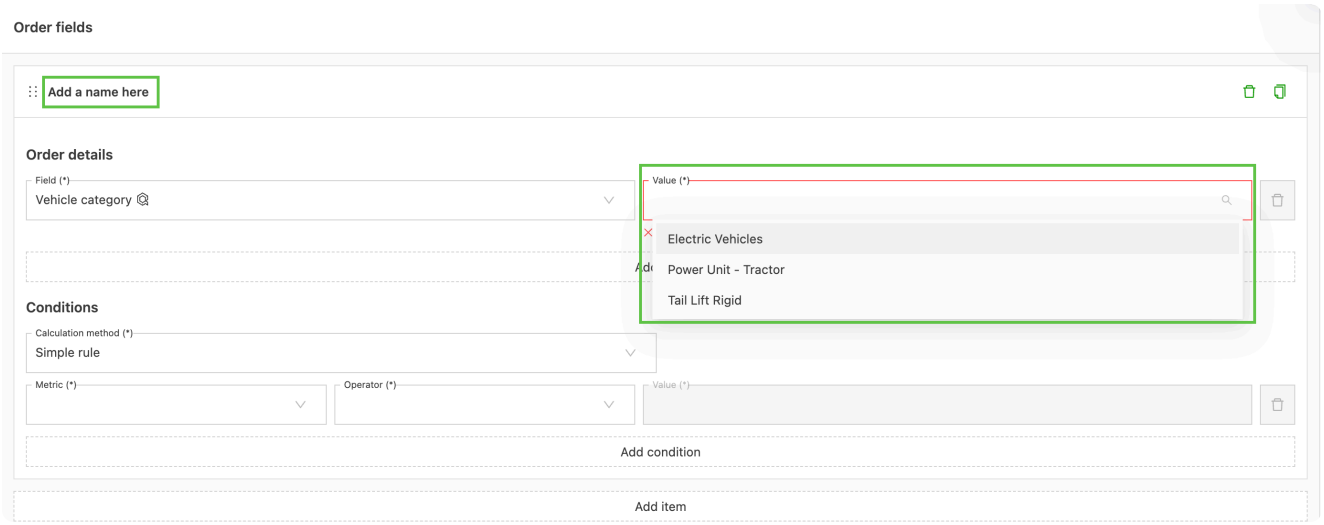


- **Load resource assignment**: assign internal & external resources



📚 **Click the link to learn more about 👉 Planning - Auto-assigning resources**

- Click **'Add item'** to start building a rule
  - If adding multiple rules, name each rule for easy identification: click **'Rule 1'** and enter the name.
- Complete the displayed fields:
  - **Field**: From the dropdown, select which field to populate automatically (e.g., customer reference, region code, ZIP code zone, vehicle category)
    - The options displayed here relate directly to the **active default and custom fields** on the property
  - **Value**: Define the value to populate for the selected field. The options displayed depend on the field selected



- **Conditions**: Define when the rule should run (for example, on creation, or when a specific field is set).
  - **Calculation method**: Run multiple simple rules in sequence, or use complex rules (Excel table) to build a specific set of criteria for the conditions to apply to.
  - **Metrics** / **Operator** / **Value**: Select the condition parameters that apply in order to auto-assign the field.

- **Save the rule**.

Using rules

- When a **new order, shipment, stop or freight line** is created, the system checks the rules that apply to it.
- **Stop fields** rules now also run for stops added to an existing order or shipment, not only for stops created together with a new shipment.
- If a field requires information that is not yet available, the rule can wait for a subsequent input or run asynchronously, depending on the rule's configuration.

‼️ This applies to all **Stop fields** rules, including existing rules for regular fields. Stops added to existing shipments are now also filled in by these rules. Review existing stop rules to check that this is the expected result.

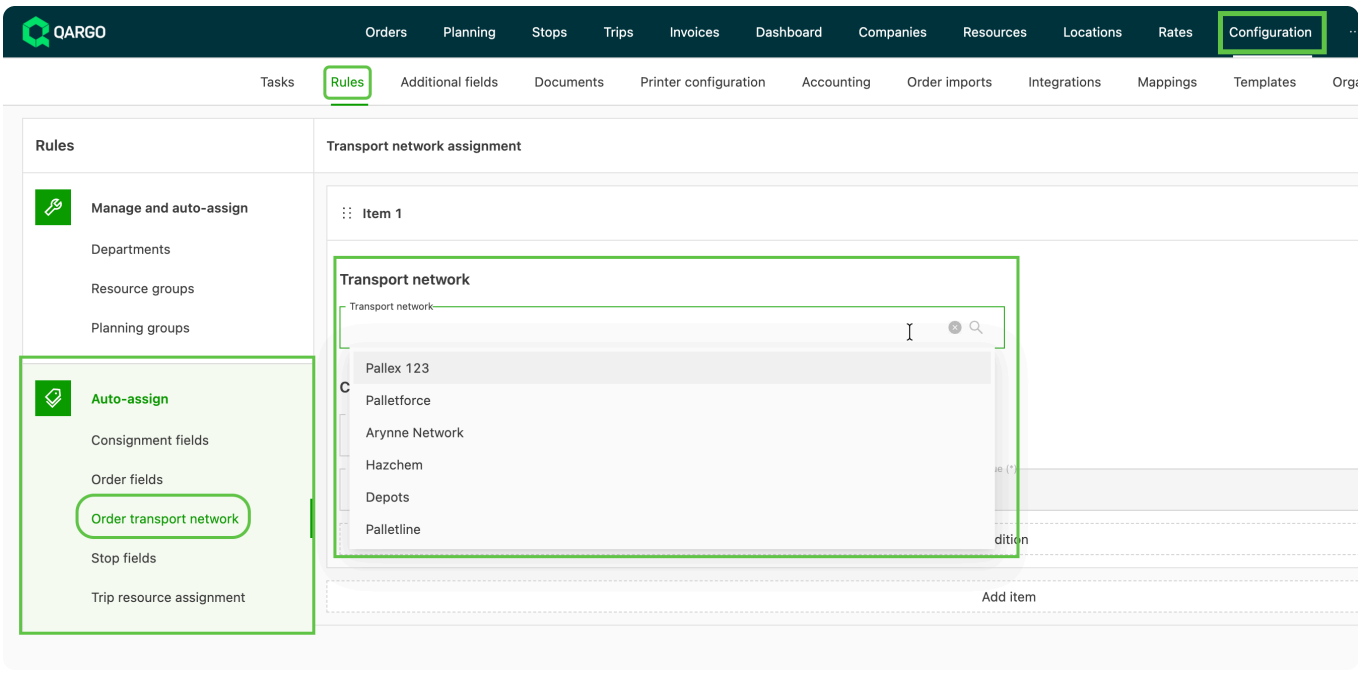
Use case: Orders - Tag an order for zone visibility



Auto-assign order transport network

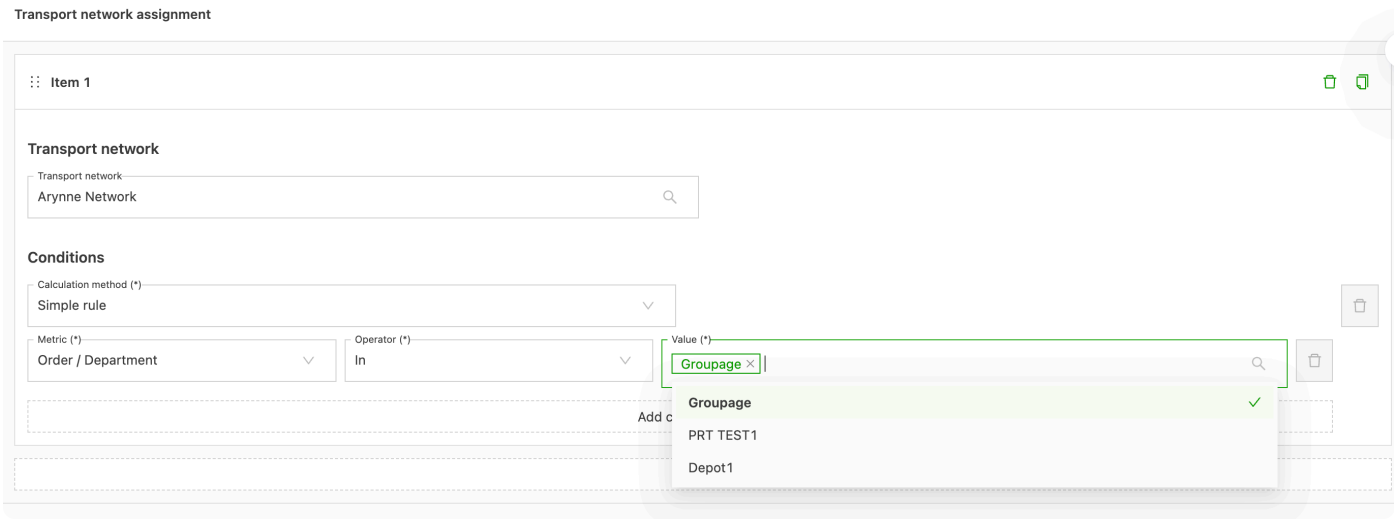
This can be used when users are members of a **transport network**, or have their **own network setup**. Auto-assign rules can configure the conditions under which the transport network is assigned automatically.

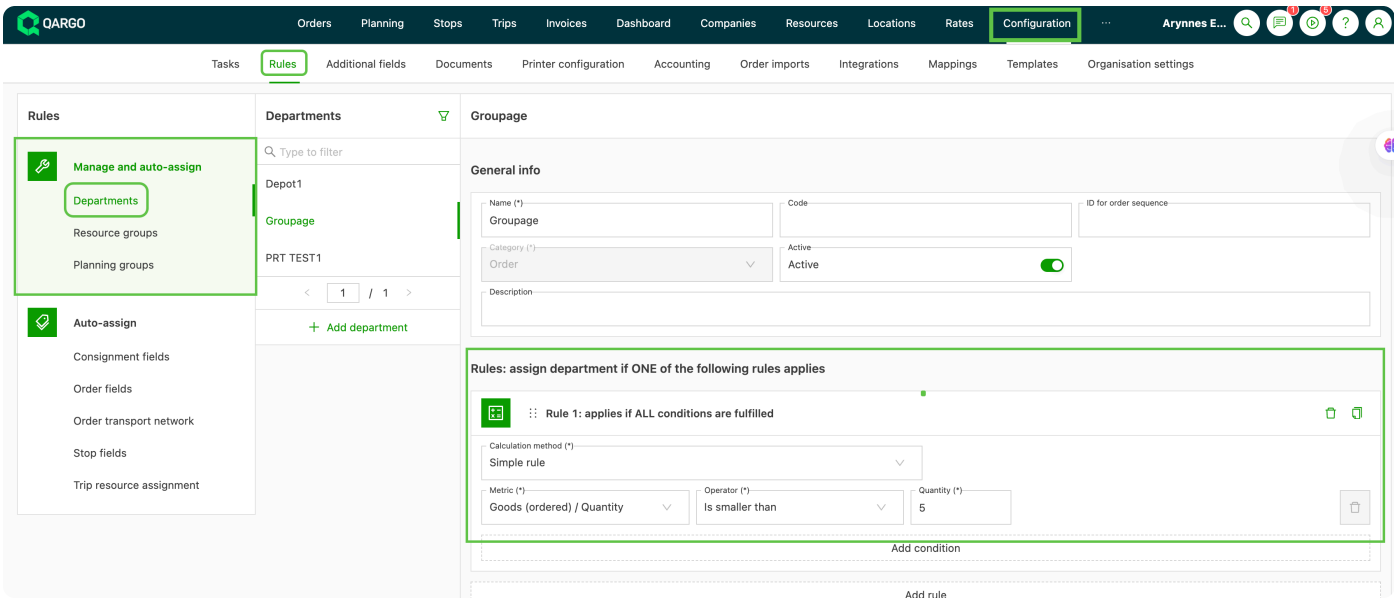
- Set up in the same way as the order, stop and shipment data fields.
- Navigate to **Configuration > Rules**
- From the **Auto-assign** side menu, select **Order transport network**
- Select the transport network from the dropdown

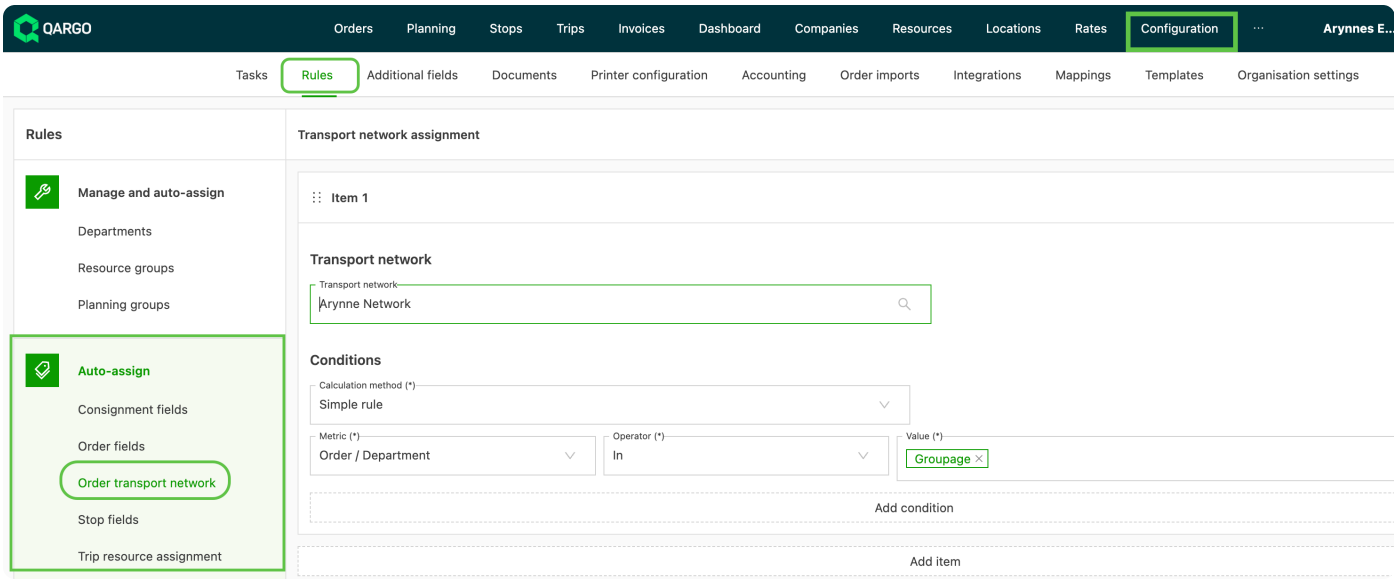


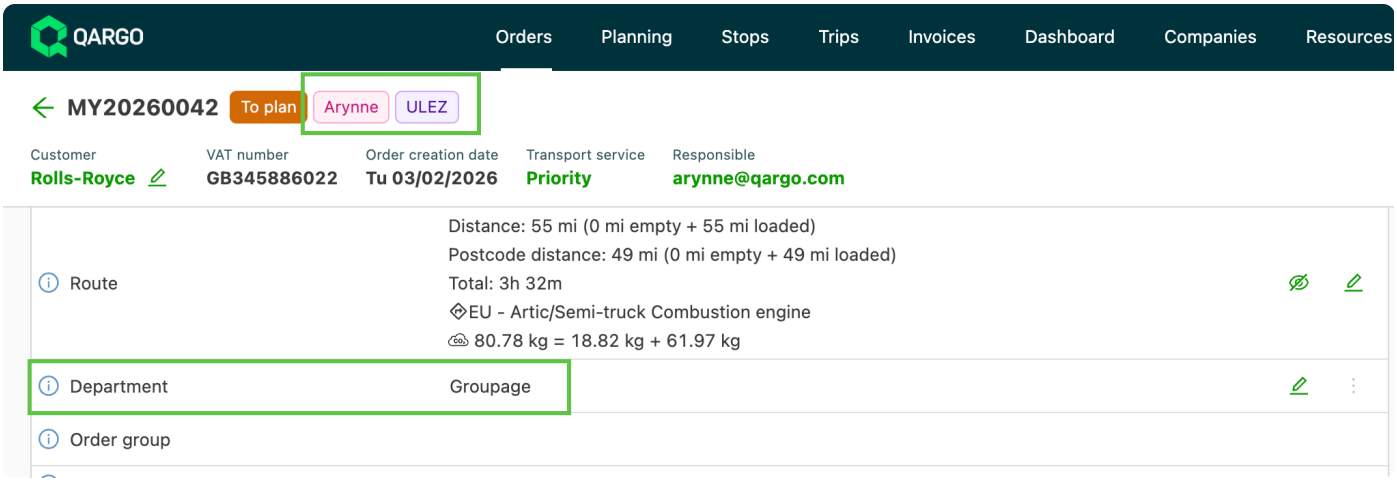
- Set the conditions that apply for the transport network to be auto-assigned.
  - The options available depend on the metrics selected

In the example below, the configured transport network is **prefilled** if the order is created and assigned to the **Groupage department**. That department is also set to be auto-assigned when the order quantity is **less than 5 units**.




QARGO
Orders Planning Stops Trips Invoices Dashboard Companies Resources Locations Rates Configuration
Arynnes E...
Tasks Rules Additional fields Documents Printer configuration Accounting Order imports Integrations Mappings Templates Organisation settings
Rules
Manage and auto-assign
Departments
Resource groups
Planning groups
Auto-assign
Consignment fields
Order fields
Order transport network
Stop fields
Trip resource assignment
Departments
Type to filter
Depot1
Groupage
PRT TEST1
1 / 1
Add department
Groupage
General info
Name (*)
Groupage
Code
ID for order sequence
Category (*)
Order
Active
Active
Description
Rules: assign department if ONE of the following rules applies
Rule 1: applies if ALL conditions are fulfilled
Calculation method (*)
Simple rule
Metric (*)
Goods (ordered) / Quantity
Operator (*)
Is smaller than
Quantity (*)
5
Add condition
Add rule


QARGO
Orders Planning Stops Trips Invoices Dashboard Companies Resources Locations Rates Configuration
Arynnes E...
Tasks Rules Additional fields Documents Printer configuration Accounting Order imports Integrations Mappings Templates Organisation settings
Rules
Manage and auto-assign
Departments
Resource groups
Planning groups
Auto-assign
Consignment fields
Order fields
Order transport network
Stop fields
Trip resource assignment
Transport network assignment
Item 1
Transport network
Transport network
Arynne Network
Conditions
Calculation method (*)
Simple rule
Metric (*)
Order / Department
Operator (*)
In
Value (*)
Groupage
Add condition
Add item


QARGO
Orders Planning Stops Trips Invoices Dashboard Companies Resources
MY20260042
To plan
Arynne
ULEZ
Customer
Rolls-Royce
VAT number
GB345886022
Order creation date
Tu 03/02/2026
Transport service
Priority
Responsible
arynne@qargo.com
Route
Distance: 55 mi (0 mi empty + 55 mi loaded)
Postcode distance: 49 mi (0 mi empty + 49 mi loaded)
Total: 3h 32m
EU - Artic/Semi-truck Combustion engine
80.78 kg = 18.82 kg + 61.97 kg
Department
Groupage
Order group

‼️ Limitations to note

- If `Order > Department` is used as a metric in transport network rules, it won't work for departments that are set automatically by other rules.
  Transport network rules are currently evaluated before the department rules.
- Transport network is only assigned automatically on order creation
- Last delivery / first pickup matches are not guaranteed for multi-shipment orders
- Clearing the transport network during order creation is not possible, but it can be removed after the order is created

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Other auto-assign options

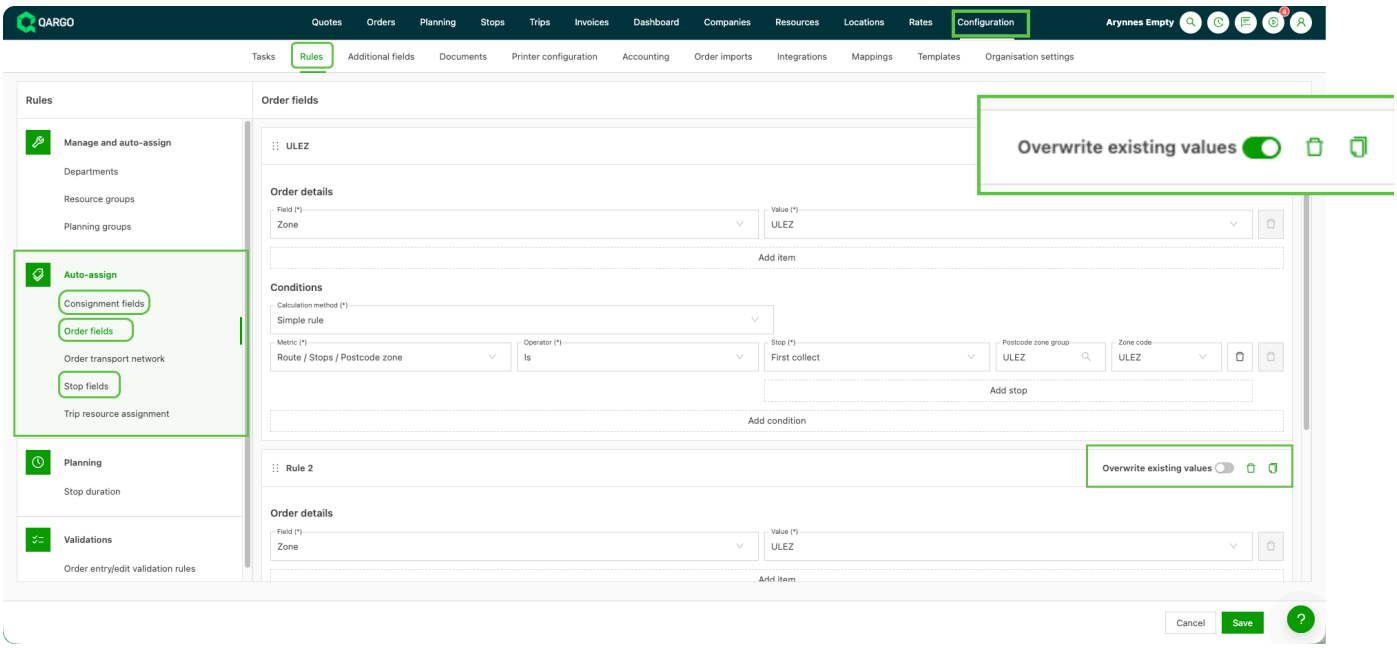
- **Department** rules can be created to automatically allocate an order to a department based on set conditions.
  - **To learn more about departments 👉 Click here**
- Add **resource groups** to organize planning boards: filter easily, customize, and improve planning and pre-planning visibility.
  - **To learn more about resource groups 👉 Click here**

Use **planning groups** rules to simplify allocating orders to specific planning groups.

- **To learn more about planning groups 👉 Click here**

Enable overwrite on a rule

📚 Available on shipment fields, order fields and stop fields only.



- **Navigate** to **Configuration > Rules**.

- **Select** the field type from the **Auto-assign** side menu (shipment fields, order fields and stop fields).
- **Open** an existing rule, or **click Add item** to create a new rule.
- **Locate** the **Overwrite existing values** toggle in the rule configuration panel.
- **Toggle** the switch:
  - Toggle **off** (default) - the rule skips any field that already contains a value. Existing data is preserved.
  - Toggle **on** - the rule replaces the existing field value when the configured condition is met on a create or update event.
- **Save** the rule.

📚 Existing rules are not affected by this change. No behavior changes occur until the toggle is explicitly enabled on a specific rule. **Overwriting is on-trigger only** - the rule replaces the field value at the moment the configured condition is met (during a create or update event).

📚 The **Overwrite existing values** toggle applies to regular fields only. It has no effect on extras.

Limitations

- The toggle is configured **per rule**. There is no global switch to enable overwriting across all rules at once, and no bulk action to toggle multiple existing rules in one step.
- **Overwriting is on-trigger only** - the rule replaces the field value at the moment the configured condition is met (during a create or update event). Previously existing records are not updated retroactively; the affected record must be edited or re-triggered for the new behavior to apply.

Auto-assign stop and freight extras

Auto-assign rules can now add extras, not just field values. Extras such as liftgate, cleaning, customs handling or ADR handling no longer need to be checked by hand on every stop or freight line. When a stop or freight line matches the rule conditions, the chosen extras are added automatically. This saves time and helps make sure the rate card always picks up the charge.

- **Stop extras** are set up in the **Stop fields** category.
- **Freight extras** are set up in the new **Freight fields** category.
- **Order fields** and **Shipment fields** do not offer extras.

🧰 The **extras must exist** before they can be used in a rule. Only extras already configured under **Rates > Order input** show in the rule's **Value** picker. Learn more about 👉 Rates - Stop extras and 👉 Freight extras.

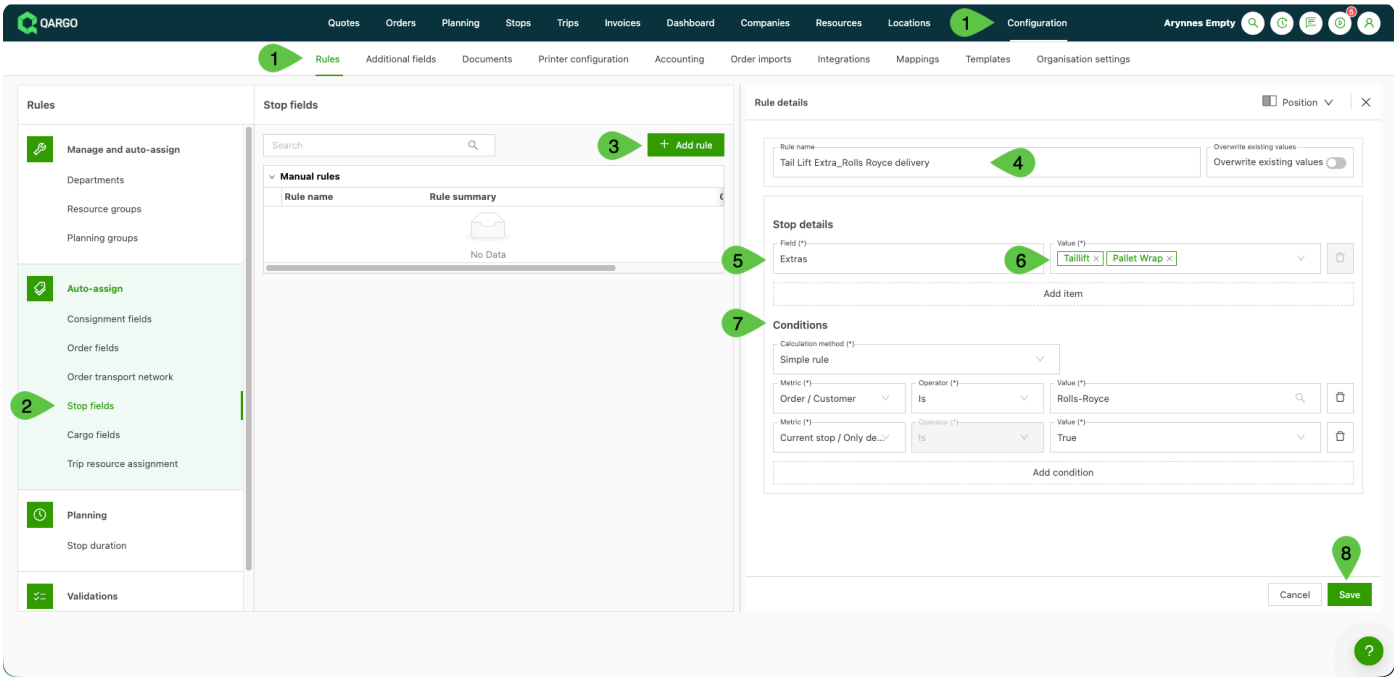
Use cases

- **Product-based stop extra**: a liquid bulk transport company with a large product catalog needs a fixed stop extra (for example **Baffled**) every time a specific product is transported. A stop extras rule with a condition on the freight product removes the need to add it by hand on each order.
- **Surcharge by area**: a pallet network member needs a surcharge stop extra on deliveries to certain ZIP codes. A stop extras rule with a ZIP code condition adds the surcharge automatically.

- **Customer-specific extras**: a delivery to a specific customer always needs a liftgate. A stop extras rule with a customer condition and a **Delivery** stop type adds **Liftgate** to every matching delivery.
- **Existing auto-assign users**: companies that already rely on auto-assign rules for fields can now manage their recurring extras in the same place.

Create a stop extras rule

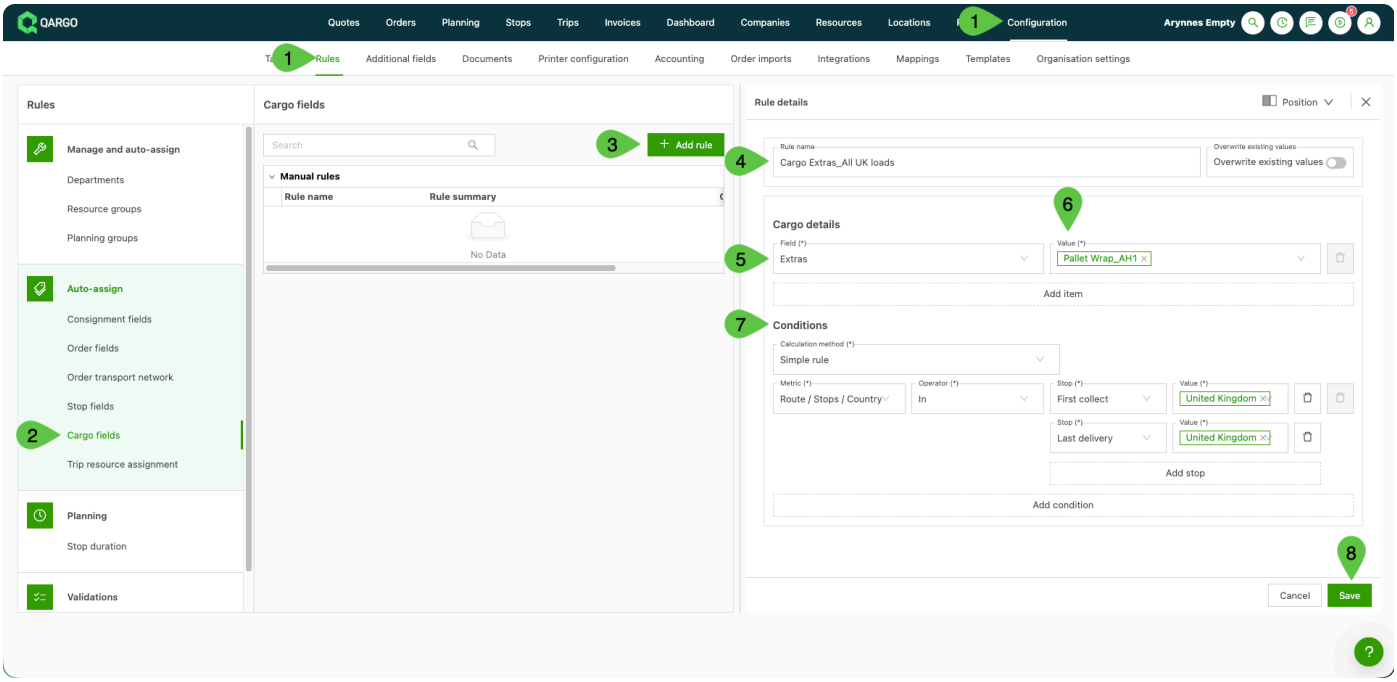
1. **Navigate** to **Configuration > Rules**.
2. **Select Stop fields** from the **Auto-assign** side menu.
3. **Click Add rule** to create a new rule, or **open** an existing rule.
4. **Name** the rule for easy identification (for example “Liftgate - Customer X deliveries”).
5. **Select Extras** from the **Field** dropdown.
6. **Select** one or more stop extras from the **Value** multi-select list.
7. **Set** the **Conditions** in the same way as for any other rule (for example a customer, a product on the freight, or the stop type).
8. **Save** the rule.



📚 **A stop extra is only added to stops that the extra allows**. Each stop extra has its own **Pickup**, **Delivery** and **Other stops** setting under **Rates > Order input**. If an extra allows more than one stop type, add a rule condition to narrow it down (for example delivery stops only).

Create a freight extras rule

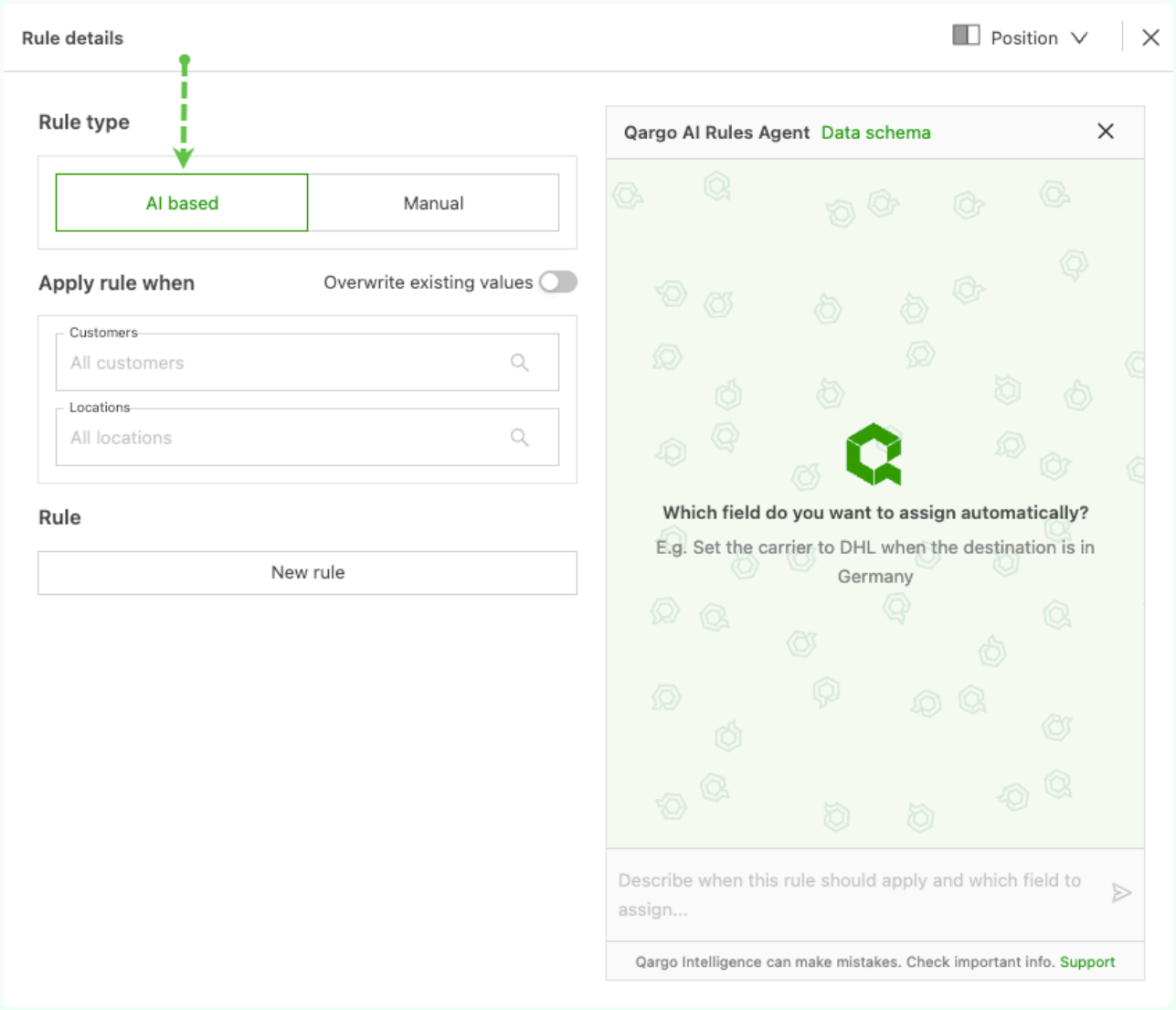
1. **Navigate** to **Configuration > Rules**.
2. **Select Freight fields** from the **Auto-assign** side menu.
3. **Click Add item** to create a new rule, or **open** an existing rule.
4. **Name** the rule for easy identification.
5. **Select Extras** from the **Field** dropdown.
6. **Select** one or more freight extras from the **Value** multi-select list.
7. **Set** the **Conditions** for the rule.
8. **Save** the rule.



📚 Freight extras have no stop type setting of their own. The rule conditions alone decide which freight lines get the extra, so keep the conditions specific.

🧰 If Qargo Intelligence is activated, 2 options show when adding a rule:

- AI-based - creates rules using the Qargo AI Agent.
- Manual - creates rules using the steps outlined above.



💬 Contact the Qargo account manager to learn more about subscribing to the Qargo Intelligence feature.

When extras rules run

- **Stop extras rules** run when a stop is created. This includes stops added to an existing order or shipment, not only stops created with a new order.
- **Freight extras rules** run when a freight line (goods) is created. The extra is added to that freight line only. Other freight lines on the same order are not changed.
- The **Conditions**, **Calculation method** and **Metrics** work the same way as for regular field rules.

What happens on the order

- Extras added by a rule behave exactly like extras added by hand. They show on the stop or freight line, feed into rate cards and billing, and count toward resource compatibility.
- Extras are never duplicated. If the extra is already on the stop or freight line, the rule skips it.

- When several rules match the same stop or freight line, all of their extras are added together. This is different from regular fields, where only one rule's value is used.

Limitations - extras

- **Rules only add extras.** The **Overwrite existing values** toggle does not apply to extras. A rule never removes or replaces an extra that is already on the stop or freight line.
- **Adding freight later does not re-run stop rules.** If freight is added to an existing shipment, the stop extras rules for that shipment are not checked again. A rule such as "heavy freight adds a forklift stop extra" only works when the freight is already on the order at the moment the stop is created.
- **Internal stop type is not available as a condition.** Adding an extra based on an internal stop type (for example a **customs** or **cleaning** stop) is not yet supported with these rules.
- **Rules do not add stops.** Extras rules add extras to stops that already exist. They do not create new stops.
- **Existing records are not updated.** Rules only run on new stops and freight lines. Stops and freight created before the rule was saved do not get the extra.
- **Only stop and freight extras.** Other items, such as incidents, cannot be added with auto-assign rules.

Do not dispatch: set it automatically with an AI-based stop rule

An AI-based rule under **Stop fields** can set **Do not dispatch** on a stop, based on the stop's activity. Qargo keeps those stops on the load but does not send them to the driver mobile app or fleet system.

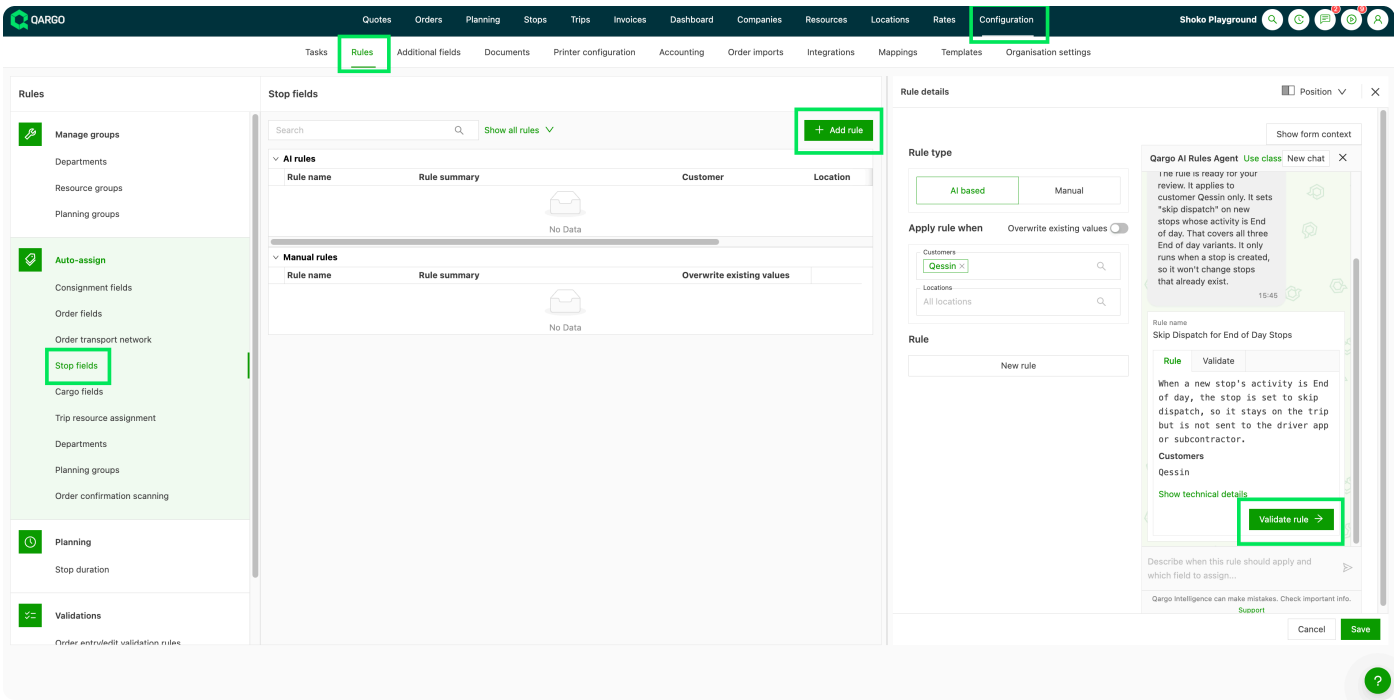
Prerequisites

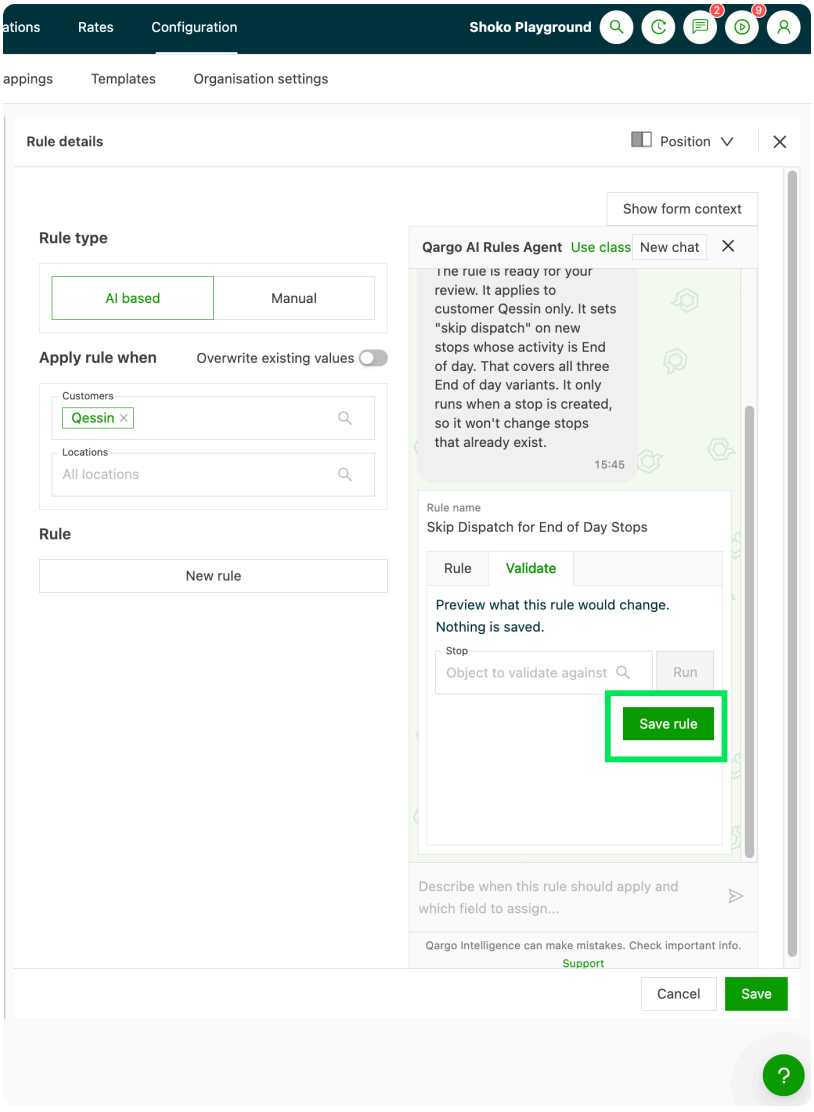
Qargo Intelligence must be enabled; the **AI-based** rule type only shows when Qi is active.

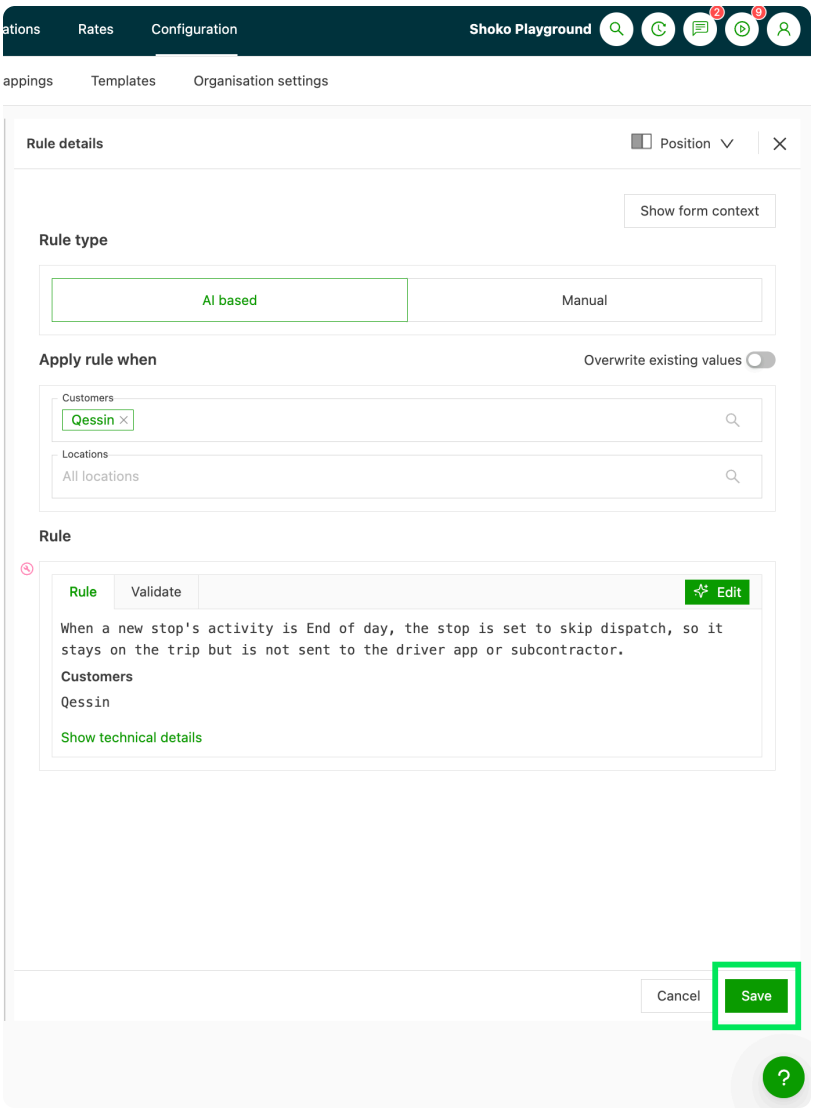
> 💬 If the **AI-based rules** do not appear, contact the Qargo account manager to activate Qargo Intelligence.

Create a Do not dispatch rule

1. **Navigate** to **Configuration > Rules**.
2. **Select Stop fields** from the **Auto-assign** side menu.
3. **Click Add rule** and choose **AI-based**.
4. **Enter** the rule in plain words in the **'Qargo AI Rules Agent'** chat, for example "When a new stop's activity is End of day, do not dispatch it".
5. **Review** the rule and **click Validate rule**, then **Save rule**.
6. **Save** the rule panel.

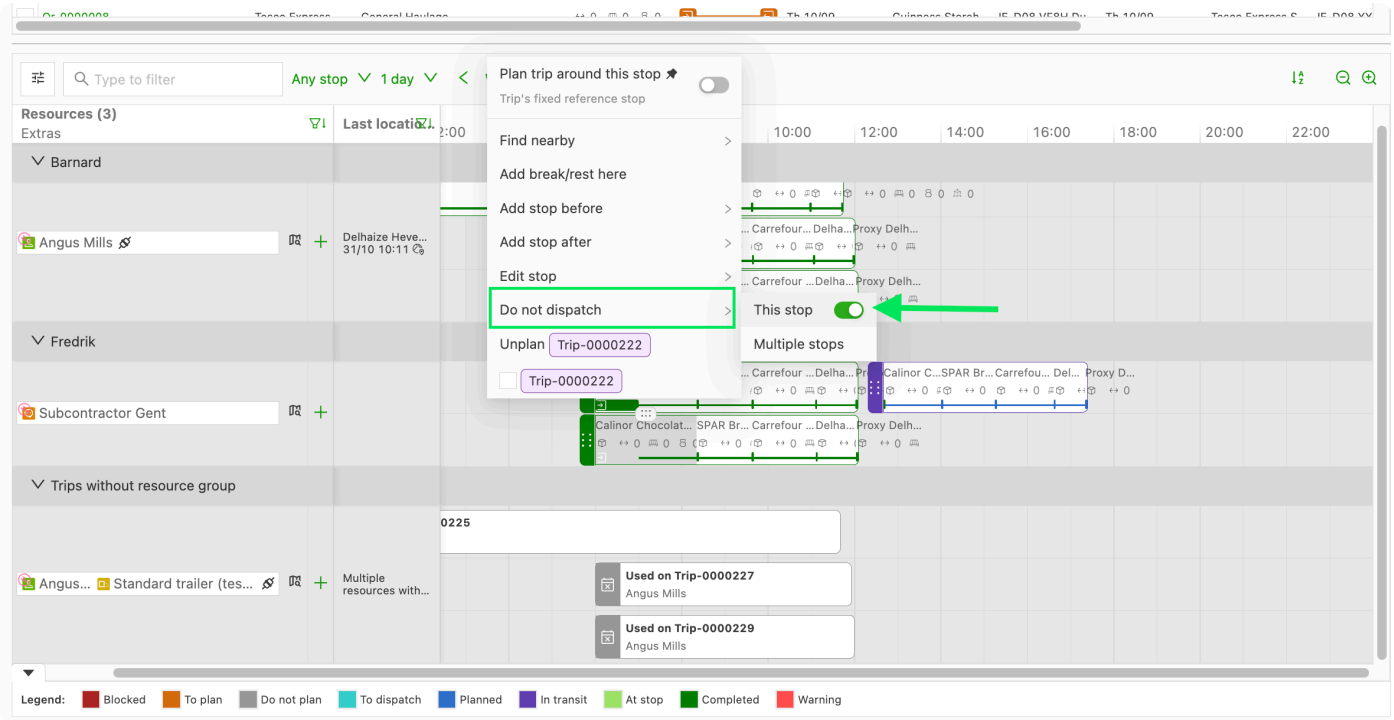

QARGO
Quotes
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Shoko Playground
Tasks
Rules
Additional fields
Documents
Printer configuration
Accounting
Order imports
Integrations
Mappings
Templates
Organisation settings
Rules
Manage groups
Departments
Resource groups
Planning groups
Auto-assign
Consignment fields
Order fields
Order transport network
Stop fields
Cargo fields
Trip resource assignment
Departments
Planning groups
Order confirmation scanning
Planning
Stop duration
Validations
Stop fields
Search
Show all rules
+ Add rule
AI rules
Rule name
Rule summary
Customer
Location
No Data
Manual rules
Rule name
Rule summary
Overwrite existing values
No Data
Rule details
Position
Show form context
Rule type
AI based
Manual
Apply rule when
Overwrite existing values
Customers
Qessin
Locations
All locations
Rule
New rule
Qargo AI Rules Agent
Use class
New chat
The rule is ready for your review. It applies to customer Qessin only. It sets "skip dispatch" on new stops whose activity is End of day. That covers all three End of day variants. It only runs when a stop is created, so it won't change stops that already exist.
15:45
Rule name
Skip Dispatch for End of Day Stops
Rule
Validate
When a new stop's activity is End of day, the stop is set to skip dispatch, so it stays on the trip but is not sent to the driver app or subcontractor.
Customers
Qessin
Show technical details
Validate rule
Describe when this rule should apply and which field to assign...
Qargo Intelligence can make mistakes. Check important info.
Support
Cancel
Save


ations
Rates
Configuration
Shoko Playground
appings
Templates
Organisation settings
Rule details
Position
Show form context
Rule type
AI based
Manual
Apply rule when
Overwrite existing values
Customers
Qessin
Locations
All locations
Rule
New rule
Qargo AI Rules Agent
Use class
New chat
The rule is ready for your review. It applies to customer Qessin only. It sets "skip dispatch" on new stops whose activity is End of day. That covers all three End of day variants. It only runs when a stop is created, so it won't change stops that already exist.
15:45
Rule name
Skip Dispatch for End of Day Stops
Rule
Validate
Preview what this rule would change.
Nothing is saved.
Stop
Object to validate against
Run
Save rule
Describe when this rule should apply and which field to assign...
Qargo Intelligence can make mistakes. Check important info.
Support
Cancel
Save



How it works

- **When it runs:** on every new stop. That covers **Create order**, order import, the API, and stops added with **Edit order** or **Add stop**.
- **Existing stops:** editing a stop does not run the rule again. A new or changed rule does not update stops that already exist.
- **Manual rules:** they cannot set **Do not dispatch**. Only AI-based rules can.
- **Switch back:** the planner can still dispatch an excluded stop from the planning board, with **Do not dispatch > This stop**.


Type to filter
Any stop
1 day
Plan trip around this stop
Trip's fixed reference stop
Find nearby
Add break/rest here
Add stop before
Add stop after
Edit stop
Do not dispatch
This stop
Unplan
Trip-0000222
Multiple stops
Resources (3)
Extras
Last location
10:00
12:00
14:00
16:00
18:00
20:00
22:00
Barnard
Angus Mills
Delhaize Heve...
31/10 10:11
Fredrik
Subcontractor Gent
Trips without resource group
Angus...
Standard trailer (tes...
Multiple resources with...
Used on Trip-0000227
Angus Mills
Used on Trip-0000229
Angus Mills
Legend:
Blocked
To plan
Do not plan
To dispatch
Planned
In transit
At stop
Completed
Warning

Troubleshooting

Issue	Resolution
Field not auto-populated	Check that the rule is configured for the correct scope (order, shipment, load, stop).\
Verify that the rule's trigger is set to run at the appropriate time (creation vs. update).\	
Make sure there are no conflicting rules that overwrite the value after it is set.	
Incorrect values	Review the rule's value definitions and any dependencies on other fields.\
Confirm that the rule's conditions match the actual data context.	
Rule not triggering	Confirm that the rule is enabled\
Check whether the rule relies on data that isn't available at creation time.	
Data inconsistency after updates	If a field is overwritten by a later rule, adjust the rule priorities or add conditions to prevent unintended overwrites.
Field value not overwritten despite toggle on	Confirm that the rule's trigger condition is met on the record.\
Verify that the rule scope matches the entity type (order, shipment or stop).\	
Check whether a later rule resets the field to a previous value.	
Field remains empty after rule runs with toggle on	Rules run on create/update events — the rule may not have fired yet.\
Re-save or re-trigger the affected record to evaluate the rule.	
Unexpected values on existing records	Rules with the toggle on do not retroactively update existing records.\
Only records created or edited after the toggle was enabled reflect the overwrite behavior.	
Extras not shown in the **Field** dropdown	Extras are only offered in **Stop fields** and **Freight fields**, not in **Order fields** or **Shipment fields**.
Freight fields category not visible	The category only shows when freight extras are configured. Add freight extras under **Rates > Order input** first.
Stop fields category not visible	The category only shows when stop fields are available on the account. Contact the Qargo account manager for help.

Issue	Resolution
Extra not listed in the **Value** picker	Check that the extra exists under **Rates > Order input** and is not archived.
Stop extra not added to a stop	Check that the extra's **Pickup**, **Delivery** and **Other stops** setting allows that stop type. - Check that the rule conditions match the stop. - Check that the stop was created after the rule was saved.
Stop extra not added after freight was added to an order	Adding freight later does not re-run stop rules. The freight must be on the order when the stop is created.
Existing extra not replaced or removed by a rule	Expected behavior. Rules only add extras, and the **Overwrite existing values** toggle does not apply to extras.
More extras than expected on a stop or freight line	Several rules matched. Extras from all matching rules are added together. Review the conditions on overlapping rules.
Freight extra added to the wrong freight lines	Freight extras have no stop type setting, so the rule conditions alone decide. Make the conditions more specific.
Do not dispatch not offered in a manual rule	Only AI-based rules can set **Do not dispatch**. Create the rule with the **AI-based** rule type.
Existing stops not excluded after saving the rule	Rules only run on new stops. Exclude existing stops on the planning board with **Do not dispatch**.

Additional tips

- Start with a small set of high-impact rules and expand gradually to avoid complex interdependencies.
- Document each rule with a short description of its purpose and the fields it affects.
- Use a standard naming convention for rules to make them easy to find (e.g., "Route_Zones_AutoFill" or "CustomerRefs_Defaults").
- Regularly review and retire rules that are no longer needed or have been superseded by new configurations.

The Auto-assign feature simplifies data management by automatically populating key fields according to well-defined rules. It streamlines workflows, reduces manual data entry and improves consistency across loads, orders, shipments and stops.

💬 For further help setting up auto-assignments, contact the account manager or Qargo support.