Tasks — Tasks on order templates

Tasks can now be configured on order templates, enabling structured quote workflows like generating PDFs, logging follow-ups, and uploading confirmations — all from the template itself.

Updated April 15, 2026

Introduction

Tasks can now be configured on **order templates**, the reusable blueprints used to copy and create live orders. Tasks configured on a template appear in a ***'to complete'*** status whenever the template is opened. This enables structured workflows such as generating a PDF quote, tracking follow-up calls, or uploading signed confirmations.

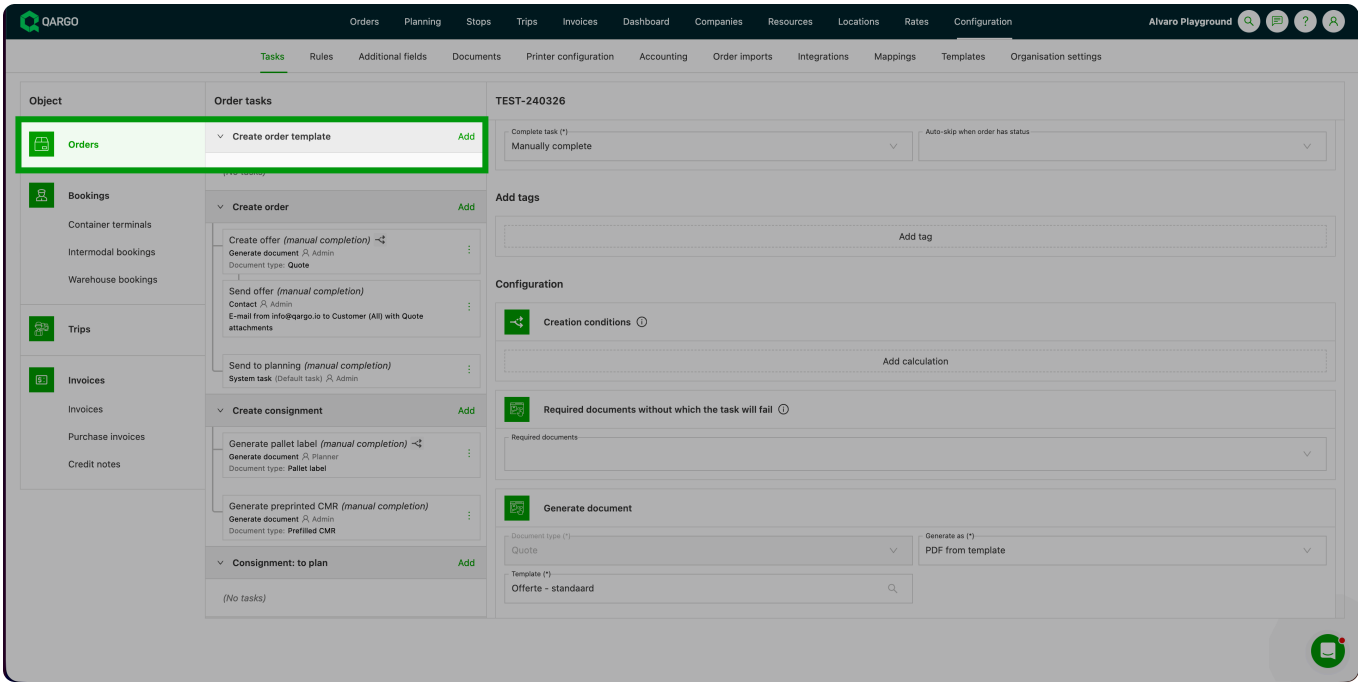
Key terminology

Term	Definition
Order template	An order saved in *Template* status that serves as a reusable blueprint. Quotes in Qargo are built on order templates.
Create order template section	The workflow section, found under **Configuration > Tasks > Orders**, that defines which tasks appear specifically on orders in Template status.

Configuration (Super Admin user)

To make tasks available on quote templates, a Super Admin must first configure the task workflow.

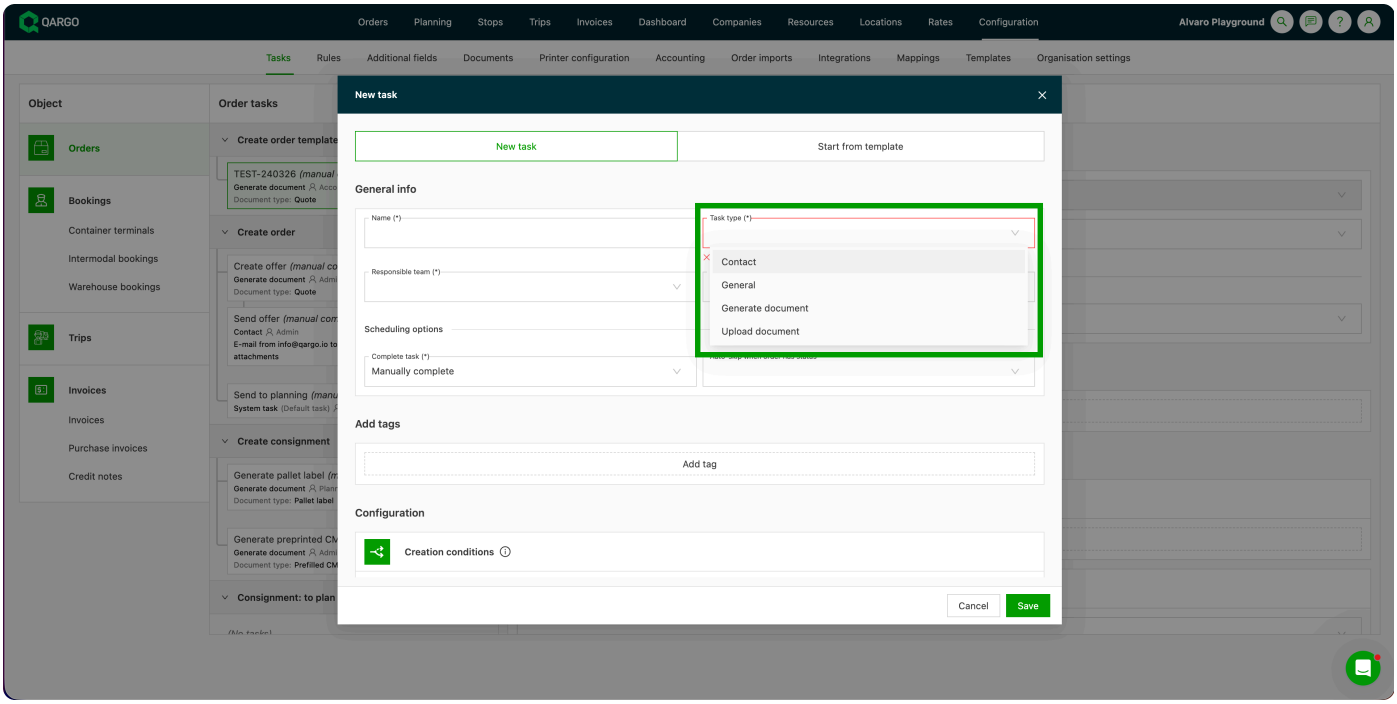
1. Navigate to **Configuration > Task configurations**.
2. Locate the **Create template** section. This section controls which tasks appear when an order is in *Template* status.



3. Click **Add task** within the **Create template** section.

4. Select one of the supported task types:

    1. **Contact**: e.g., *Call customer to follow up on quote*
    2. **General**: e.g., *Review rating before sending*
    3. **Generate document**: e.g., *Generate PDF quote for customer*
    4. **Upload document**: e.g., *Upload signed quote confirmation*

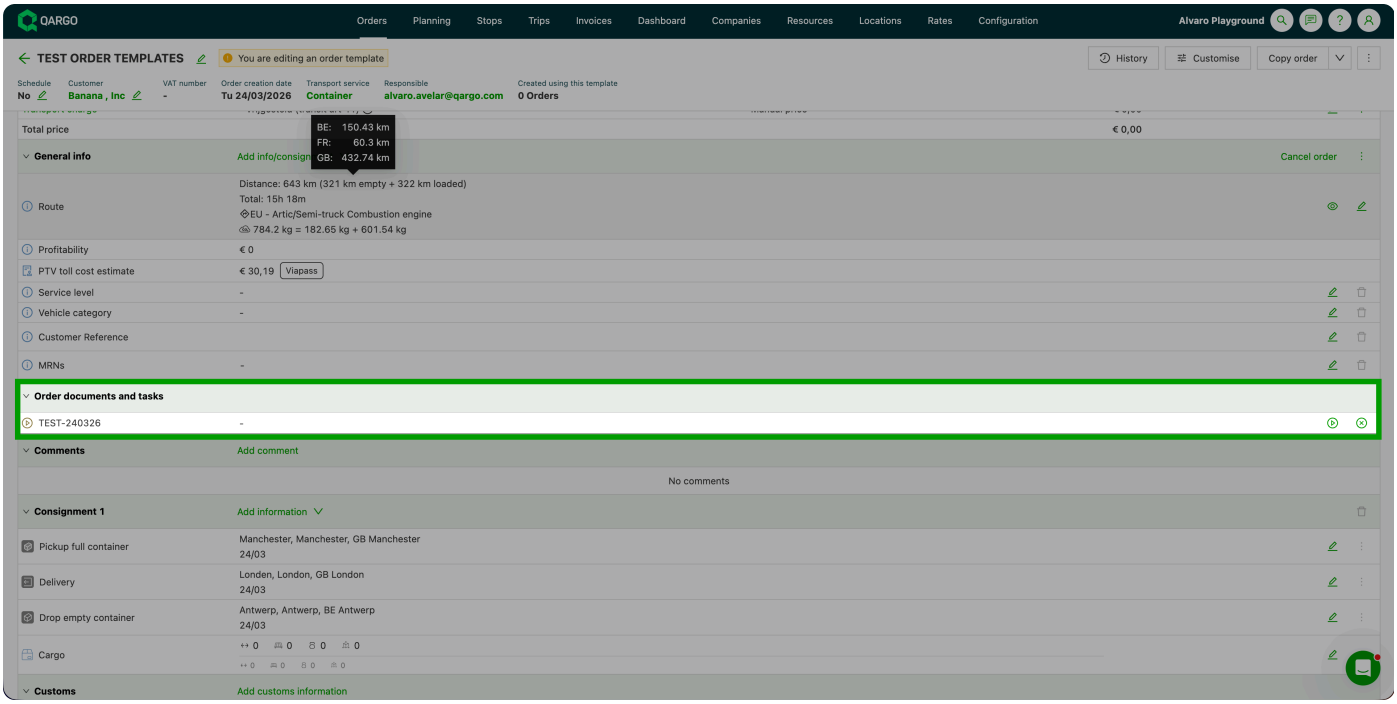


5. Configure the task details and click **Save**.

Steps for workflow

Once configured, tasks appear automatically on any order in Template status.

1. Open or create an order template (an order in *Template* status).
2. The tasks configured in the **Create order template** section appear automatically in **To do** status.



1. Complete tasks directly on the template. For example, use a *Generate document* task to produce a PDF quote to send to the customer.

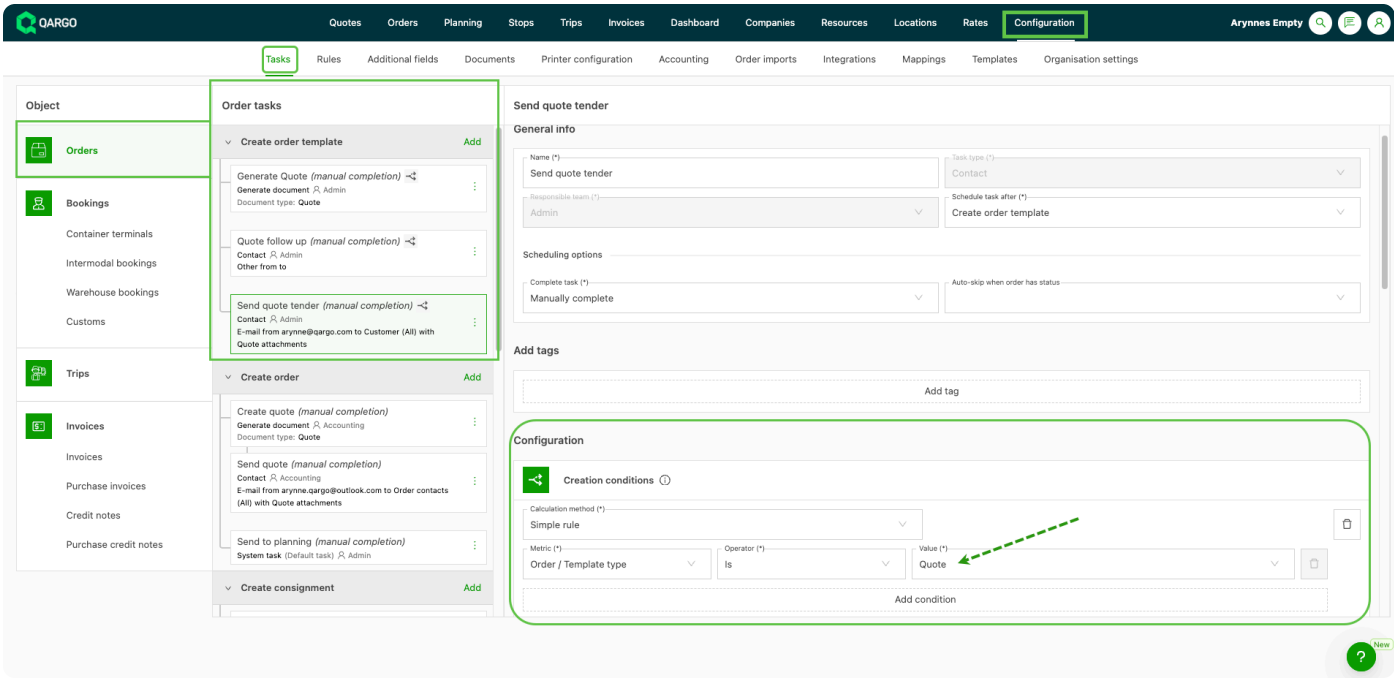
📚 When a live order is created from the template (by copying it), only regular workflow tasks appear on the new order. Template-specific tasks remain on the template and are not carried over.

‼️ The **Send to planning** action is not available on template orders. This prevents accidentally converting a reusable quote template into a live planned order.

Using task conditions for template orders

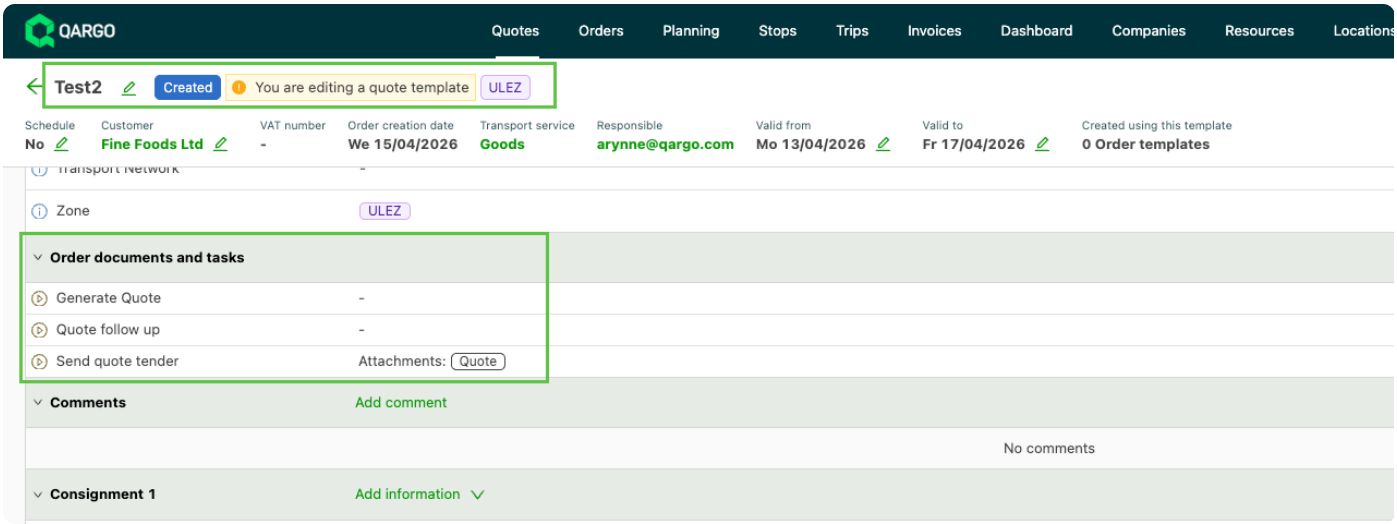
Templates can refer to both **Orders and Quote tenders**. An option under **Task Configuration > Creation conditions** allows users to assign specific tasks to the different template options (Orders / Quotes).

- **Navigate** to Tasks
- **Select** the task to update or click **Add** to add a new task
- **Locate** the Configuration panel and select **Calculation method** = **Simple rule**
  - Set the metric **Order / Template type** is **Order / Quote** (Value)
- **Save** the task

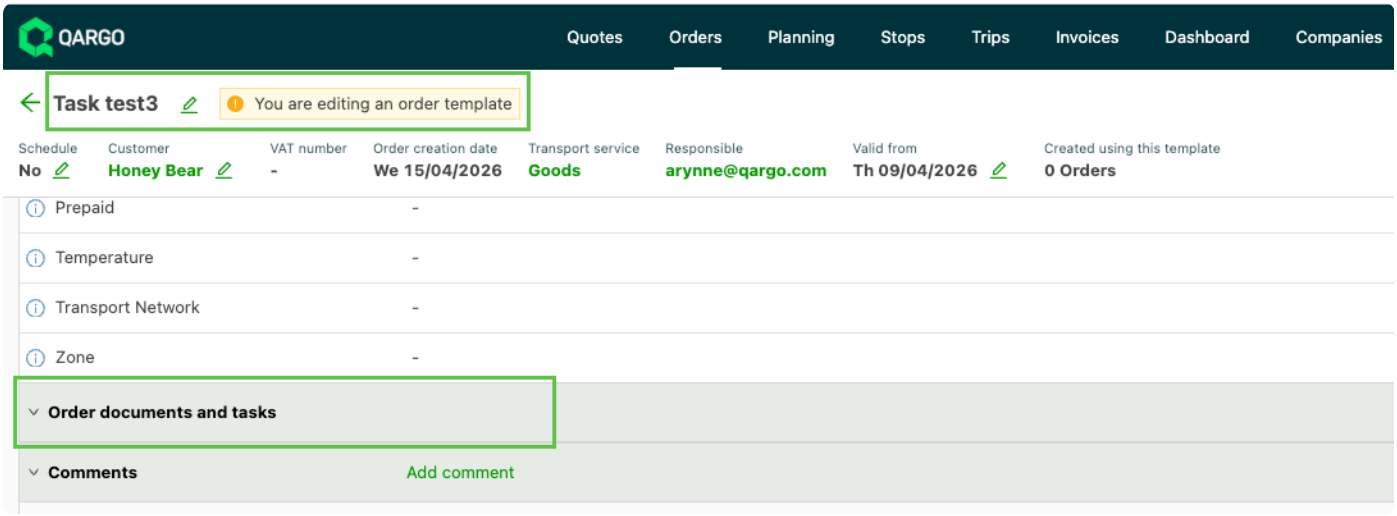


- Once a task condition is set, the configured tasks only apply to the relevant template types.

Quote Tender (template): Tasks set up when conditions apply



Order Template: No conditions apply to order templates, so no tasks are created.



Limitations

- Only **order-level tasks** are supported in this version. Shipment-level document tasks are not included.