Customer portal: create orders from templates

Booking a recurring route on the customer portal means filling in the same form over and over. Templates solve this. Portal users can pick a template for standard routes and create an order from it in seconds, with all key information filled in.

Updated October 28, 2026

Introduction

Customer portal users can now browse order templates and create orders from a preconfigured template. Locations and the transportation service are locked; only dates, quantities and references can be edited.

Summary

- **What:** A new **Templates** subtab on the customer portal lets portal users browse the customer's order templates. They can create a new order from a selected template, with key fields prefilled and locked.
- **Why:** Portal users previously had to fill in the full order form from scratch every time, even for recurring routes booked weekly. Template-based order creation removes repetitive data entry for standard, recurring transportation.
- **How:** A super admin user must enable the feature with a toggle in **Organization settings**. Portal users then see a **Templates** tab under **Orders**, select a template and open a prefilled order form. Locations and the transportation service are locked to the template. Dates, quantities and references can be changed before saving.

Prerequisites

- The customer portal must be configured to process orders through the **Order import** flow. See Customer portal orders via the order import flow for setup instructions.
- A super admin user must enable the **Show templates on customer portal** toggle in **Organization settings > Customer portal configuration**.
- **Order templates** must exist for the relevant customer. Each portal user only sees the templates of their own customer.

Use cases

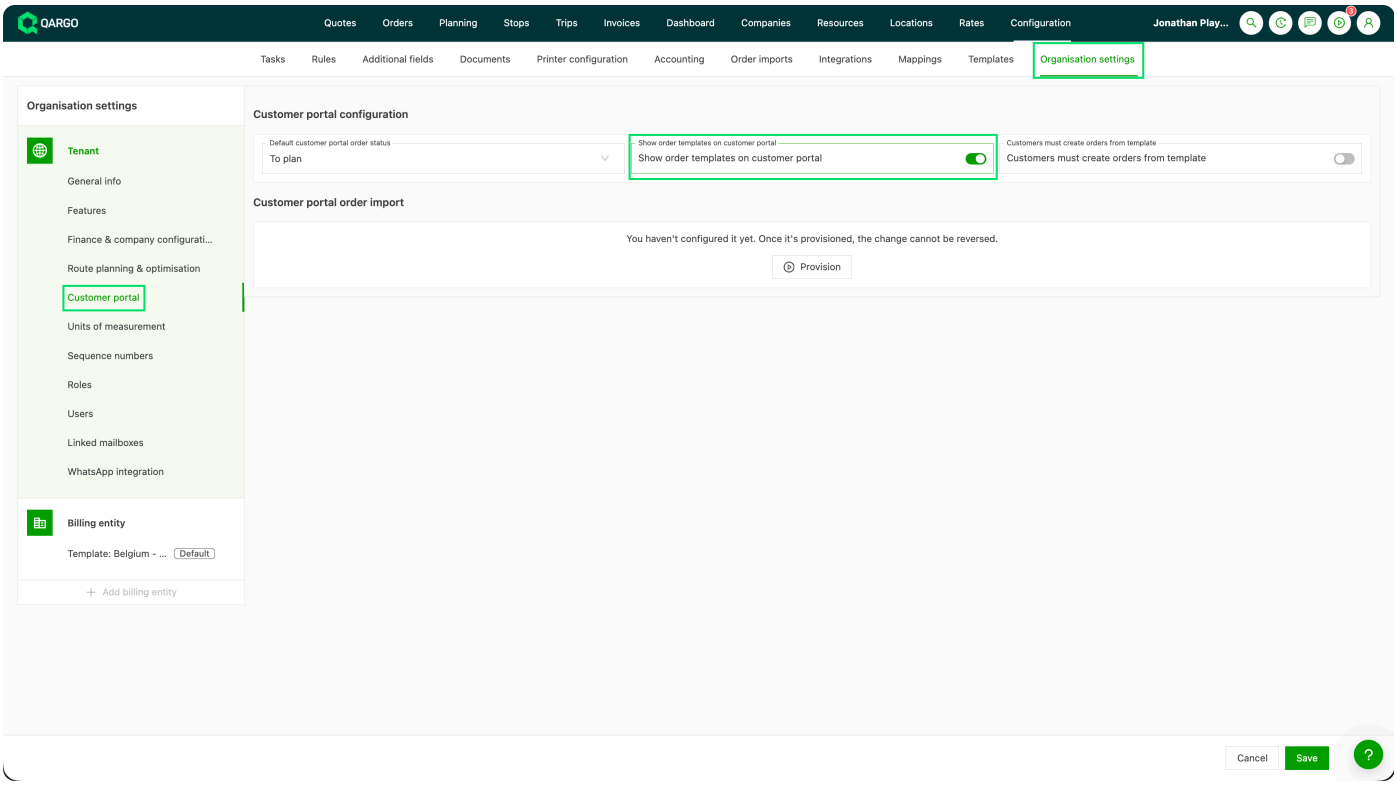
- A portal user who books the same recurring lane every week selects the template and adjusts only the pickup date and pallet quantity. There is no need to re-enter all addresses, the transportation service and the shipment details.
- A logistics coordinator manages templates internally in the TMS. End customers on the portal use those templates to place orders quickly and consistently, which reduces entry errors.
- A customer with several standard delivery routes uses templates to make sure the correct transportation service and route structure are always applied. No TMS-side intervention is needed for each booking.

Terminology

Term	Definition
Order template	A preconfigured order in Qargo containing a full route structure: stops, transportation service, shipment structure and rating.
Templates subtab	A new tab under **Orders** on the customer portal, listing the customer's own templates in read-only view.
Create order from template	The portal action that opens a prefilled order form based on a selected template.
Locked fields	Fields inherited from the template that the portal user cannot change: pickup/delivery locations, transportation service and shipment structure.
Customer portal configuration	The settings section in **Organization settings** where portal features (including template visibility) are enabled or disabled for all customers.

Enabling templates on the customer portal (super admin setup)

🧰 **An admin performs this step once**, for all customers with portal access.



1. Navigate to **Configuration > Organization settings**.
2. Open the **Customer portal** section.
3. Enable the **Show order templates on customer portal** toggle.
4. Save the settings.

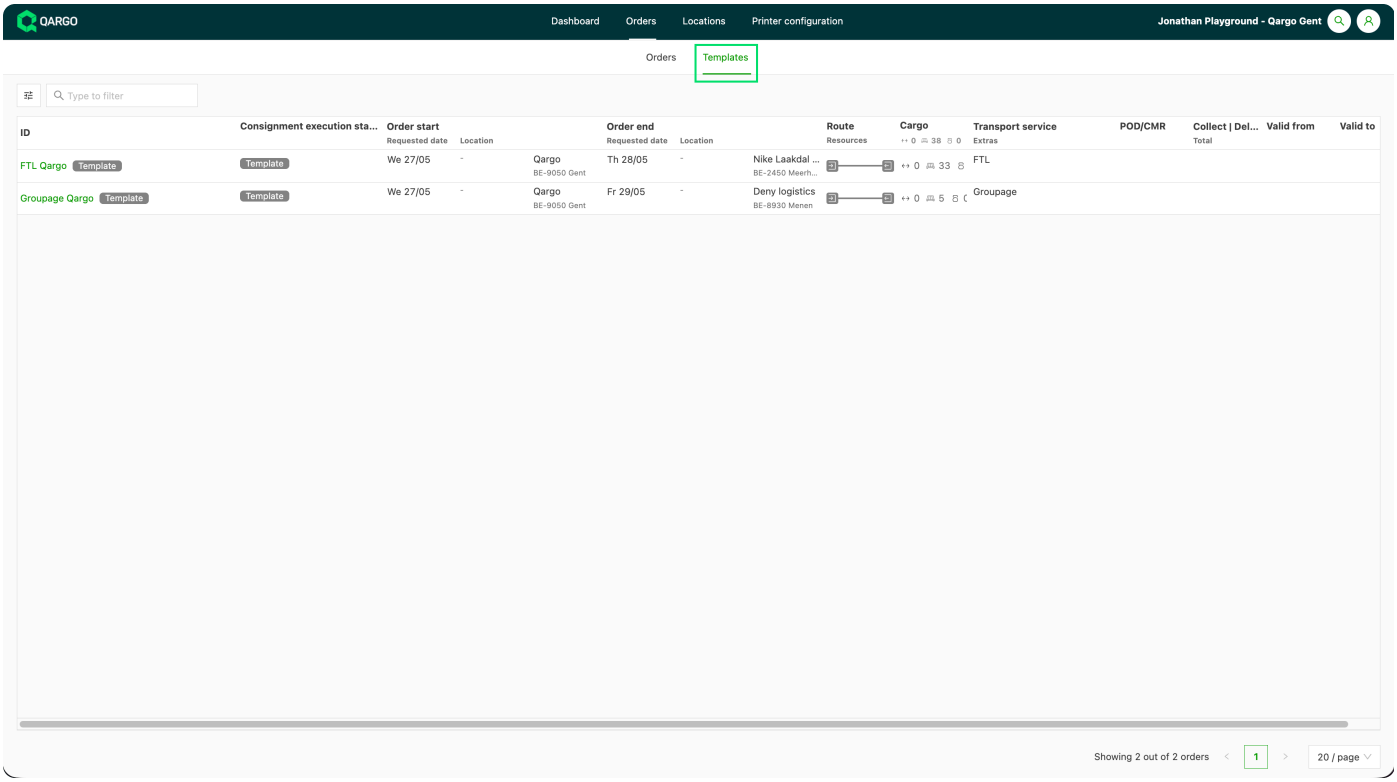
Once enabled, the **Templates** subtab becomes visible to all portal users across all customers. Each customer only sees their own templates.

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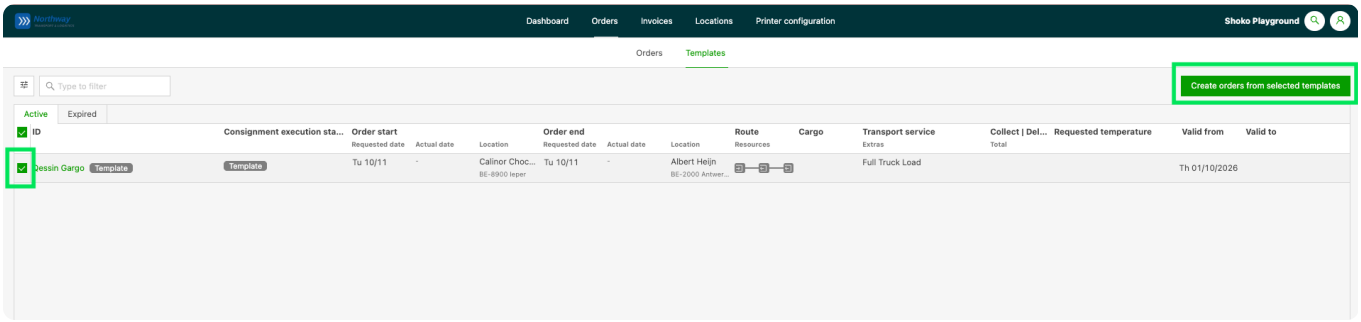
🧰 A second, separate toggle sits in the same **Customer portal configuration** section: **Customers must create orders from template**. Where **Show order templates** only makes the **Templates** tab available, this toggle enforces it. When it is enabled, the **Create order** button is hidden entirely for portal users, leaving only **Create from template**.

Creating an order from a template (portal user)

1. Log in to the customer portal.
2. Navigate to **Orders**.
3. Select the **Templates** subtab. A list of the templates available for this customer is displayed.
4. Browse the templates. Each row shows the template name, route details and goods information. Use search or filters to find the right template.



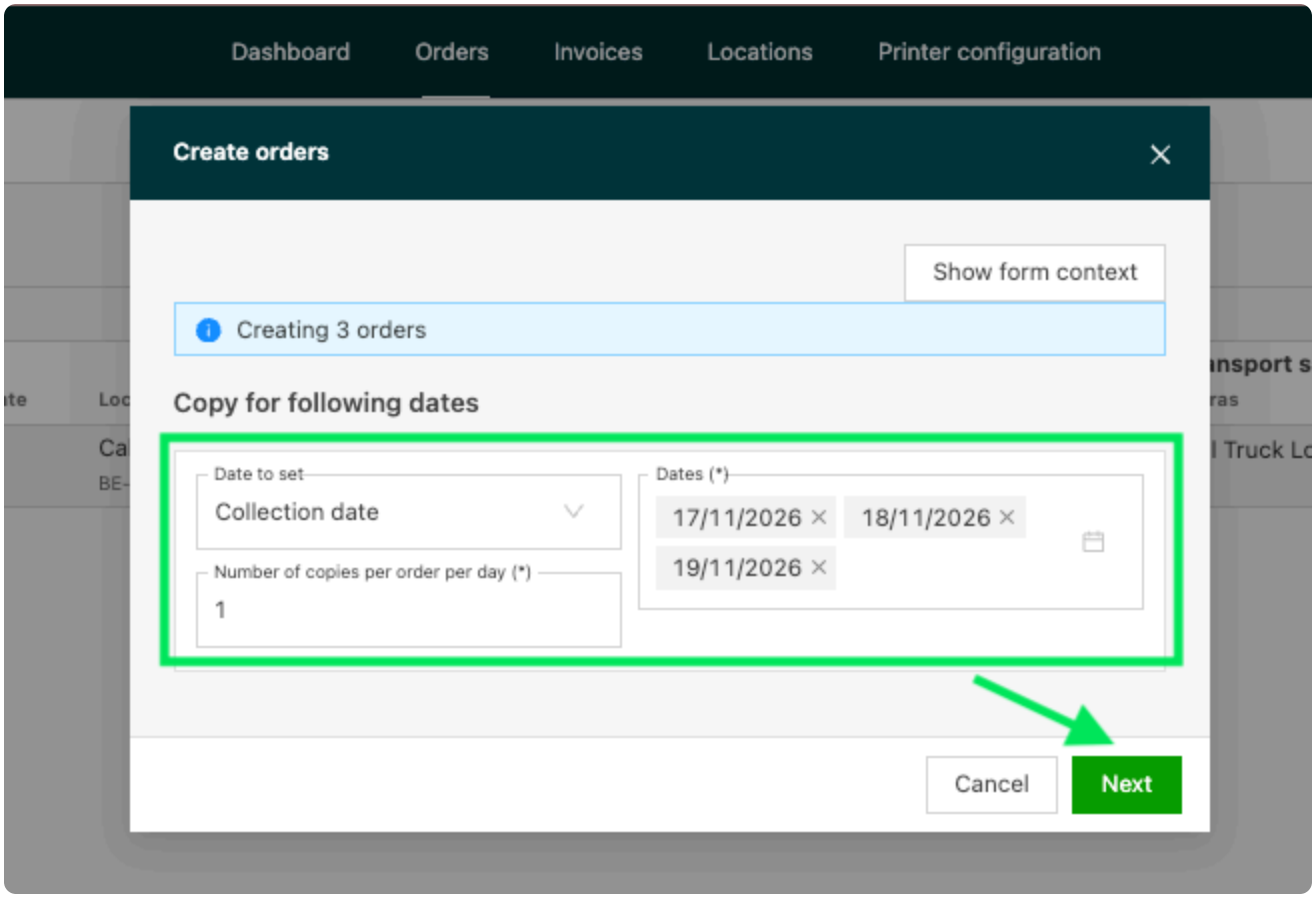
1. **Click** the desired template row to open the template detail view.
2. **Select** *Create orders from selected templates*. The order creation form opens, pre-filled with the template's data.



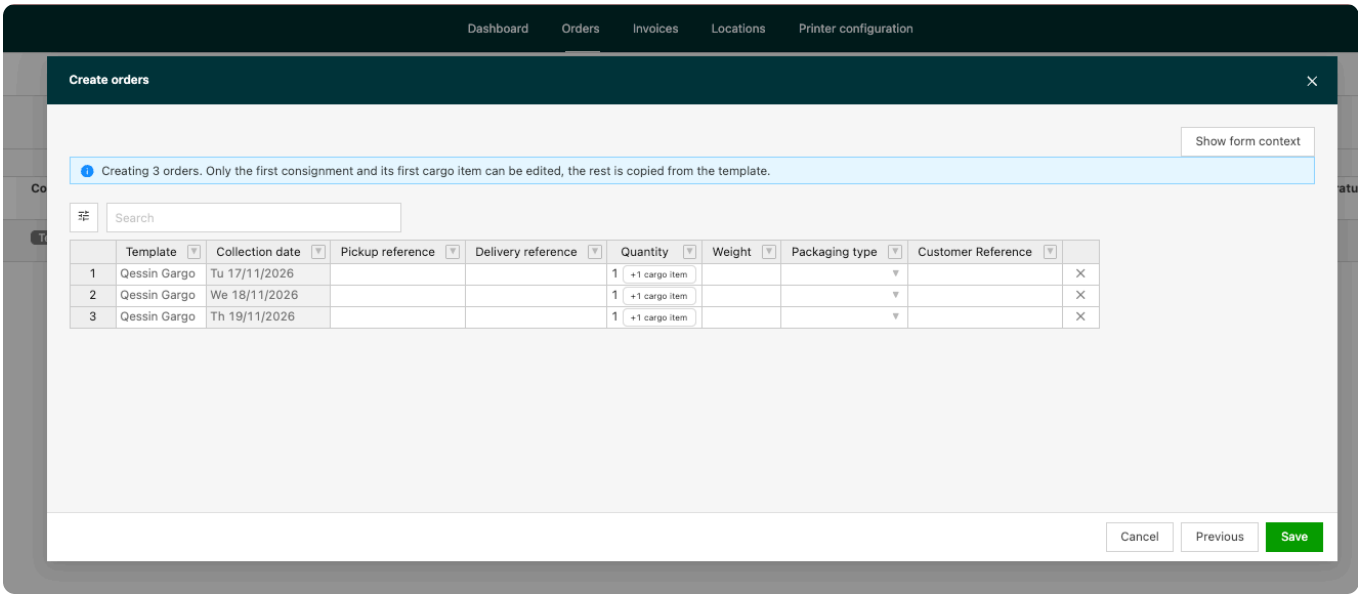
3. Create order panel opens.

4. **Fill in** the fields.

5. **Click** Next.



6. **Add** values.



7. **Save** the order.

Limitations

- **One order at a time.** Bulk creation from templates is not supported on the portal.
- **No template creation or editing on the portal.** Only TMS users create and manage templates. Portal users have read-only access to templates.
- **No recurring or scheduled orders.** The portal user must start each order manually.
- **Order import flow required.** The customer portal must be configured to use the order import flow. Direct order creation (without order import) does not support template-based orders.
- **Per-customer override not available.** The **Show templates on customer portal** toggle applies to all customers. Per-customer overrides are not available for now.
- **Template matching uses the same rules as EDI/API imports.** Locations must be correctly aliased on the template for the import to succeed.

Troubleshooting

Issue	Likely cause	Resolution
Templates tab is not visible on the portal	The **Show templates on customer portal** toggle is disabled, or the portal is not using the order import flow	Enable the toggle in **Organization settings > Customer portal configuration**; confirm that the portal is configured for order import
No templates are visible in the list	No templates exist for this customer, or RBAC is not configured correctly	Verify that templates exist for the customer in the TMS and that the customer's RBAC is set up correctly
Order creation fails after selecting a template	Location alias mismatch or shipment count mismatch between the template and the form data	Check the location aliases on the template's stops; make sure the form has the same shipment structure as the template
Create order from template button is not visible	The template detail page is not showing the portal-specific button	Confirm that the portal is logged in as a portal user (not a TMS user) and that the toggle is enabled
Customer portal users can still create orders without a template	The **Customers must create orders from template** toggle is not enabled	Enable the toggle in **Configuration > Organization settings > Customer portal**