Configuration – Chat-based validation rules for order capture

Qargo has a built-in AI agent that lets users create order capture validation rules themselves just by describing them in plain language. Setting up a validation rule used to mean involving engineering. Now users can describe, test, and enable rules themselves.

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Summary

- **What is it?**
  - A conversational *AI agent* in **Configuration > Rules** that turns a plain-language description into an order capture validation rule.
  - The agent produces the same underlying rule mechanism used today. No new rule types or entry points are introduced.
- **Why use it?**
  - Until now, only Qargo Professional Services could author these rules, so every new rule became an internal ticket.
  - Chat-based authoring lets users (Super admin / Qargo admin only) create and adjust validation rules directly.
- **How does it work?**
  - A rule is described in plain language and refined with the agent over several turns until it is correct.
  - A rule can be tested against a mock order before saving, directly from the order create screen.
  - Rules keep working when copied between sandbox and production.

Prerequisites

- *Super admin* access: rule authoring is located under **Configuration > Rules**.
- The *Qargo Intelligence* (Qi) feature flag must be enabled for the tenant.

Use cases

- Blocking an order when a required field, such as packaging type, is left empty.
- Enforcing packaging weight limits or locked pallet-space rules at the point of order capture.
- Restricting allowed time windows or service-level availability per ZIP code zone.
- Allowing Admin users to adjust a validation rule without raising a ticket.

Terminology

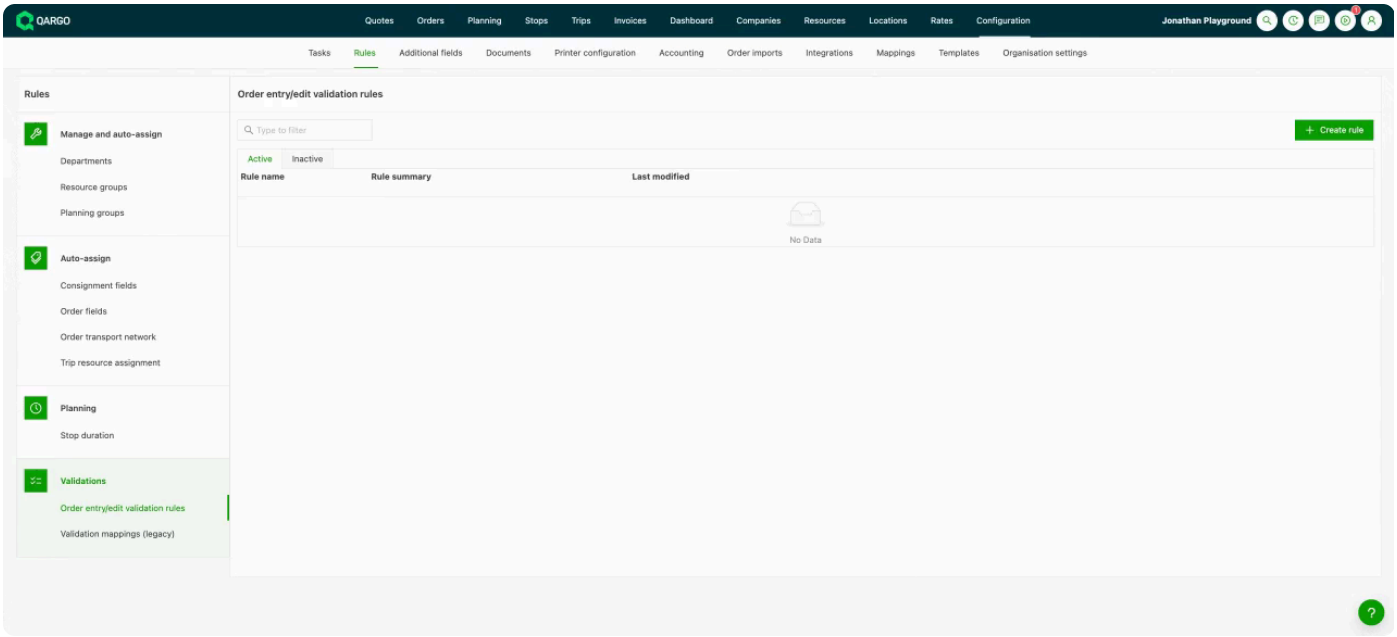
Term	Definition
Validation rule	A check applied at order capture that blocks input on the portal and shows a warning in the web app when conditions are not met.
Chat agent	The conversational AI assistant that translates a plain-language description into a validation rule.
Master data	Reference records such as customers, locations, and packaging types, matched by their code.
Validation mode	A test mode that opens the order create screen so a mock order can be built to check a rule.

Creating a rule

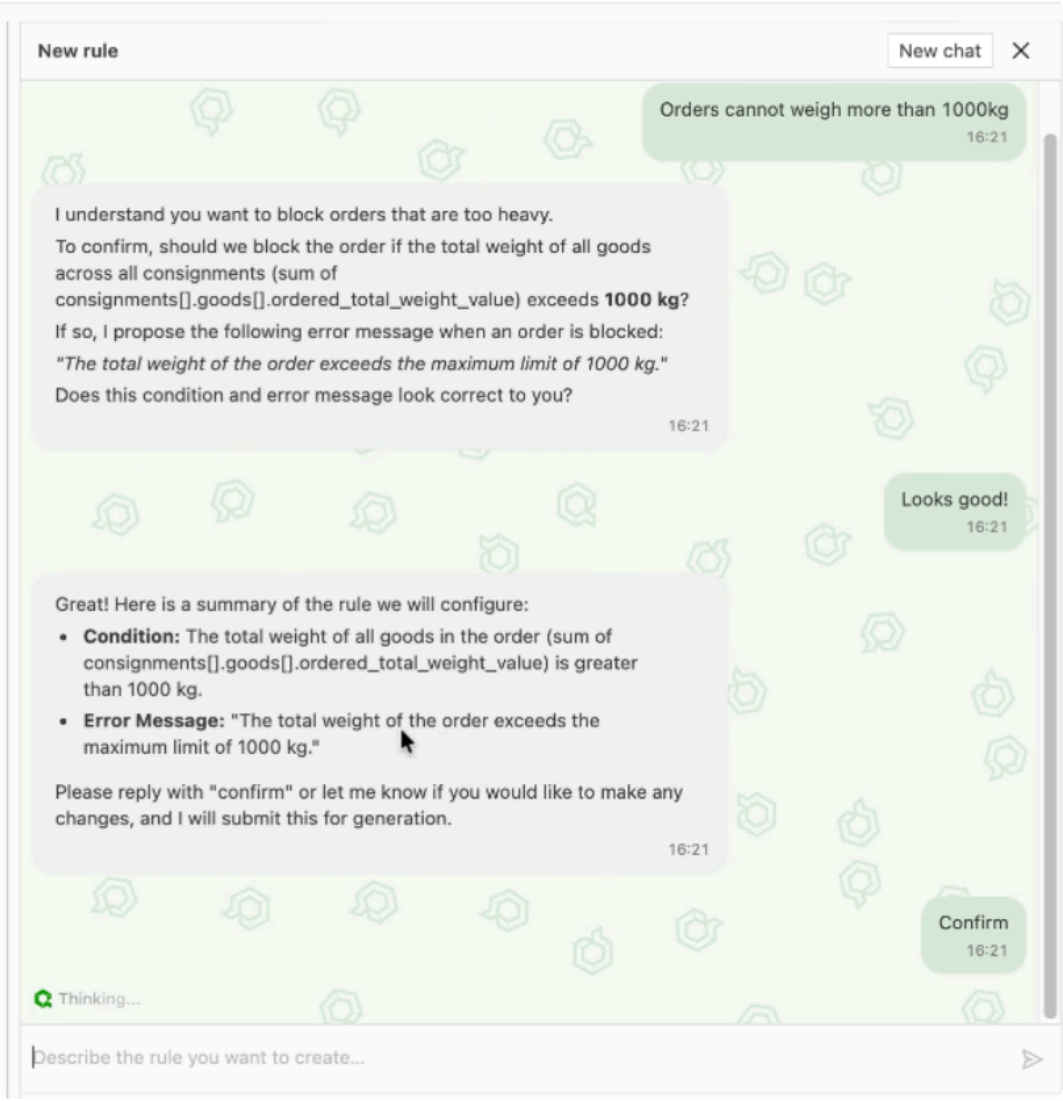
🎥 This video shows the entire process of creating chat-based validation rules:

▶ https://watchclueso.com/embed/v78nwub4k9mnksfi

1. **Navigate** to **Configuration > Rules**.
2. **Create rule** by clicking the button in the top right-hand corner.
3. **Describe** the required validation rule to the *chat agent* in plain language.

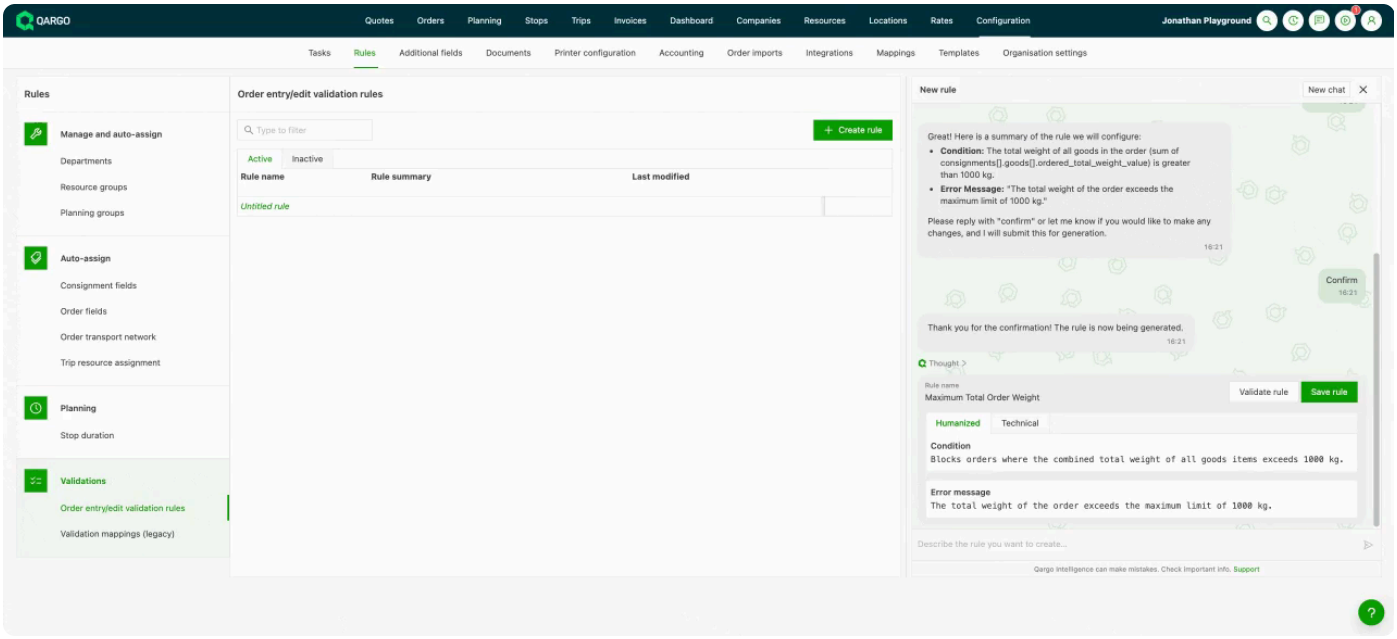


1. **Review** the agent's response and **refine** the description over additional turns until the rule reflects the intended check.
2. **Confirm** the matched master data items. The agent auto-fills codes, and the resolved list remains editable.



Testing a rule before saving

1. **Open** *validation mode* on the draft rule. A pop-over opens the order create screen.
2. **Build** a mock order that should trigger the rule.
3. **Visualize** the rule's effect on the mock order before saving.

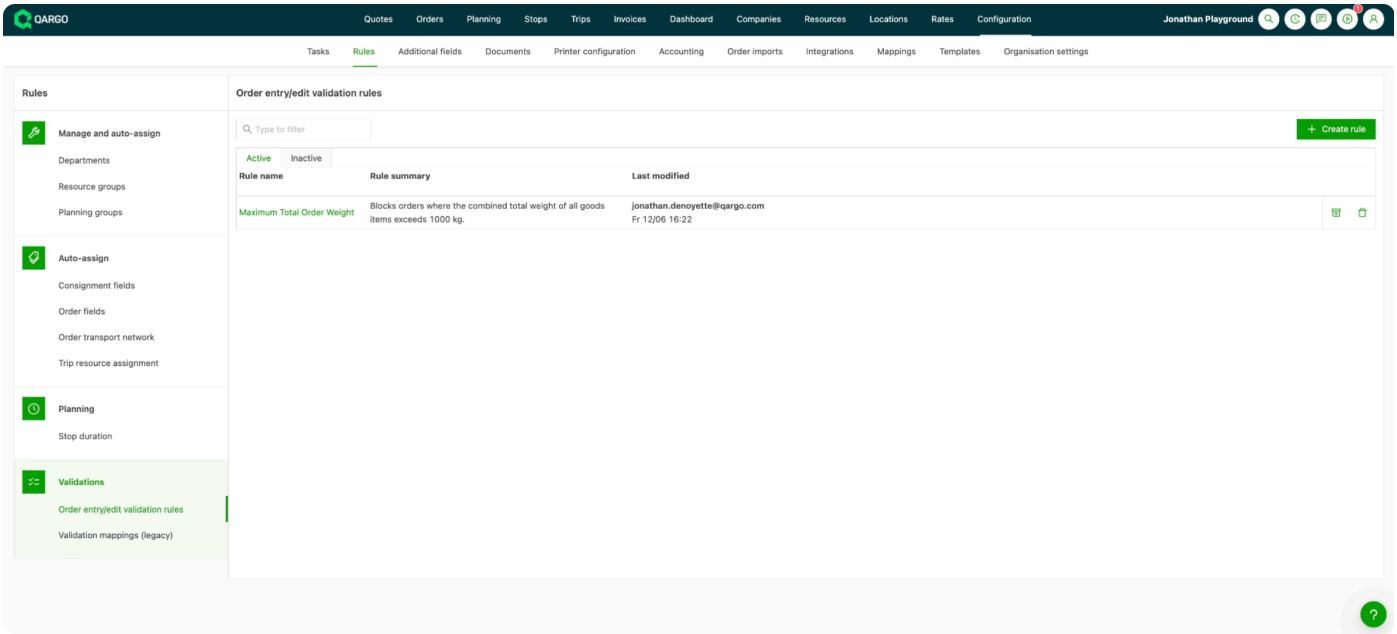


‼️ Thorough validation is strongly recommended, because the rule is generated by AI and can still be incorrect even when it appears right.

Saving a rule

Once validation is complete, the rule must be saved.

1. **Save rule** by clicking the button next to Validate.
2. The rule then appears in the **Order capture/edit validation rules overview**.
3. From there, rules in the account can be **edited**, **deactivated**, or even **removed**.



How master data is matched

- Rules reference master data (customers, locations, packaging types, and so on) by *code* rather than by name.
- Setting a code on these entities is strongly recommended, because codes are more stable for rule generation.
- The same rule continues to work when copied between sandbox and production, since codes are consistent across environments.

Troubleshooting

Issue	Cause / Resolution
The agent returns a formatting or syntax error.	The description may be ambiguous. Rephrase the request, or ask the agent to try again over additional turns.
The agent cannot find a referenced service or add-on.	A typo or an unrecognized name was used. Reference the entity by its exact name or code. Having a code set is strongly recommended.
A saved rule does not behave as expected.	The AI-generated rule may be incorrect. Retest in validation mode with a mock order and refine the description.

Limitations

- Rules validate input on save. They do not lock fields or limit which options appear in the order form.
- Rules generated by AI can still be incorrect, so thorough validation is essential.