Customer portal — Excel and CSV order export — what, why and how.

A new Export button on the customer portal lets portal users download their filtered order list as CSV or Excel using admin-enabled export templates.

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Portal users can download their order list as a *CSV* or *Excel* file using any export template a Super Admin has enabled for the portal.

Summary

What?

- A new **Export** button is available on the customer portal **Orders** list and **Dashboard**.
- Portal users select from templates enabled for the portal and download a CSV or Excel file matching their current filter.

Why?

- Previously, portal users could only download PDF documents. Customers who needed to export order data for their own systems had to take screenshots or ask the carrier's operations team to run exports manually.

How?

- A Super Admin enables an export template for the portal with the **Available on customer portal** toggle in **Configuration > Templates > File exports/downloads**. Once it is enabled, the **Export** button becomes visible to portal users.

Prerequisites

- *Super Admin:* At least one order export template must have **Available on customer portal** switched on under **Configuration > Templates > File exports/downloads**. Nothing appears on the portal until this step is complete.

Use cases

- A freight forwarder with portal access exports filtered orders for a specific date range directly to Excel to include in its own management reporting.
- A shipper downloads a CSV of all confirmed orders for the week to reconcile them against purchase orders, without needing to contact the carrier.

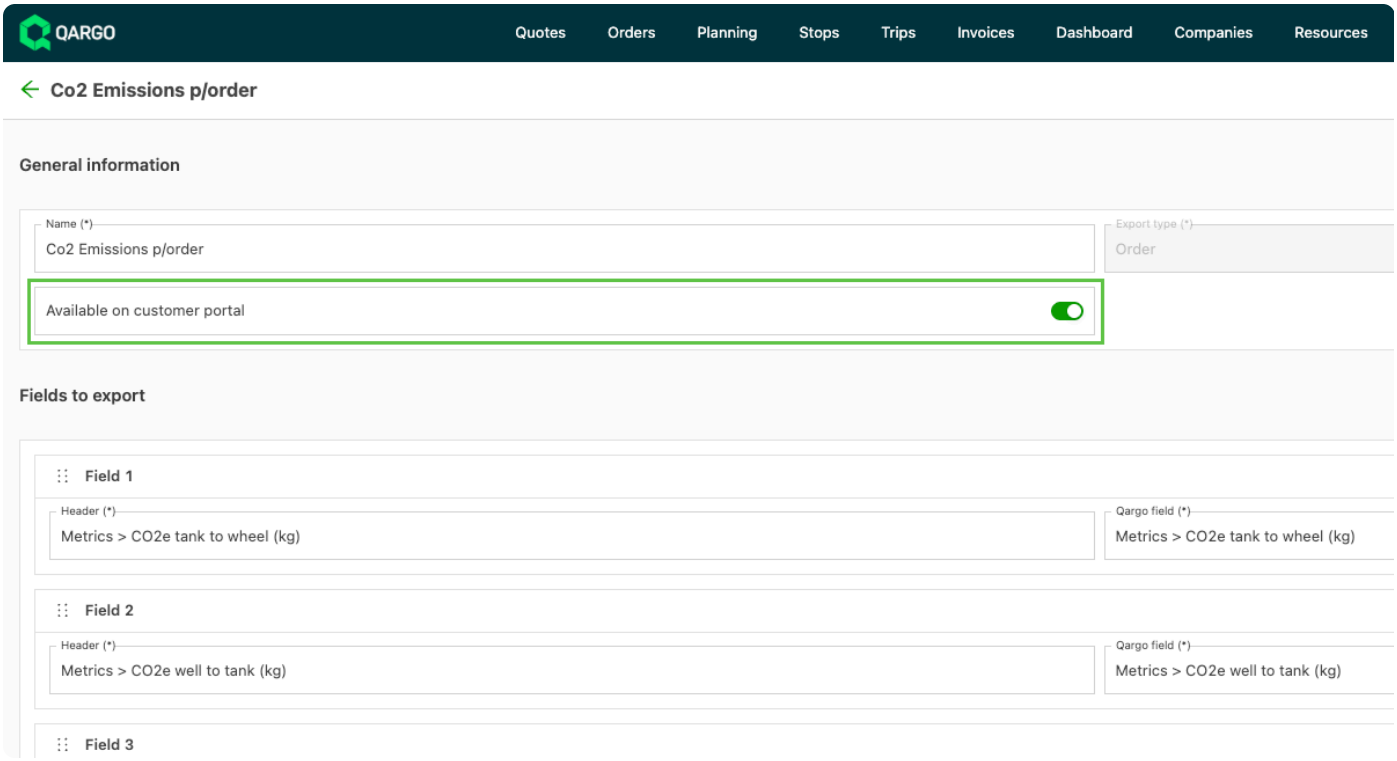
Terminology

Term	Definition
Customer portal	The Qargo web interface available to a carrier's customers for tracking and managing their shipments
Export template	A configurable file export definition in **Configuration > Templates > File exports/downloads**
Available on customer portal	The toggle on an order export template that makes it visible to portal users
Async delivery	Delivery of large exports by email instead of direct browser download, used when the export exceeds the direct-download size limit

Enabling portal exports (admin setup)

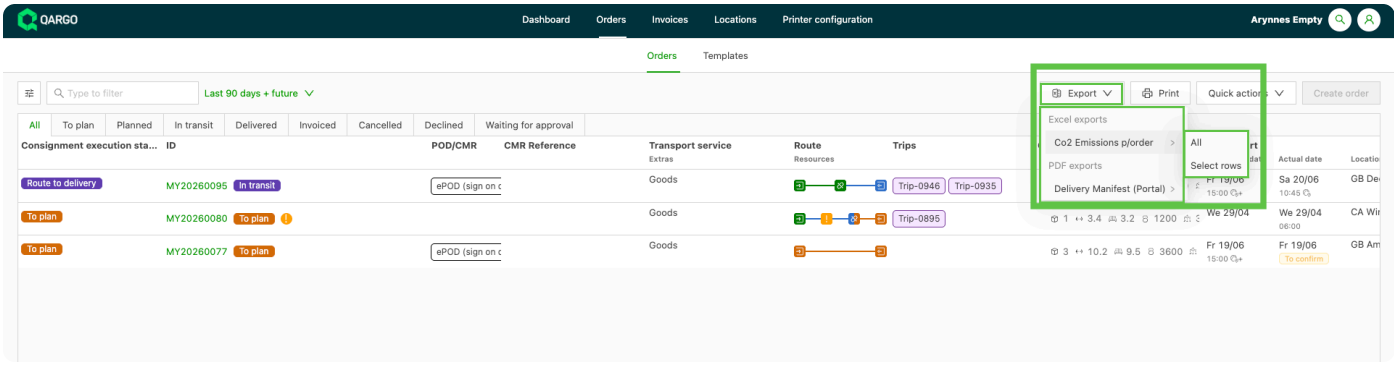
1. **Navigate** to **Configuration > Templates > File exports/downloads**.
2. **Select** an order export template to make available to portal users.
3. **Enable** the **Available on customer portal** toggle on the template.
4. **Save** the template. The **Export** button now appears on the customer portal for users of that tenant.

Note: Only ***order*** **export templates** can be enabled for the portal. Only columns visible to portal users will contain data. Internal-only fields such as cost and margin are excluded.



Using the export (portal user)

1. **Open** the **Orders** list on the customer portal.
2. **Apply** any required filters to narrow down the order list.
3. **Select** the **Export** button.
4. **Choose** the export template from the list of available templates.
5. **Download** the file. Small exports download immediately in the browser; larger exports are delivered by email.



Troubleshooting

Issue	Resolution
No **Export** button visible on the portal	A Super Admin must enable **Available on customer portal** on at least one order export template
Template not visible in the portal export picker	Verify that **Available on customer portal** is toggled on for that specific template
Some fields appear blank in the export	The field is internal-only and is not exposed to portal users; adjust the export template to use portal-visible fields only
Export delivered by email instead of direct download	The export exceeds the direct-download size limit. This is expected behavior; check the inbox associated with the portal account