Qargo Intelligence: Assign fields tasks — what, why & how

Qi Assign fields tasks check a plain-language condition and, when it is met, automatically fill in fields on orders, loads, or stops.

Updated September 23, 2026

Summary

- **What is it?**
  - A new type of **Qi task** called **Assign fields**.
  - When the task runs, it checks a condition. If the condition is met, it writes a value into one or more fields in Qargo.
  - The rule is set up by describing it in plain language to a *chat agent*. No technical knowledge is needed.
- **Why use it?**
  - Standard Qi validation tasks can only add a *tag*. Many tags on one order or load make the overview hard to read, and a tag cannot hold a value.
  - An Assign fields task stores a real value, such as a container no. or a booking instruction, in a field that can be shown in overviews, on documents, or in the customer portal.
- **How does it work?**
  - The task is created under **Configuration > Tasks** like any other task.
  - The chat agent turns the description into a rule, which can be checked against a real order or load before saving.
  - The value can be fixed (for example “BOOK TIMESLOT”) or derived from current data (for example “the next Monday from today”).
  - The rule can overwrite an existing value or only fill the field when it is empty.

Prerequisites

- *Qargo Intelligence (Qi)* must be enabled for the tenant.
- *Super Admin* or *Admin* permissions to configure tasks.
- Any custom field the task should fill in must already exist.
- Familiarity with tasks is helpful. See Tasks – what, why & how? and Qi – validation tasks.

💬 Qargo Intelligence is an add-on. Contact the Qargo account manager if the **Qi task** option is not visible.

Use cases

- **Show the container or trailer number to customers:** when a resource is assigned to a load, write the container or trailer number into a custom field that is visible in the customer portal.
- **Set booking instructions automatically:** set a dropdown field to “BOOK TIMESLOT” when a time slot time window has been selected.
- **Replace tags with one clear value:** instead of several Qi tags stacking up on a load, store the outcome in a single field that is easy to read and filter on.
- **Flag special goods:** set a field when the goods on an order meet a condition, such as specific UN numbers, so it stands out to planners.

Terminology

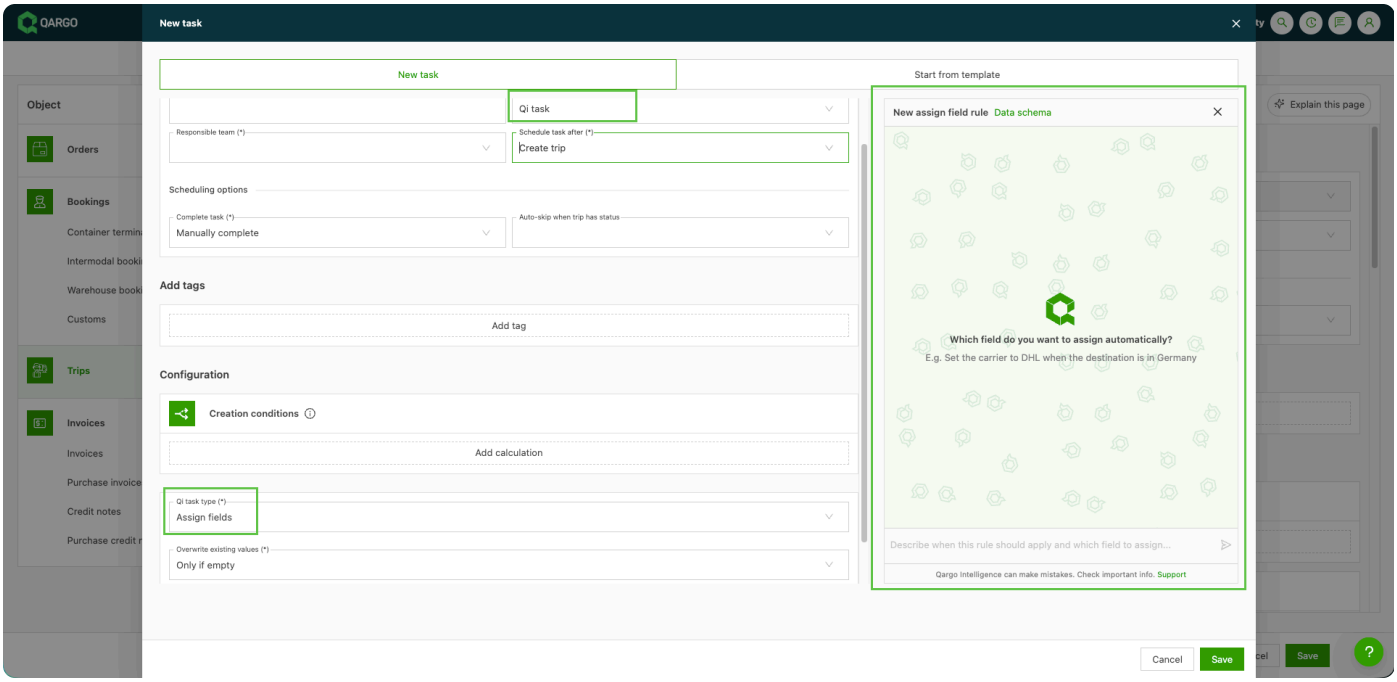
Term	Definition
Qi task	A task that uses Qargo Intelligence (AI) to check or update data automatically.
Assign fields	The Qi task type that writes values into fields, instead of only adding a tag.
Chat agent	The AI assistant in the task modal that turns a plain-language description into a rule.
Condition	The check the rule makes first. Fields are only filled in when the condition is met.
Static value	A fixed value that is always the same, for example “BOOK TIMESLOT”.
Derived value	A value derived from current data, for example a container no. or a calculated date.
Humanized / Technical	Two views of the same rule: plain English, or the underlying expression the system runs.
Validate	A check of the draft rule against one real order or load, showing what would change.

Creating an Assign fields task

Open a new Qi task

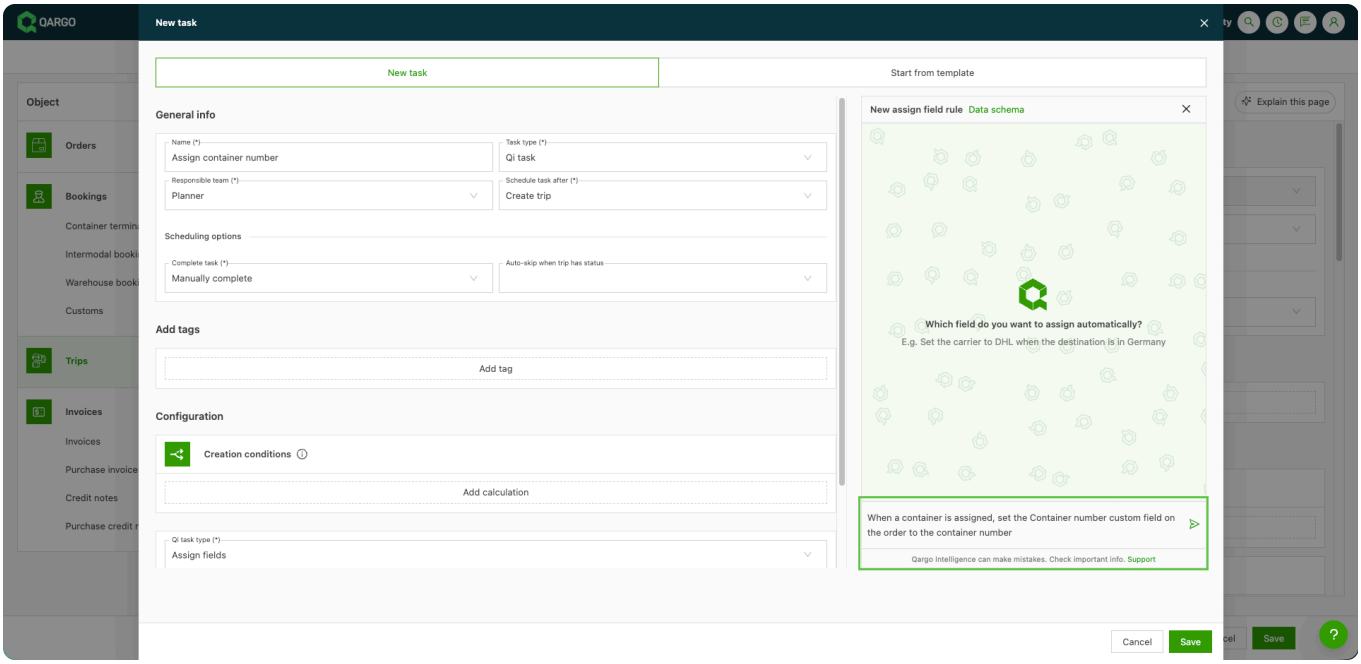
1. **Navigate** to **Configuration > Tasks**.
2. **Select** the object the task belongs to, for example **Orders** or **Loads**.
3. **Click Add** to open the new task modal.
4. **Select Qi task** as the **Task type**.
5. **Confirm** that the **Assign fields** type is selected. The *chat agent* panel opens.

📚 Selecting a different Qi task version closes the chat agent and returns to the standard tag-based Qi task.

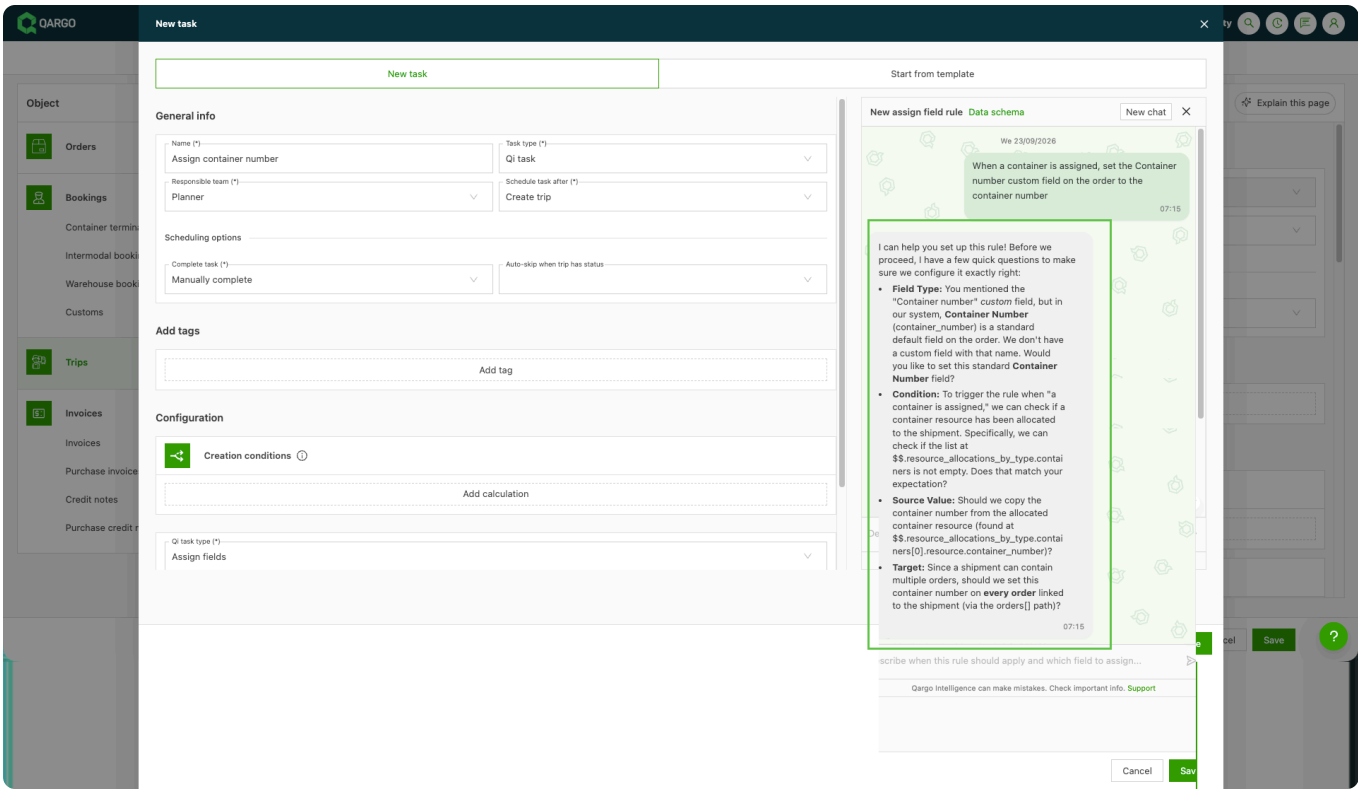


Describe the rule

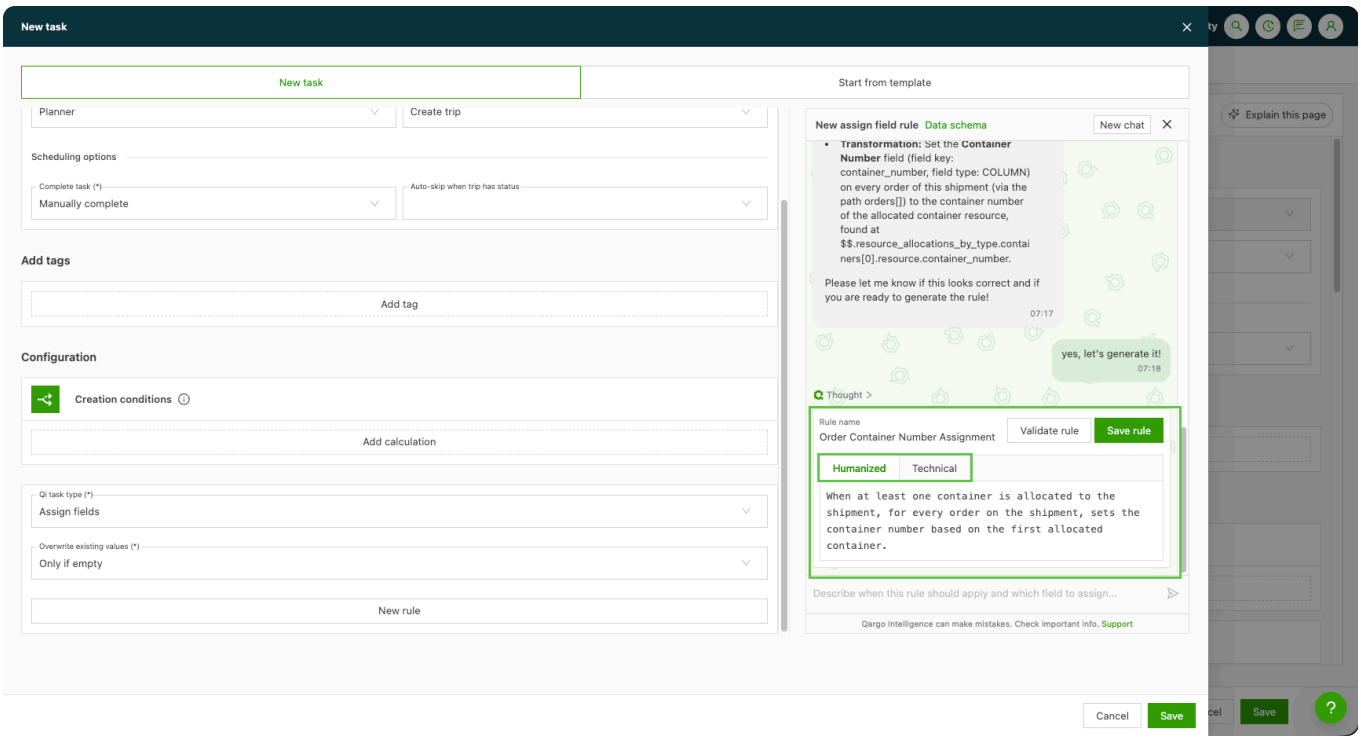
1. **Describe** the rule in the chat panel in plain language. Include the condition and the field and value to set, for example: *"When a container is assigned, set the Container no. custom field on the order to the container no."*



2. **Answer** any follow-up questions from the chat agent. It guides the description until the rule is clear.



3. **Review** the rule in plain language, using the **Humanized** view. Switch to **Technical** to see the underlying expression if needed.

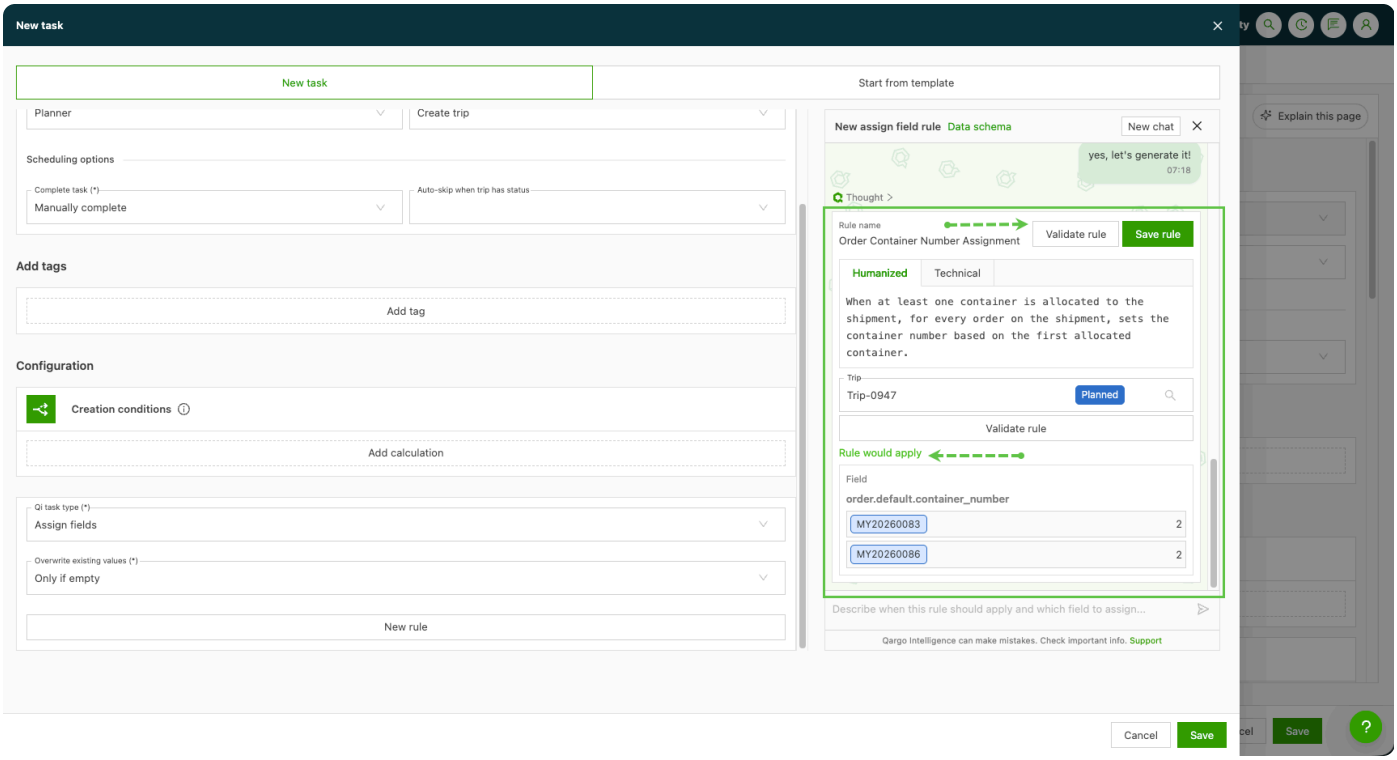


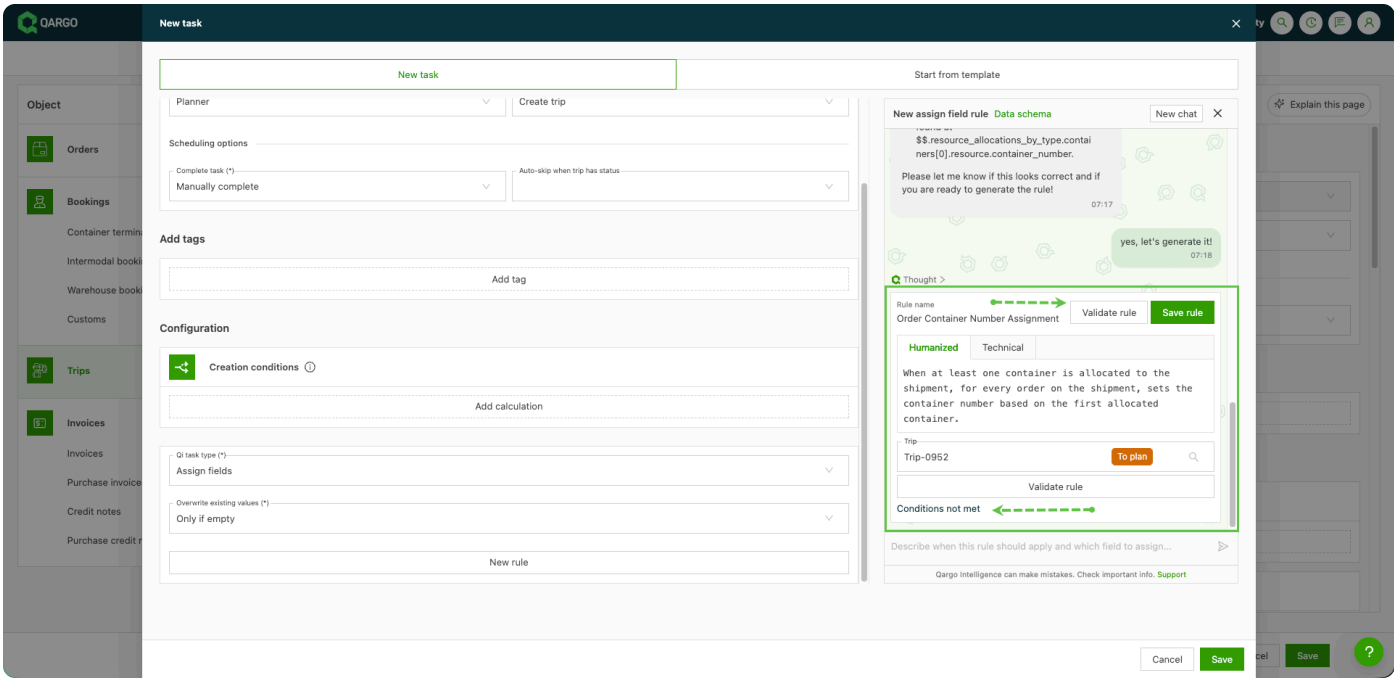
4. **Choose** whether the value may overwrite an existing value, or should only be written when the field is empty.

> 📚 Use the exact name of the field to fill in, and of the field to read from. Similar fields (for example a resource's display name and its container no. field) can hold different data.

Validate the rule

1. **Click Validate**. A search box opens.
2. **Select** one order or load to test against. Only one record can be validated at a time.
3. **Review** the result:
   - **Rule applies**: the condition is met, and the fields are shown with their values before and after.
   - **Rule doesn't apply**: the condition is not met for this record, so nothing would change.
4. **Refine** the description in the chat and validate again until the result is correct.

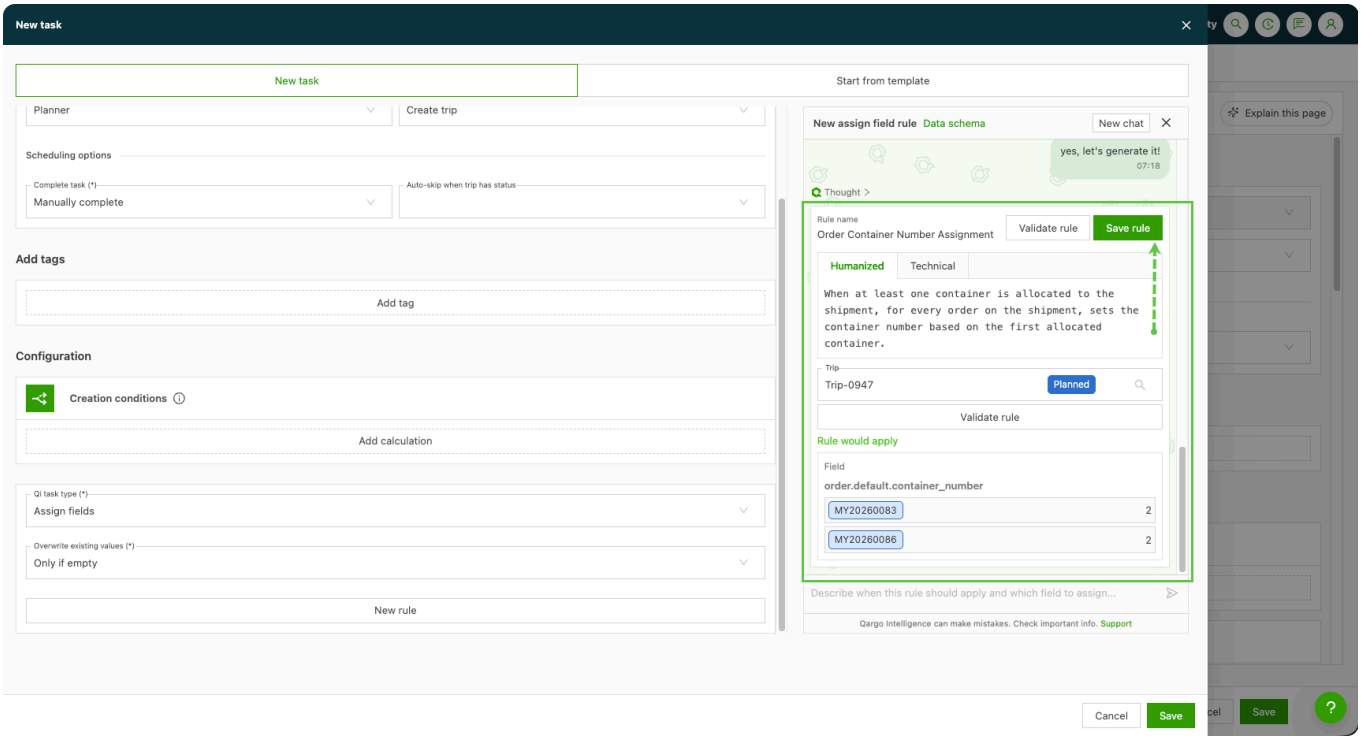




‼️ The rule is generated by AI and can be wrong even when it looks right. **Validate against several records**, including ones where the rule should not apply, before

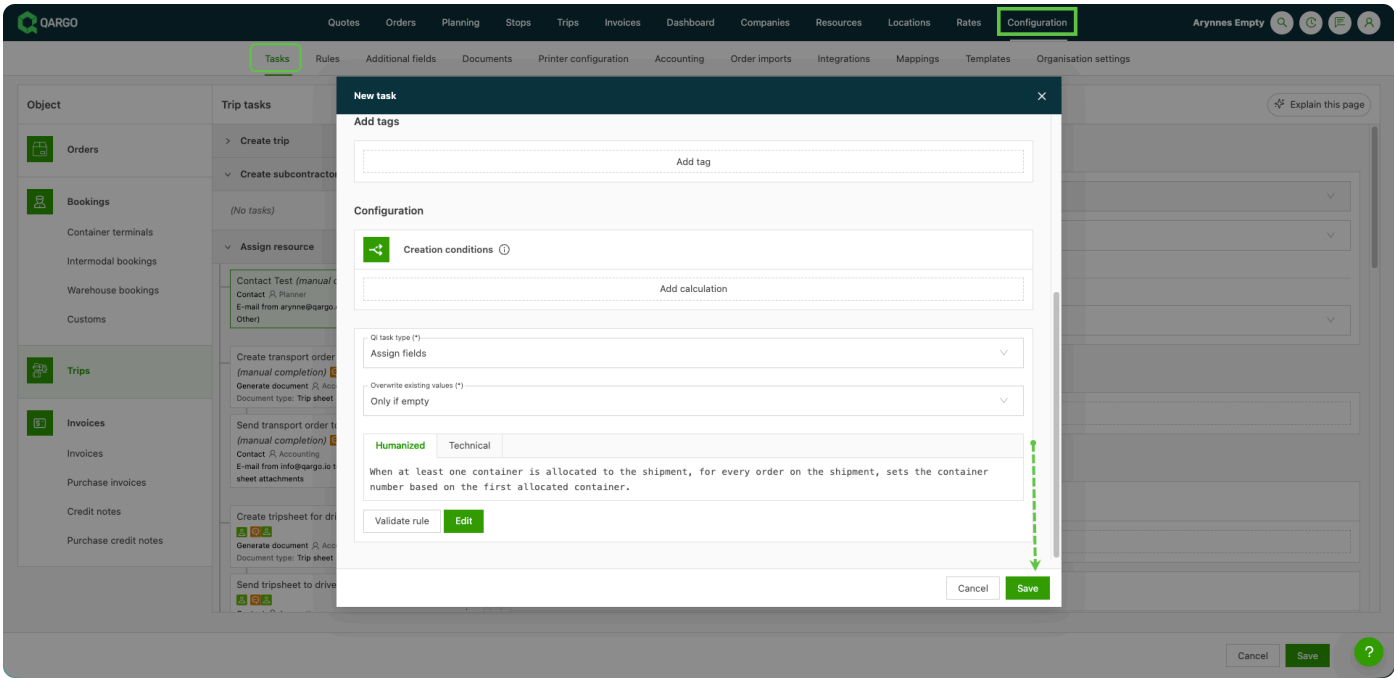
Save the rule and the task

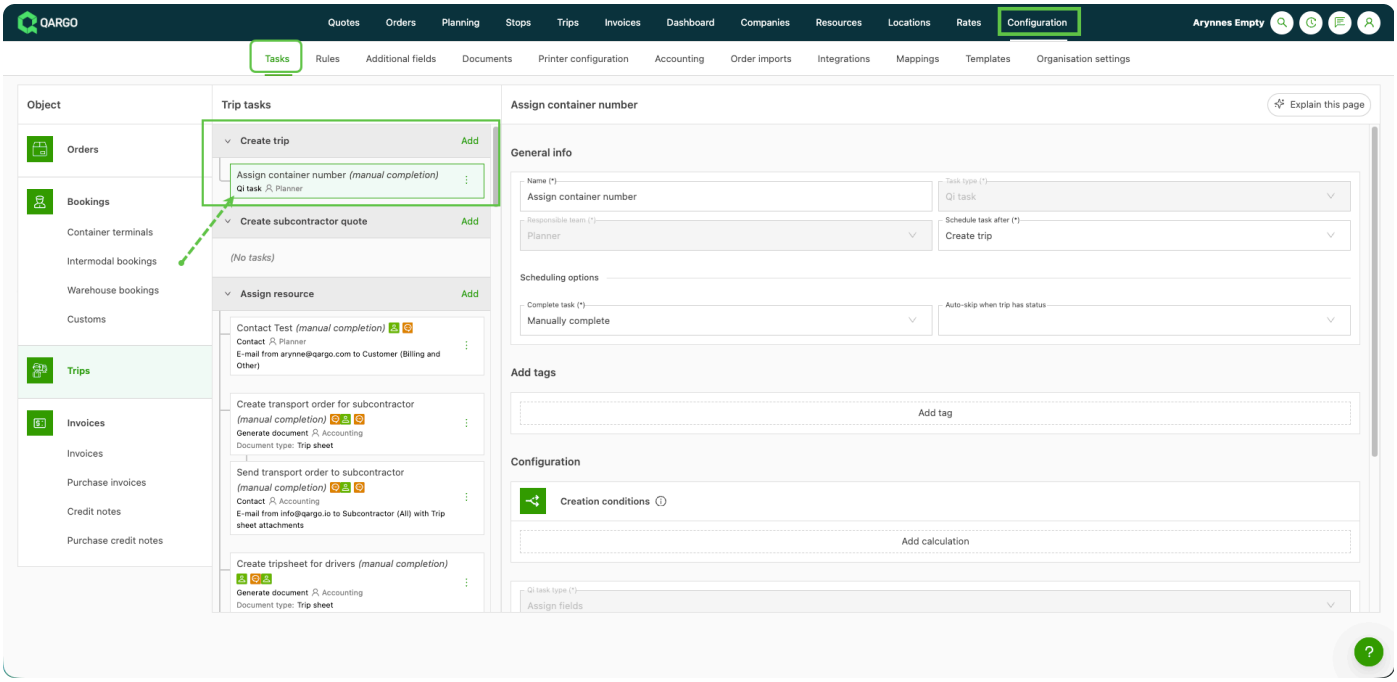
1. **Click Save rule** in the chat panel. The chat closes and the modal shows an overview of the configured rule.



2. **Complete** the remaining task settings, such as the name and when the task should run in the workflow.

3. **Save** the task. It appears on the task page with its rule.





🧰 ***Save rule*** must be clicked in the chat panel before the task itself is saved.

Edit an existing rule

1. **Open** the task on the task page and click **Edit**.
2. **Update** the rule through the chat agent, which opens again for changes.
3. **Validate** and **save rule** again before saving the task.

What happens when the task runs

- The task runs at the point in the workflow it is scheduled for.
- The condition is checked using data from orders, shipments, loads, and stops.
- When the condition is met, the value is written to the chosen field(s). The field then shows on the order, load, or stop like any manually entered value and stays editable.
- A field that is already shown in the customer portal also shows the new value there. No extra setup is needed.

‼️ Like all tasks, ***Assign fields tasks*** do not re-run automatically when data changes later. If the source data changes, the task must be run again to update the field.

Limitations

- **No automatic re-run:** the task does not re-run when the input data is updated.
- **Supported objects:** conditions use order, shipment, load, and stop data. Invoice and credit memo tasks cannot use the **Assign fields** type.
- **Not yet supported as targets:** time windows, vehicle categories, stop extras, freight extras, and incidents. These are planned for a future release.
- **Early stage:** the feature is new and still being improved. Feedback on the chat agent and setup screens is welcome through the Qargo account manager.

Troubleshooting

Issue	Cause / resolution
Saving the task shows an error with no description.	The rule was not saved in the chat panel. Click **Save rule** in the chat first, then save the task.
The chat panel keeps loading and never finishes.	Refresh the page and try again. If it keeps happening, create the task again and contact Qargo Support.
The task ran but no field was filled in.	The condition was not met, or the rule reads the wrong data. Use **Validate** on the same record to see whether the rule applies, and refine the description.
The wrong value was written (for example a reference number instead of a container no.).	The chat agent picked a similar field. Name the exact source field in the description, check the **Humanized** view, and validate again.
An existing value was not replaced.	The rule is set to only fill empty fields. Edit the rule and allow it to overwrite existing values.
The field shows an old value after a trailer or container was changed.	Tasks do not re-run automatically. Run the task again on the order or load.
Assign fields is not available.	Qi is not enabled for the tenant, or the task object does not support it (for example invoices). Contact the Qargo account manager about Qi.