Qargo Intelligence (Qi): order scanning

Upload order confirmations in bulk and let Qargo Intelligence scan them in the background into ready-to-review orders, directly from Qargo or Outlook.

Updated October 19, 2026

Summary

- **What is it?**
  - ***Qargo Intelligence users*** can turn order confirmations into orders. Documents are dropped into the **Upload orders** tab (or sent from Outlook) and scanned in the background.
  - Qargo Intelligence identifies the customer and transportation service on its own, then fills in a proposal order ready for review.
  - Many more fields are pre-filled than with the original scanning on the **Create order** page.
- **Why use it?**
  - No more waiting on the page while each document is read. Upload a whole batch, keep working, and come back to review.
  - No need to download email attachments and upload them again.
  - Orders written in the body of an email, with no attachment, can be scanned too.
  - Rules written in plain language teach the scanner how each business and each customer works.
- **How does it work?**
  - Drop one or more files into **Upload orders**, drag in a saved email, or click **New order** in the Outlook plug-in.
  - Each document becomes an import and is scanned in the background.
  - Review the proposal order, correct the customer or transportation service if needed, and confirm.

💬 Order scanning is part of Qargo Intelligence and needs to be turned on. Contact the Qargo Account Manager to activate Qargo Intelligence.

🎥 This video shows the general settings and rules (more info on this below):

▶ https://watchclueso.com/embed/ac02506734ghhbty

Prerequisites

- **Qargo Intelligence (Qi)** active on the account, with order scanning turned on by Qargo. Without it, the **Upload orders** tab does not appear.
- **Access to rules:** editing rules under **Configuration > Rules** is available to **Super Admin** and **Operations** users only.
- **Qargo Outlook plug-in** installed, if orders will be started from Outlook.

Use cases

- **A batch of morning orders:** A planner receives ten order confirmations overnight. All ten are dropped into **Upload orders** at once, and the planner reviews each proposal order as soon as it finishes scanning.
- **Orders arriving by email:** A customer emails a PDF order. The planner opens the email in Outlook and clicks **New order**, with no download or re-upload needed.

- **Orders typed into the email itself:** A customer writes the transport details directly in the email body. The email is sent to Qargo and the text is scanned into a proposal order.
- **One email, several attachments:** A customer emails three order PDFs. The email is saved, dropped into **Upload orders**, and all three attachments are selected for import.
- **One document, several orders:** A customer sends one file listing several container moves. The document is scanned once and split into one order row per transport.
- **Extras added manually:** Planners keep adding a liftgate or a booked time window to every order from a certain customer. A rule with a short instruction now does this automatically.

Terminology

Term	Definition
Order confirmation	The document or email a customer sends to request a transport
Order scanning	Qargo Intelligence reading an order confirmation and turning it into a proposal order
Upload orders tab	The tab next to **Orders** where documents are dropped in and scanned imports are reviewed
Import	One scanned document (or one order found in a document) waiting to be reviewed and created
Proposal order	An order pre-filled from the document, ready for review before it is created
Drop zone	The area on the **Upload orders** tab where files can be dragged in
Rule	A setting that controls which order fields are read from documents and how
Instruction	Plain-language guidance in a rule that tells the scanner where to find a value and how to format it
Override	A rule that applies only to a specific customer, transportation service, or both
Qargo Outlook plug-in	The Qargo sidebar in Microsoft Outlook that sends emails into Qargo

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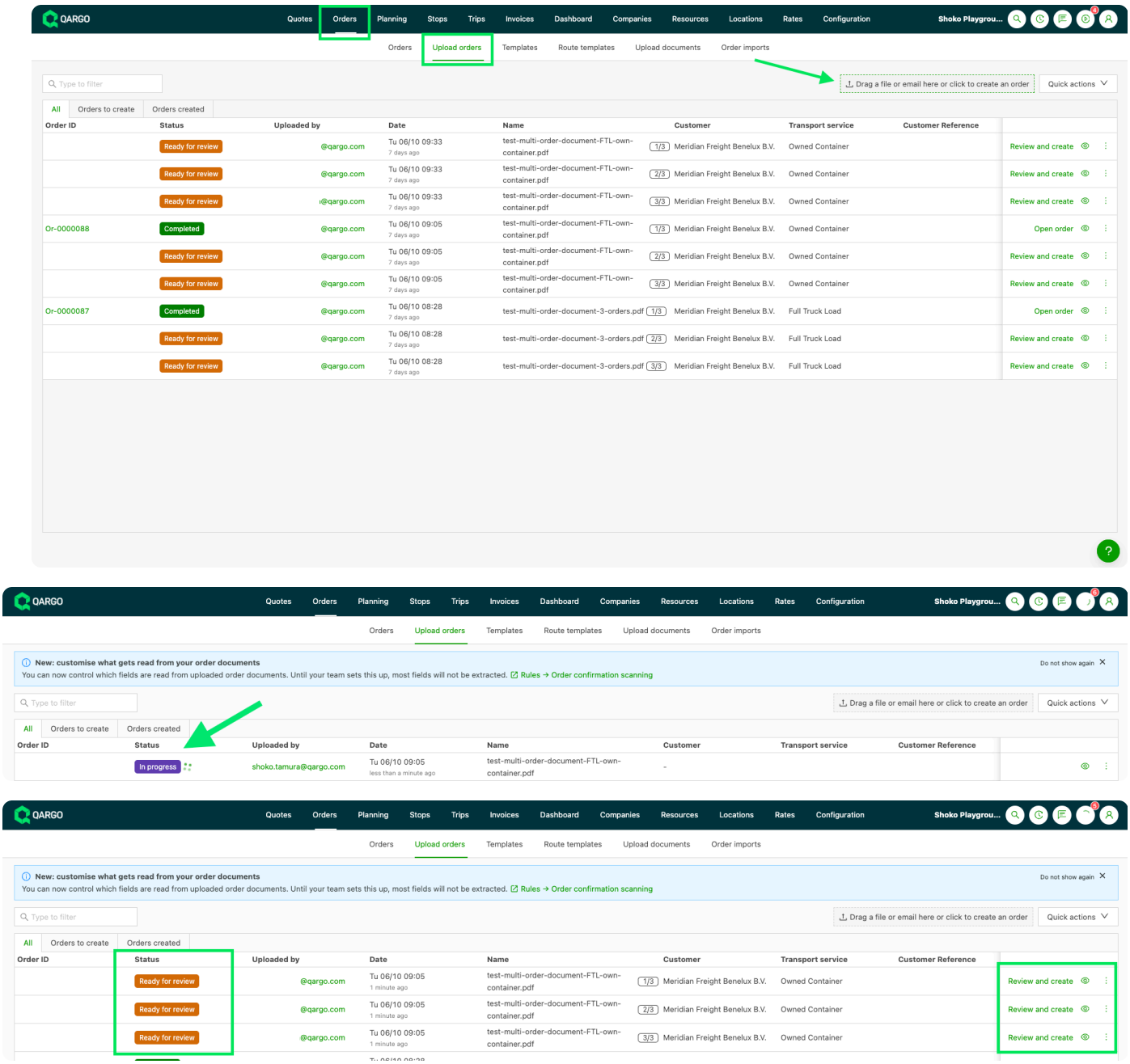
Uploading order confirmations

🎥 This video explains exactly how uploading orders works with Qi:

▶ https://watchclueso.com/embed/kl489txrmglox9pc

Upload from the Upload orders tab

1. **Open** the **Upload orders** tab, next to **Orders**.
2. **Drag** files into the drop zone, or click the drop zone to browse. Several files can be added at once.
   - Supported file types: PDF, PNG, JPEG, TIFF, Word (.doc / .docx), Excel (.xls / .xlsx), RTF and TXT.
   - There is no need to select the customer or transportation service first. Qargo Intelligence identifies them.
3. **Continue** working. Each file becomes an import and is scanned in the background. The page does not need to stay open, and more files can be added at any time.



Upload a saved email (.eml / .msg)

1. **Drag** a saved email onto the drop zone, or anywhere on the **Upload orders** page.
2. **Check** the email preview shown in the panel. Click an attachment to read it before choosing.
3. **Select** what to scan:
   - **Attachments**: check as many as needed, or
   - **Email body**: when the order is written in the email itself.
4. **Confirm** to start the scan.

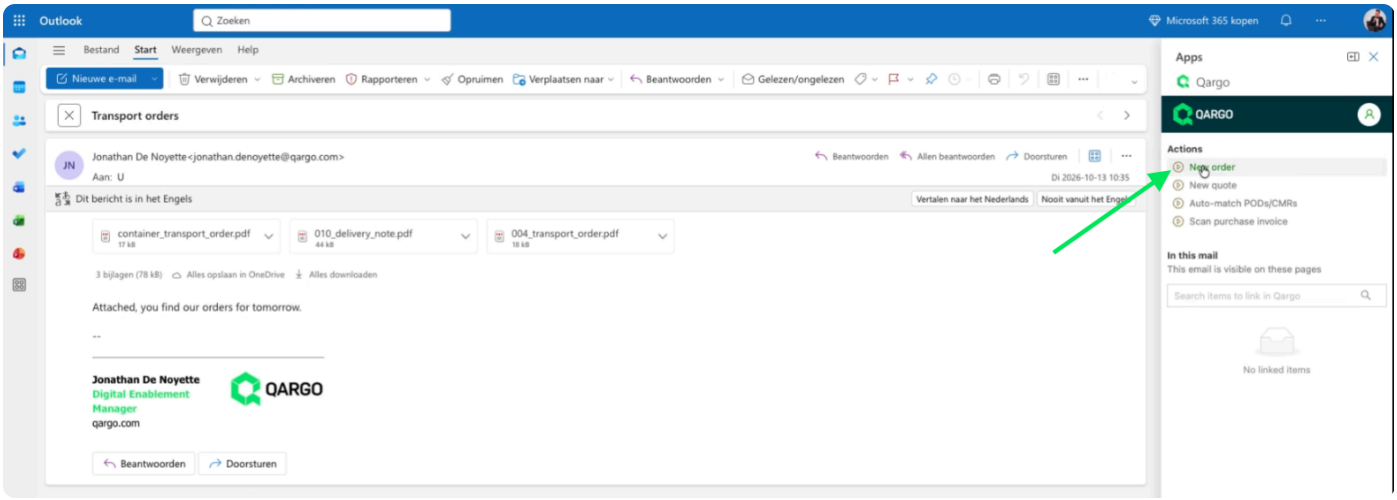
📚 An email with no usable attachments is scanned from the email body right away, with no extra questions. In the list, the row is named after the email subject, and the eye icon opens the email.

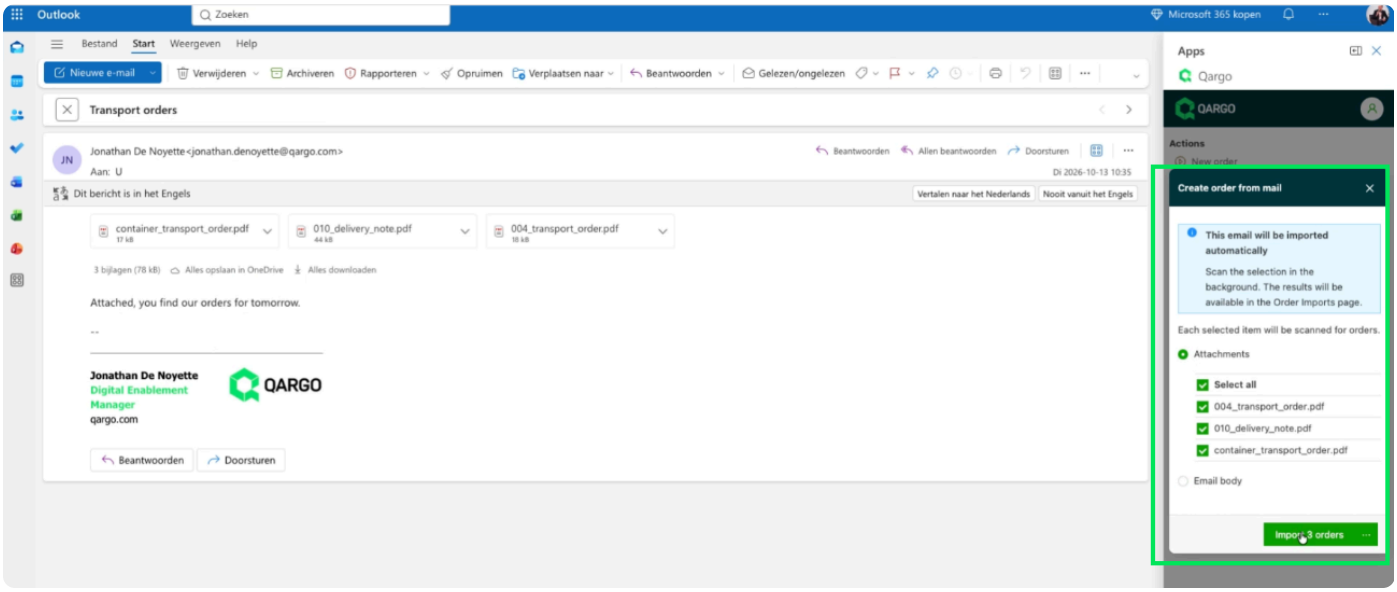
🎥 It's also possible to import orders from an email inbox. This video shows how:

▶ https://watchclueso.com/embed/l2xhvjwaz32ol0x5

Start from Outlook

1. **Open** the email containing the order confirmation. This can be an attachment or order details written in the email itself.
2. **Open** the Qargo Outlook plug-in sidebar.
3. **Click New order** under **Actions**.
4. **Continue** working. The email joins the same background scanning, and the result appears in the **Upload orders** tab.

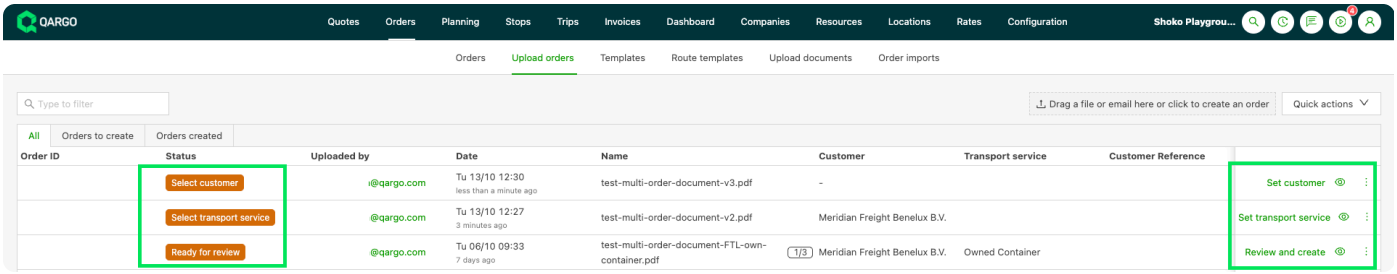




Reviewing and creating orders

Find scanned imports

1. **Open** the **Upload orders** tab.
2. **Select** a view:
   - **Orders to create**: imports waiting for review
   - **Orders created**: imports already turned into orders
   - **All**: everything uploaded
3. **Check** the label on each row to see what is needed:
   - **Select customer**: the customer was not recognized
   - **Select transportation service**: the transportation service was not recognized
   - **Ready for review**: the proposal order is ready to check
4. **Click** the eye icon on a row to view the scanned document or email.



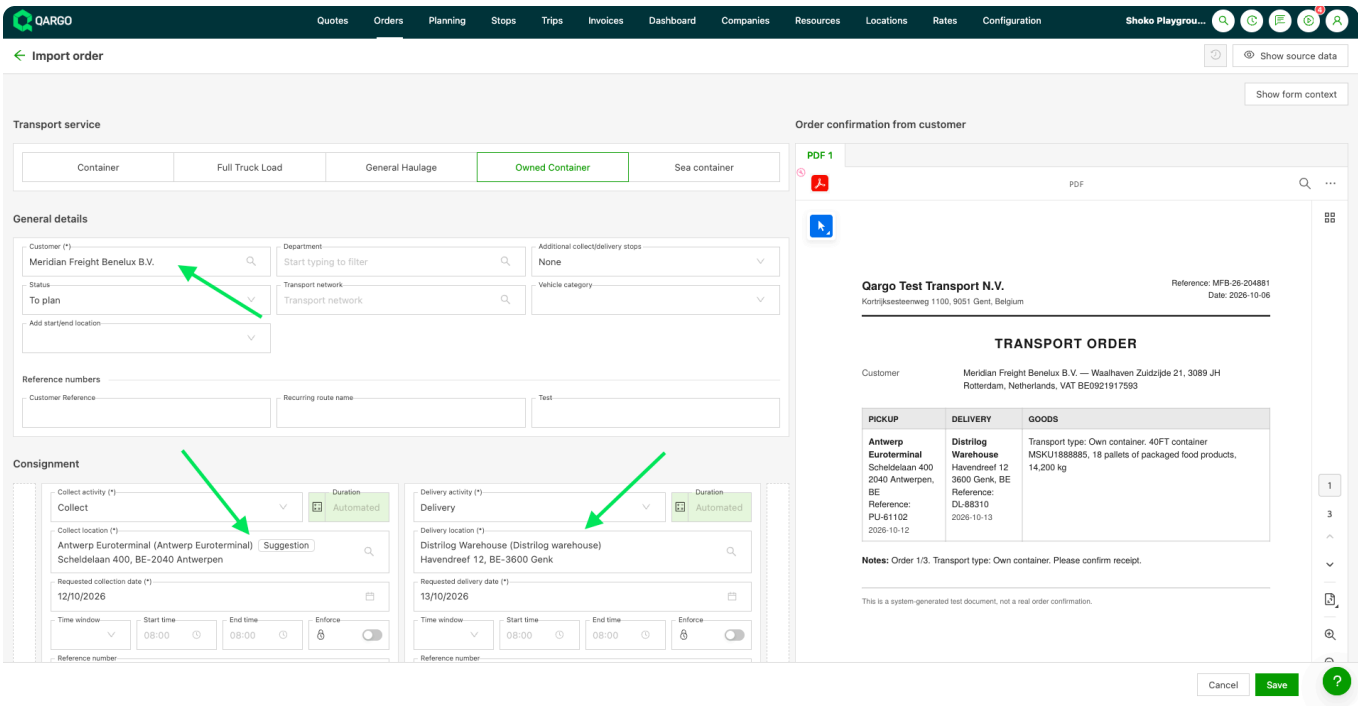
📚 The **Uploaded by** column shows who added each import.

Set the customer or transportation service

1. **Select** the correct customer or transportation service on the row and save.

Review and create the order

1. **Click Review and create** on the row.
2. **Check** the pre-filled details and complete any missing fields.
3. **Save** to confirm and create the order. The order is linked to the import and the import status changes to **Completed**.

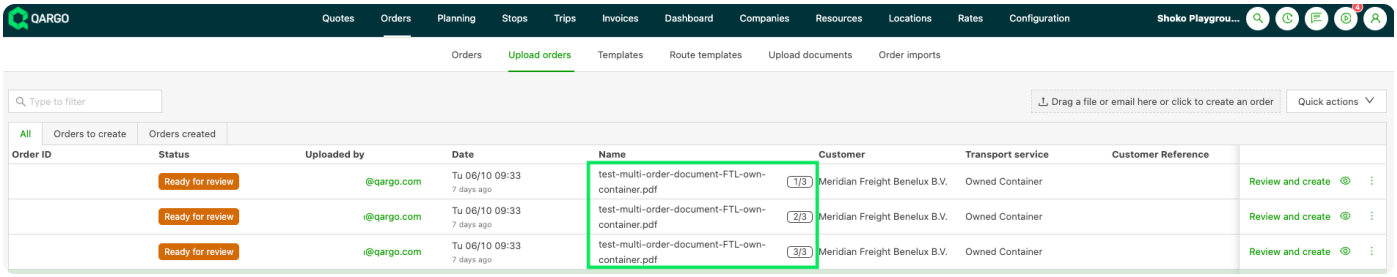


🧰 Fields that stay empty may not be turned on in the rules. Each field to be pre-filled must be enabled. See ***Setting up rules*** below.

Documents with several orders

When one document contains several transport orders, it is scanned once and split into one row per order.

- Each row is labeled with its position in the document (for example 1/3, 2/3, 3/3).
- The customer and transportation service are identified once for the whole document, so every row starts with the same values.
- Each row has the source document attached and is reviewed and created individually.



🧰 Splitting into several orders depends on the **Shipment splitting** setting under **Organization settings > Order confirmation scanning**. 2 options are available:

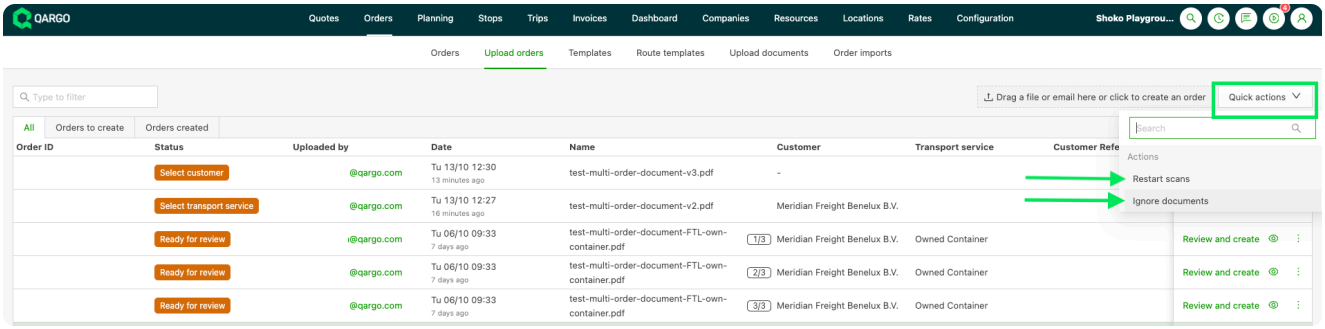
- **One order per pickup/delivery location**
- **One order per good**

The default keeps the document as one order with several shipments. A Super Admin user can change this setting.

‼️ **Re-scan full document** replaces all order rows from that document with a new scan. **Qargo asks for confirmation first.**

Fix mistakes with Quick actions

1. **Select** one or more rows.
2. **Open Quick actions** and choose:
   - **Ignore documents**: sets the status to **Ignored**, for example when the wrong file was uploaded
   - **Restart scans**: scans the documents again, for example after updating rules



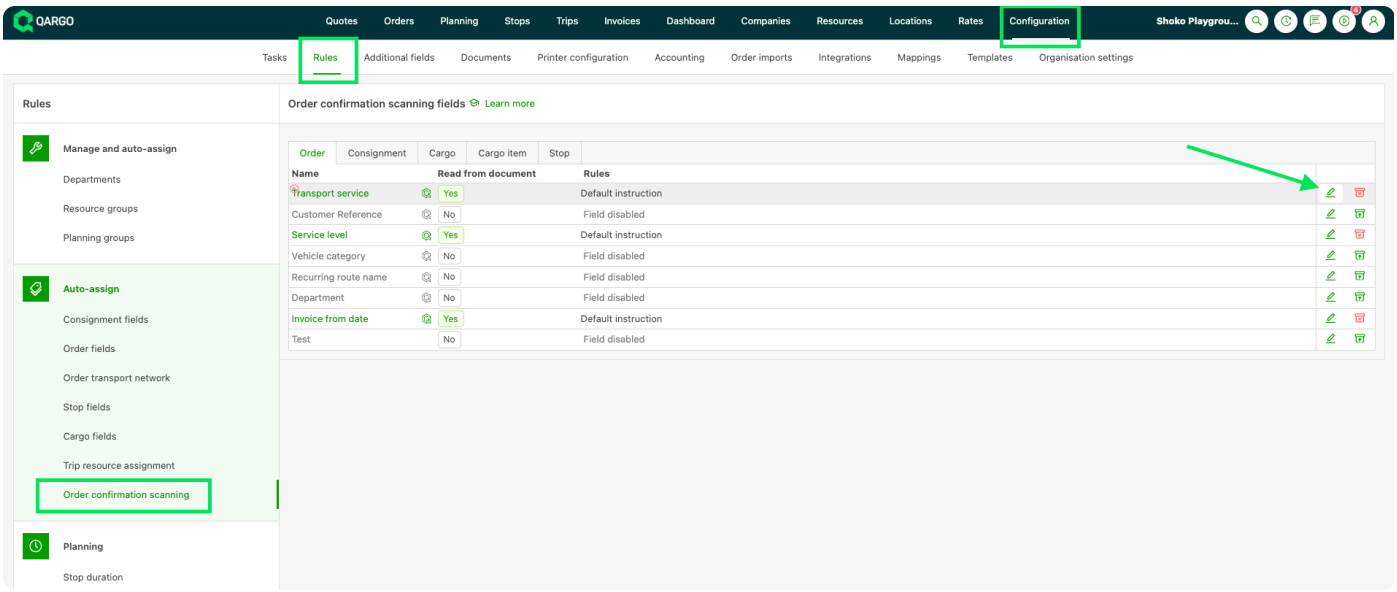
Setting up rules

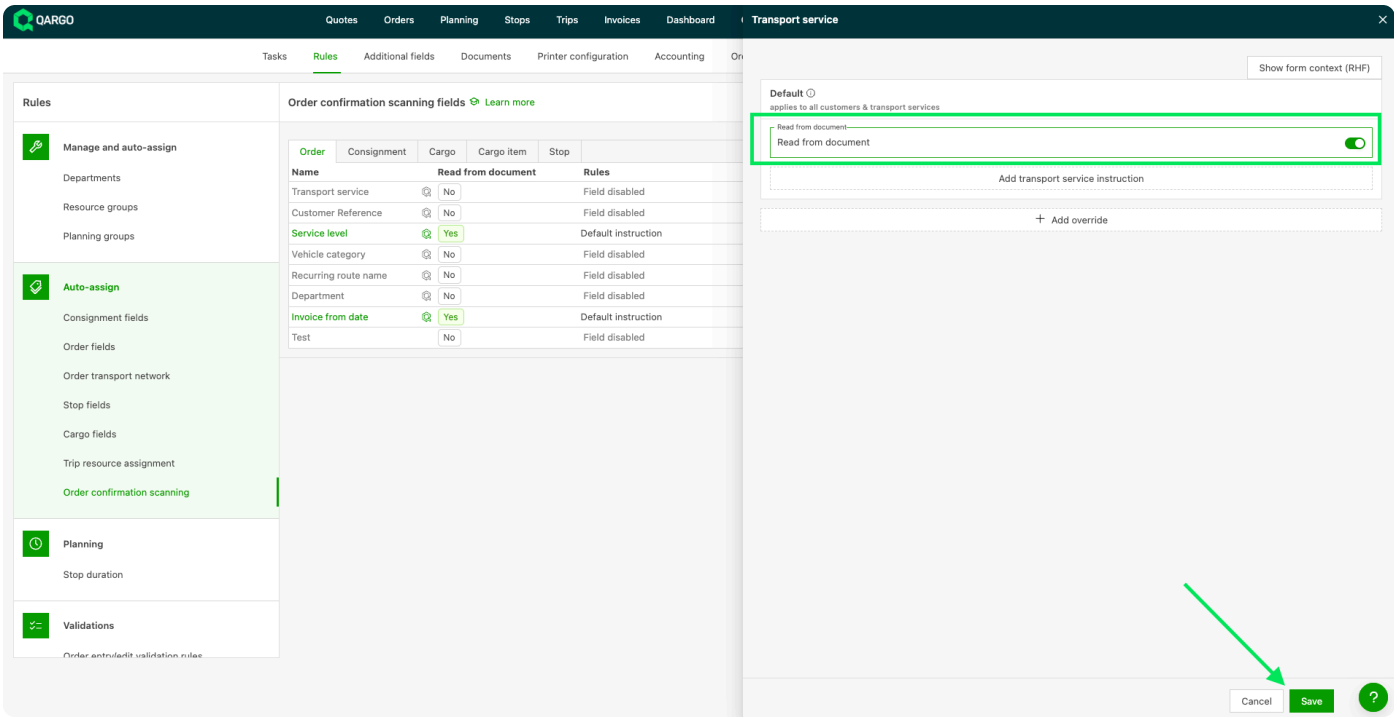
Choose which fields are read

Only the essential fields are read; more fields can be turned on. Default fields are:

- Customer
- Transportation service
- Locations
- Dates

1. **Go to Configuration > Rules > Auto-assign > Order confirmation scanning**.
2. **Click** the green button on the right of a field's row to turn it on.



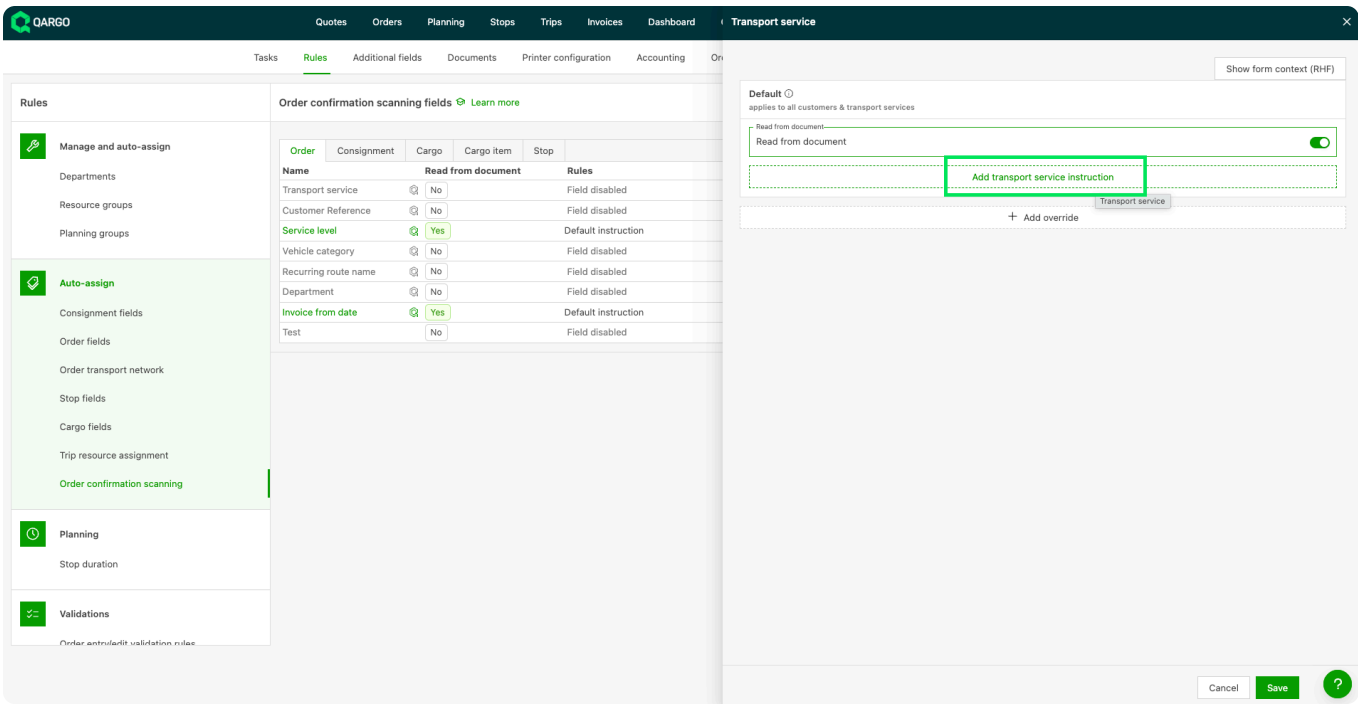


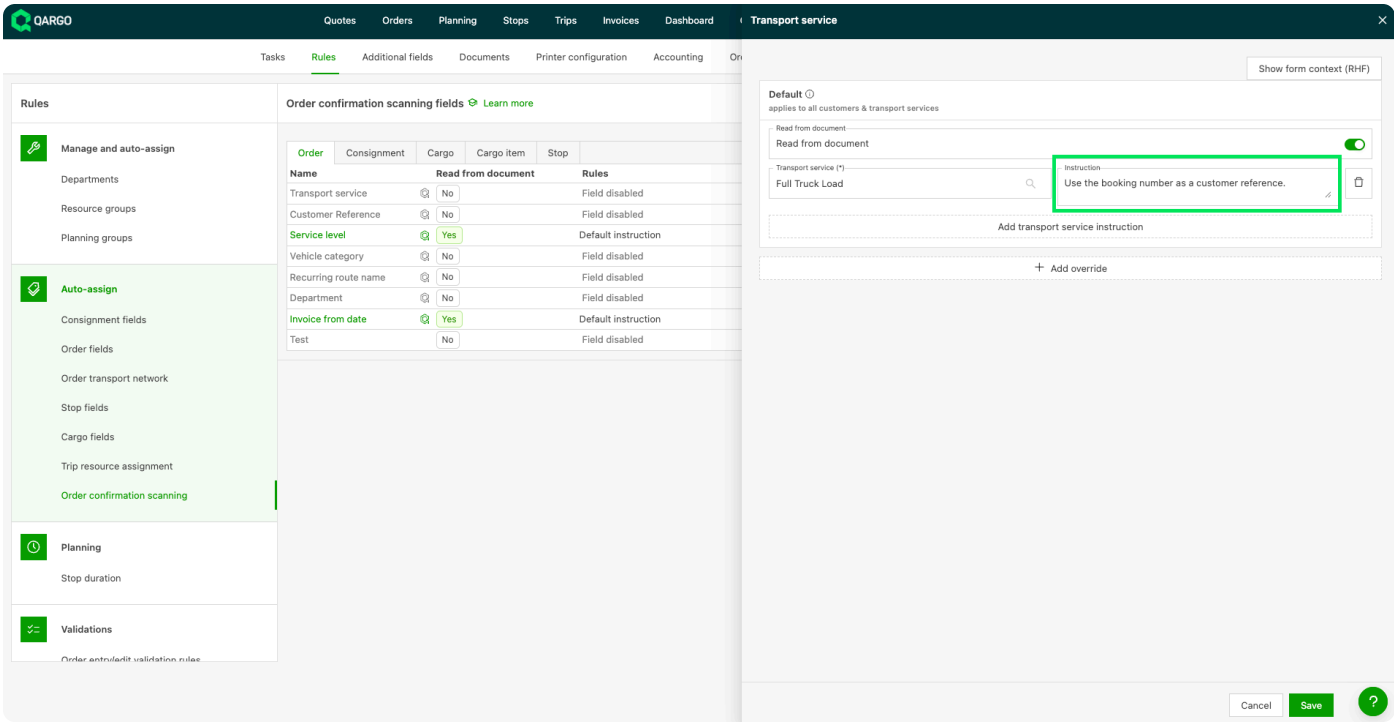
Fields are grouped by tab (for example **Order**, **Stop**, **Freight**). Custom fields can be turned on too.

Write instructions

Every business sets up orders in its own way. Instructions explain, in plain language, how and when a value should be taken from the document. They are most helpful for customer references, stop notes and custom fields.

1. **Click** the green pen icon on the right of a field's row.
2. **Write** the instruction and save.





Tips for a good instruction

- Say where to look. Use the labels as they appear on the document (“seal no.”, “your reference”).
- Describe the format and give an example.
- If a value is always the same for a customer or transportation service, set it as a default instead. See Customer default order prefill.

Example: seal number

Find the seal number on the document. - Usually located next to the container no., labeled “seal”, “seal no.”, “zegel”, “zegelnr”. - Return the number only, without the label and without spaces (e.g. “Seal no.: SL 44 21 90” becomes “SL442190”). - If it says “N/A”, “none”, or nothing at all, leave empty.

Example: customer reference

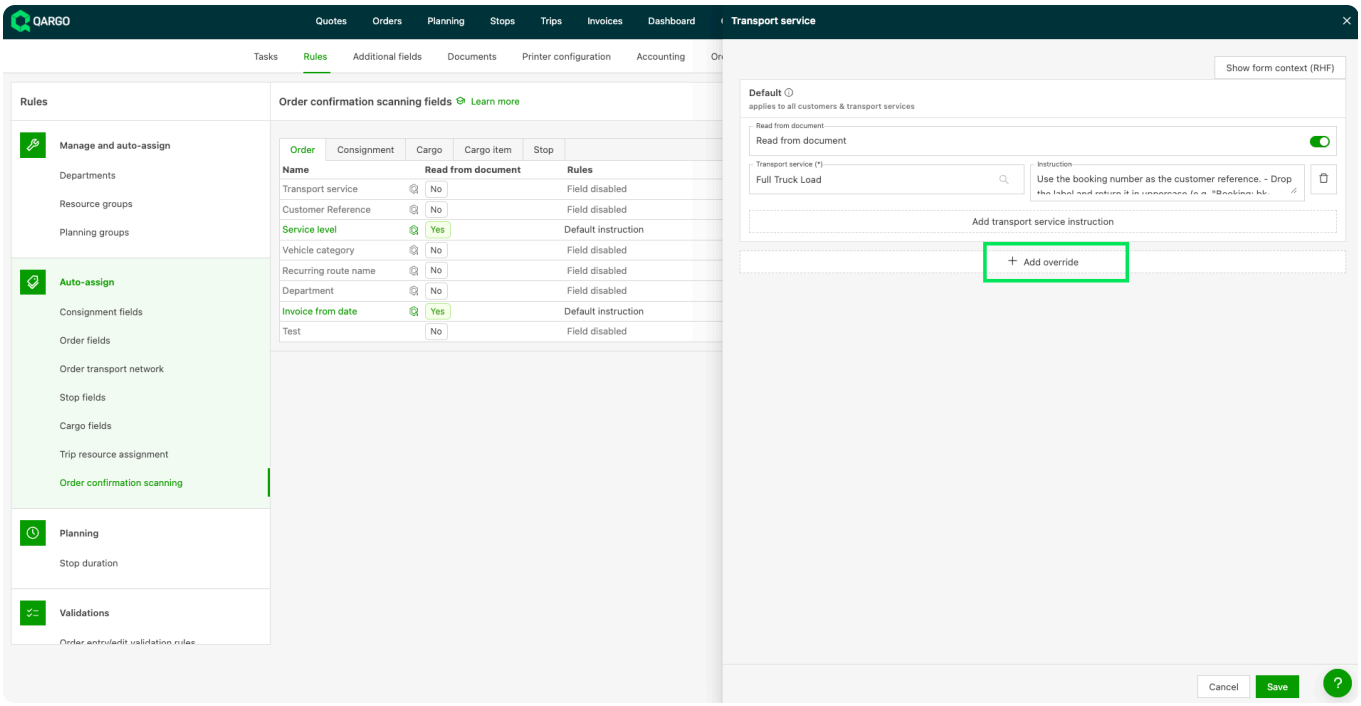
Use the booking number as the customer reference. - Remove the label and return it in uppercase (e.g. “Booking: bk-77401” becomes “BK-77401”). - If the document shows several booking numbers, take the first one.

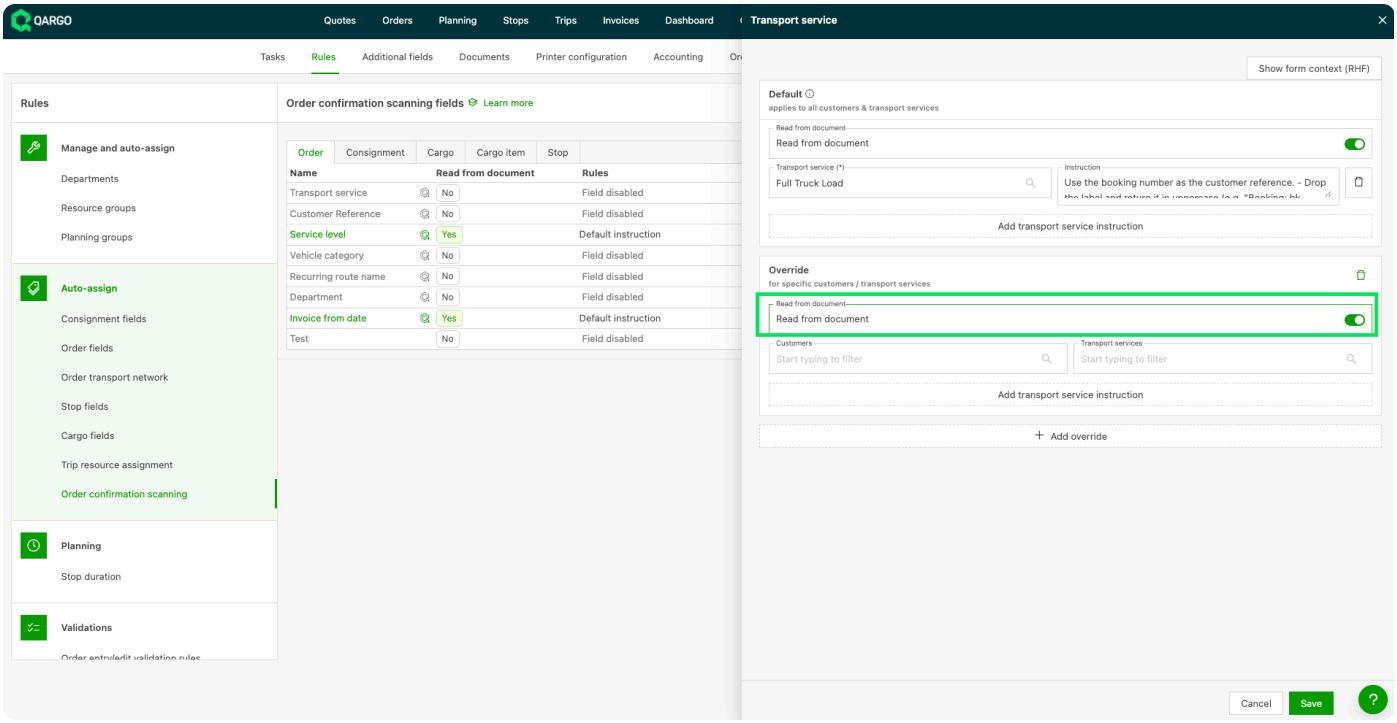
Example: unloading stop note

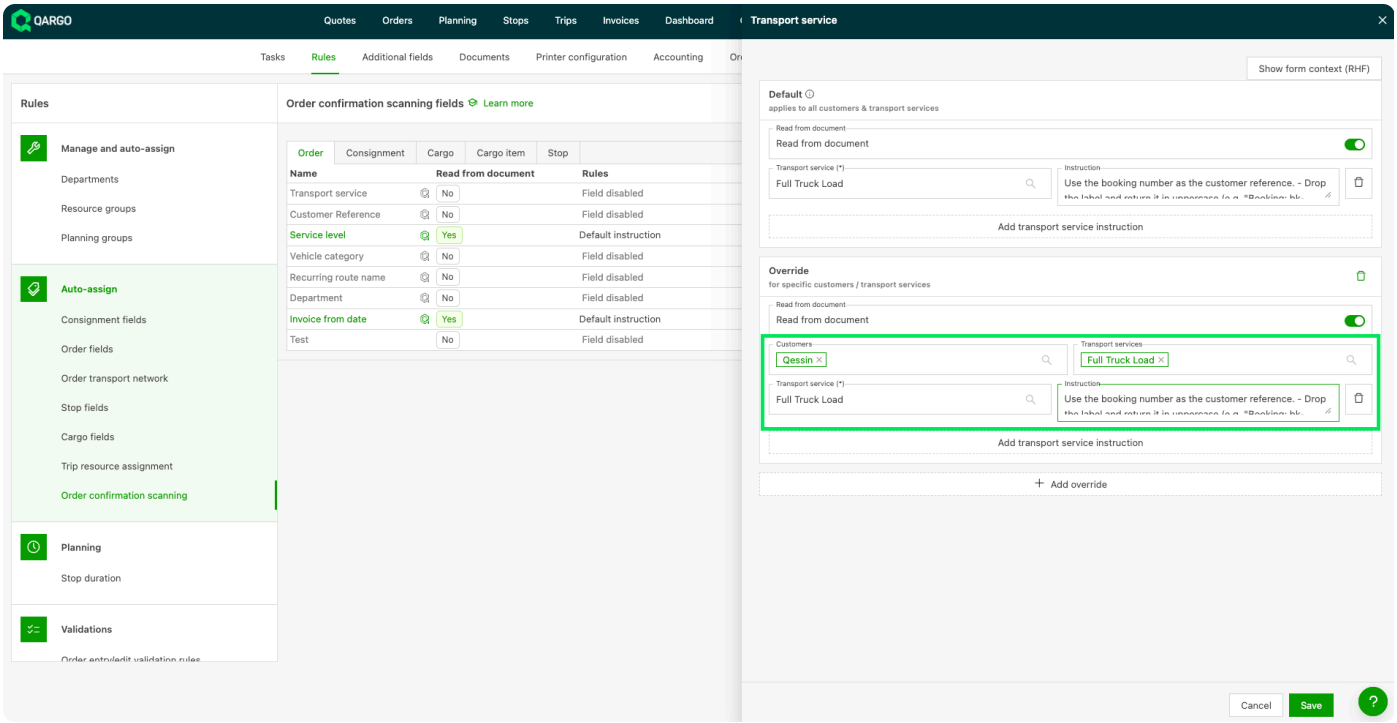
Copy the driver instructions for the unloading location. - Only what the driver needs on site: check-in procedure, gate number, opening hours, required PPE. - Do not copy payment terms, rates or general terms and conditions.

Add overrides for a customer or transportation service

1. **Add** an override instruction when one customer, one transportation service, or a combination of both needs different handling.
2. **Use** the **Read from document** toggle on an override to stop a field from being filled in for that customer or transportation service.







Stop extras, freight extras, time windows and vehicle category

These fields can also be detected from documents:

- **Stop extras** and **Time window** (**Stop** tab)
- **Freight extras** (**Freight** tab)
- **Vehicle category** (**Order** tab)

1. **Add** each option that should be detected (for example **Liftgate**).
2. **Write** when it applies (for example “apply for all deliveries to Amazon sites” or “apply when the document mentions a booking reference”). The instruction is required.

3. **Check** the result in **Review and create**, where the option can still be changed or removed.

‼️ Options are only detected when added to the rule with an instruction. An option is never picked up by its name alone, even if the document mentions it.

📚 When a named time window is matched, the stop uses that time window's configured times instead of the times printed on the document.

Known limitations

- **Saved emails:** one email at a time. Several emails, or an email together with separate files, must be uploaded separately.
- **Updating existing orders:** not supported yet. Each scan creates a new order.
- **Fields not yet read from documents:** service levels, HS codes, transport networks and order planning group.
- **Extras:** matched as options only. A quantity or price next to an extra is not read.
- **Rule scope:** rules can be set per customer and transportation service, not per document layout.
- **Dropdown custom fields:** only options with an instruction can be chosen.
- **Master data fields** (product, packaging, packaging type, container type): can be turned on or off, but do not accept instructions.
- **Automatic mailbox import:** pulling orders directly from a linked mailbox is planned for a later release.

Troubleshooting

Problem	Possible cause	Solution
The **Upload orders** tab is not visible	Order scanning is not turned on	Contact the Qargo Account Manager
Row shows **Select customer**	The customer was not recognized on the document	Select the customer on the row, or use **Quick actions > Set customer / transportation service**
Row shows **Select transportation service**	The transportation service was not recognized	Review the transportation service rules to verify that rules are set. Add or update the rule and verify.
A field is always empty	The field is not turned on in the rules	Turn it on in **Configuration > Rules > Auto-assign > Order confirmation scanning**
A field is filled with the wrong value	The scanner needs more context	Add or improve the field's instruction, then use **Restart scans**
One customer's documents are read incorrectly	Their layout differs from others	Add an override instruction for that customer
An extra or time window is mentioned but not filled in	The option has not been added to the rule with an instruction	Add the option and an instruction under the matching field
A multi-order document creates one order	**Shipment splitting** is set to the default	Change it in **Organization settings > Order confirmation scanning**
Transportation service instructions seem to be missing	The setting has moved	Find them under **Configuration > Rules > Auto-assign > Order confirmation scanning**. Existing settings were moved automatically.
The wrong file was uploaded	-	Select the row and use **Quick actions > Ignore documents**

💬 Qi order scanning is only available when Qargo Intelligence (Qi) is enabled. Contact the Qargo Account Manager to activate Qargo Intelligence.