Dashboards - Using custom dashboards: Walkthrough

Custom dashboards: what they can show, how to request one from the Qargo account or onboarding manager, and how to use them.

Updated November 10, 2026

💬 Custom dashboards are configured by Qargo. Please contact Qargo Account Manager to enable the custom dashboards required.

Introduction

A custom dashboard is a dashboard built for one customer, based on the numbers that matter to that business. It sits in the *Dashboards* menu next to the standard Qargo dashboards.
Customers do not build these dashboards themselves. The Qargo account manager or onboarding manager configures and publishes each one. The customer's role is to explain clearly what the dashboard needs to show.

💡 Next up: Allowing customers to create custom dashboards using Qargo Intelligence by themselves, no extra help needed from Qargo Account Manager or Onboarding Manager.

Terminology

Term	Meaning
Custom dashboard	A dashboard built for one customer, separate from the standard and add-on dashboards.
Tile	A single chart, table or number on the dashboard.
KPI tile	A tile that shows one big number, such as deliveries this month.
Published version	The version of the dashboard that users see in the Dashboards menu.
Date filter	The date range selected at the top of the dashboard. Most tiles follow it.
Date zoom	A control that switches the time steps on a chart, for example from day to week to month.
Data grain	What one row or one data point stands for, such as one row per order.

Prerequisites

🧰 A Qargo account manager or onboarding manager configures the dashboard. Customer users cannot create or edit custom dashboards.

- A maximum of 5 custom dashboards per customer.
- Existing customer-specific dashboards keep working as they are.

Use Case(s)

1. **Management overview:** a transport manager wants revenue per customer per month on one screen. The Qargo manager builds it and publishes it to the *Dashboards* menu.
2. **Daily planning check:** planners want a KPI tile with today's orders and a table of open loads. They open the dashboard each morning instead of building an export.
3. **Change to an existing dashboard:** the business wants an on-time delivery tile added. The Qargo manager edits the dashboard, and users keep seeing the current version until the change is published.

Custom dashboards: available options

Tile types

A custom dashboard can hold several tiles. Each tile is one of these types:

Tile type	Best for
KPI tile	One key number, for example total deliveries this month compared to last month.
Bar chart	Comparing totals, for example revenue per customer.
Stacked bar	Comparing totals split into parts, for example orders per depot split by transport type.
Line chart	Showing change over time, for example orders per week.
Pie or doughnut chart	Showing shares of a total, for example FTL compared to LTL orders.
Scatter	Showing how two numbers relate, for example distance and toll cost per load.
Table	A list with details, for example all orders with customer, status and cost.

Data that can be shown

Custom dashboards use the same reporting data as the standard Qargo dashboards. Each dashboard only shows that customer's own data.

- **Numbers:** orders, loads, legs, shipments, revenue, cost, cost per load, distance, on-time %, active resources (vehicles and drivers).
- **Group or split by:** region, customer, resource, route (start and end location, city or country), depot (pickup location, delivery location or department), transportation service, product category, department, contract carrier.

  > 🧰 For region, Qargo records a state or region for each address, so it can group by region on:
  > **Deliveries and pickups:** by the delivery state/region or the pickup state/region
  > **Invoices:** by the customer's billing state/region (billing country and city can be used)
  > Orders, loads, and revenue and cost don't have a region. For those, it can group by delivery or pickup country plus postal code instead.

- **Time steps:** day, week, month, quarter, year.

Dashboard settings

- **Default date filter:** the date range selected when the dashboard opens, for example *Last 30 days*.
- **Extra filters:** other filters at the top of the dashboard, for example customer, order ID or location name.

- **Tile time period:** a tile follows the date filter by default. A tile can also be locked to a fixed period, such as the last 3 months.
- **Default sort and position:** how each table or chart is sorted, and where each tile sits on the screen.

Request a custom dashboard

Prepare the request

💡 The clearer the request, the faster the dashboard is ready. Prepare these details before contacting the Qargo manager.

1. **Enter** the dashboard settings: the default date range and any extra filters.
2. **Enter** one line per tile with:
   - *Tile type* – for example bar chart, table or KPI tile.
   - *What to see* – one sentence in plain words, for example “total revenue per delivery country”.
   - *Data grain* – what one row or point stands for, for example one row per order.
   - *Time period* – follows the date filter, or a fixed period.
   - *Time steps* – the default for charts over time, for example week.
   - *Default sort* – for example highest cost first.
   - *Position* – for example top row, left half.
3. **Enter** a definition for each business term, for example “Revenue = invoiced amount excl. tax”. Definitions differ per company.
4. **Add** an example if available: a screenshot of a current report, an Excel file or a rough sketch.

📚 Use Qargo terms such as order, load, leg, resource and shipment. Keep each tile to one of them: an order view and a load view do not mix in one chart.

Send the request

1. **Contact** the Qargo account manager or onboarding manager with the prepared details.
2. **Check** the dashboard with the manager once it is built, and ask for changes if needed.

The manager publishes the dashboard when it is approved. It then appears in the *Dashboards* menu for every user of the account.

💬 Not sure who the Qargo account manager is? Contact Qargo Support and ask to be put in touch.

🎥 This video shows how a custom dashboard is created and how to use it:

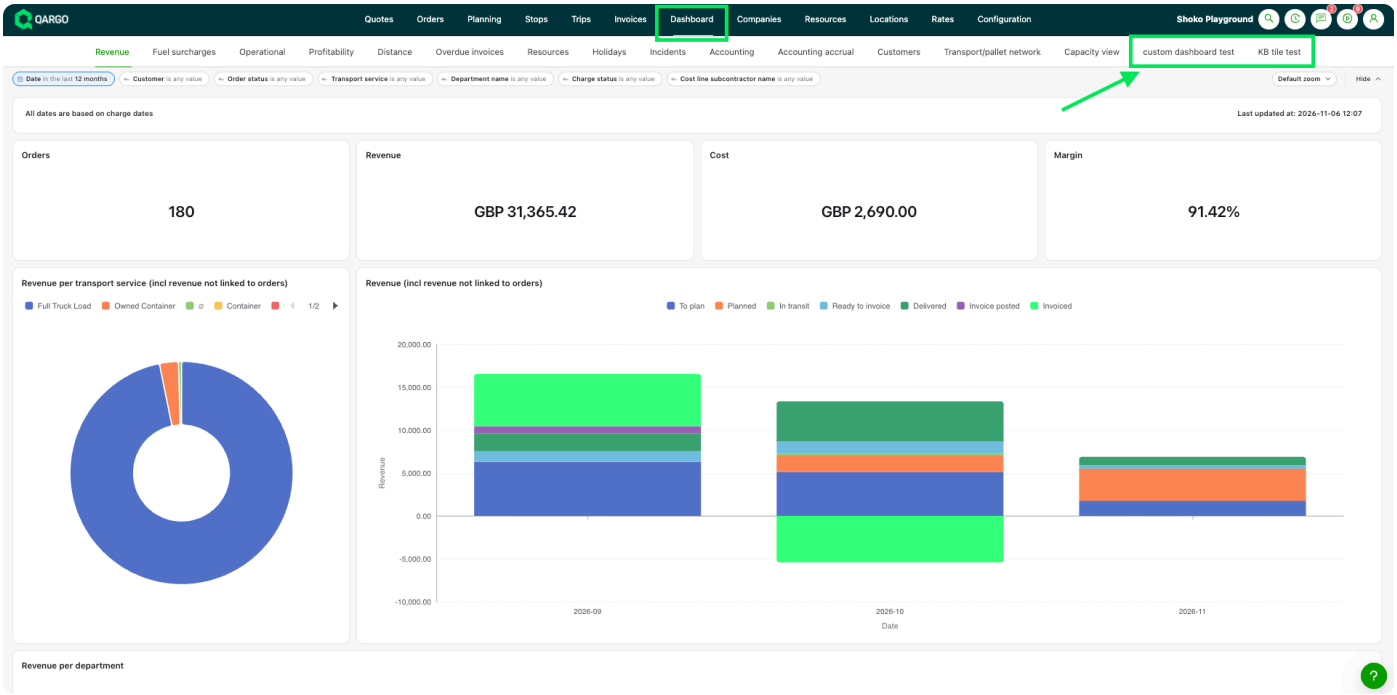
▶ https://watchclueso.com/embed/trcs6dgk3txu41zd

Use a custom dashboard

Open the dashboard

1. **Open** the *Dashboards* menu.

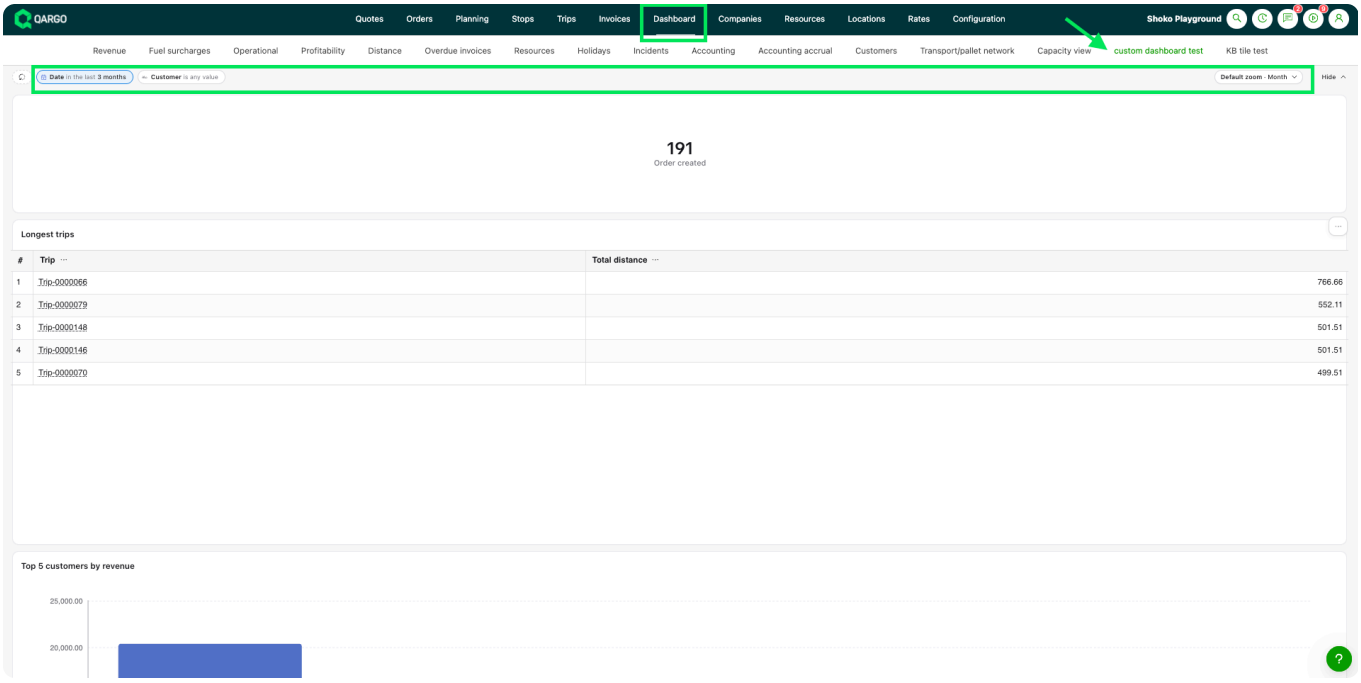
2. **Select** the custom dashboard. Custom dashboards appear after the standard and add-on dashboards.



📚 Labels and tile names show in the user's own language. The data values themselves are not translated.

Filter and explore the data

1. **Select** a date range in the date filter at the top. Tiles that follow the date filter update.
2. **Select** a value in any extra filter, for example a customer.
3. **Change** the date zoom to switch a chart between day, week and month.



Request a change

1. **Contact** the Qargo account manager or onboarding manager with the change, in the same format as a new tile.

The account manager edits the dashboard without affecting what users see. Users keep seeing the current version **until the change is published**. An earlier version can be restored if a change does not work out.

Troubleshooting

Issue	Resolution
The custom dashboard is not in the Dashboards menu.	The dashboard is not published yet, or was removed from the menu. Contact the **Qargo account manager.**
A requested change is not visible.	The change is not published yet. Ask the **Qargo account manager** to publish it.
A tile shows numbers that look wrong.	Check the date filter first. If the numbers are still wrong, send the account manager the definition the tile should use.
A new dashboard cannot be added.	A customer can have up to 5 custom dashboards. Agree with the manager which one to replace.
Data values show in another language.	Labels follow the user's language, but data values are shown as stored in Qargo.