Adding Documents to Resources

This article shows how to add and update documents for drivers, vehicles and subcontractors, including validity dates when required.

Updated 6 December 2024

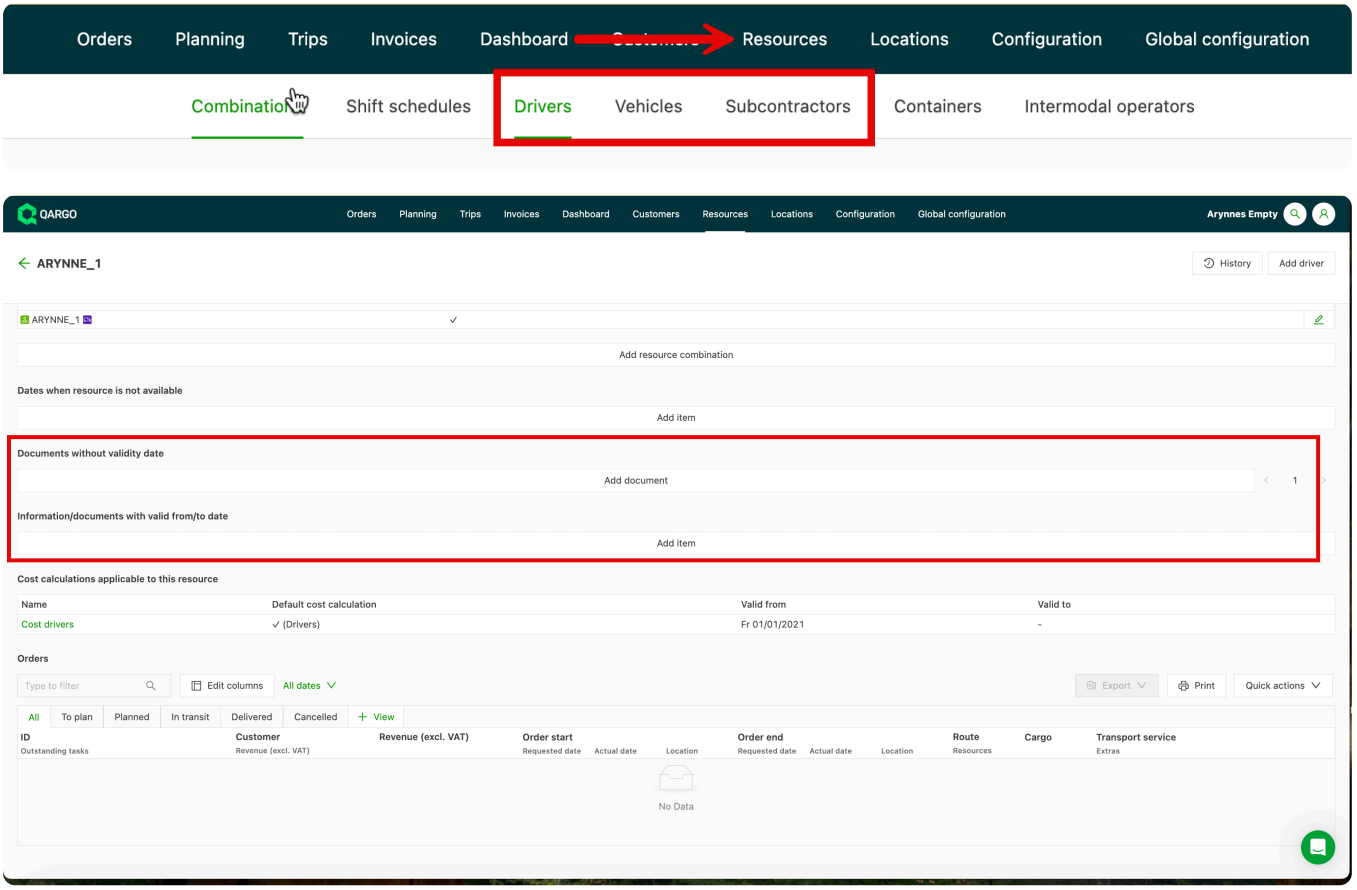
You can add documents with or without validity date to your resources, including Drivers, Vehicles and Subcontractors.

When adding a document, you can choose a document type in the dropdown list. Select the document of your choice and complete the required fields. Some examples of documents you can add are:

- Driver licenses
- Certificates
- Technical examinations
- Insurances

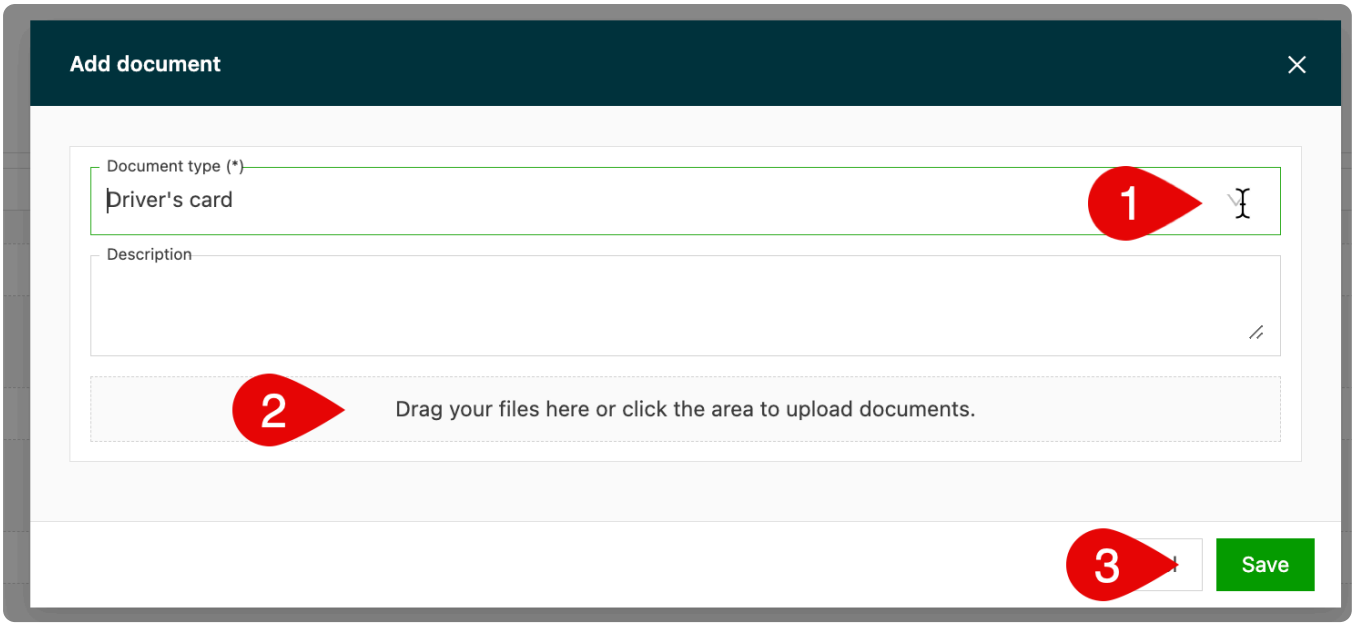
To Add or update existing documents on your Resources:

- Navigate to RESOURCES
- Click on the resource of your choice in the header (Driver / Vehicle / Subcontractor)
- Click on the specific resource you would like to add or update.
- Documents without validity date - Click 'Add Document'.
- Information/documents with valid from/to date - Click 'Add Item'.



Add a document without Validity dates: Click 'Add Document'

1. Select the document type from the drop down menu, and provide a description if required.
2. Drag or upload a copy of the document. NOTE: this is required.
3. Save the record.



Add a document with validity date: Click 'Add Item'

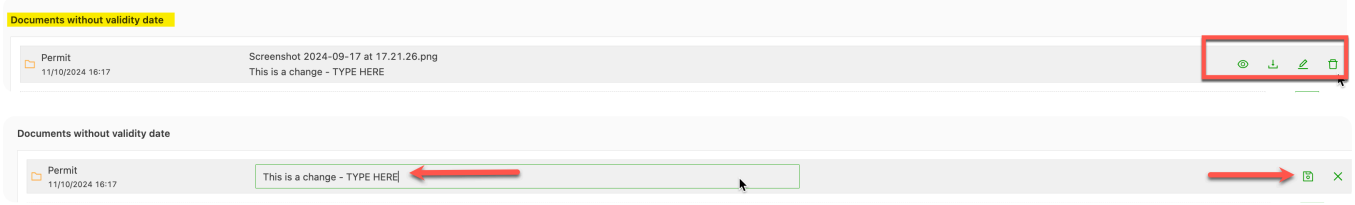
- Add the document type and the VALID FROM and VALID TO date.
- You can also toggle on that the resource would be unavailable once the date has been expired (of e.g. a driver license).



To Update existing documents

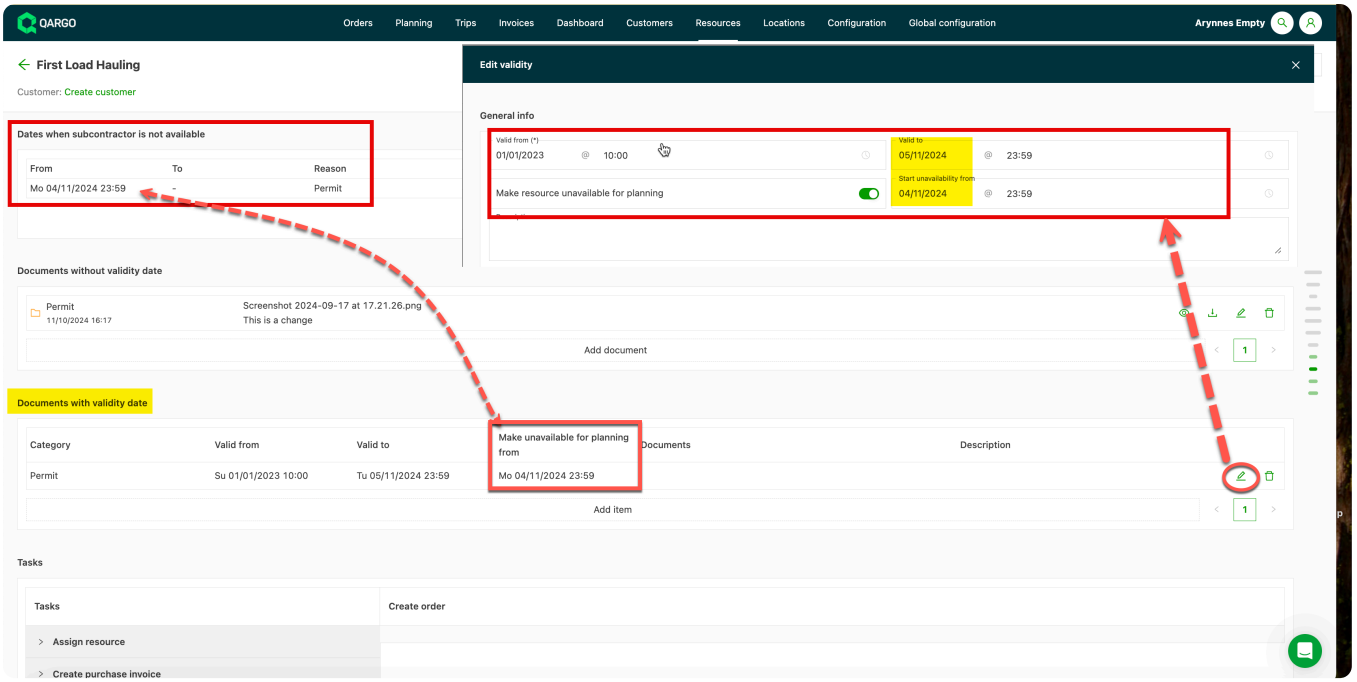
For documents **WITHOUT** Valid From/To Dates:

- Options are to View / Download / Add a Note / Delete
- To add a note, Click the EDIT function, indicated by the Pencil Icon, this will open a text field. You will have the option to add a note
- Click the SAVE icon.



For documents or items **WITH** a valid From/To Date:

- To update the dates, or change the 'unavailable' setting, click the EDIT (pencil) icon.
- This will open the Edit panel, where you can update the dates
- Click SAVE.

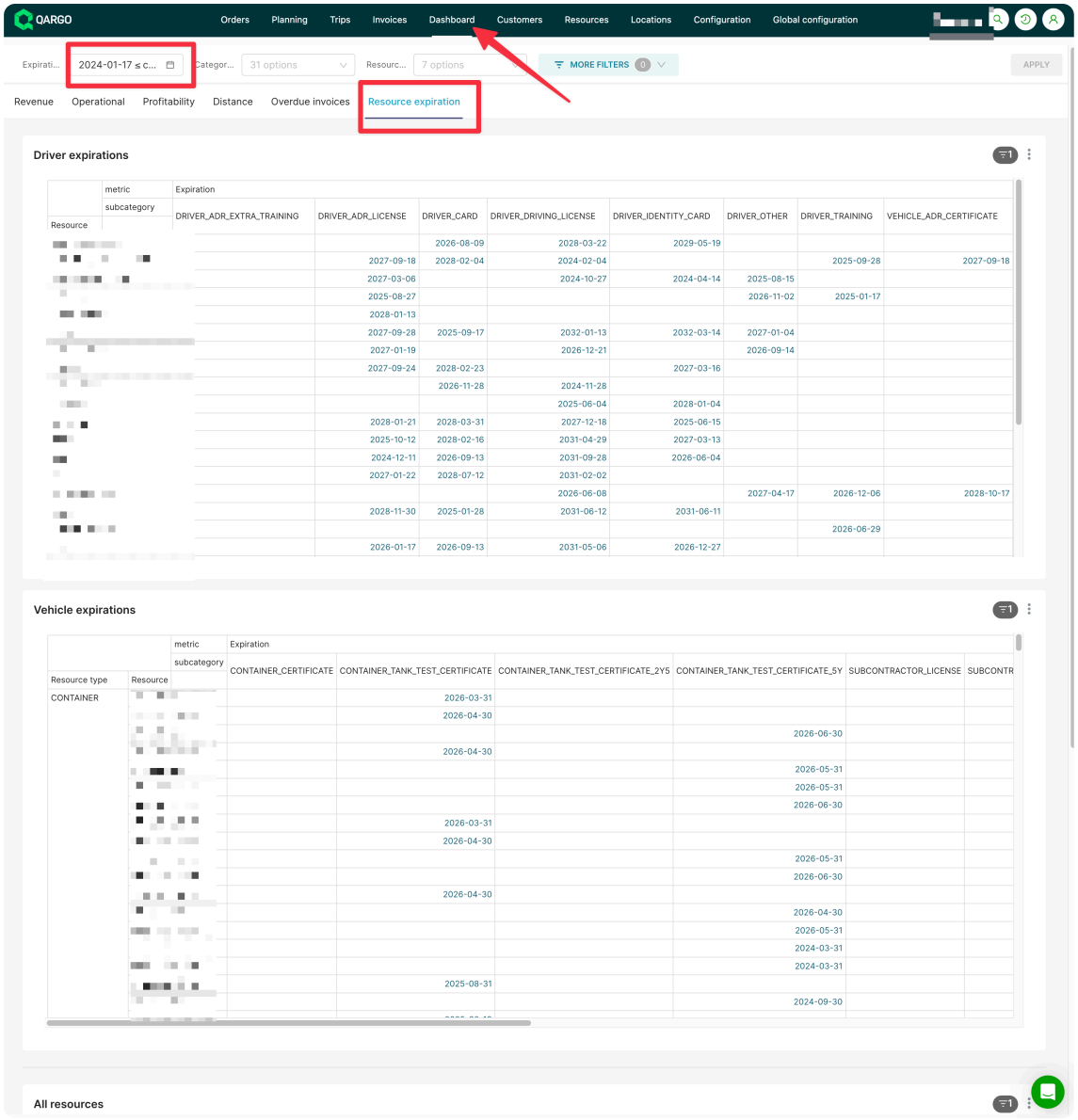


TIP: When using the Valid From / To dates, together with the 'Make Resource Unavailable' toggle, Qargo will automatically add this to the 'Not Available' schedule. You can manually set the 'Unavailable' date in advance of the 'Valid To' date to provide a window before the expiration dates, and avoid any potential planning issues. Otherwise the Unavailable Date will default to the Valid To date.

Visualise the expiration date in Dashboard

In addition, you can search in Dashboard which documents will expire.

- Navigate to Dashboard.
- Click on Resource expiration in the header.
- Choose a date.


QARGO
Orders
Planning
Trips
Invoices
Dashboard
Customers
Resources
Locations
Configuration
Global configuration
Expirati...
2024-01-17 ≤ c...
Categor...
31 options
Resourc...
7 options
MORE FILTERS
APPLY
Revenue
Operational
Profitability
Distance
Overdue invoices
Resource expiration
Driver expirations
Vehicle expirations
All resources