TASKS - What, Why & How?

This article gives a general overview of task, including what they are, why they are needed and how they work in the application

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Introduction

Tasks create a form of workflow in the Qargo application. Configuring tasks offers the benefit of including automation into a workflow, adding efficiency and reducing any potential errors or latency in the process. Default tasks are created for all new accounts, but the ability to modify these gives flexibility to create a unique process that suits individual business needs.

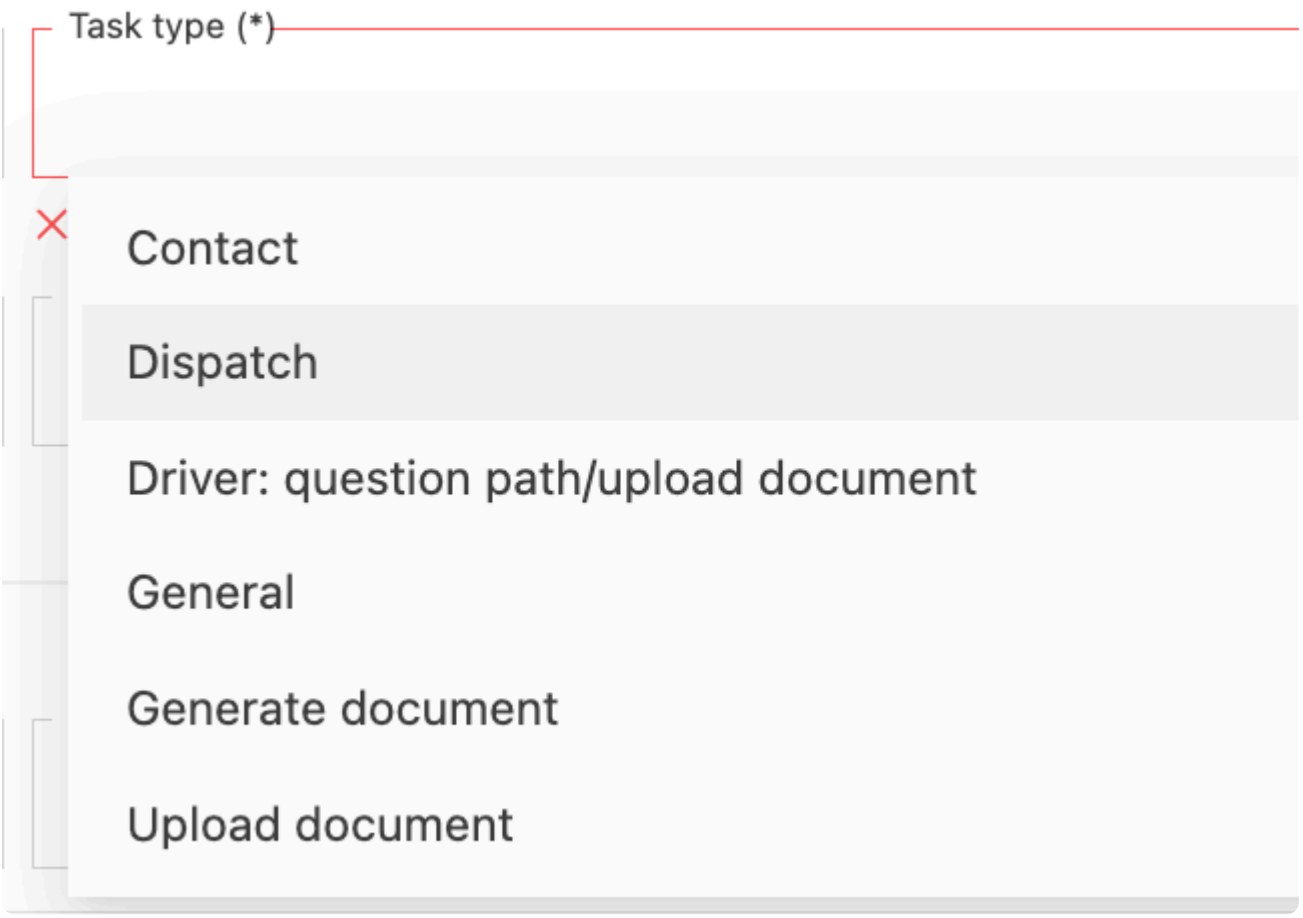
Term	Definition / Context in Qargo	Notes for Logistics / Trucking Use Case
Task	A discrete unit of work or action in the Qargo system, which may be manual or automated, forming part of a workflow.	Tasks can represent steps such as sending documents, verification, approvals, or driver actions.
Workflow	A sequence or combination of tasks configured for a particular process (e.g. order-to-delivery)	Helps ensure consistency and visibility across operations and departments.
System Task	A task automatically generated by the system; cannot be modified by users.	These represent core built-in steps essential for the platform's integrity.
Contact Task	A task involving communication with a contact (e.g. client, vendor, or third party).	May include sending emails or requesting confirmations.
Dispatch Task	A task related to dispatching operations (e.g. assigning cargo or trips).	Central to coordinating trucks, routes, and schedules.
Driver Task	A task assigned to the driver or subcontractor; may require the driver to answer questions or upload documents via their app.	Examples: upload proof of delivery, answer inspection checklist, take photos.
General Task	A flexible, non-specialised task type for miscellaneous steps not covered by more specific types.	Use for ad hoc tasks or additional checks.
Generate Document Task	A task whose action is to generate a document (e.g. PDF, manifest, label).	Useful for automating paperwork like trip sheets, invoices, or regulatory compliance forms.
Upload Document Task	A task that requires attaching a document or file (e.g. certificate, photograph, invoice).	Ensures that necessary documents are collected and stored.
Automatic (Auto) Complete	A task that completes itself automatically when its preconditions are satisfied.	Reduces manual intervention and speeds process throughput.
Manual Complete	A task that requires user action to mark as done (e.g. human review, approval).	Useful for quality control, exception handling, or custom checks.
Always Skip Task	A task configuration option that causes the task to be omitted from execution in the workflow, unless overridden.	Useful when certain steps are not relevant for particular customers, lanes, or cargo types.
Override (Customer Override)	A per-customer configuration that customises or replaces default task behaviour (e.g. change task to manual, adjust document requirement).	Enables flexibility per client or route without altering the global workflow.
Tagging	The practice of labelling tasks with tags or markers for categorisation, filtering, or status tracking.	Tags may denote priority, region, cargo type, or exception status.
Scheduling Option	Configuration settings that determine when a task is triggered relative to other events (e.g. before or after order creation, at trip dispatch, upon invoice creation).	Helps align tasks with real-world process timing and dependencies.

Configuration

Types of tasks

Tasks types determine what action is required; options include:

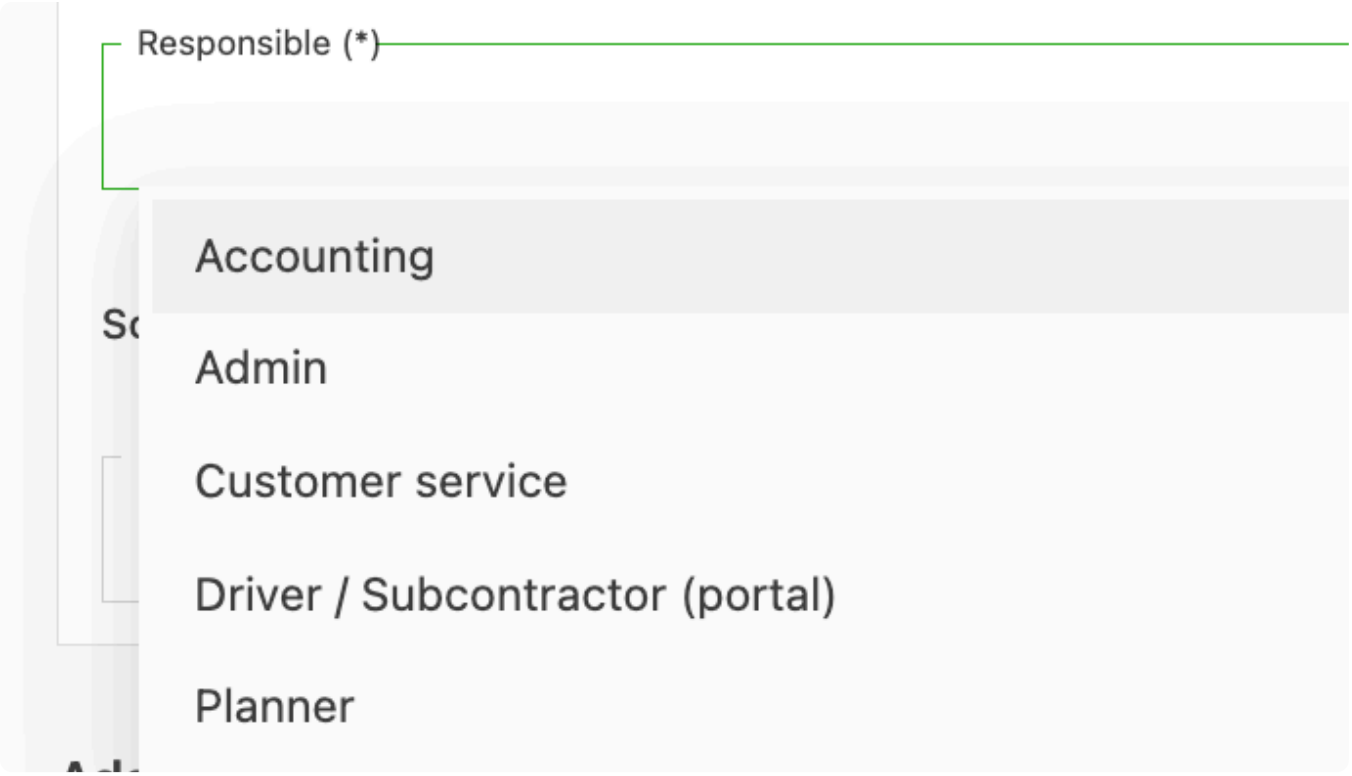
- *System:* Automatically generated - cannot be modified.
- *Contact:* This task will generate a form of communication as set in the task (ie: EDI, email, etc) and send to the recipients configured. Additional communication templates can be included here, for instance generic email content can be added here.
- *Dispatch:* This task will perform a dispatch action to the integration selected.
- *Driver:* question path/upload document: This task will allow users to create specific actions to be completed by users of the Qargo Mobile App. For example, question-path tasks must be completed exclusively through the Qargo mobile app and cannot be fulfilled via external systems like a Fleet Management System (FMS). Tasks may be skipped if the trip is not sent to the mobile app.
- *General:* This is generic task with no additional actions.
- *Generate Document:* This task will generate a document as configured (draft invoice / invoice).
- *Upload document:* This task will require an upload of a document.



- Each option will open additional configuration panels, depending on the action required.
    - For instance, a *'Generate document'* task will show the option to generate either a Draft Invoice or Invoice.

Who is responsible?

- Assign tasks to specific roles, ie: planners or admin.
- Task type may drive who is responsible; some tasks do not have a portal option
- Options include:
    - Accounting
    - Admin
    - Customer service
    - Driver / Subcontractor (portal)
    - Planner

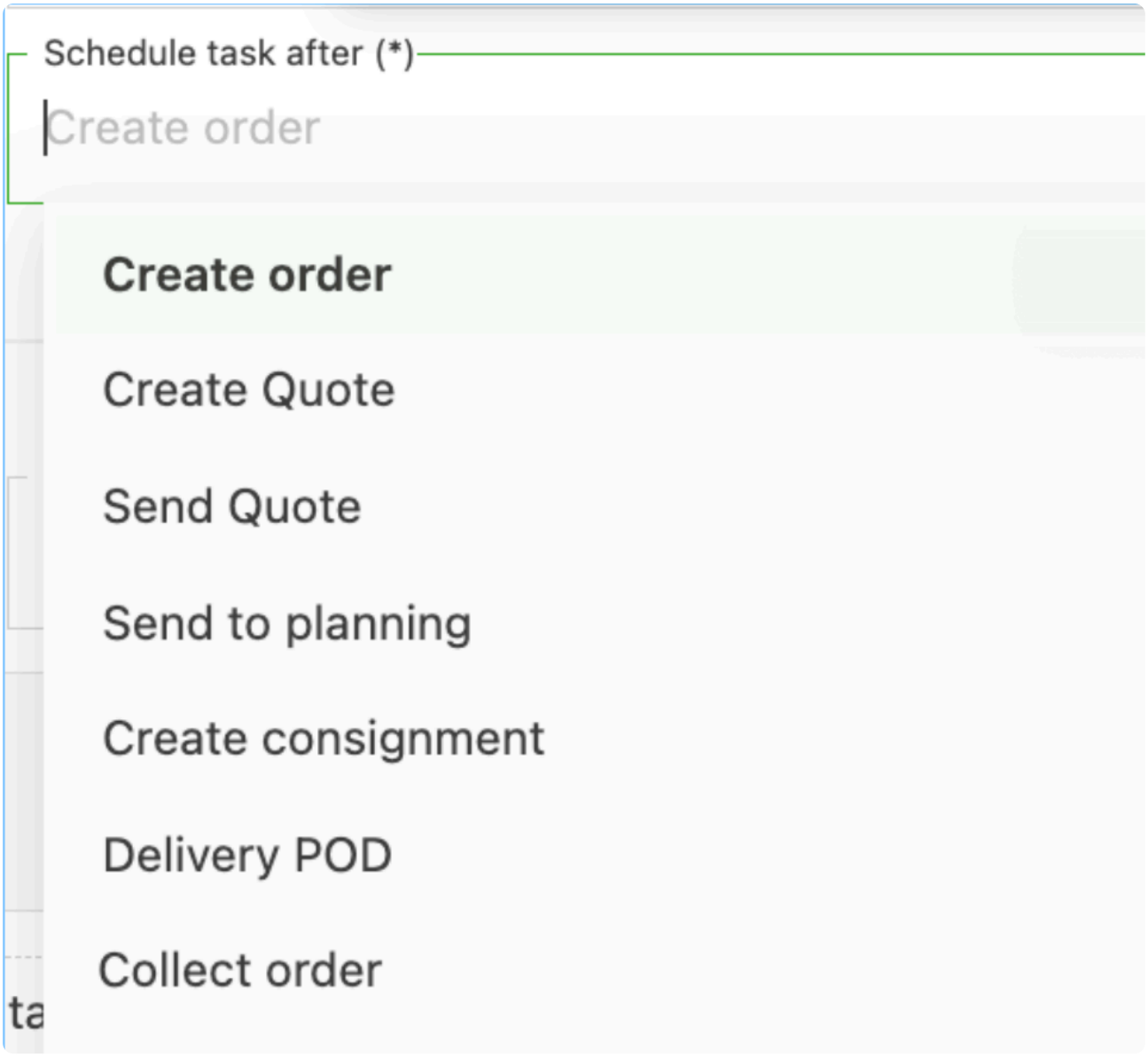


When to schedule task?

Each task category will have different options based on other activities / tasks that might already be setup.

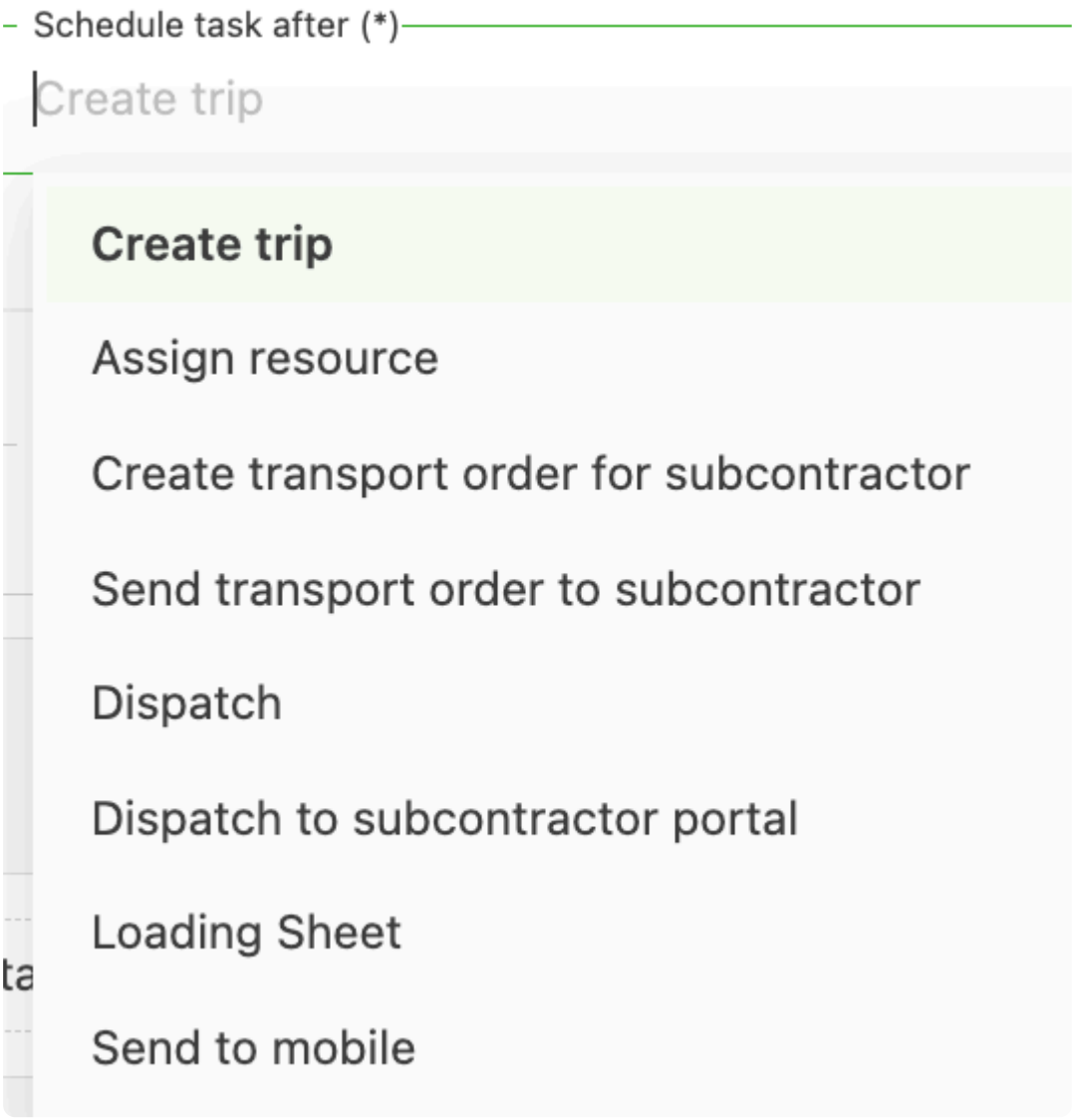
- Schedule task within the workflow, with NEW tasks added at the appropriate part of the workflow
- Schedule options will be based on what tasks already exist in the workflow

Orders:



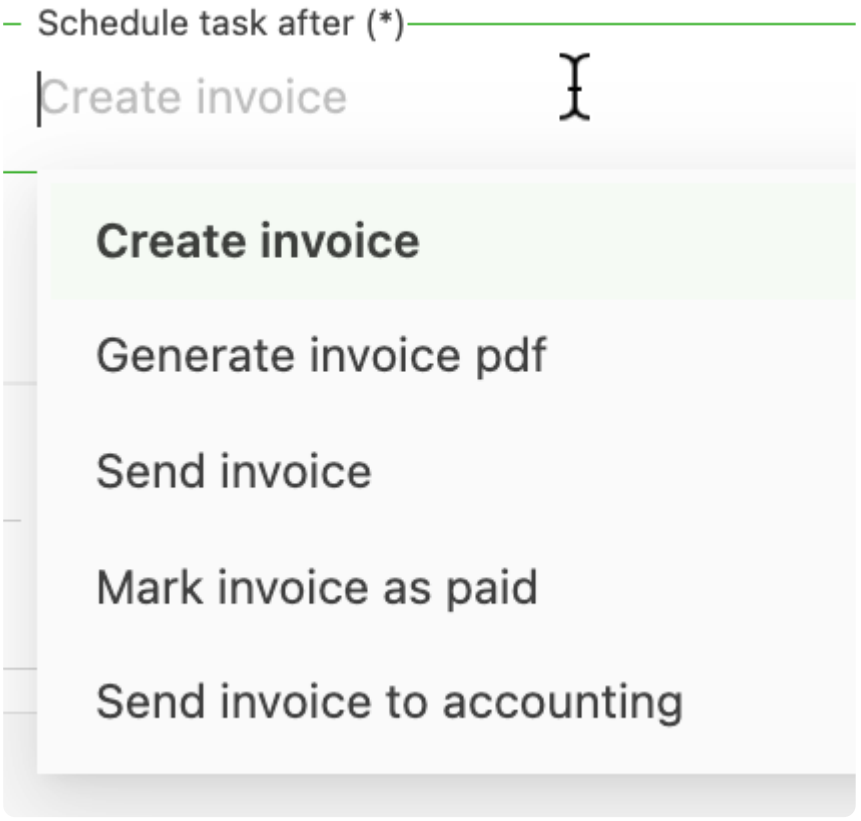
Auto-skip settings can help bypass tasks related to order completion when it’s clear that predefined conditions have been fulfilled.
Settings should be configured ahead of order creation for seamless integration with workflows.

Trips:



Auto-skip configurations can simplify workflow management by automatically bypassing tasks related to trip-specific operations, if the conditions for completing them are satisfied beforehand.
These settings ensure that only necessary steps remain in the process, saving time and effort.

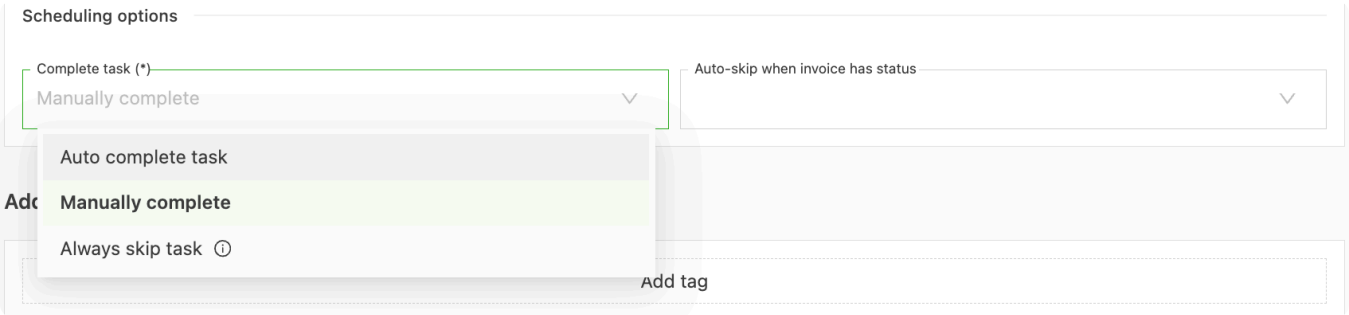
Invoices:

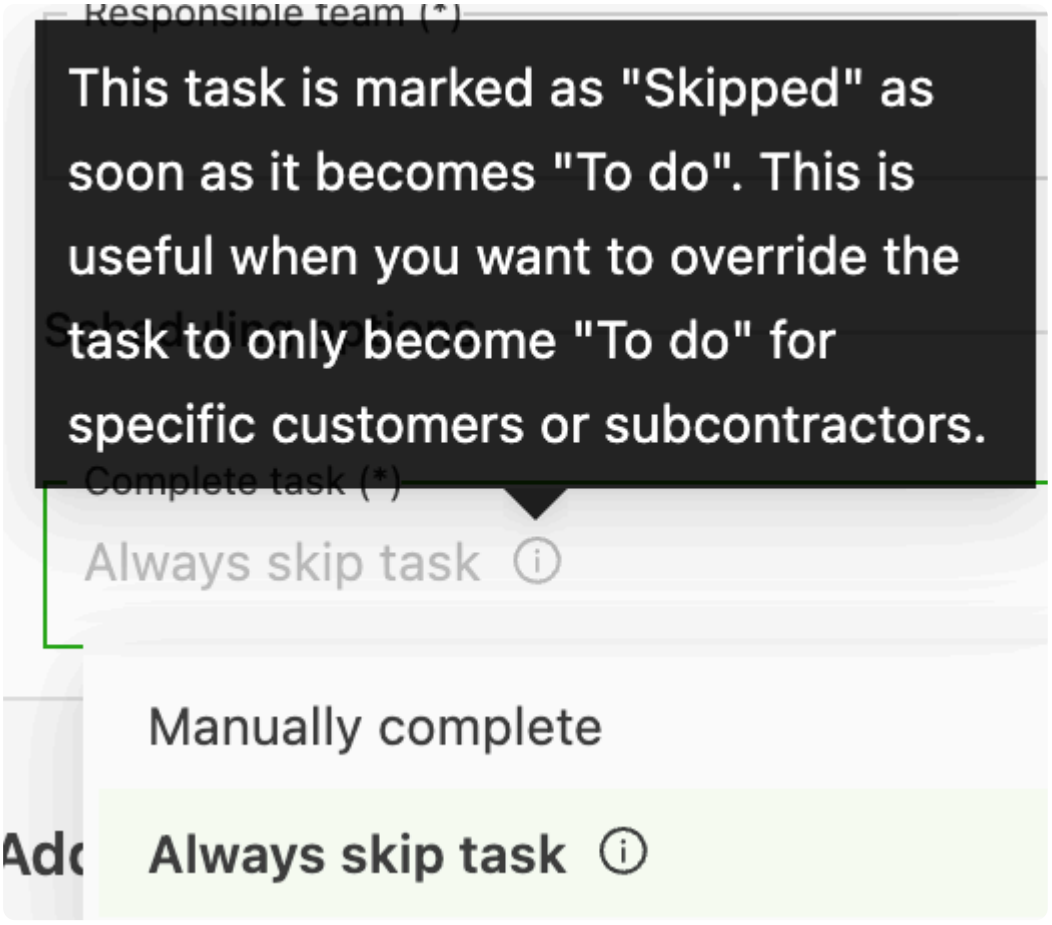


- Create Invoice
- Generate invoice pdf
- Send invoice
- Mark invoice as paid
- Send invoice to accounting

Scheduling Options

- To automate tasks, select this option when scheduling a task.
- Manual tasks will require some level of user interaction to complete.
- Tasks marked ***'Always Skip Task'*** will automatically be skipped in the workflow.
    - Create tasks with this option if required for specific customers or subcontractors, and use the ***'override task'*** option.
- Use **auto-skip settings to bypass tasks** that meet predefined completion conditions, optimising workflows and eliminating redundant steps. For example, a task marked as 'Auto-skip if completed' will automatically be skipped when the system identifies that the condition has been satisfied. However, keep in mind that new skip settings apply prospectively and will not retroactively alter existing tasks or documents.





How tasks generate

Auto complete

- System generates and completes the task as part of the workflow. No manual updates are required to complete the task.
    - Example: Auto complete Sending an invoice to the customer once its been generated. Once the invoice is created the system will use the contact task to send the invoice directly to the specified contact. The 'Send invoice' task will then automatically be completed.

Manual complete

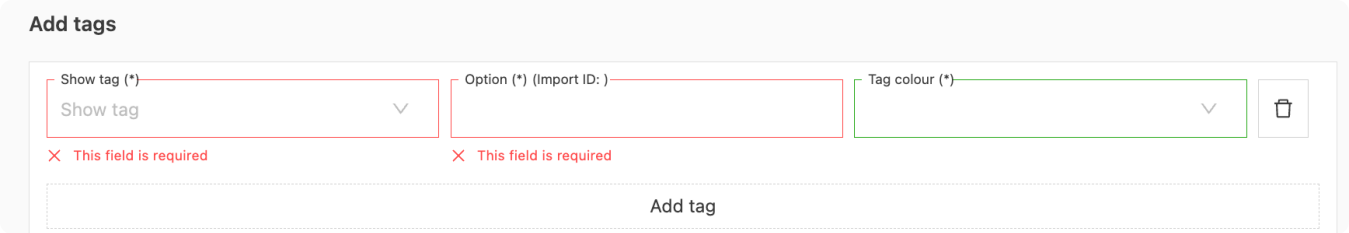
- User must manually execute the task
- Depending on the task this may be via the execute button, but could also a 'generate document' task, where creating the document will complete the task.
- Once the user has manually completed or executed the task, it will update to completed by the user.

Skipped Task

- Auto-skip settings in Qargo streamline processes by skipping redundant tasks when specific conditions, like completion, are met. For example, if an invoice is generated after enabling the auto-skip rule, the system will bypass associated tasks, like Proof of Delivery (POD), as expected.
- Typically used with Overrides
- Task will be marked **'Skipped'** and only become part of the workflow for specific customer or subcontractors
- Exceptions include tasks like 'Question-Path Tasks,' which require completion via the Qargo mobile app and are not compatible with external systems. Additionally, auto-skip configurations are applied only to tasks created after the rule is set, meaning retrospective changes must be made manually.

Tagging:

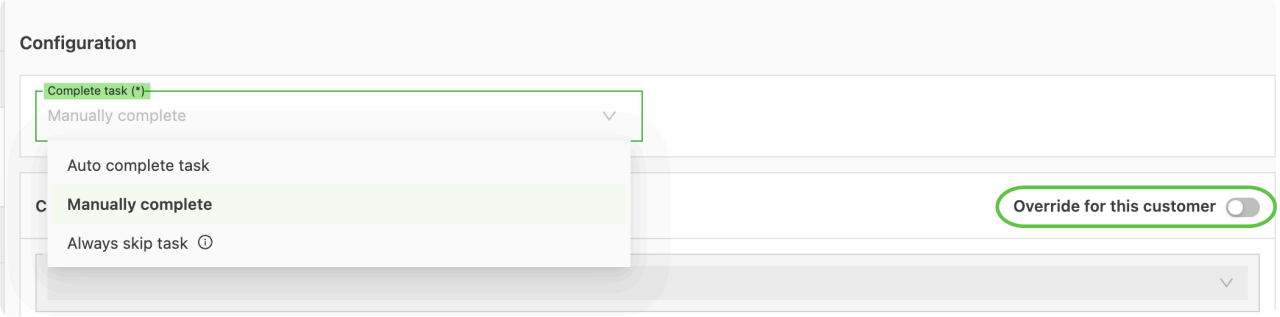
- Tagging adds coloured labels to indicate something that needs a users attention
- Flexibility allows the user to configure tagging to suit individual business requirements



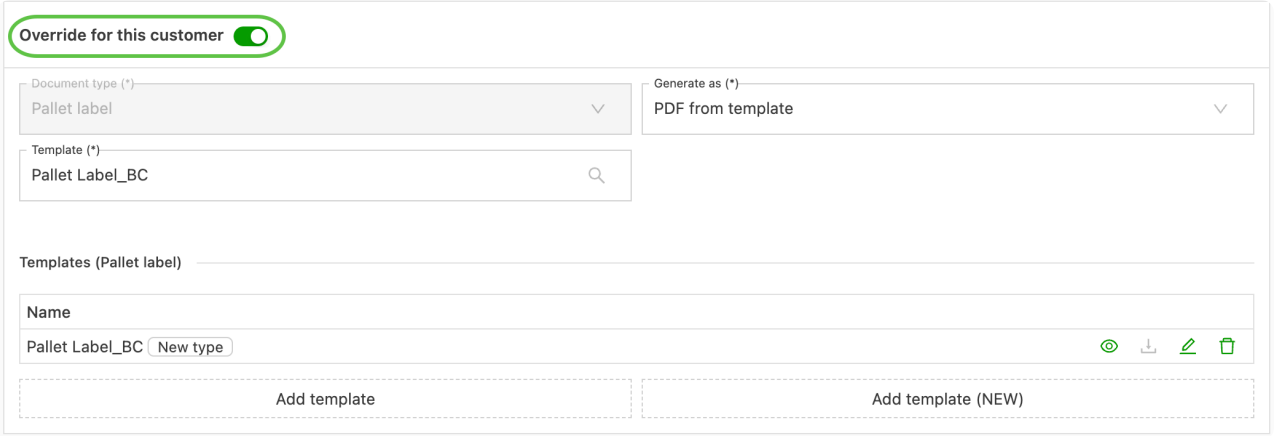
Customer Tasks / Overrides

It is possible for some tasks, different customers will have their own requirements.

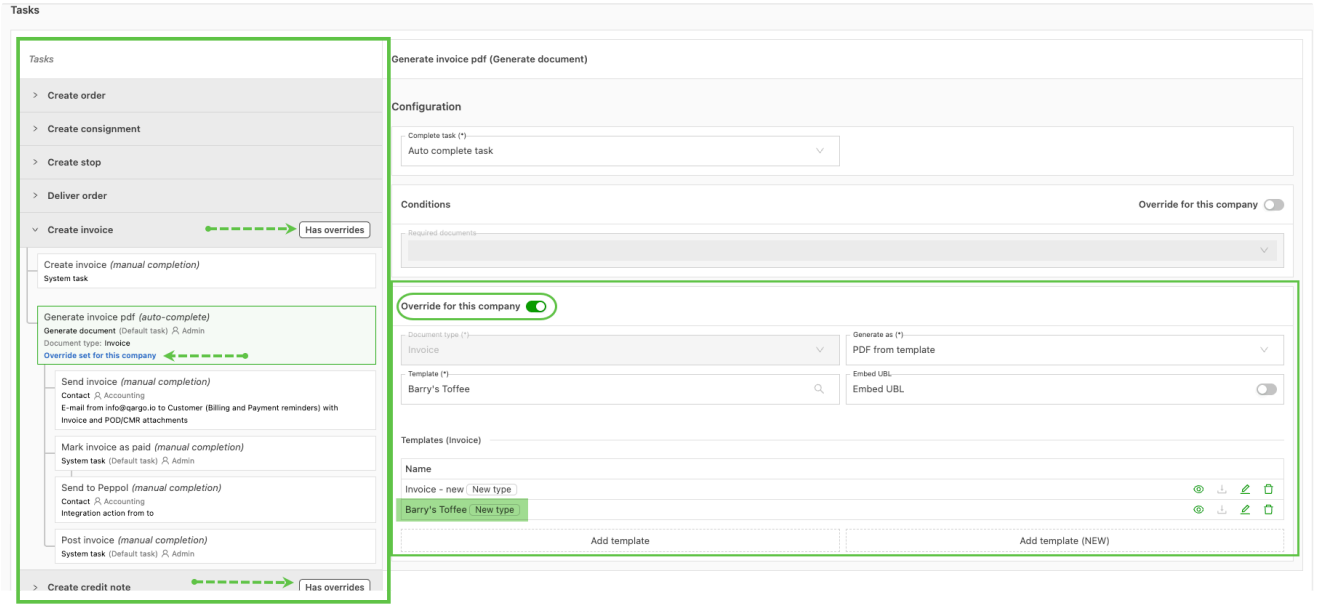
- Use the **'Override' toggle** from the Customer Profile tasks, to create a task specifically for that customer.
- Override options include:
  - Complete task function (manual / automatic)
  - Conditions for required documents



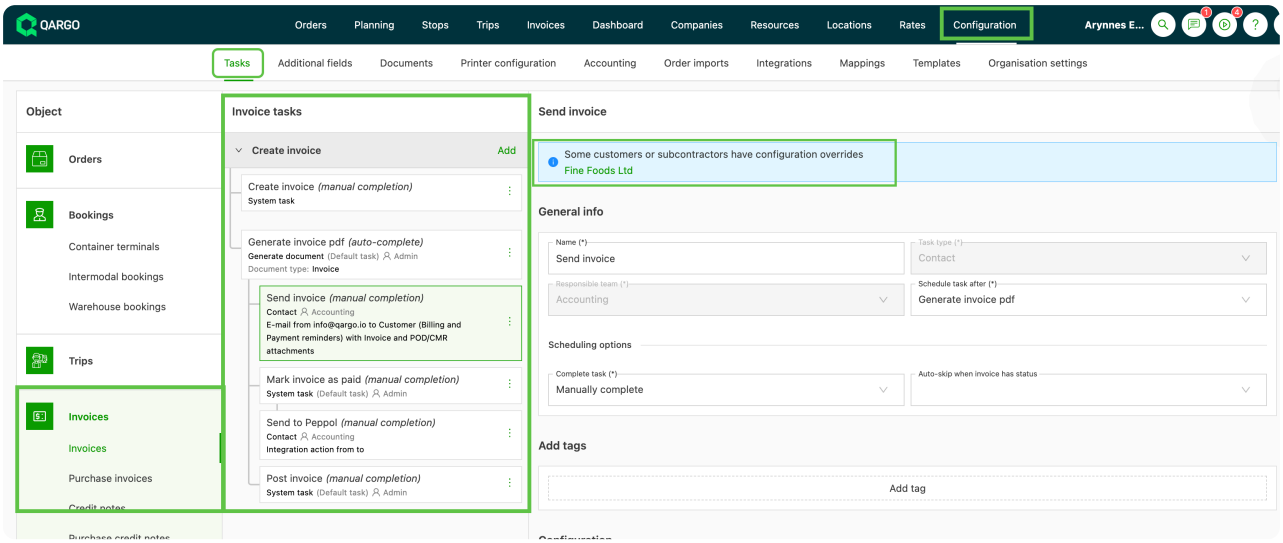
  - Template used if generating a document, for instance a customer specific trip sheet or label, etc.



- Once an override is active, a label will display on the task workflow in the customer profile, indicating an override is present.
- A warning will show in the specific task on the workflow, indicating where the customer override is present.



- Customer overrides are indicated in the specific tasks
  - Click on the customer name to access specific overrides



📚 The **"Override for this customer"** toggle only exists on **Generate Document**, **Upload Document**, and **Contact** tasks.
For all other task types (e.g. **General**), there's no per-customer override - instead you can set the task's global default to **Always Skip**, then for each customer that needs it, adjust the **Complete task** setting to **Manual** or **Automatic** to trigger it for them.