Adding documents to resources

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

Updated December 6, 2024

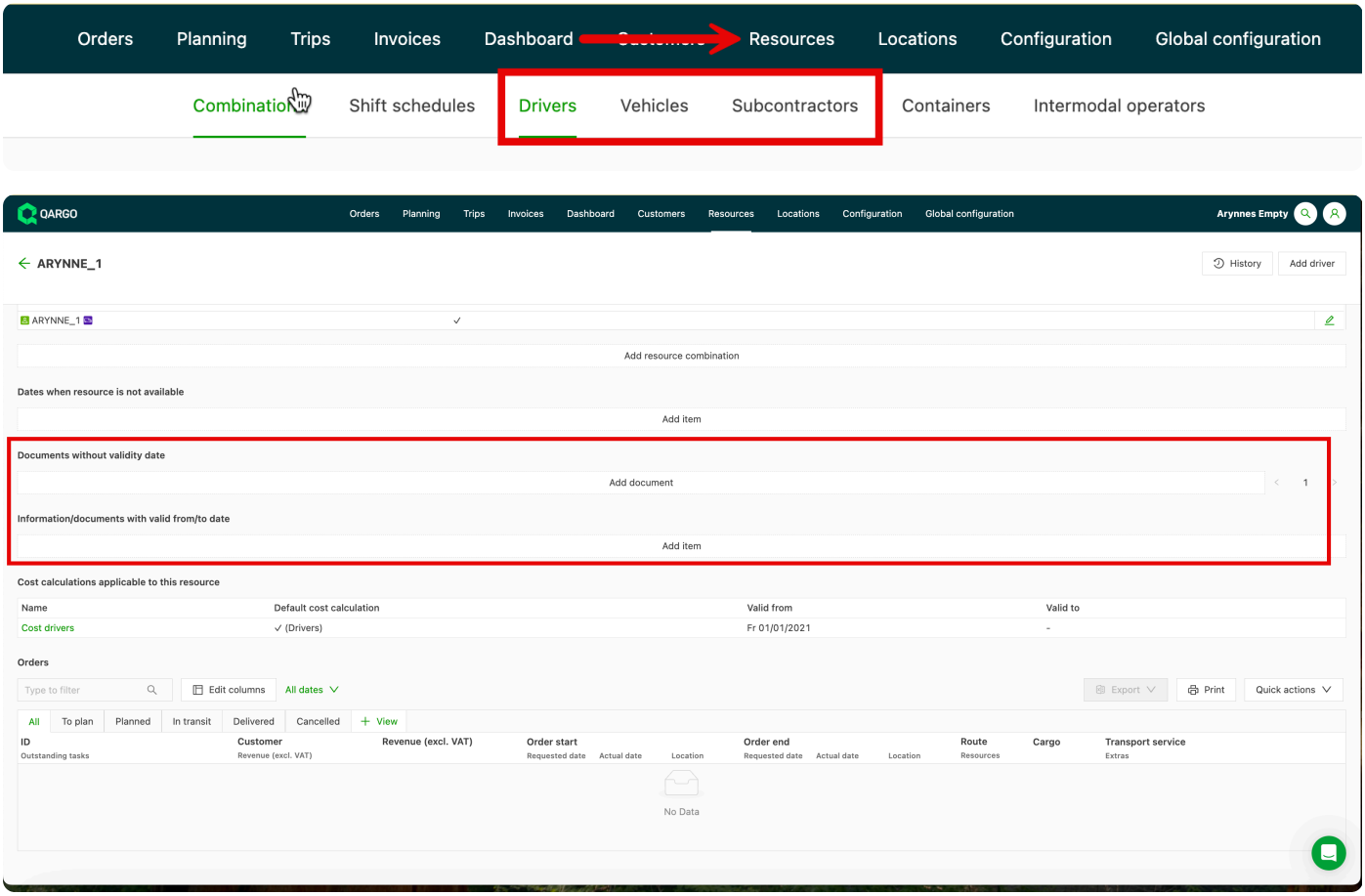
Documents with or without a validity date can be added to resources, including drivers, vehicles, and contract carriers.

When adding a document, a document type can be chosen from the drop-down list. Select the document type and complete the required fields. Some examples of documents that can be added are:

- Driver's licenses
- Certificates
- Technical inspections
- Insurance policies

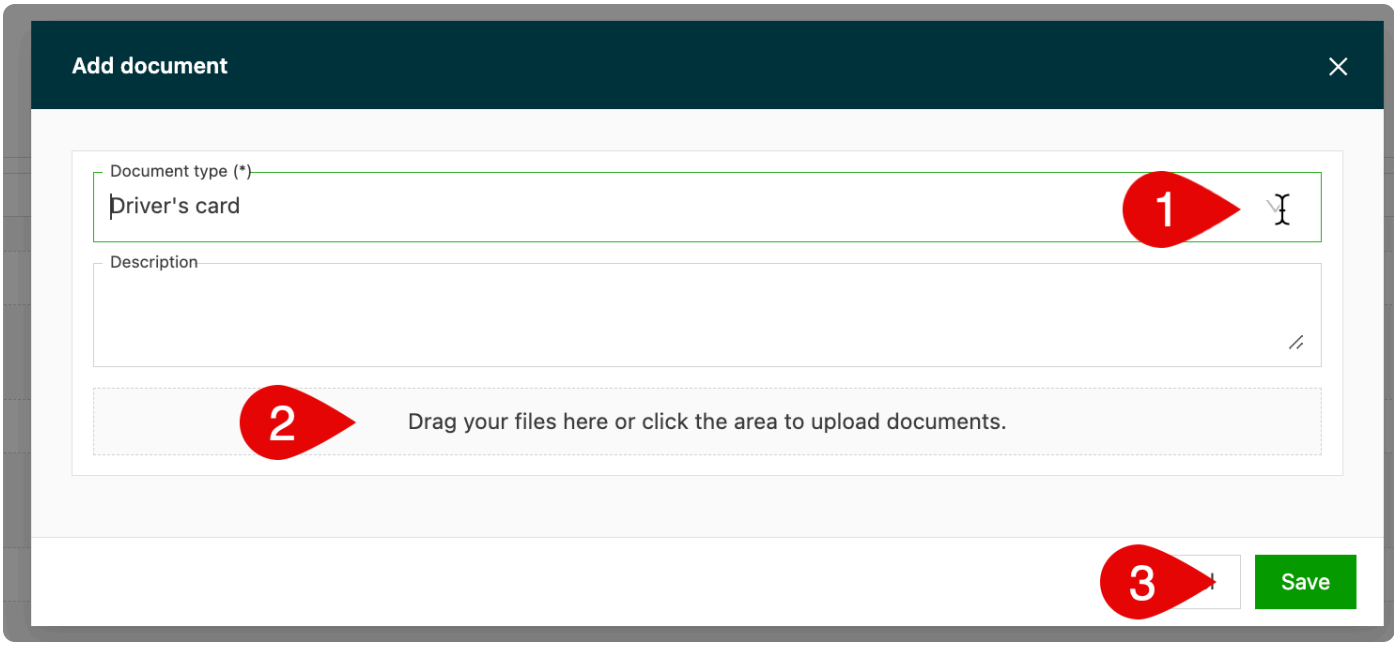
To add or update existing documents on resources:

- Navigate to **Resources**
- Click the resource type in the header (**Driver** / **Vehicle** / **Contract carrier**)
- Click the specific resource to add or update.
- Documents without a validity date: click **Add document**.
- Information/documents with a valid from/to date: click **Add item**.



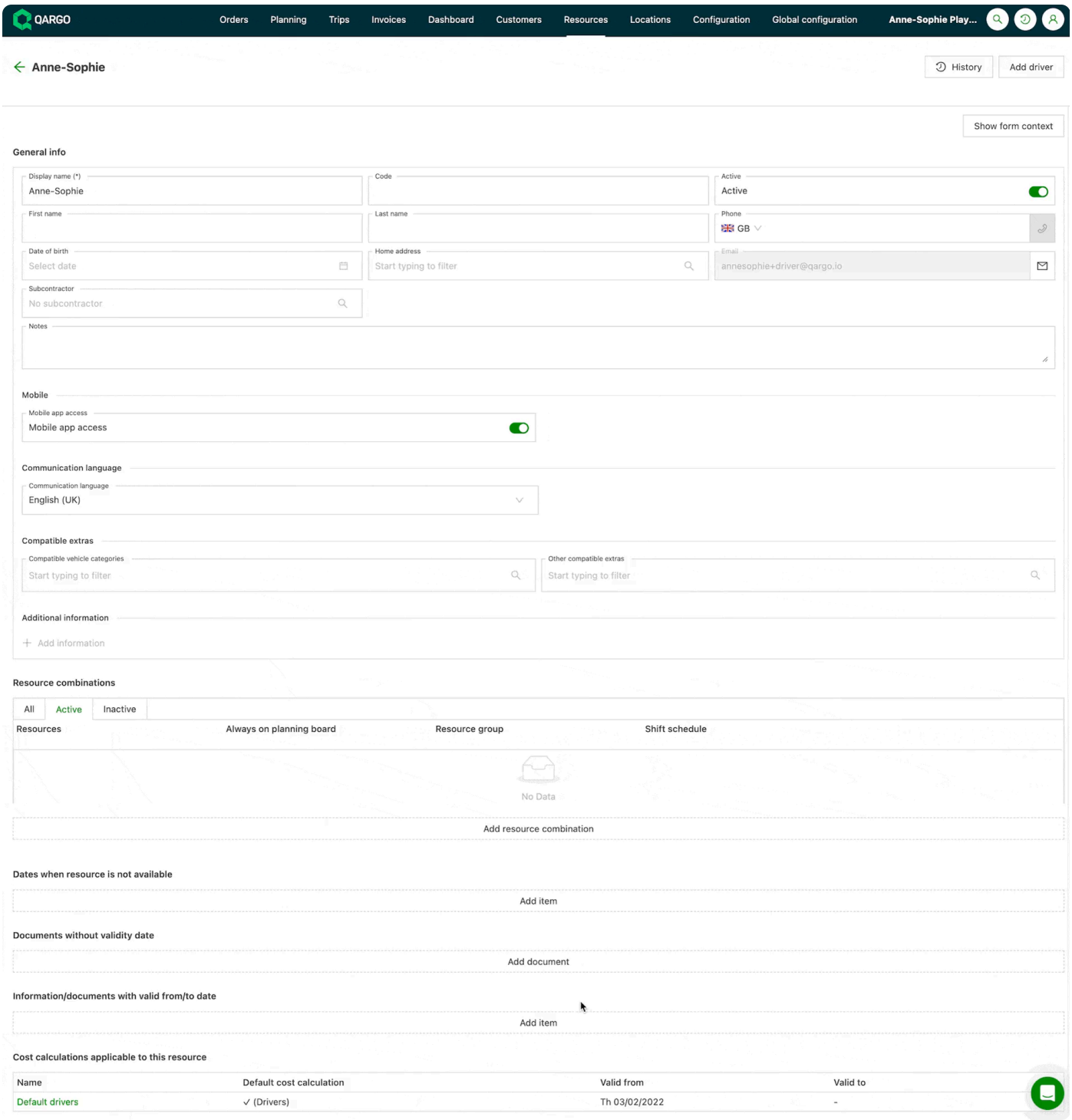
Add a document without validity dates: click Add document

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 a validity date: click Add item

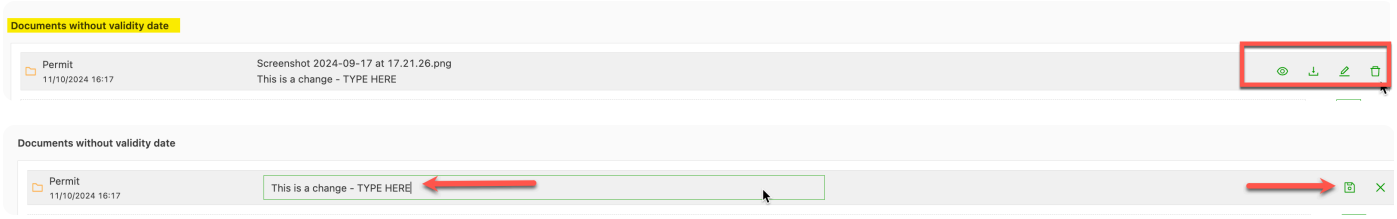
- Add the document type and the **Valid from** and **Valid to** dates.
- A toggle can also be switched on so the resource becomes unavailable once the date has expired (for example, of a driver's license).



To update existing documents

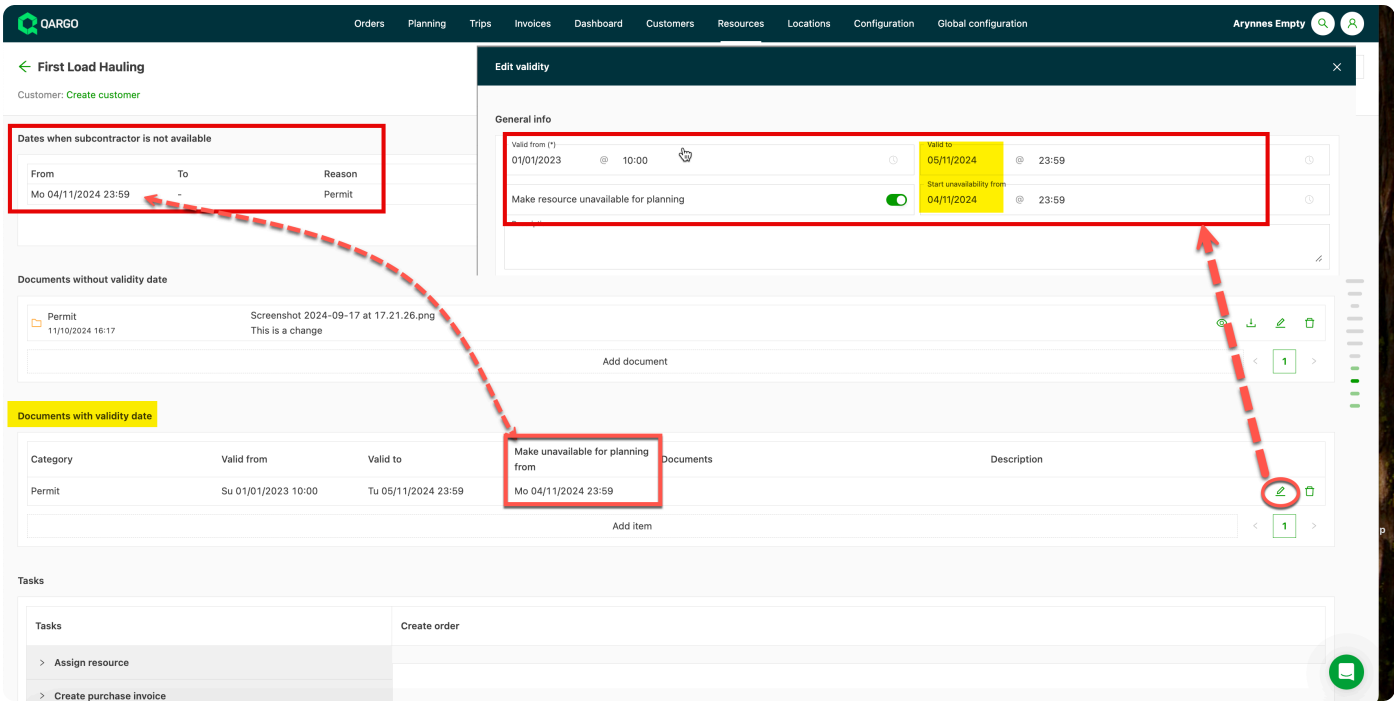
For documents **without** valid from/to dates:

- Options are **View** / **Download** / **Add a note** / **Delete**
- To add a note, click the **Edit** function, indicated by the pencil icon. This opens a text field where a note can be added
- 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 opens the **Edit** panel, where the dates can be updated
- Click **Save**.

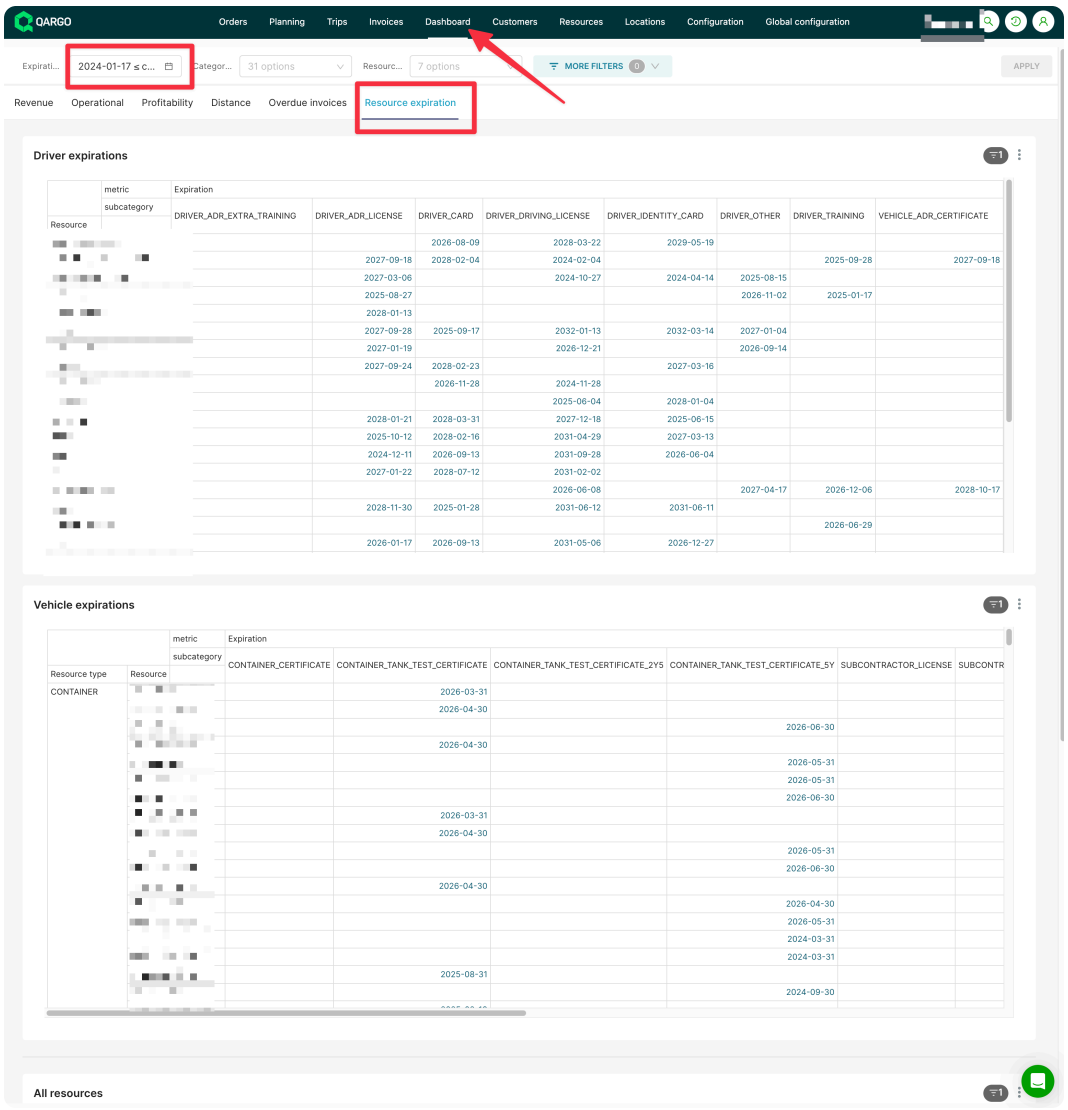


Tip: When the **Valid from** / **Valid to** dates are used together with the **Make resource unavailable** toggle, Qargo automatically adds this to the **Not available** schedule. The **Unavailable** date can be set manually ahead of the **Valid to** date to provide a window before the expiration dates and avoid any potential planning issues. Otherwise, the **Unavailable** date defaults to the **Valid to** date.

Visualize the expiration date in Dashboard

In addition, Dashboard can be used to search for documents that will expire.

- Navigate to **Dashboard**.
- Click **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