Dashboards: viewing data.

Dashboards provide data visualization across revenue, operations, profitability, and more. Includes filters, export options, and clickable links.

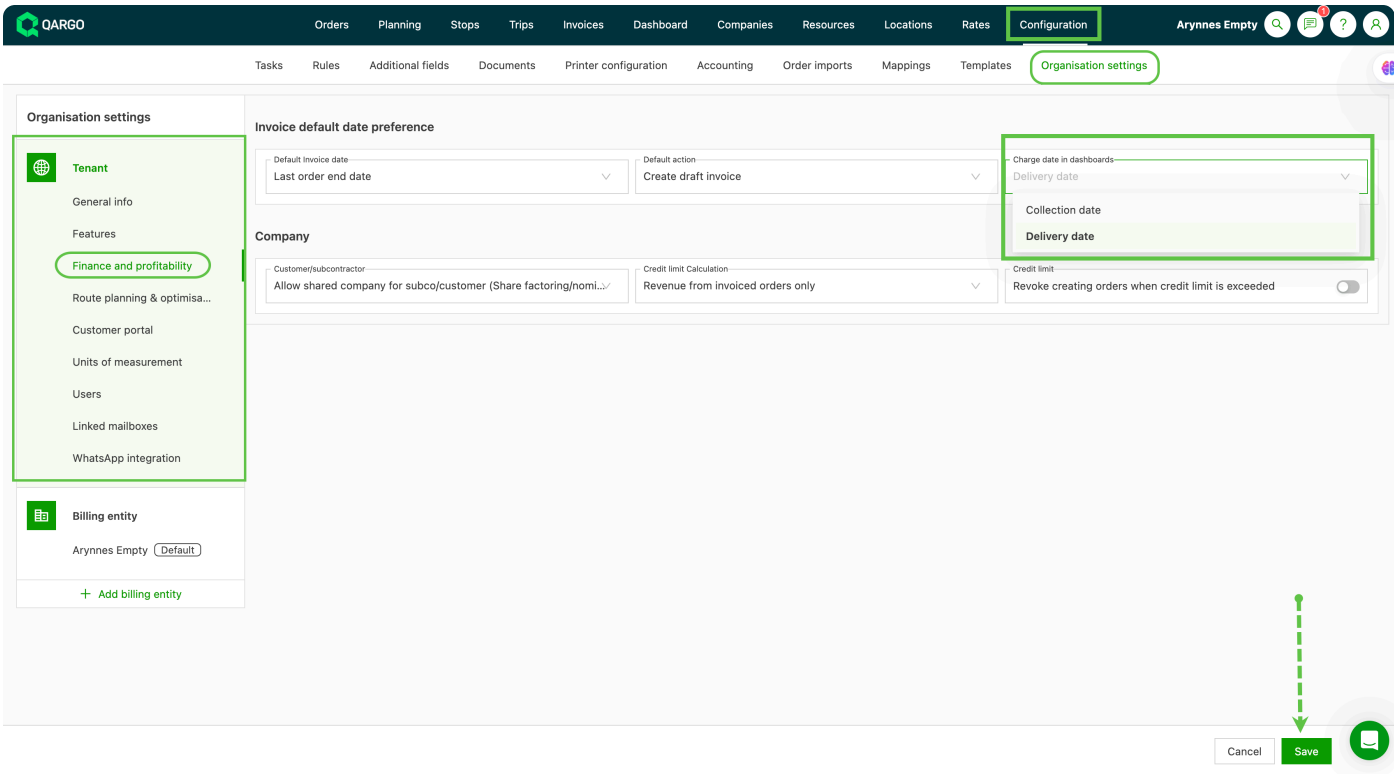
Updated February 3, 2026

Each time an order, a load, or an invoice is created in the platform, valuable information is entered. The Dashboard module provides an easily accessible overview of that data, from revenue to costs, the due date of invoices to be paid, etc.

Configuration

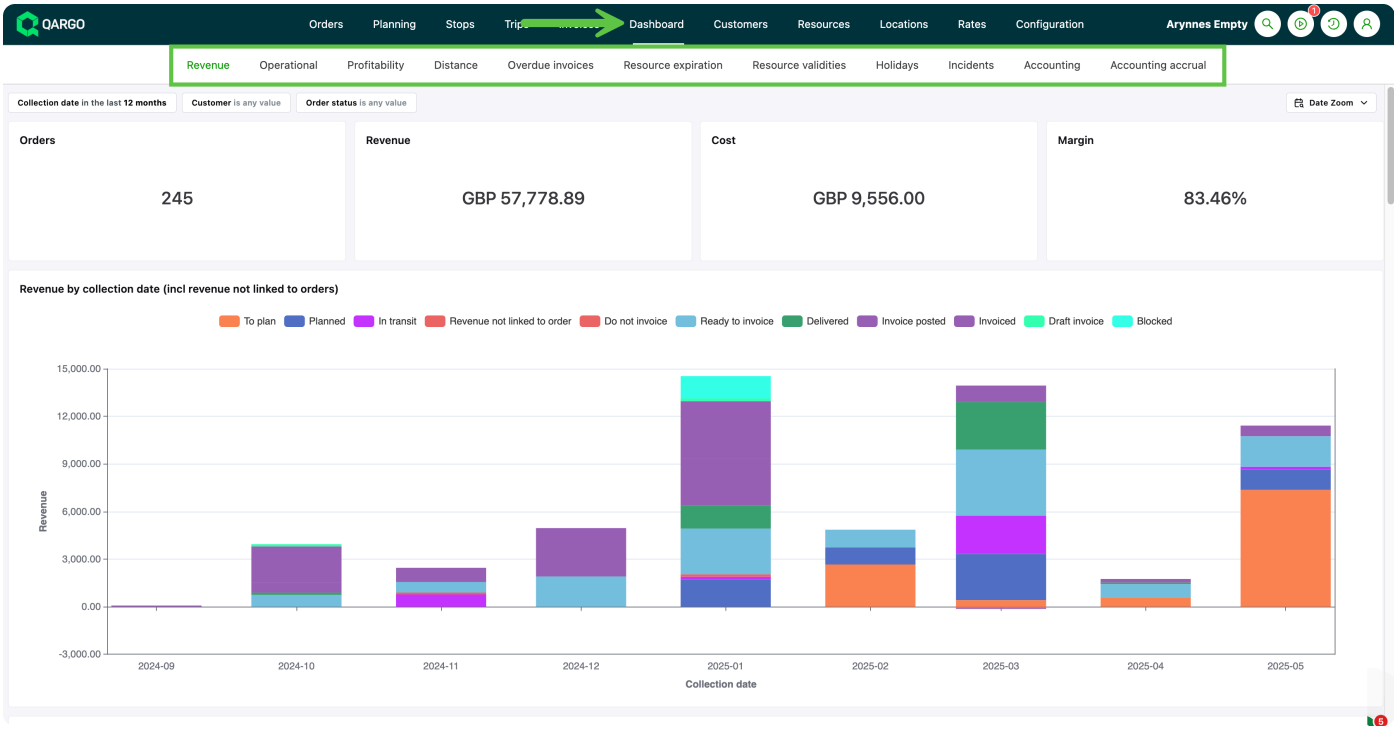
🧰 **Available to Super Admin users only.**

- Navigate to **Configuration > Organization settings**
- From the **Tenant** submenu on the left, select **Finance and profitability**
- Locate **Charge date in dashboards** and select the preferred option from the dropdown:
  - Pickup date
  - Delivery date
- Click **Save**



- All dashboard reports use the default date selected here.

Navigate to Dashboard

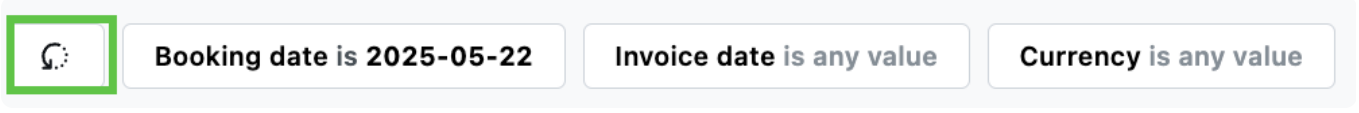


Each dashboard tab provides a comprehensive selection of graphs and tables that give insight into metrics across all aspects of the business. Click the tabs to see a visualization of a specific segment. The following segments are available:

- Revenue
- Operational
- Profitability
- Distance
- Overdue invoices
- Resource expiration
- Resource validities* (new)
- Holidays
- Incidents
- Accounting
- Accounting accrual

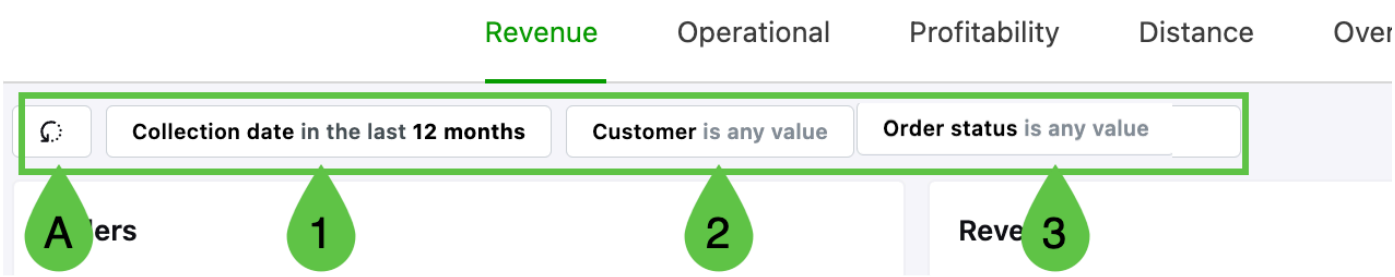
Filters

- Each tab includes a variety of filters that provide further granularity, including date range, customers, or contract carriers.
- Filters are in the same location on each tab and show what is already defined as the default.
- Click into a filter and adjust it to report on a specific customer, contract carrier, status, etc.
- Each set of filters includes a **Reset** button to quickly and easily set filters back to the defaults.



Reset only appears if the filters have been changed from the defaults.

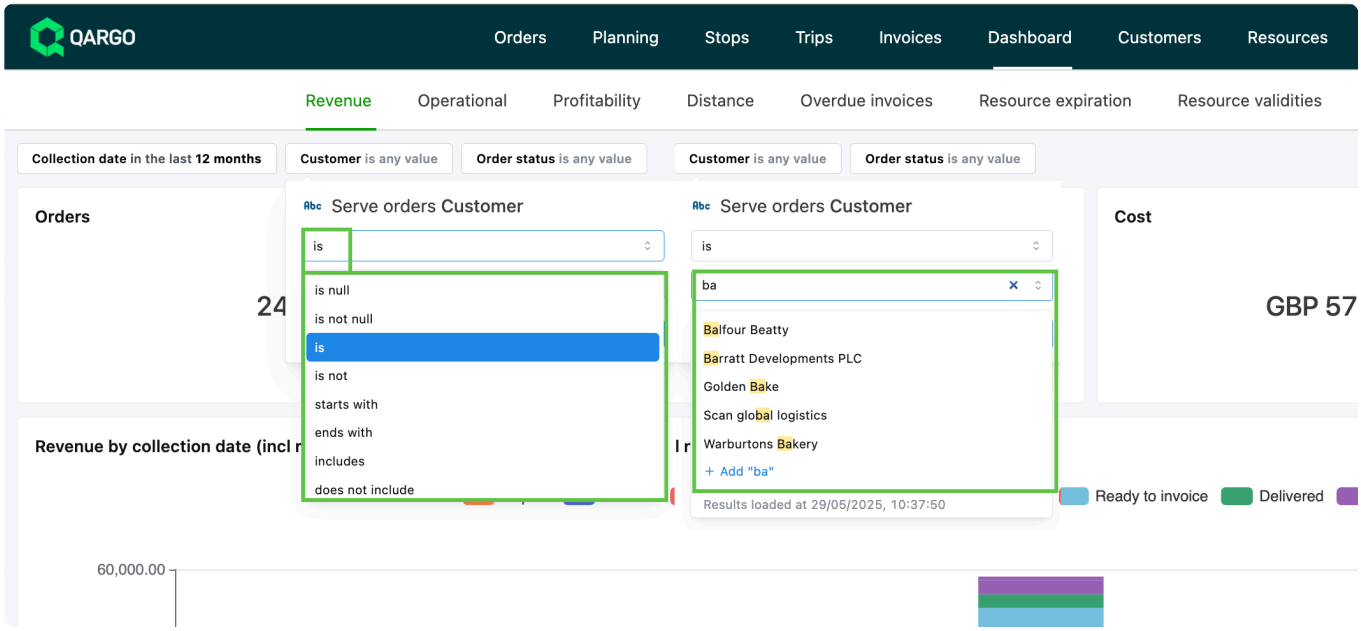
Example:
The default Revenue parameters filter on:



1. Pickup date in the last 12 months
2. Customer is any
3. Order status is any

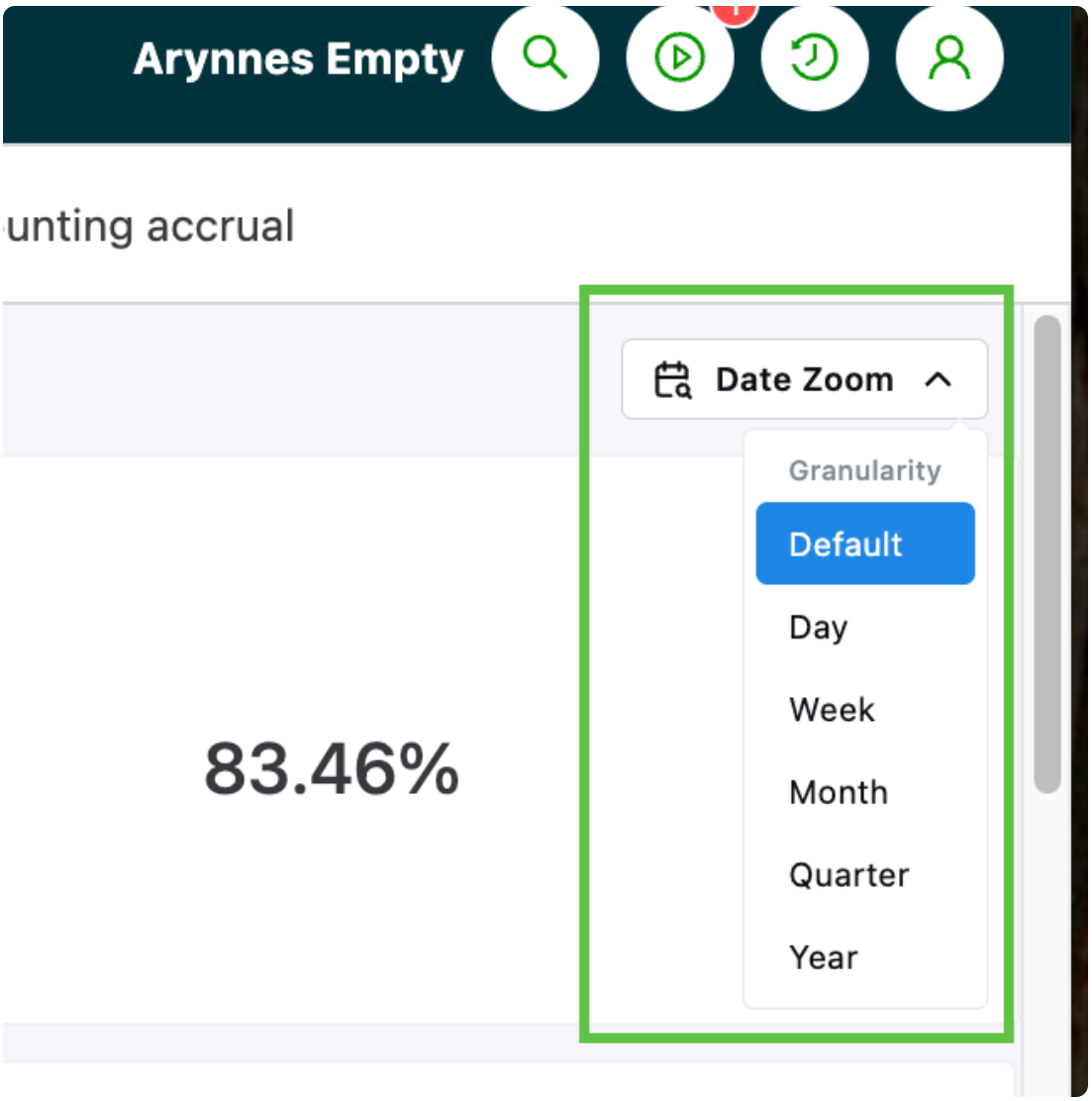
A.) Use this to reset the filters to the default

- Click into the field to see the available filtering options.



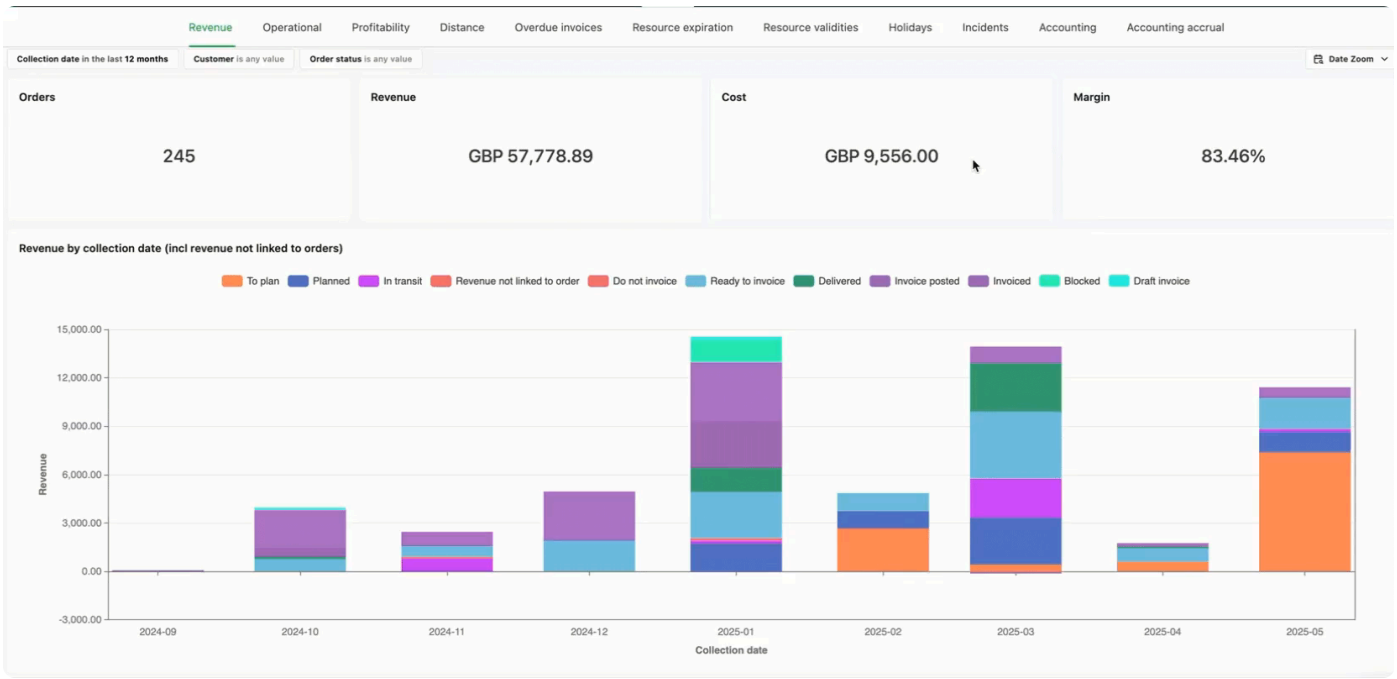
Date Zoom filter:

- Easily adjust the granularity of the date range using the Date Zoom feature.

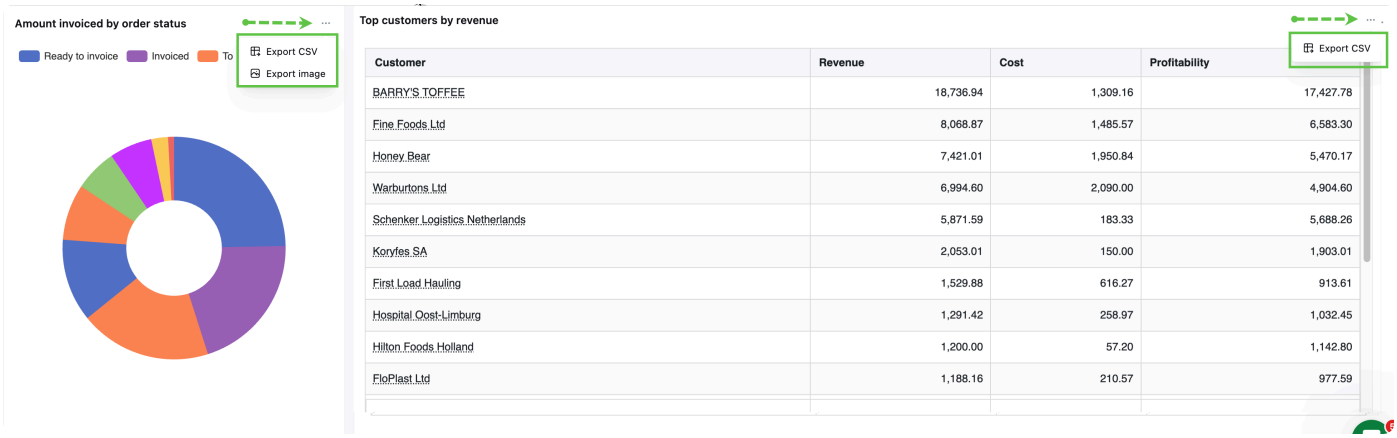


Visualizations

- Each graph or chart includes a rollover function: hovering the mouse over a specific data point highlights all the components in the chart that match that data.

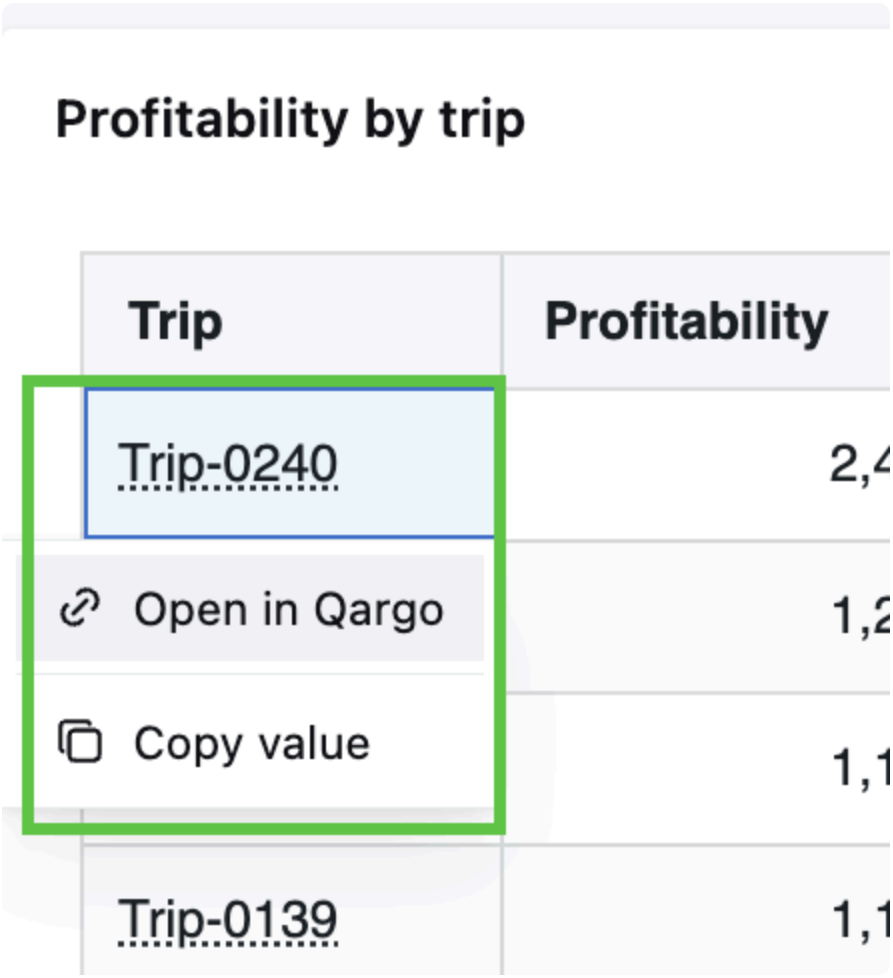


- Each graph or table can be exported (CSV or image).
- Click the 3-dot menu in the top right corner to show the export options.

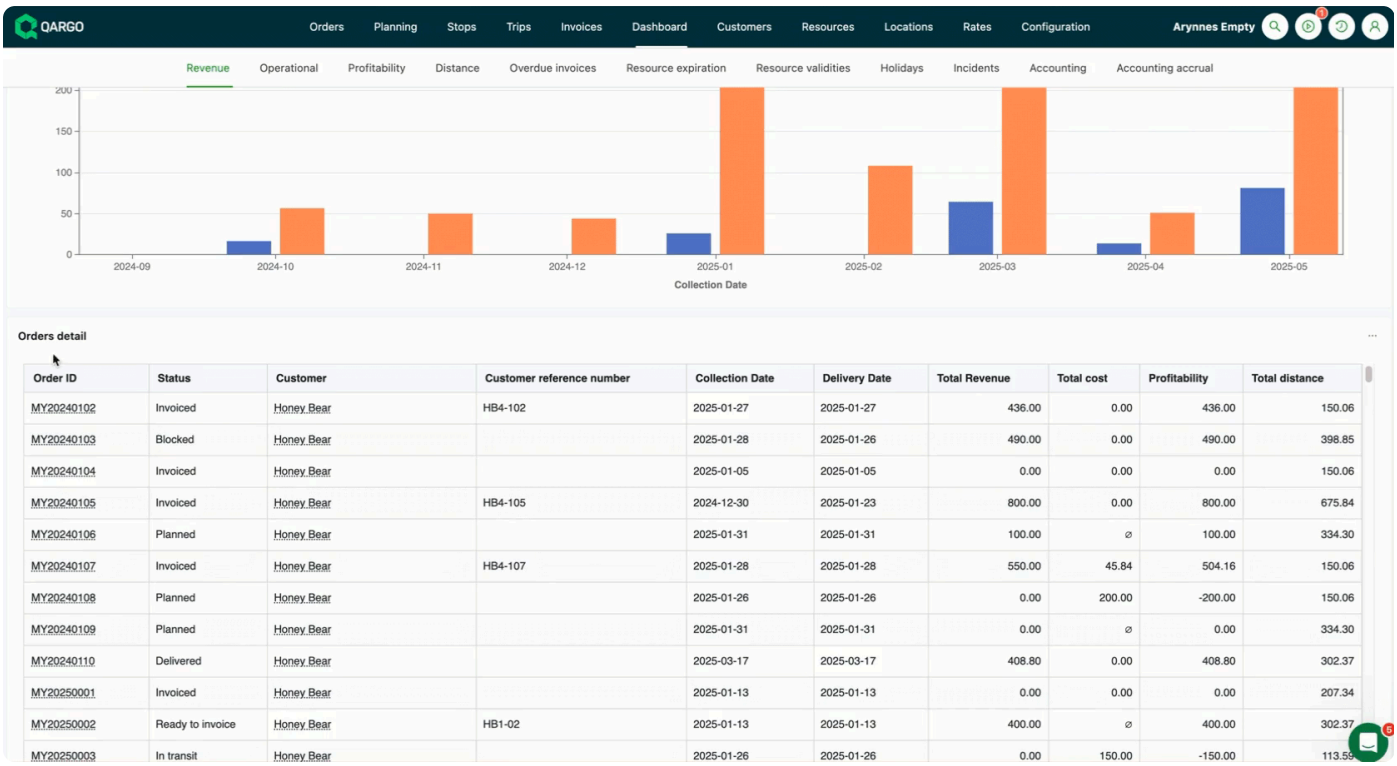


Clickable links

- Clicking into specific data points, such as a customer name, invoice, or load number, gives the option to
  - Copy value
  - Open in Qargo



- For a specific load, invoice, or order, this opens the specific record.
- For a customer name, opening it in Qargo automatically opens the list view for the relevant module (orders, invoices, etc.) with filtering applied for that customer.

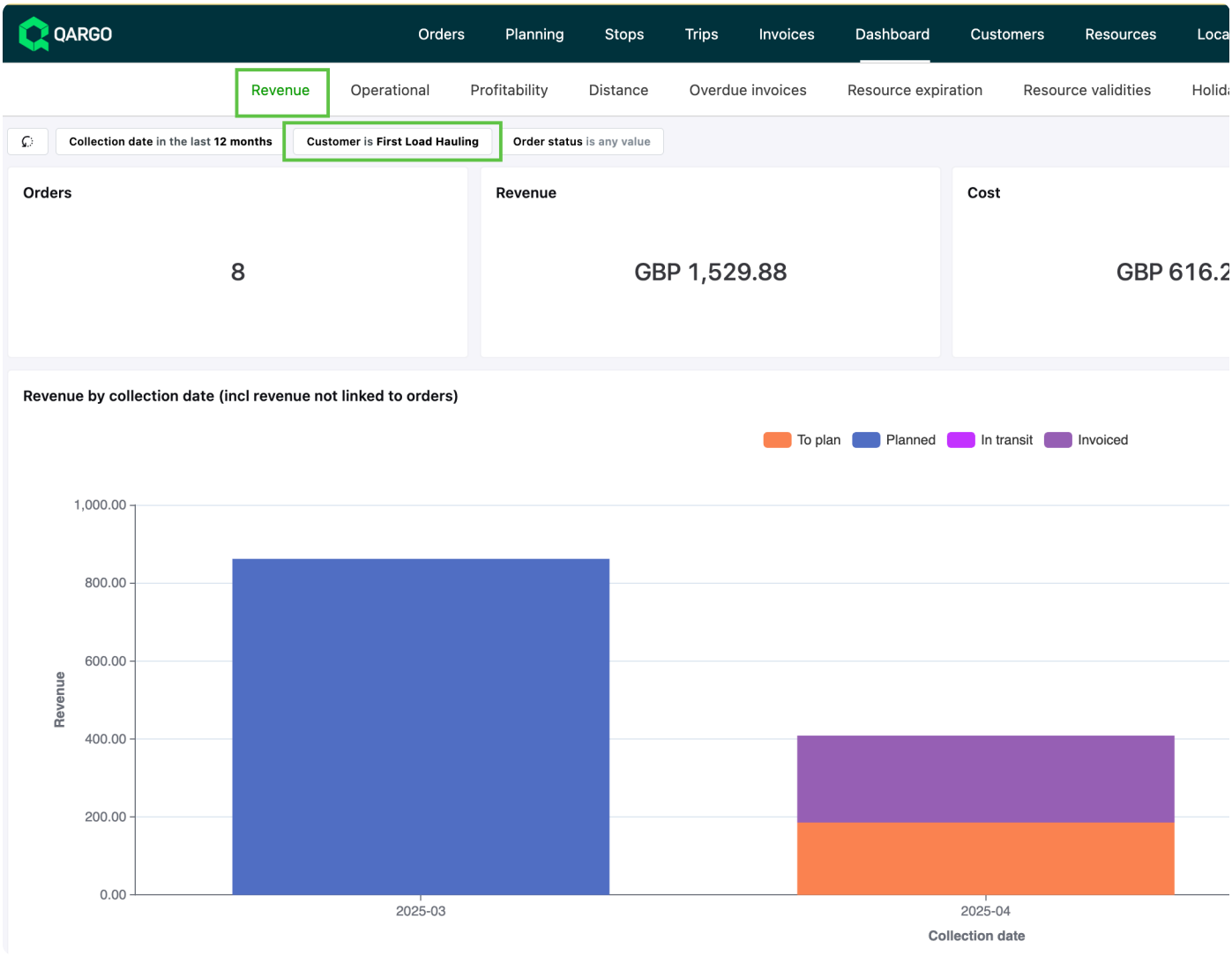


Order ID	Status	Customer	Customer reference number	Collection Date	Delivery Date	Total Revenue	Total cost	Profitability	Total distance
MY20240102	Invoiced	Honey Bear	HB4-102	2025-01-27	2025-01-27	436.00	0.00	436.00	150.06
MY20240103	Blocked	Honey Bear		2025-01-28	2025-01-26	490.00	0.00	490.00	398.85
MY20240104	Invoiced	Honey Bear		2025-01-05	2025-01-05	0.00	0.00	0.00	150.06
MY20240105	Invoiced	Honey Bear	HB4-105	2024-12-30	2025-01-23	800.00	0.00	800.00	675.84
MY20240106	Planned	Honey Bear		2025-01-31	2025-01-31	100.00	⌀	100.00	334.30
MY20240107	Invoiced	Honey Bear	HB4-107	2025-01-28	2025-01-28	550.00	45.84	504.16	150.06
MY20240108	Planned	Honey Bear		2025-01-26	2025-01-26	0.00	200.00	-200.00	150.06
MY20240109	Planned	Honey Bear		2025-01-31	2025-01-31	0.00	⌀	0.00	334.30
MY20240110	Delivered	Honey Bear		2025-03-17	2025-03-17	408.80	0.00	408.80	302.37
MY20250001	Invoiced	Honey Bear		2025-01-13	2025-01-13	0.00	0.00	0.00	207.34
MY20250002	Ready to invoice	Honey Bear	HB1-02	2025-01-13	2025-01-13	400.00	⌀	400.00	302.37
MY20250003	In transit	Honey Bear		2025-01-26	2025-01-26	0.00	150.00	-150.00	113.59

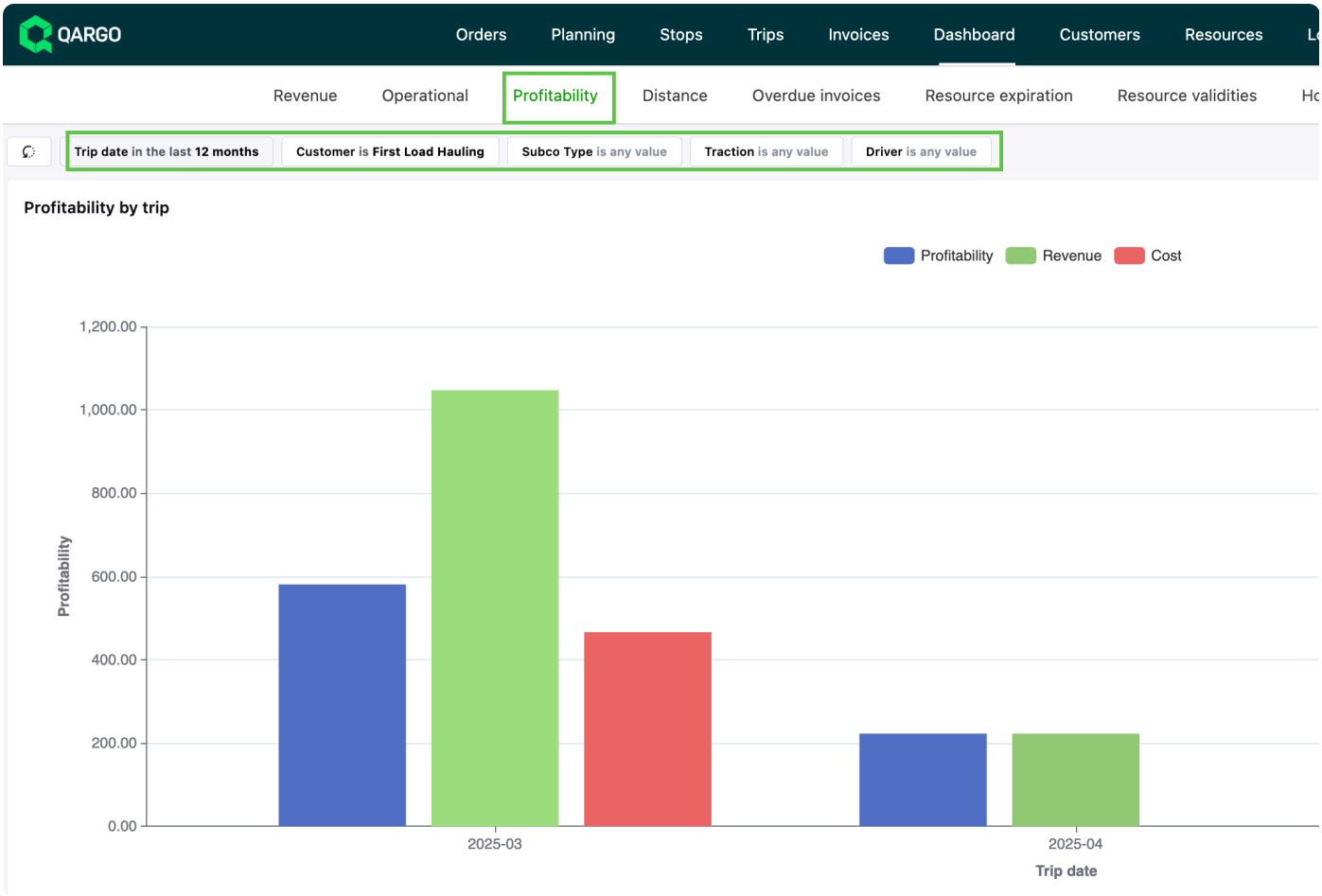
Customer vs. contract carrier reporting

Customer and contract carrier reporting are broken out and visualized on 2 different tabs. On the appropriate tab, it is possible to filter on a specific customer or contract carrier via the *'Customer'* search field.

- **Customer reporting = Revenue.**
    - In this instance, the contract carrier also appears as a customer. The Revenue table looks specifically at the **orders** where they were the customer.



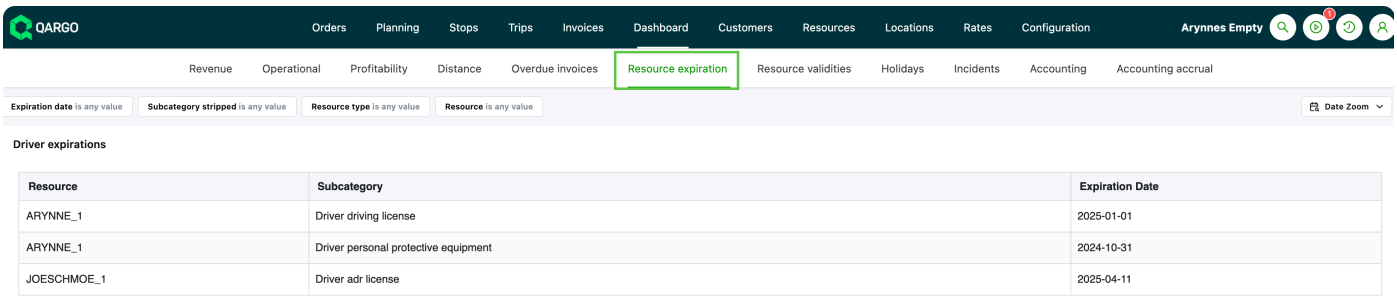
- **Contract carrier reporting = Profitability**
  - In this visualization, the contract carrier is also the customer; in this instance, the data is based on **loads**



Resource expiration and resource validity

Resource expiration

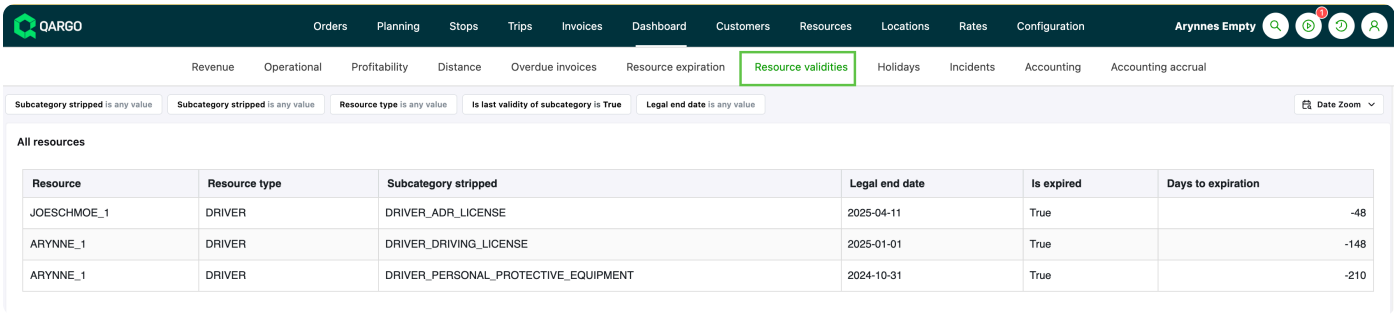
- Looks at specific documents and certificates assigned to resources (especially vehicles and drivers) and reports on their expiration date, e.g., the end of licenses or permits.
- Filter on *'expiration date'* to see when critical documents are due to expire.
- Tables are available for specific resources, e.g., driver-related expirations.



Resource validities

- Reports on the validity period for all resources, including start and end date, expiration, and number of days until expiration.

- Includes resources that are currently unavailable due to expired validities.
- Filter on *'End timestamp'* or *'legal end date'* to view resources with dynamic unavailability
    - The system automatically marks a resource as unavailable when a document expires.



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Why 2 options? {#h_35b52fe216}

The split between the **Expiration** and **Validity** dashboards is mainly due to:

- Customer workflow: flexibility to see all validities vs. just upcoming expirations.
- Filtering: Resource expiration typically uses an **"is between"** expiration date filter, while Resource validity dashboards use filters on the legal end date.

Summary:

1. Use **Resource expiration** for a quick, focused list of items that are about to expire soon (with direct date-based filtering).
2. Use **Resource validity** to see the full range of validity periods for resources (including those that have already expired or are causing current unavailability).