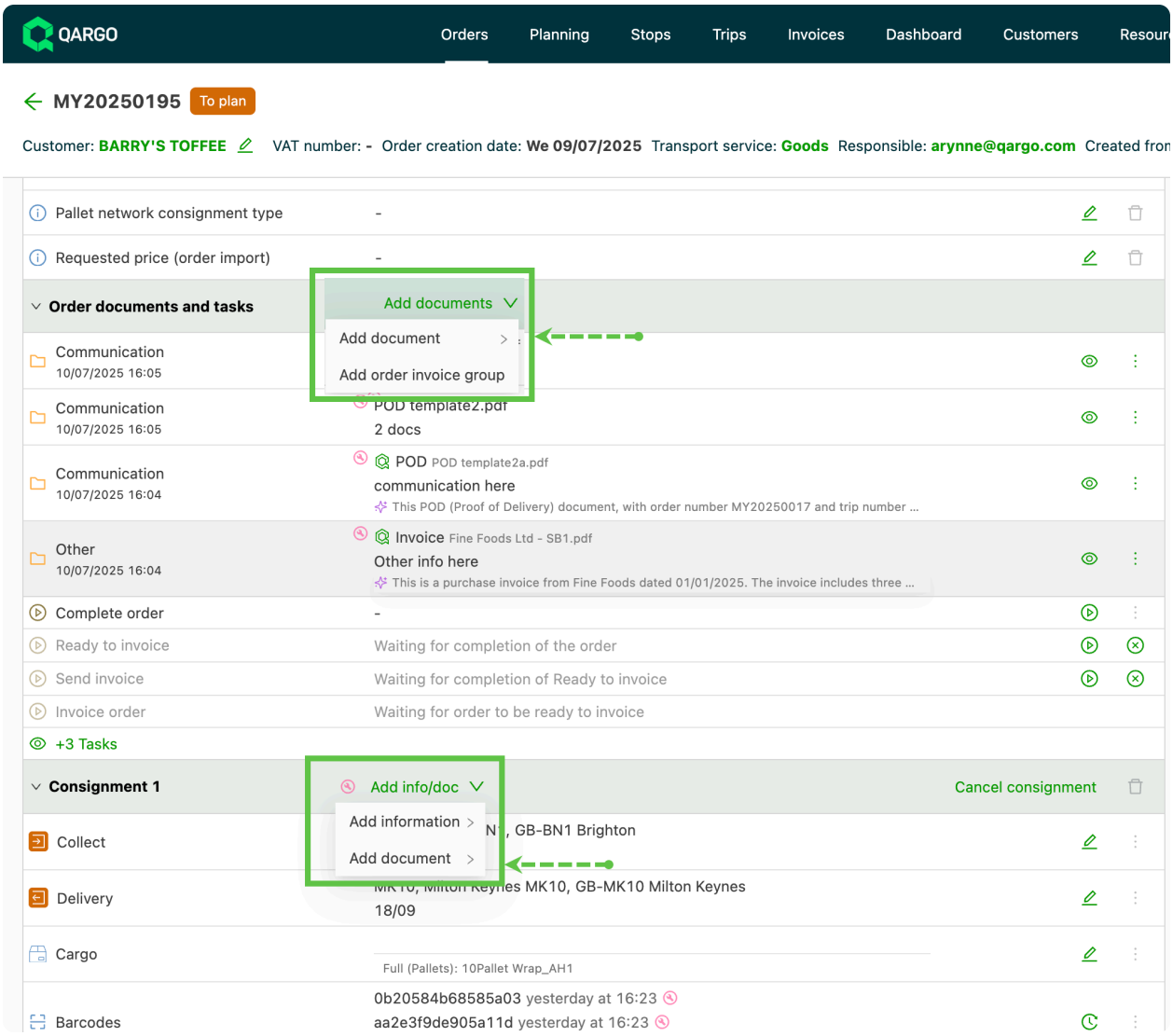
Orders – upload or link documents in bulk

Upload documents to an order in the main platform and through the customer portal. Documents can be added as an individual file or as multiple files on a single order, or in bulk across multiple orders.

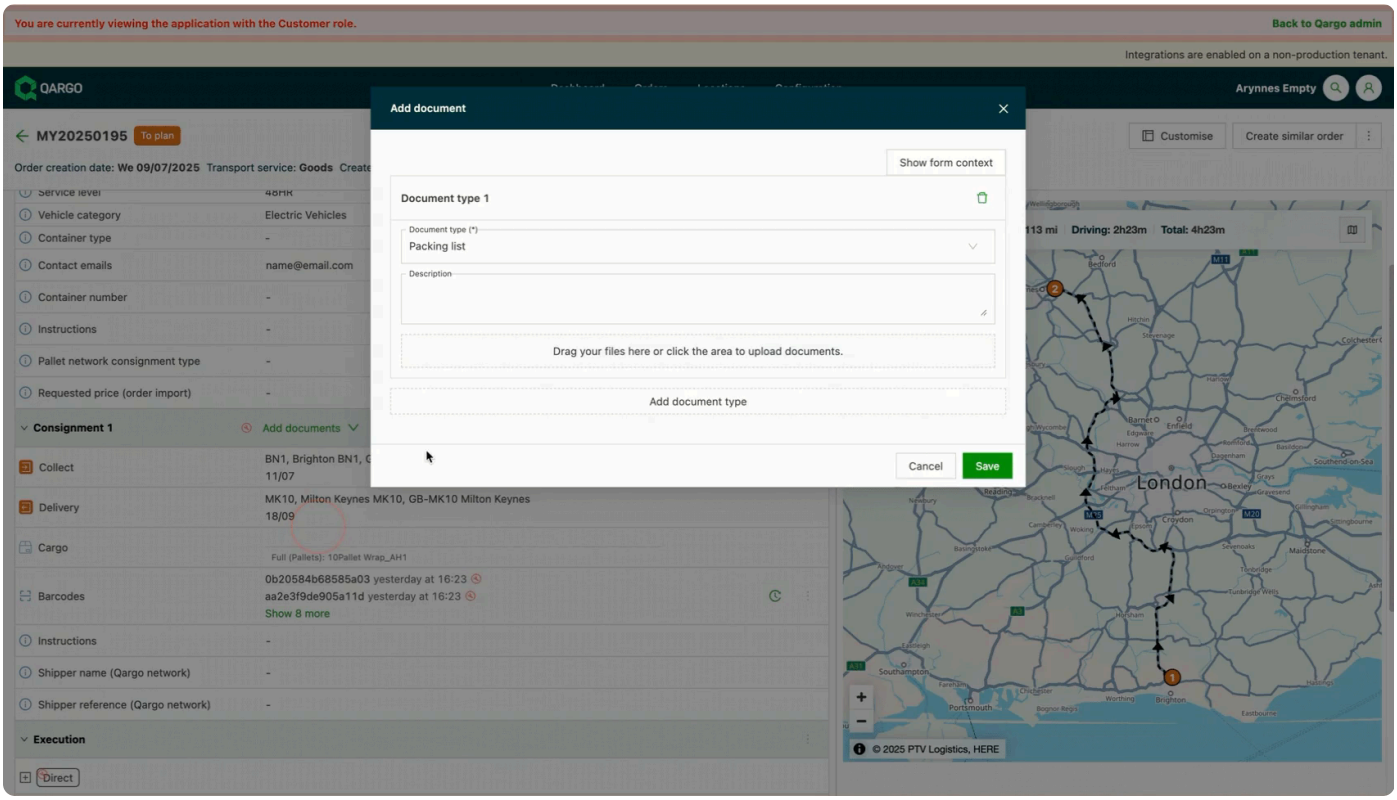
Updated August 7, 2026

Upload multiple documents to a single order

To upload to a single order in either the main platform or the customer portal, use the **Add document** link on the order details screen.

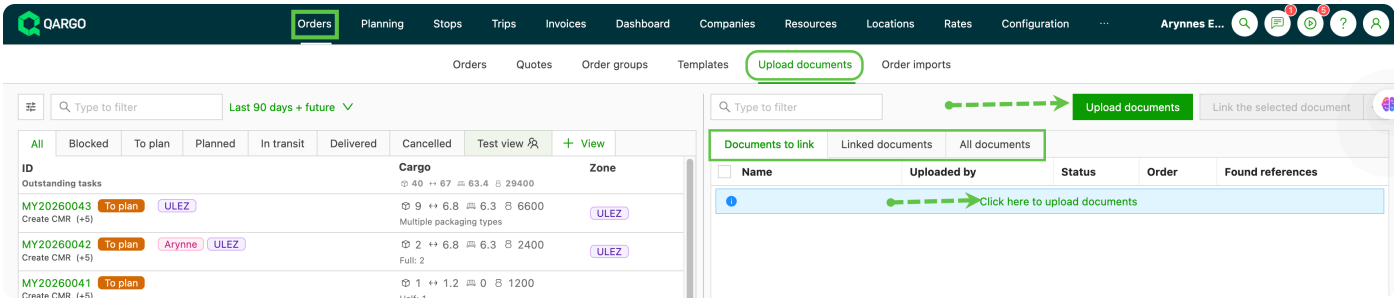


- Select the appropriate document type from the dropdown list.
- A new window opens where the document can be attached.
  - Multiple documents can be selected (same document type)
  - The description applies to all documents of the same type that are added
  - A new document type can be added on the same screen



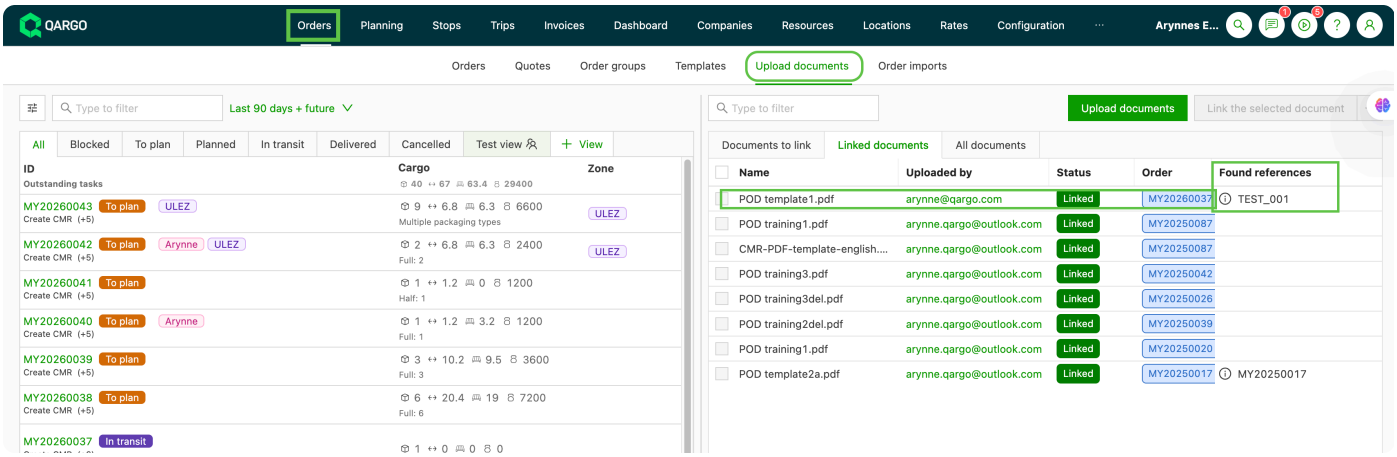
Upload documents to multiple orders

- Navigate to **Orders > Upload documents**
- Click the **Upload documents** button or go to **Documents to link**
  - The same screen opens regardless of the option selected



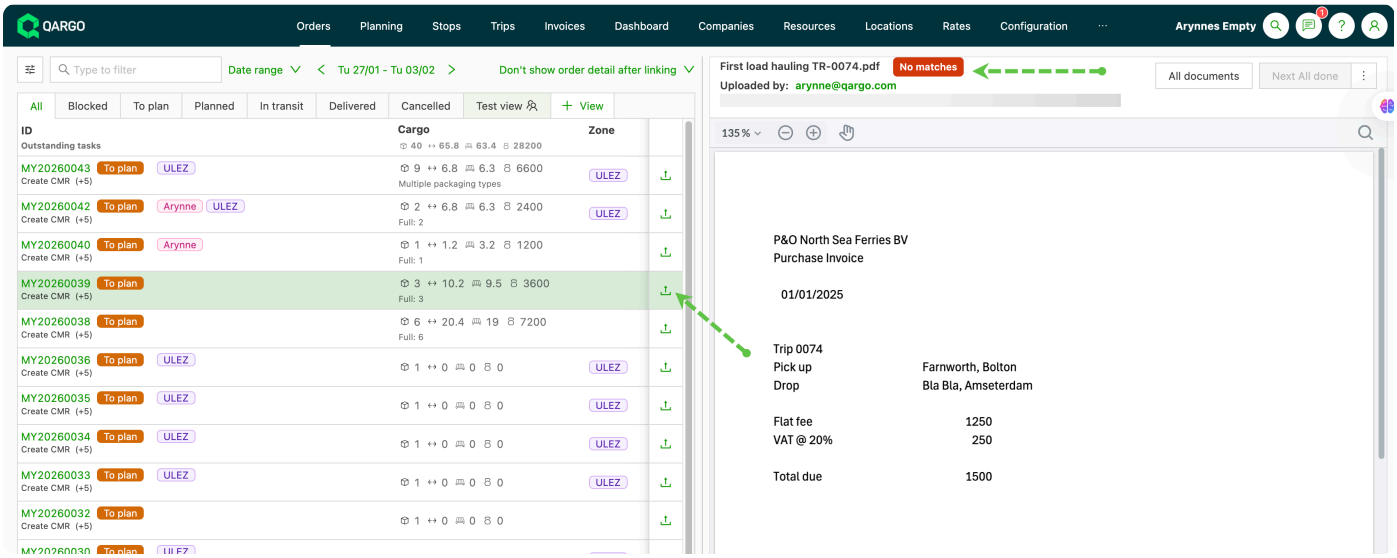
- The **order list view** is displayed on the left side of the screen.
- The **upload documents area** is displayed on the right side of the screen.
- Select a tab to review:
  - **Documents to link**: upload new documents to an order
  - **Linked documents**: shows documents already uploaded, along with the email of the user who uploaded them.
  - **All documents**: shows all uploaded documents
- Documents can be added to multiple orders

📚 When a customer reference number is used for matching, documents can be linked automatically. When linked, the **Found references** are shown so the user can confirm them manually.



If a document doesn't automatically match an existing order, a **No matches** label is displayed.

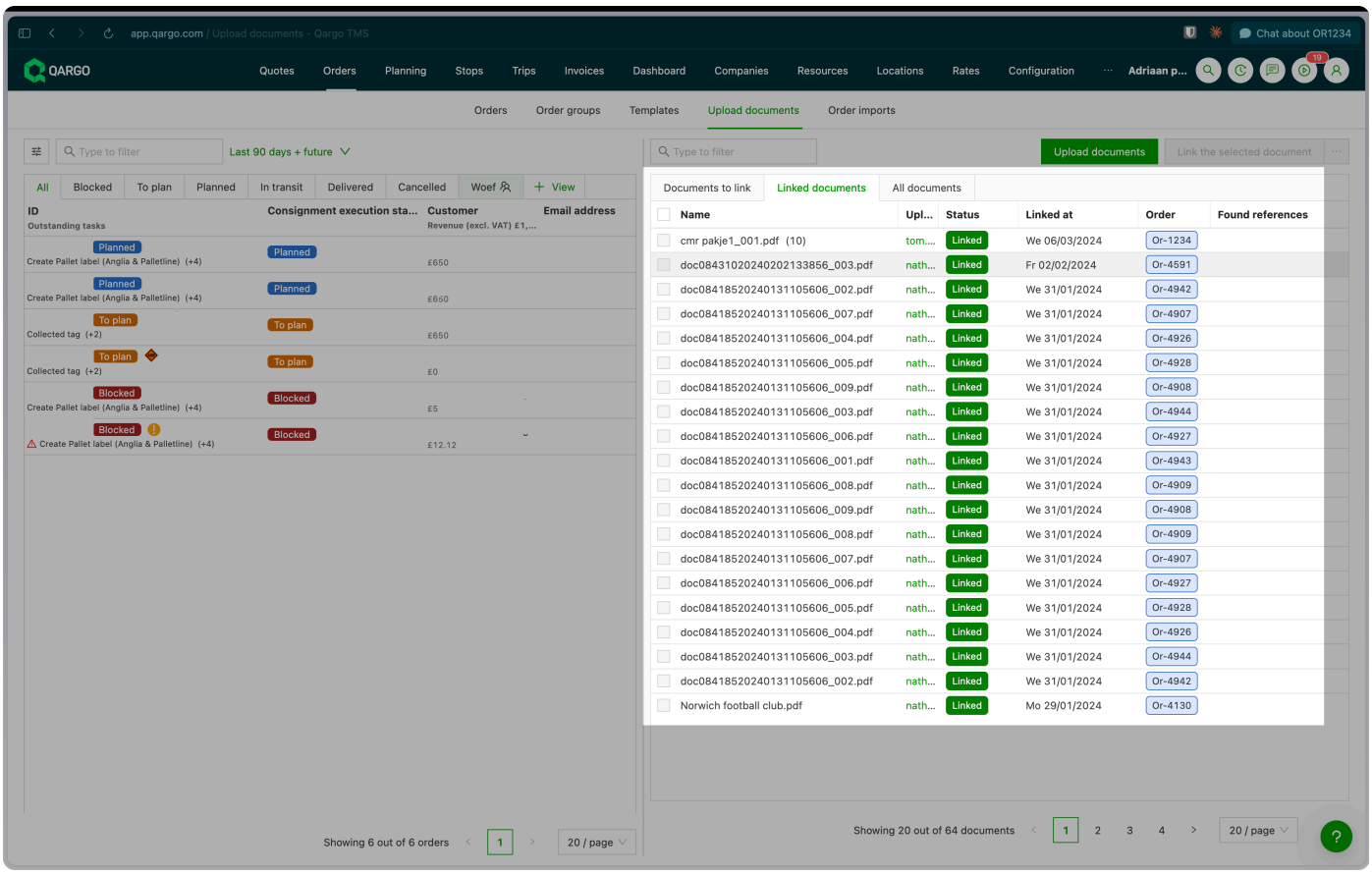
- Manually locate the appropriate order and click the upload icon to add the document to the order.



Linked date column

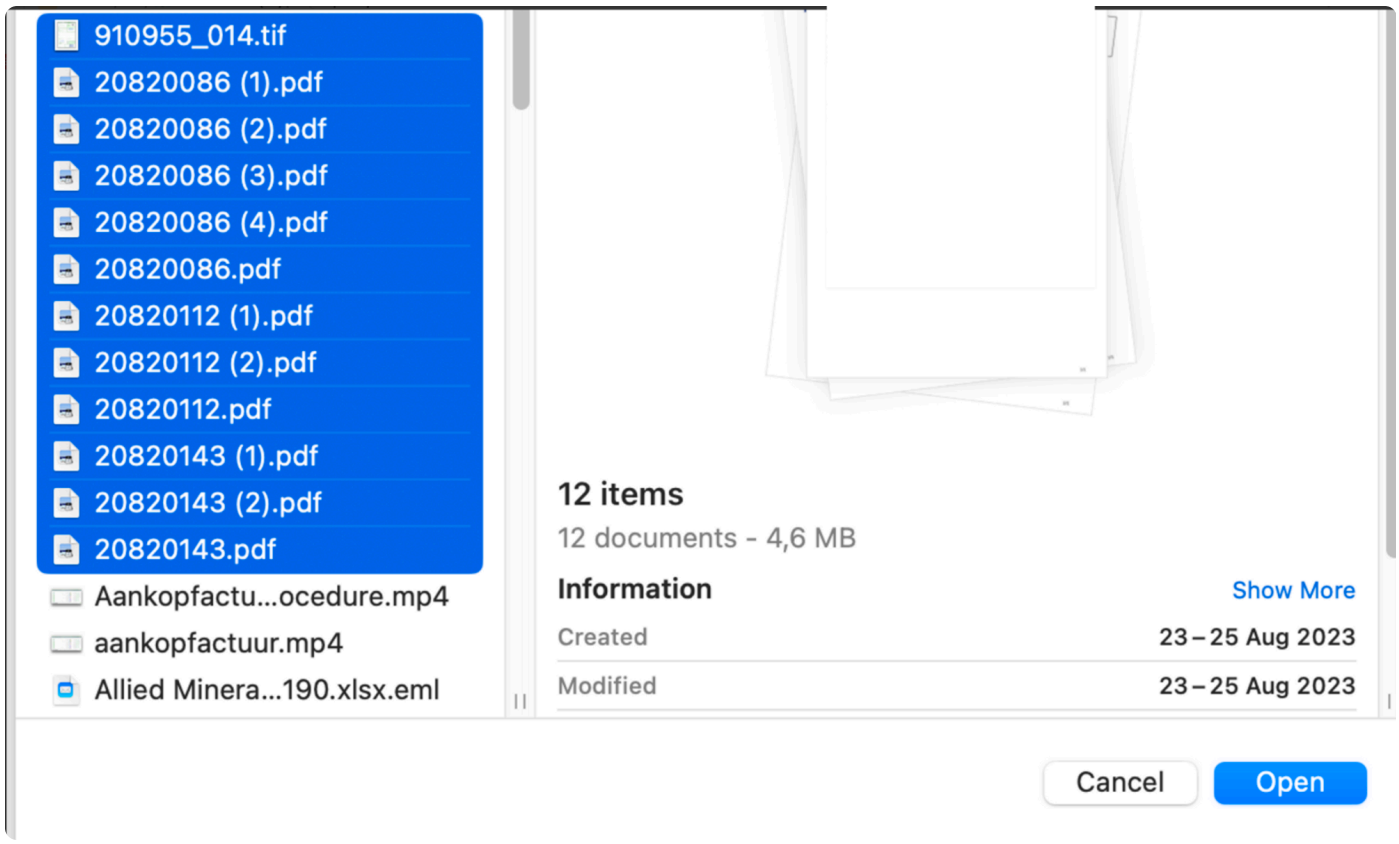
The **Linked documents** tab in **Orders > Upload documents** includes a **Linked date** column. It shows the date each document was linked to an order, so operators handling large volumes of documents can confirm at a glance when a document was linked, without opening individual orders.

- The column appears in both the **Linked documents** tab and the **All documents** tab.
- It sits between the **Status** and **Order** columns and displays the date in dd/mm/yyyy format.
- The value is the date the document was linked to the order. The column is display-only; filtering on the linked date is not available in this version.

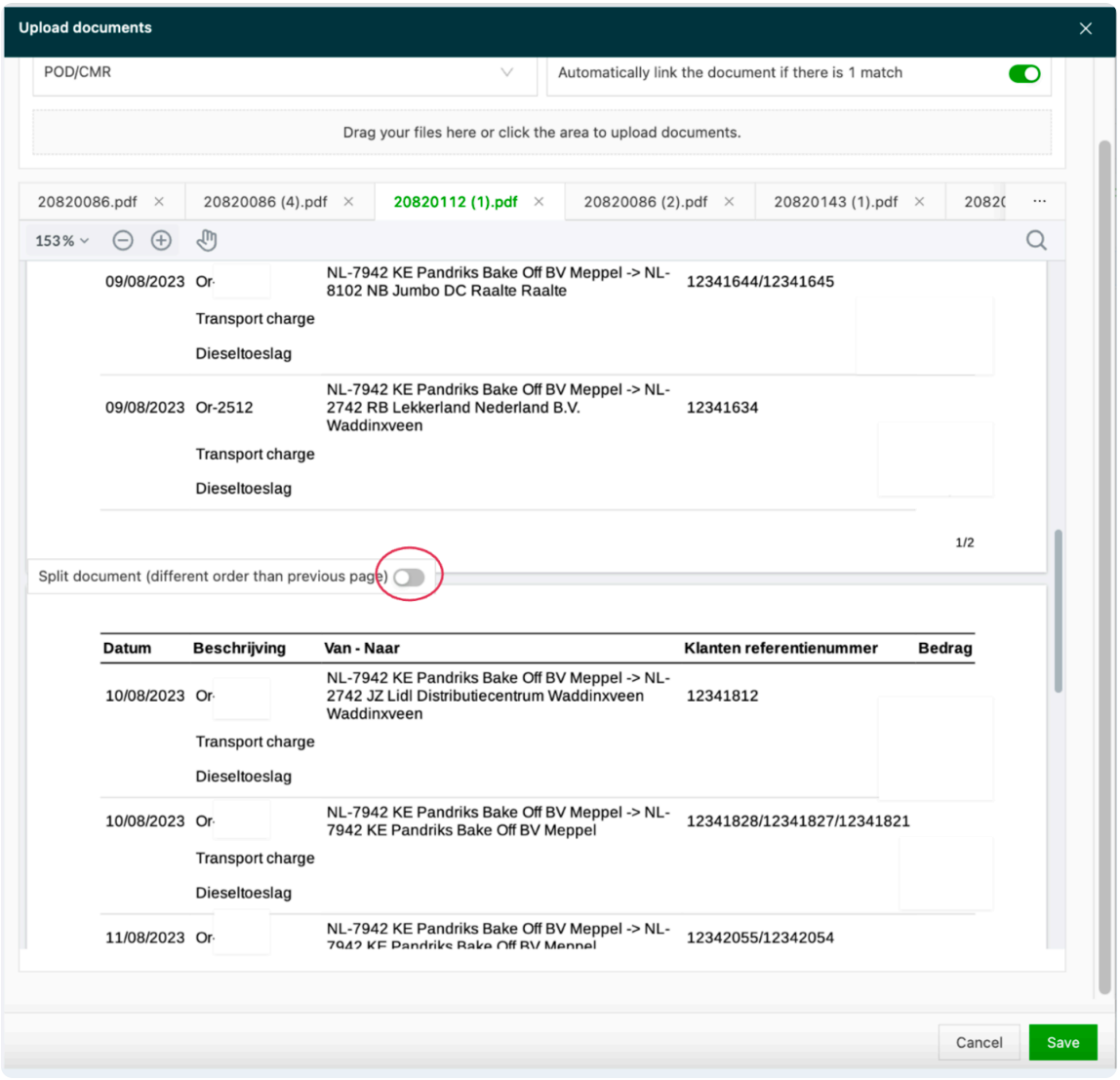


Upload documents from a computer

To upload documents, either drag and drop them or select them from a folder on the computer.



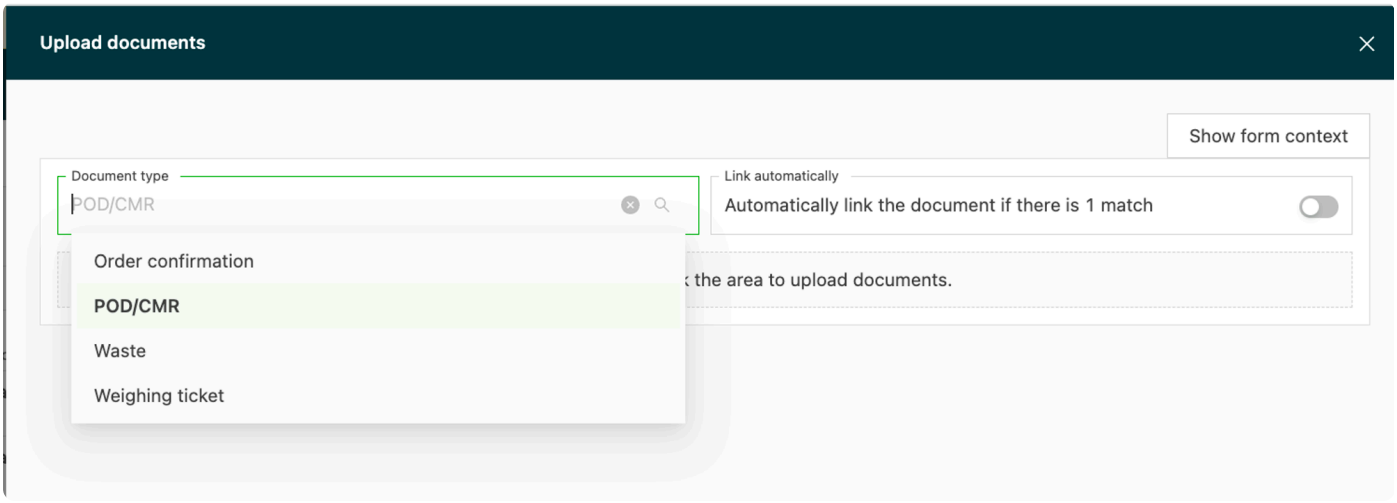
Once uploaded, each PDF document is shown in a separate tab. To split a document into two separate documents, use the **Split document** toggle. The document is then split and a new tab is created. Save it.



Document types to upload

There are four document types that can be uploaded:

- Order confirmation
- POD/CMR
- Waste
- Weighing ticket

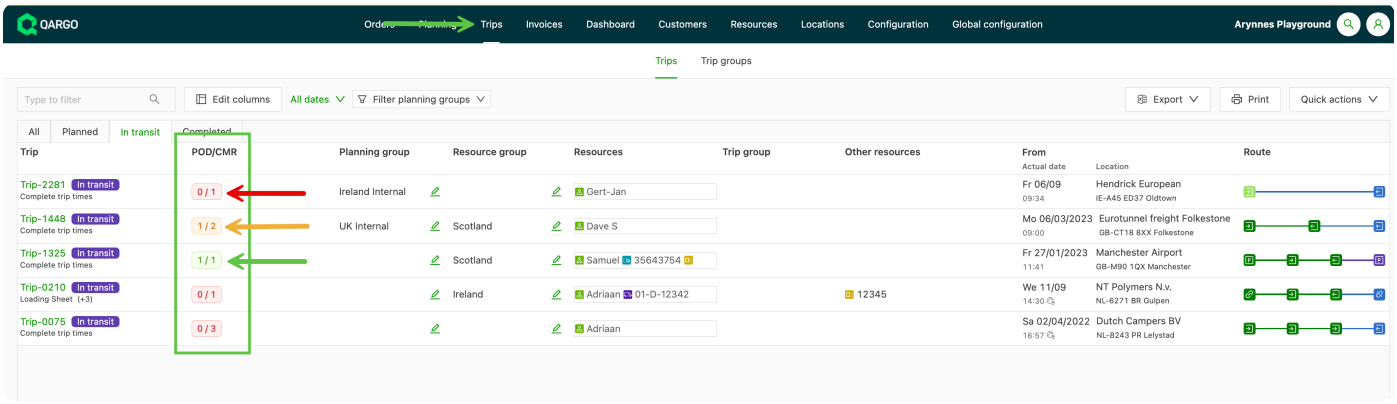


📚 If there are multiple CMRs/documents (order confirmation, waste, weighing ticket) that need to be linked to (multiple) orders, these documents can be uploaded in bulk.

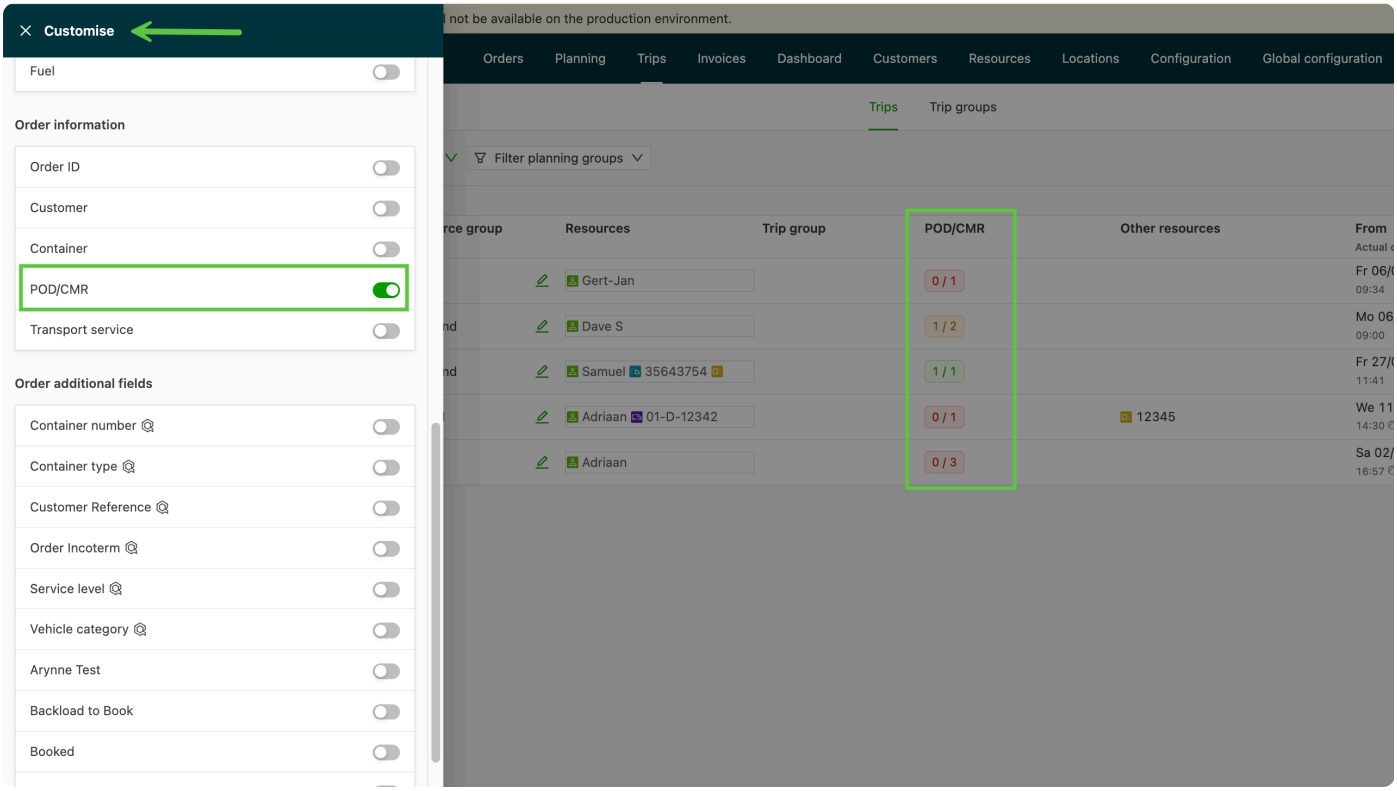
Viewing documents

It is possible to see at a glance whether the POD / CMR has been received for an order. Where multiple documents are expected, the system compares and shows how many documents have been received vs. how many were expected. A color-coded tag makes it even easier to visually identify any orders with missing documents.

- Red: no documents received
- Orange: some documents received / documents still outstanding
- Green: all expected documents received.



Tip: The POD/CMR column must be toggled on under **Edit columns**



Preview documents in orders and stops

- An inline document preview panel is now available on the **Stops** tab and the **Orders** list.
- Clicking a POD or document tag on a row opens the document in a panel beside the table, with no need to navigate to a separate page.
- The panel supports configurable dock positions: left, right, top, bottom, or split view.
- *AI Document Intelligence* data (signed status, ZIP codes, weight, reference numbers, document type) appears in the panel alongside the document.
- Supported file types: PDF, images, Word, and Excel. Email attachments open in the existing mail thread viewer.

Use cases

- Document verification teams checking PODs before billing can review signatures and reference numbers without losing their place in the stop list.
- Operations staff processing delivery confirmations can scan document contents and AI-validated fields in a single view.

Terminology

Term	Definition
Inline preview panel	A resizable side panel that displays a document beside the table without requiring full-page navigation
Split view	A dock position that places the table and document panel side by side simultaneously
AI Document Intelligence	Automated extraction of document metadata (signed status, ZIP codes, weight, reference numbers, document type), displayed as validation tags
POD	Proof of delivery: a document confirming that goods were received at a stop

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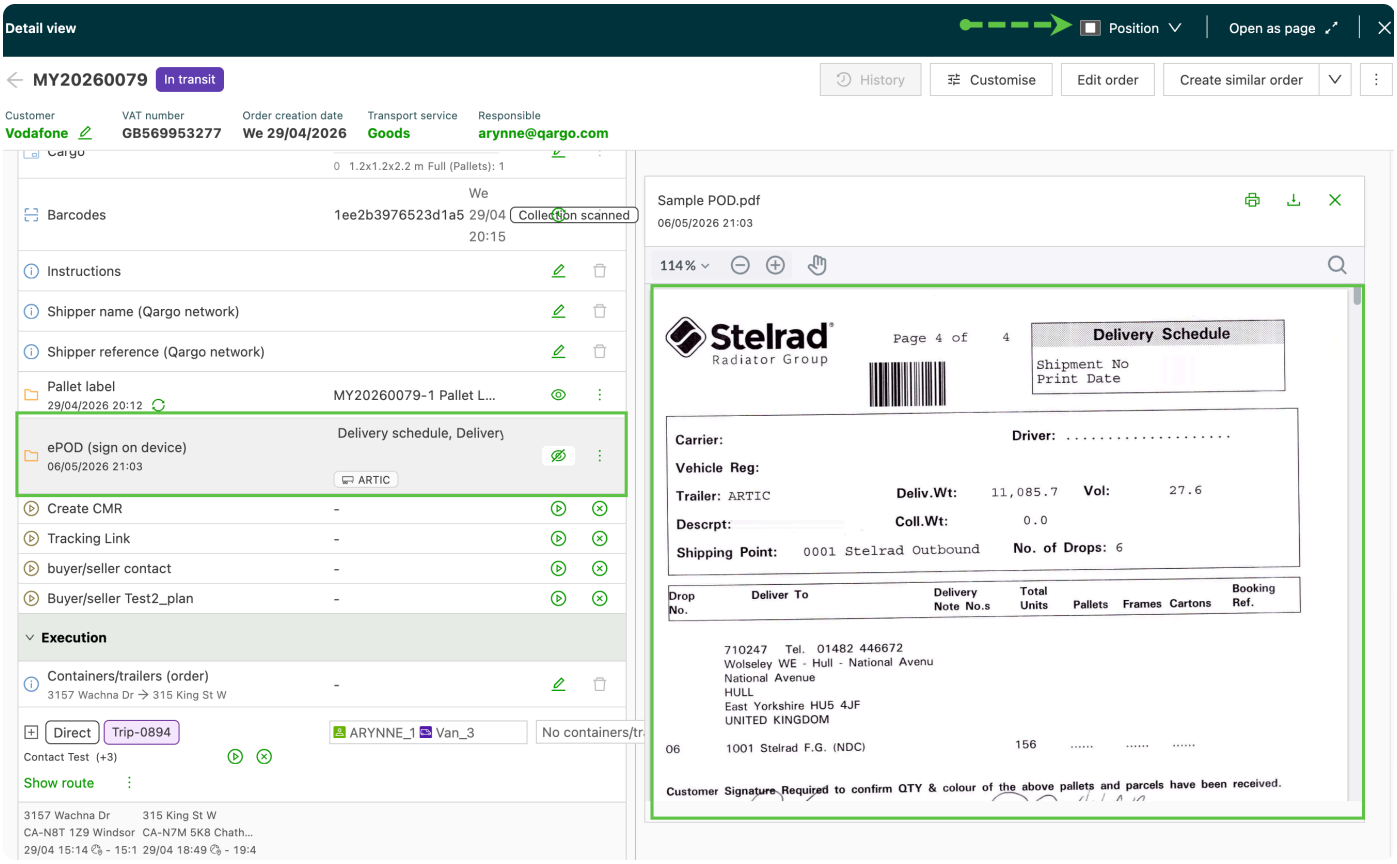
Accessing the inline preview panel

From the orders list

1. **Navigate** to **Orders > Orders list view**
    1. Make sure the POD/CMR column is toggled on under **Edit columns**
2. **Click** a document tag on an order row. The preview panel opens beside the table.
3. **Review** the document and *AI Document Intelligence* data.

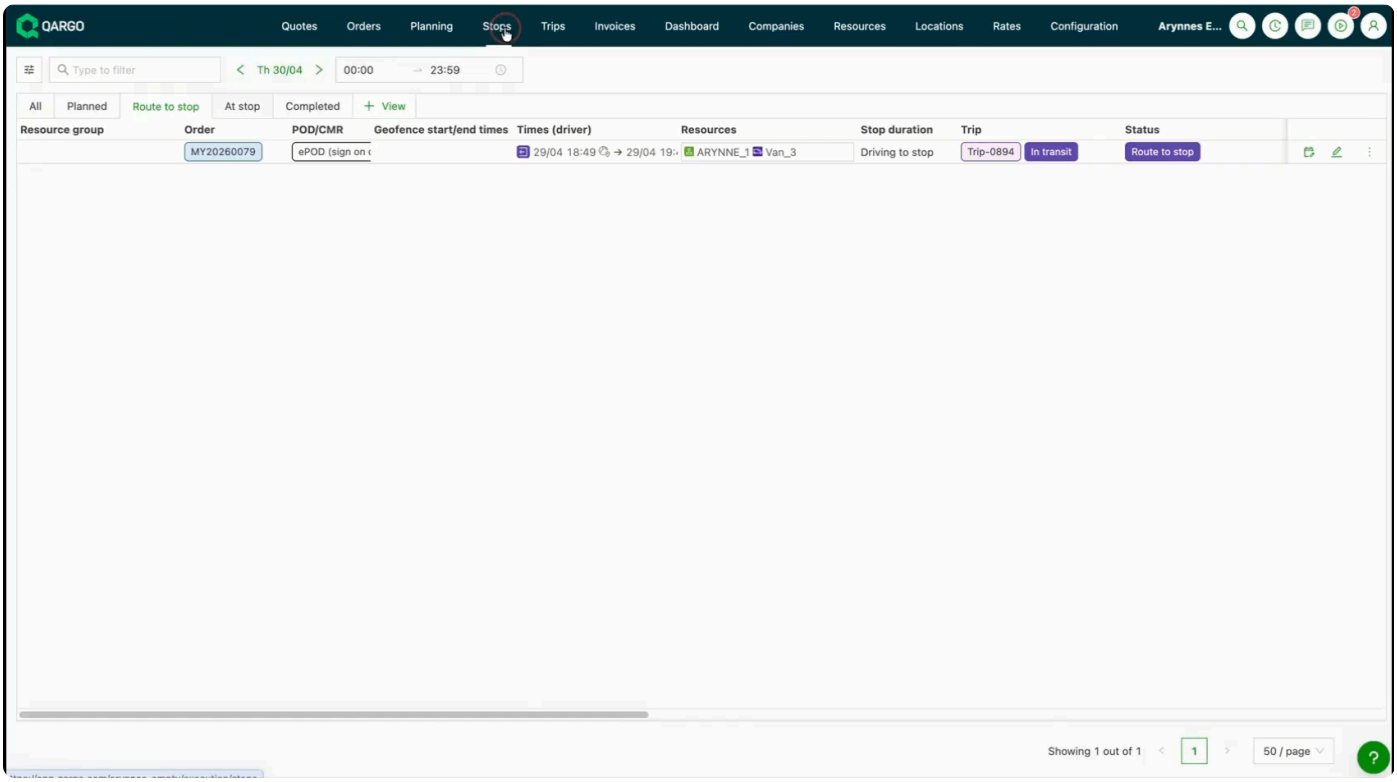
From the stops tab

1. **Navigate** to **Stops**.
2. **Click** a POD or document tag on any stop row. The preview panel opens to the right of the table.
3. **Review** the document content. The *AI Document Intelligence* section below the document shows the extracted fields: signed status, ZIP codes, weight, reference numbers, and document type.
4. **Navigate** between multiple documents on the same stop using the arrow controls inside the panel.
5. **Close** the panel by clicking the X icon to return to the full-width **Stops** table.



Adjusting the panel position

1. **Click** the dock position icon in the panel header.
2. **Select** one of the available positions: **Left**, **Right**, **Top**, **Bottom**, or **Split view**.
   - **Split view** keeps both the table and the document visible simultaneously at full width.
3. **Drag** the panel divider to resize the panel to the preferred width.



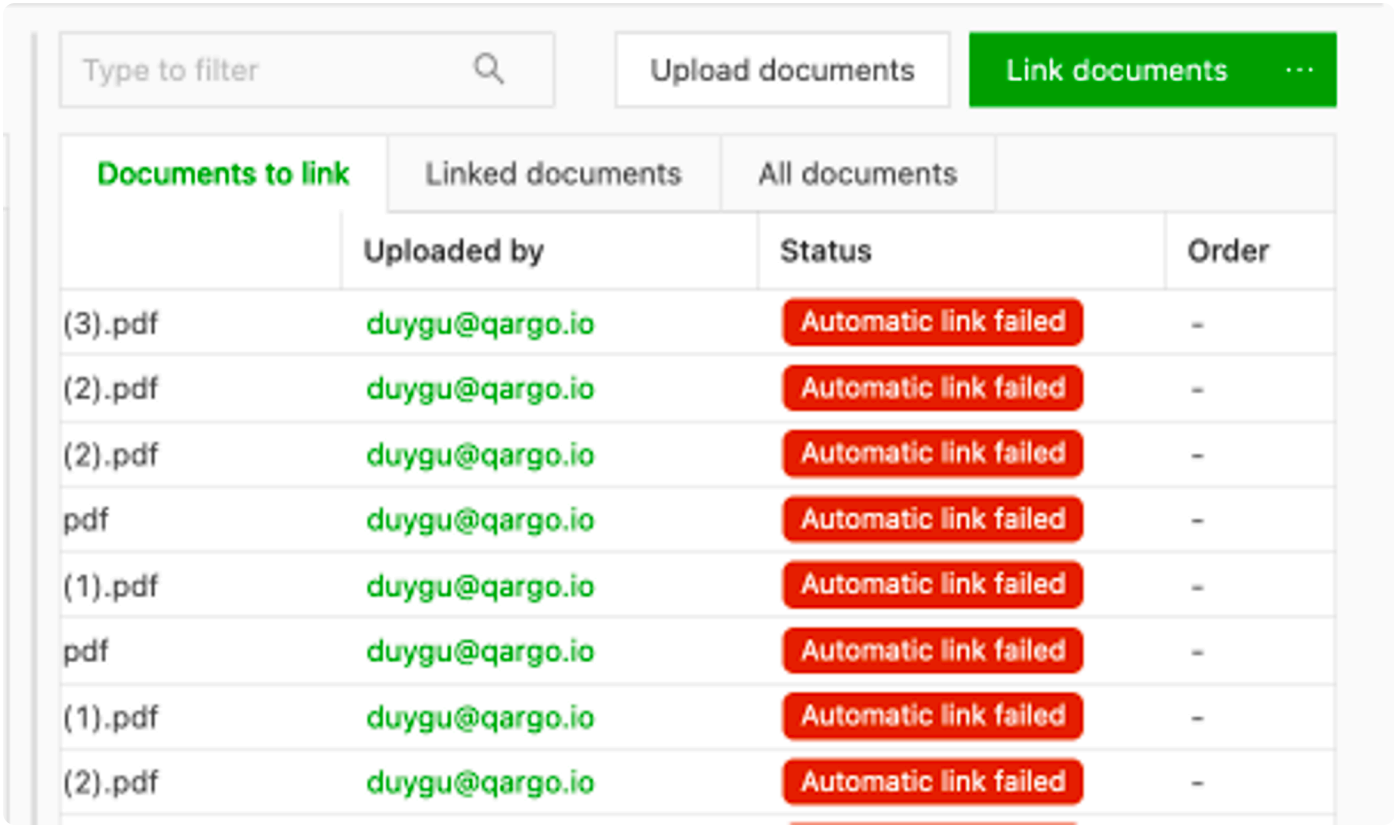
Troubleshooting

Issue	Resolution
The **Recently visited** list is empty	No operational objects have been opened in the current browser session. Navigate to any order, invoice, or load to start building the list.
A recently opened object is not appearing in the list	The list holds a maximum of 20 items. Older records are removed as new ones are added. Only objects opened as drawers, modals, or full pages are tracked; quick-preview mode is not included.
The list does not carry over between browsers	The **Recently visited** history is browser-specific. Switching to a different browser shows a separate or empty history.
Audit log access is no longer in the top navigation	The audit log button previously located in the top navigation bar has been replaced by the **Recently visited** icon. Access audit logs via the **User menu** instead.

Automatically link documents

When selecting the document type, there is an option to automatically link the document if there is 1 match.
Example:

- If the order number matches the document name, the document is automatically linked to that order.
- Use the toggle to activate this option.
- If the automatic linking fails, the status of that document changes to **Automatic link failed**; link it manually.

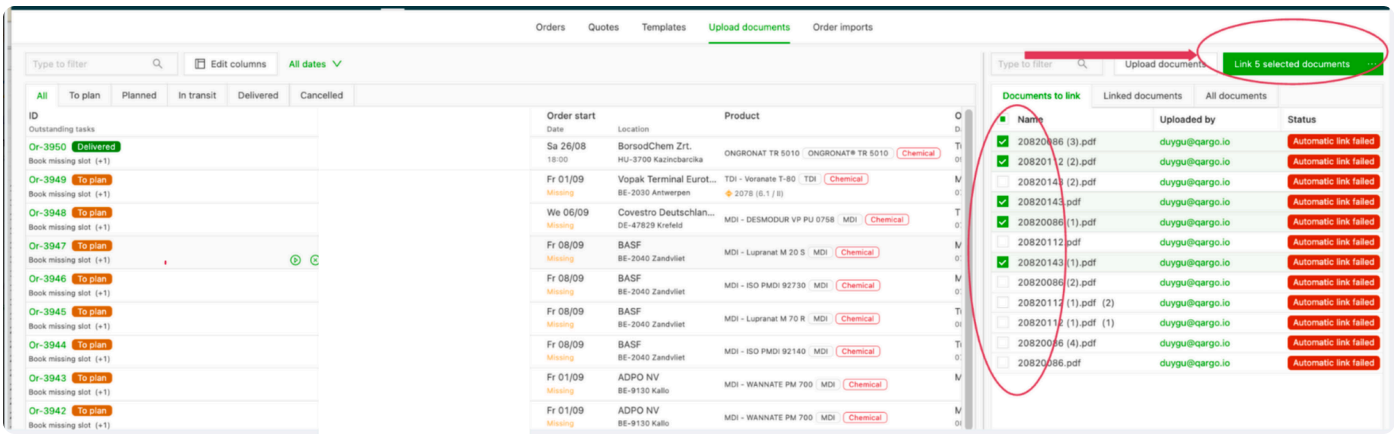


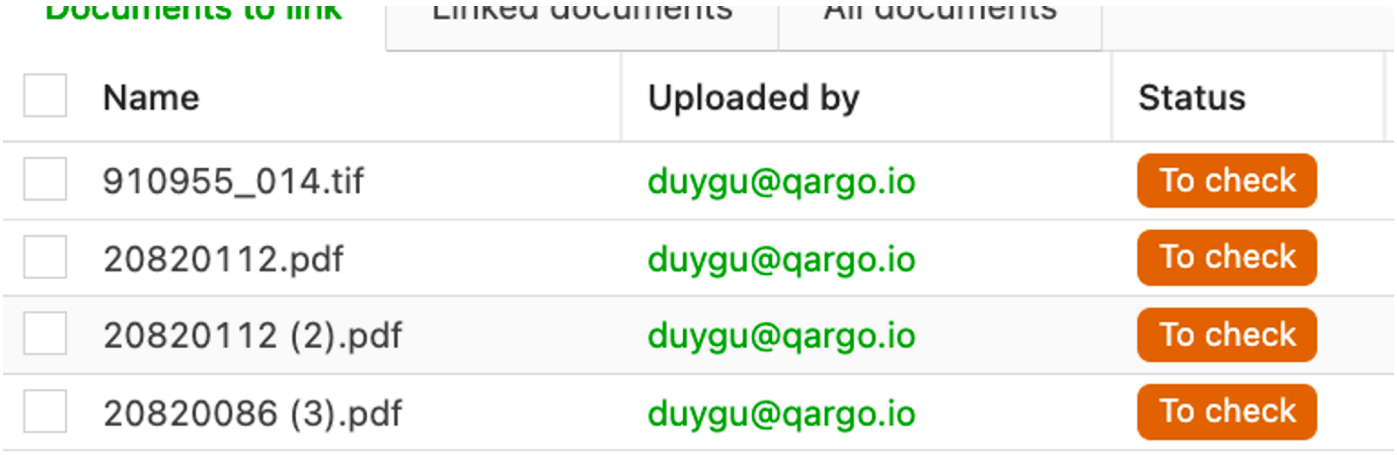
📚 **Tip: multiple references in one field**
If a reference field contains several values separated by `,` , `;` , `/` , or `-` (e.g., customer reference `6650852, 1000` or container no. `ABCDEF / GHIJK`), Qargo now matches each value as a separate exact reference when scanning documents. A POD that only prints `6650852` or `GHIJK` is still auto-linked. A comma without a trailing space (e.g., `Ref 1,000`) is treated as a thousands separator and is not split.

Manually link documents

Once the documents are correctly split, they can be linked to the orders.

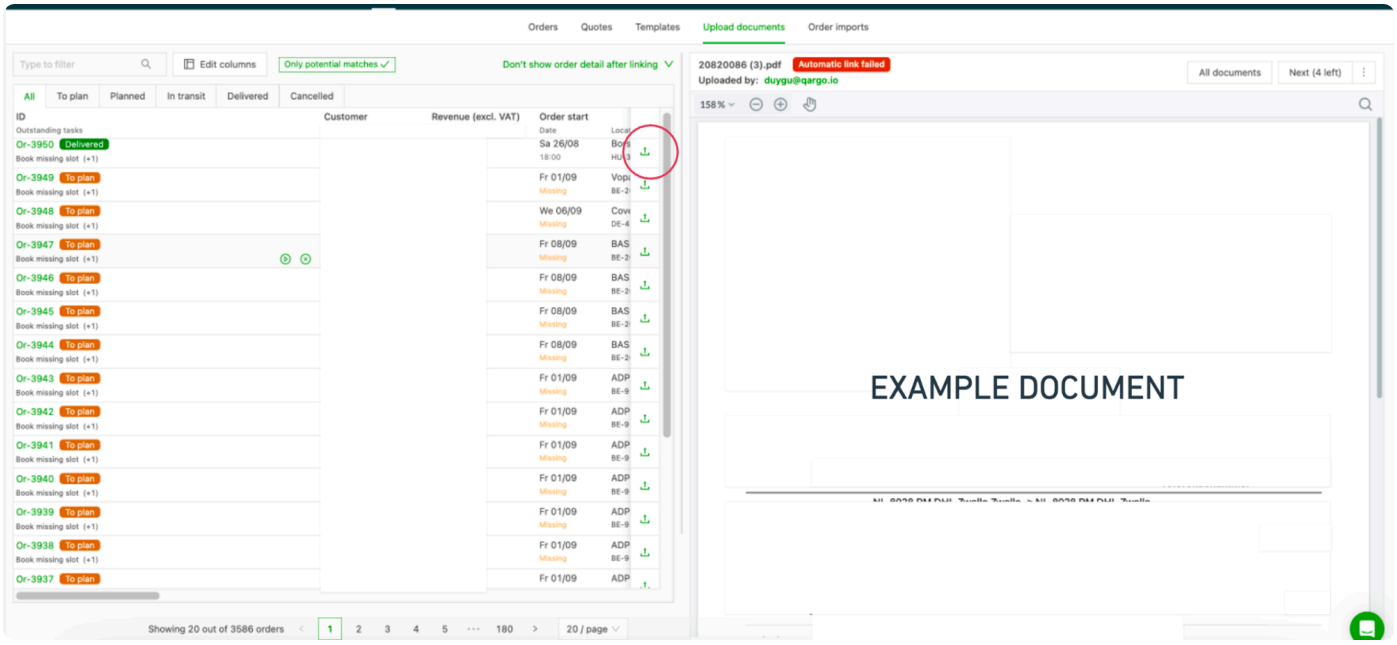
- Select the documents to link to one order
- Click **Link the (number) documents**.



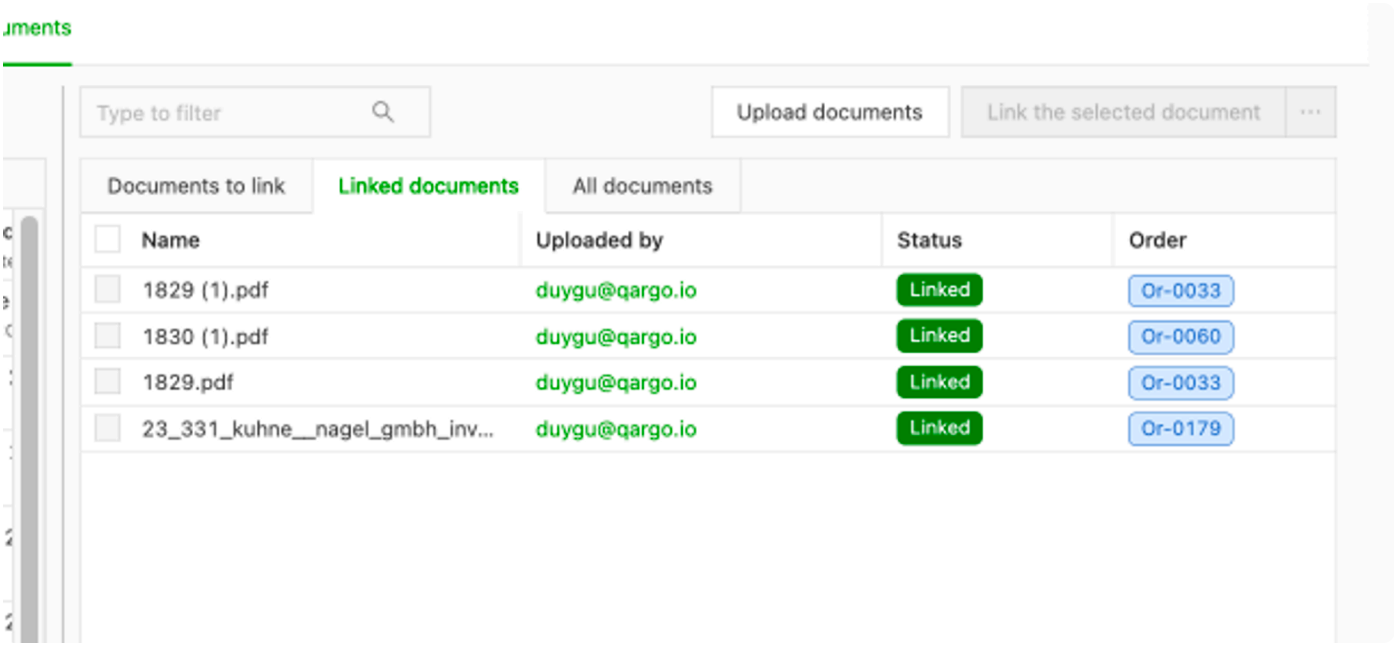


Once linked, a preview of the document and the order list are shown side by side.
Here the document can be viewed and the related order found.

- Link the document to the correct order using the upload button shown on the right side of that order line.
- Once linked, the next document appears on the preview page.
- Repeat until no documents are left to be linked. (The top right corner shows how many documents are left to be linked.)



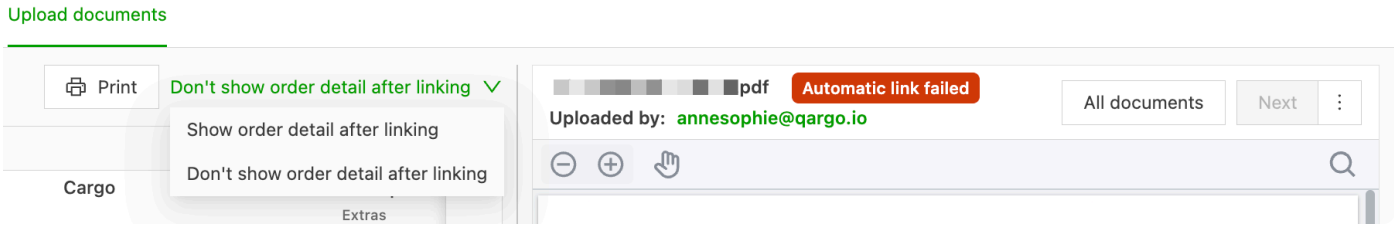
Linked documents shows an overview of all linked documents with the necessary details (who uploaded each document, which order it is linked to, etc.).



After the linking has been performed, all the linked documents and the order numbers linked to them can be viewed.

Show the order detail after linking

- Choose to show (or hide) the order detail after linking.
- Use the dropdown menu to select the option
- When the order detail is set to show after linking, the order page opens automatically once the document has been linked.



📚 A log is kept when users download/print a document. This helps planners, and also customer portal users, avoid printing the same document twice.

