Data import: Importing driver data

A comprehensive guide to importing driver data, which allows for the bulk creation of both internal and contract carrier drivers. This is a critical step for preparing the Qargo system for dispatch.

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Importing driver data allows for the bulk creation of drivers, both internal drivers and those belonging to contract carriers. This is a crucial step in preparing the Qargo system for dispatch and order management. This article outlines the specific requirements, best practices and common issues related to importing driver data.

📖 Key terminology

For clarity throughout this guide, the following terms are defined.

- **Driver:** An individual who operates a vehicle for transport jobs.
- **Internal driver:** A driver directly employed by the company.
- **Contract carrier driver:** A driver employed by a contract carrier.
- **Contract carrier name:** The name of the company the driver is linked to. This must be an exact match to a company already in the Qargo system.

✅ Critical import requirements for drivers

Before importing driver data, the following requirements and warnings must be considered to ensure data integrity.

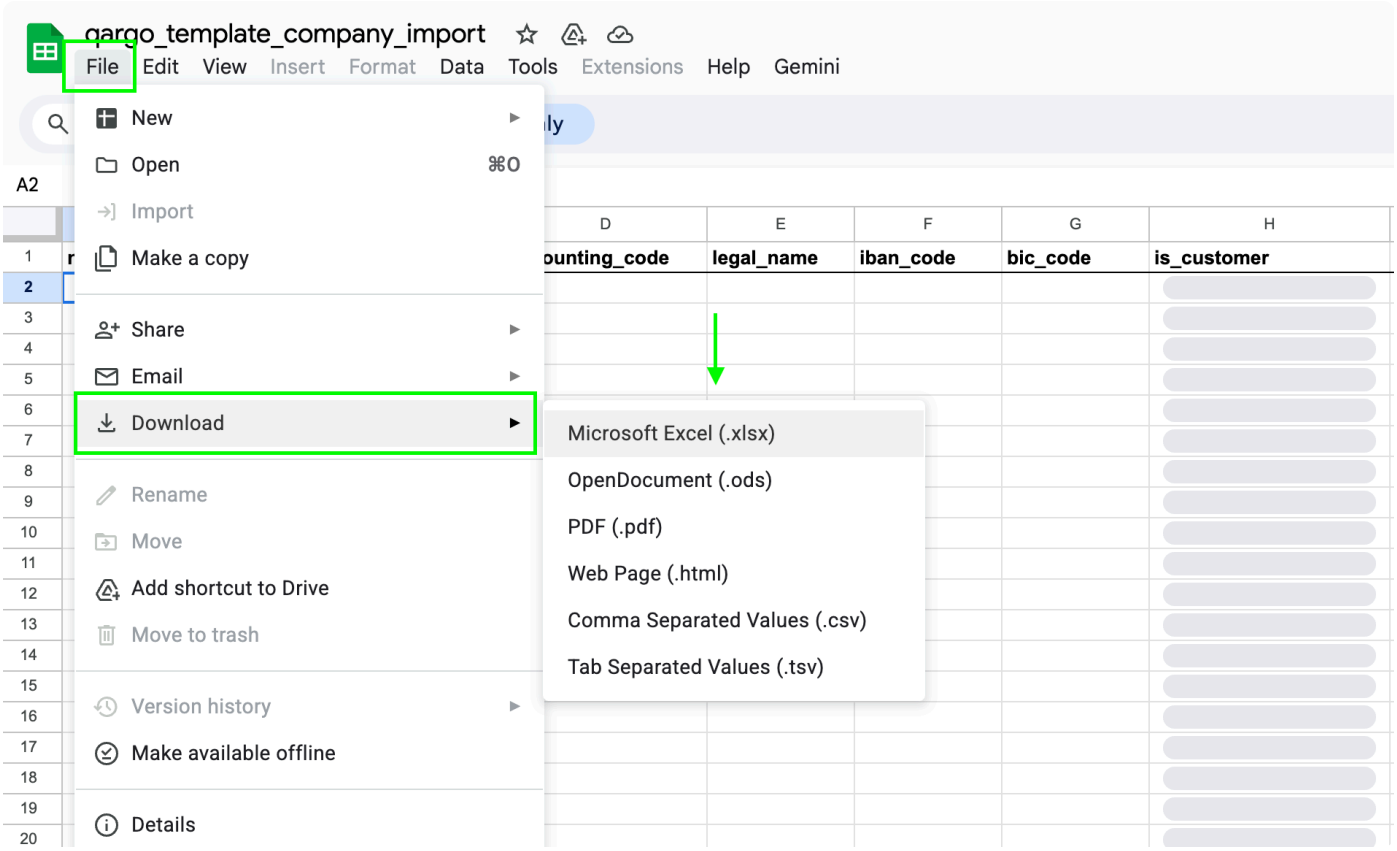
- **Contract carrier prerequisite:** Before a driver belonging to a contract carrier can be imported, the contract carrier's company record **must** already exist in the Qargo system. The import will fail if the specified contract carrier cannot be found.
- **Mandatory fields:** The **Full name** is a mandatory field. Qargo identifies existing drivers primarily by their **Full name.** An import will fail if this is left blank.

🛠️ Step-by-step data import process

Step 1: Download the template

A specific spreadsheet template is available to upload driver data. **To be able to edit and upload the data, a copy of the template must be downloaded:**

1. Click the link: Driver data import template
2. Once the template opens, go to **File** and select **Download**
3. Save the template **(in .xlsx or .csv format)** to the computer and begin entering the company data.



📚 Always use a **blank template** downloaded directly from here or provided by the Qargo team. Reusing an old template may lead to import errors.

Step 2: Fill in the Excel template

Open the template and populate it with the required data. The template contains column headers that correspond to the fields in Qargo.

- **Required fields:** Make sure to fill out all the required fields (a comprehensive list of required fields can be found in the next section of this article). An import will fail if these fields are left blank.
- **Formatting:** Close attention should be paid to the specified data format (e.g., dates, numbers, text).

Step 3: Submit for upload

1. **During onboarding:** Work directly with the **onboarding manager** to upload the initial business data. The onboarding manager will guide the process and ensure a successful import.
2. **After onboarding:** For all future data updates and imports, contact the **account manager**. The account manager will assist with the upload process and provide ongoing support.

📝 Details of the driver import template

The following provides a detailed, field-by-field explanation of the Excel template for driver import, including data formats, required fields and best practices for populating each column.

Column name	Required/optional	Remarks	Example
name	Required	Driver name displayed in Qargo	Steve Johnson
code	Optional	Unique code	12
first_name	Required		Steve
last_name	Required		Johnson
phone_number	Optional		+334717727
date_of_birth	Optional		27/12/1991
email_address	Required if the driver mobile app will be used.		steve.johnson@qargo.io
note	Optional		
subcontractor_company	Optional		
archived	Optional		TRUE or null
locale	Optional	Driver's language	en
custom_fields__example	Optional	To import custom field values. Remark: the format uses a double underscore (`__`) to connect the prefix **custom_fields** to	
absence_planner_object_id	Optional		TRUE or FALSE
absence_planner_active	Optional		
generic_object_id	Optional		
generic_active	Optional		TRUE or FALSE
generic_integration_code	Optional		
sage_hrm_object_id	Optional		
sage_hrm_active	Optional		TRUE or FALSE

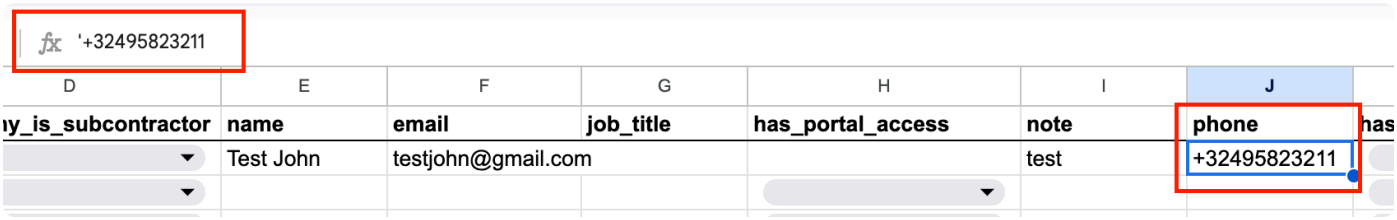
🔎 Troubleshooting common driver import errors

This section addresses specific errors that may arise during the import of driver data.

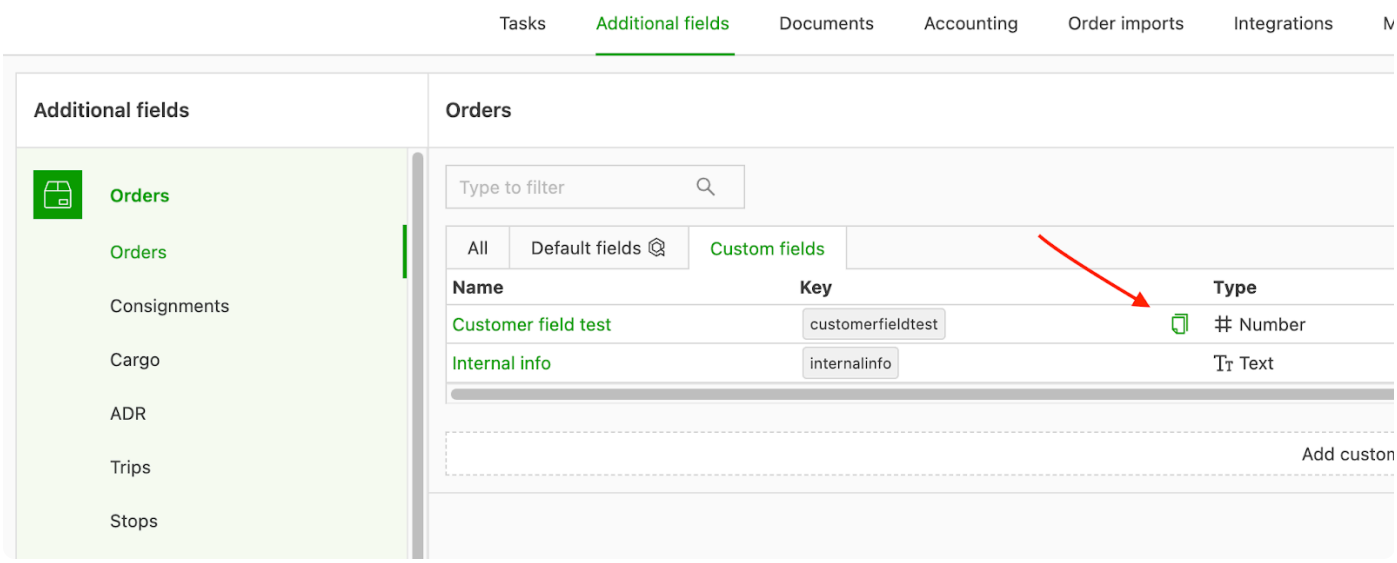
- **Contract carrier record not found:** This is the most common error for contract carrier drivers. It occurs when the **Contract carrier name** in the template does not exactly match an existing company in Qargo. The contract carrier must exist in the system before its drivers can be imported.
- **Duplicate drivers:** If two drivers have the exact same **Full name**, it can cause conflicts.
- **Sheet name:** The sheet in the Excel template file must be named exactly **'Import'**. Any other name will cause an error when uploading the file.
- **Case-sensitive column headers:** Column headers must be entered with the correct casing (e.g., `vat_number`, not `VAT_number`). Using incorrect casing will cause the data in that column to be silently ignored and not imported, as the

system will not recognize the header.

- **Leading apostrophe errors:** Data in a cell cannot begin with an apostrophe (’). If an apostrophe is used, the system will not recognize the value, and an error may occur. **This rule is waived only if the article explicitly instructs that an apostrophe should be used for a specific field.**
- **Phone number format:** The phone number should consist of the country code followed by the number without any spaces (e.g., **+3212345678**). In Excel/Google Sheets, the format of the column should be **Text**, and in the formula cell a ’ should be added before the country code and phone number (i.e., ‘**+3212345678)** for the phone number to show up correctly**.** See the example below:



- **Custom fields:** The column name must follow the convention **custom_field__[ID]** (remember to keep the double underscore to connect the prefix **custom_field** to the unique field ID), with the specific ID retrieved from the Qargo organization settings. Click the copy button next to the custom field to copy its ID:



✨ Best practices for importing drivers

To ensure a smooth and accurate import, consider the following best practices.

- **Ensure contract carrier data is complete:** Before attempting to import contract carrier drivers, verify that all associated contract carriers have already been successfully imported into the system as companies.
- **Maintain data consistency:** Pay close attention to the **Contract carrier name** and **Code** fields. Any spelling mistakes or different capitalization will cause the link to fail.
- **Use the Code field:** Although optional, using the **Code** field is highly recommended. It provides a reliable way to update driver records and prevents conflicts that can arise from duplicate names.

➡️ What to do next

Once drivers have been successfully imported, they can be assigned to vehicles and combinations. The next logical steps include:

- **Importing vehicles:** The fleet can be populated by importing vehicles owned by the company or its contract carriers.
- **Configuring combinations:** Drivers can be linked to vehicles in bulk by creating combinations.

📈 Use cases for driver import

Importing driver data is an invaluable tool for several key business processes.

- **Initial fleet setup:** The primary use case is to populate a Qargo tenant with an entire fleet of drivers, including both internal employees and regular contract carrier drivers.
- **Onboarding a new fleet:** When a new business unit or fleet of drivers is acquired, their details can be added in bulk to the Qargo system.