Tasks - Contact tasks: Viewing and sending documents

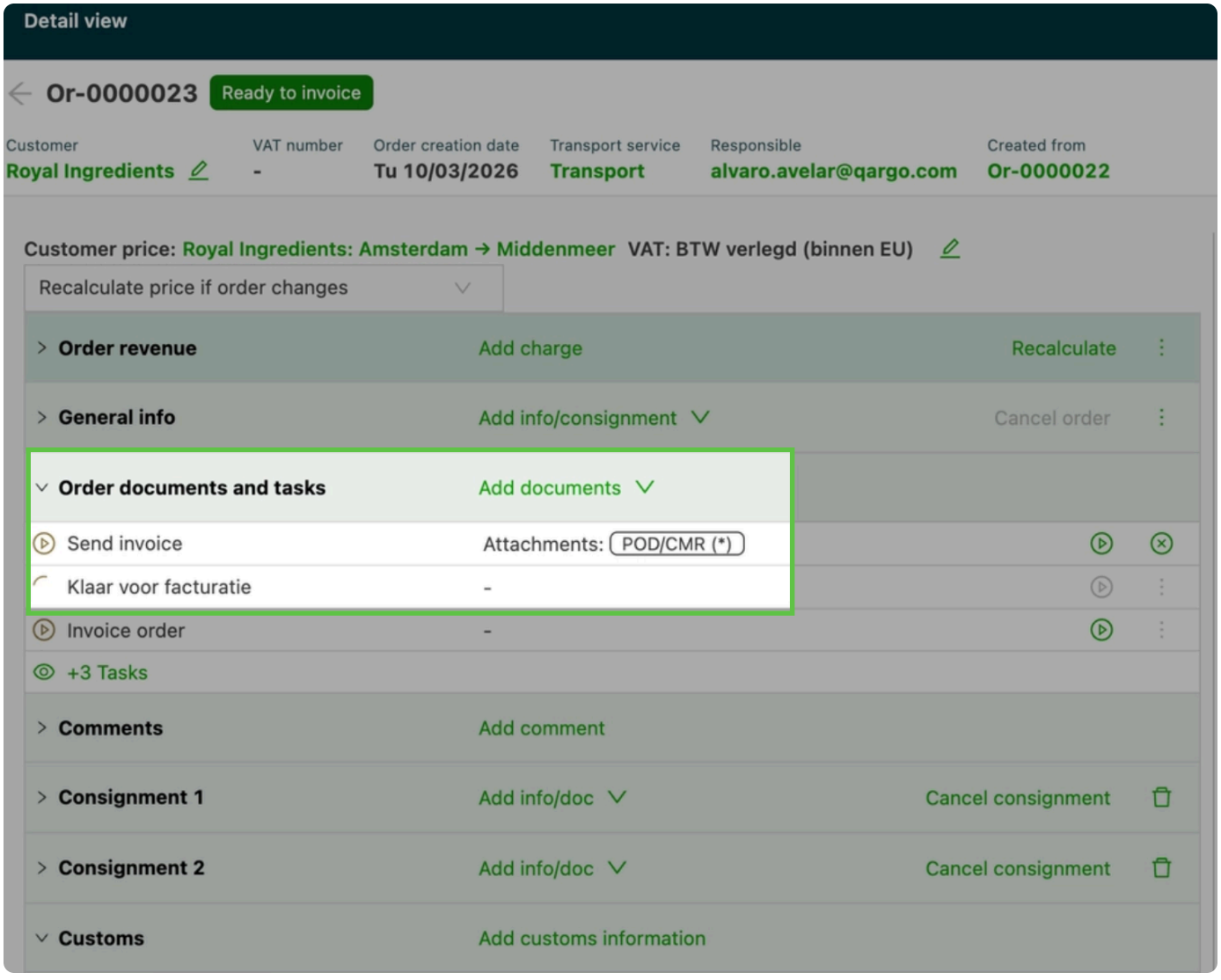
When working with contact tasks, users can see and act on which document types will be sent and which are required, directly on the task detail page. This helps users verify their configuration and make sure all required documents are in place.

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Introduction

Contact tasks often trigger automated document sends, such as sending an invoice with a POD or CMR attached. When working with **Contact tasks**, the document types that will be attached to the email are shown directly in the task row, before the task is executed.

- Enhanced visibility lets users quickly verify what will be sent without having to open each individual document.
- A visual indicator (*) shows whether the document is required



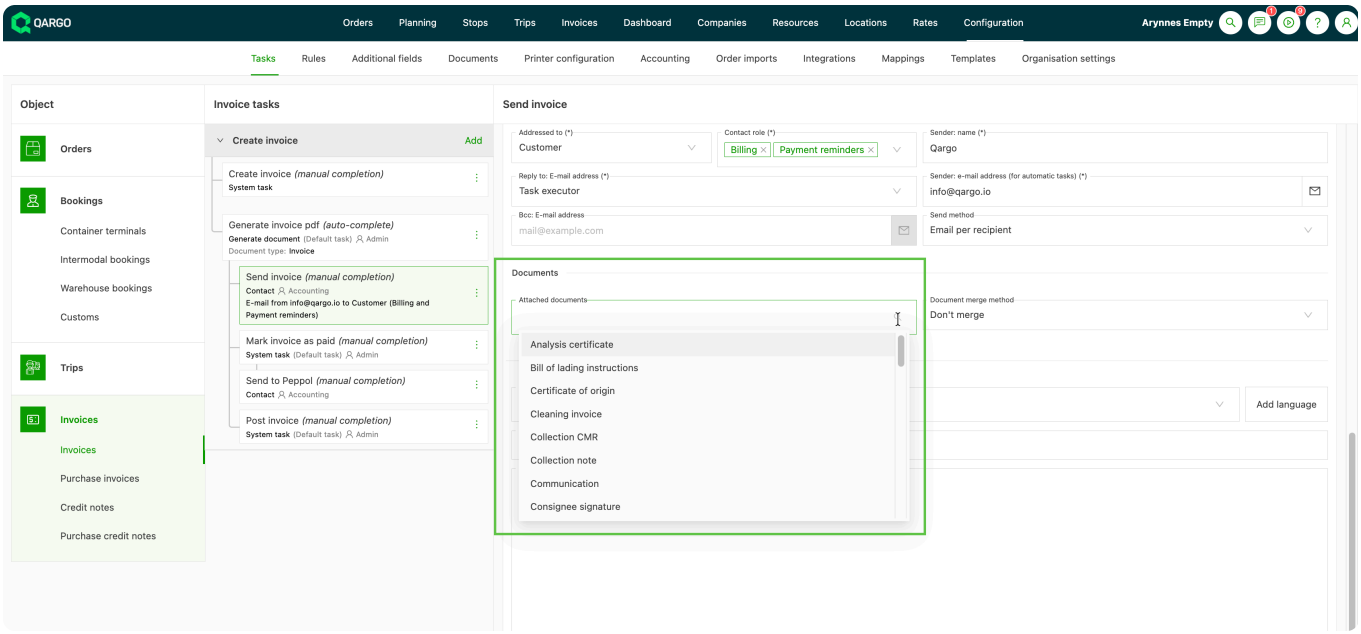
Terminology

Term	Description
Task	An action item within Qargo assigned to a load or order, such as generating or sending a document
Contact task	A task that sends a communication (email, EDI, etc.) to a configured contact
Generate document task	A task that creates a PDF document (e.g., a CMR or loading sheet) based on order data
Send document task	A task that sends a generated document to a specified recipient
Document type	A category of document in Qargo (e.g., CMR, Invoice, POD, Load sheet)
Attached documents	Documents configured to be sent along with the email in the task settings
Required (*)	The document type is flagged as required in the task configuration

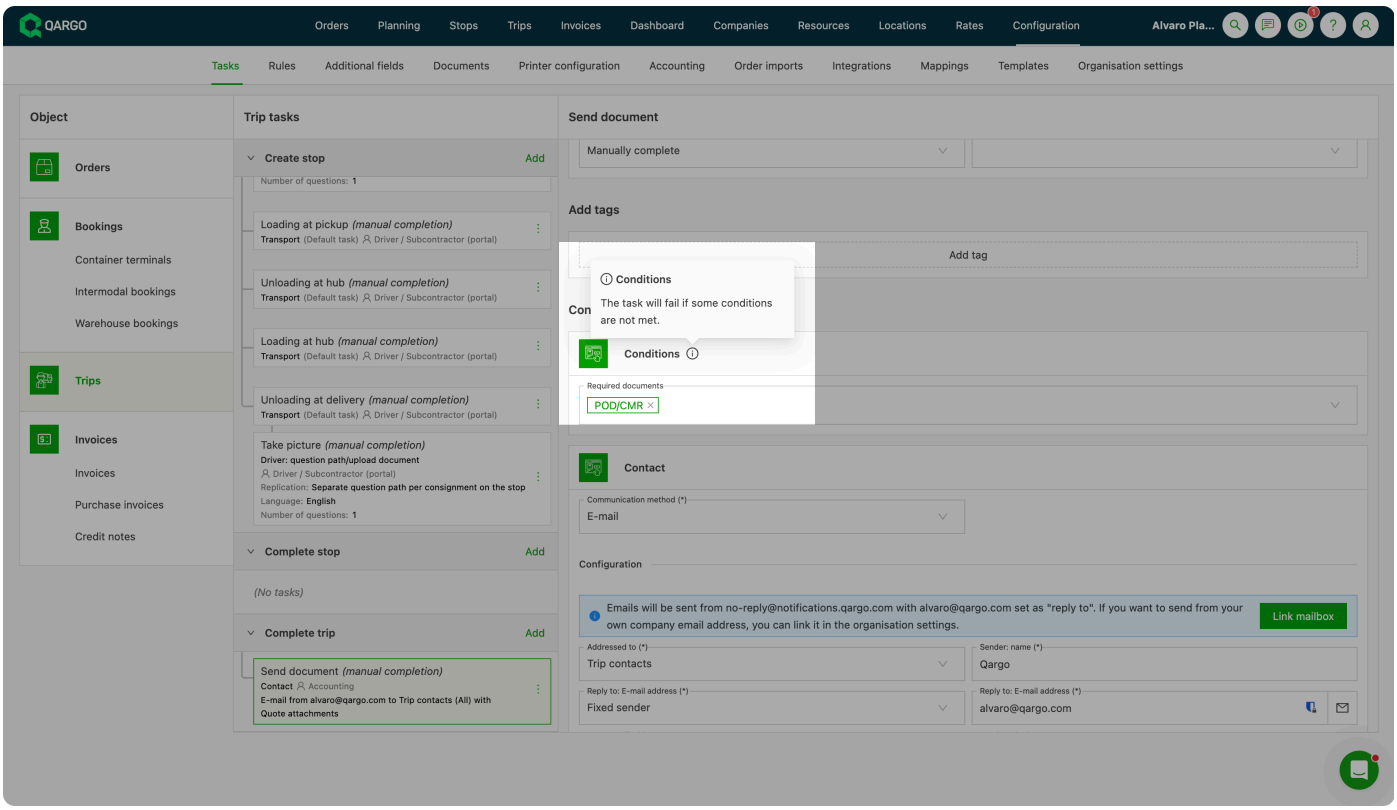
Before starting

To show document types on a contact task, the task must have **Attached documents** configured in its workflow settings. If no documents are configured, nothing appears in the task row.

- Navigate to **Configuration > Tasks**
- Open the contact task from the relevant workflow (e.g., **Invoices > Send invoice**)
- Under **Configuration**, select the documents that should be included with the email.
- Under **Conditions > Required documents**, mark any that must be present before the task can be executed.
- In the **Documents** panel, select from the drop-down the documents that should be sent with the email



- Under **Conditions > Required documents**, mark any that must be present before the task can be executed.

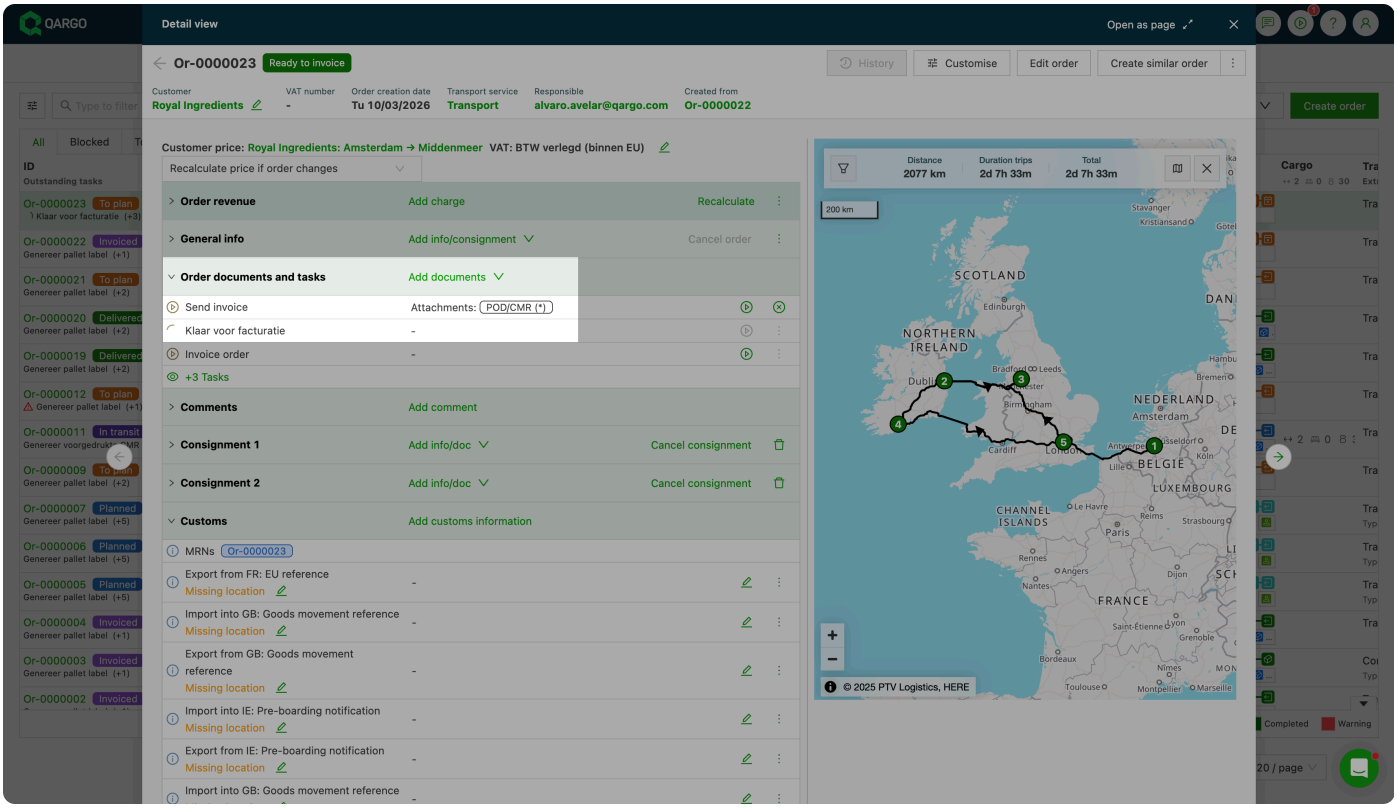


See Tasks – Add workflow tasks for more on setting up contact tasks.

What is shown

On any detail page where a pending contact task is shown (such as an order, invoice, or customer page), the task row displays an **Attachments** label followed by the configured document types:

- **Document types without a marker:** included in the email if the document is available.
- **Document types marked with (*)**: flagged as **required** in the task configuration. These should be present before the task is executed.



How to view document types on a contact task

1. Open an entity where the contact task applies, for example an **active order** or an **invoice** in the correct workflow stage.
2. In the **Order documents and tasks** section (or the equivalent on the entity), locate the pending contact task.
3. Read the **Attachments** label directly on the task row. The document types are shown inline, with **(*)** marking any that are required.

Example: The **Send invoice** task configured with *POD/CMR* as an attached and required document shows **Attachments: POD/CMR (*)** directly in the task row. This confirms that the POD/CMR will be sent along with the invoice and is required before sending.

Generating and sending a document in one step

What is this feature?

- When a **Send** document task is completed and the document has not been generated yet, the system automatically generates it first, combining both steps into a single action

Why was it built?

- Previously, two separate task completions were required: generate first, then send. This created extra steps and the risk of accidentally skipping the generate step before trying to send.

How does it work?

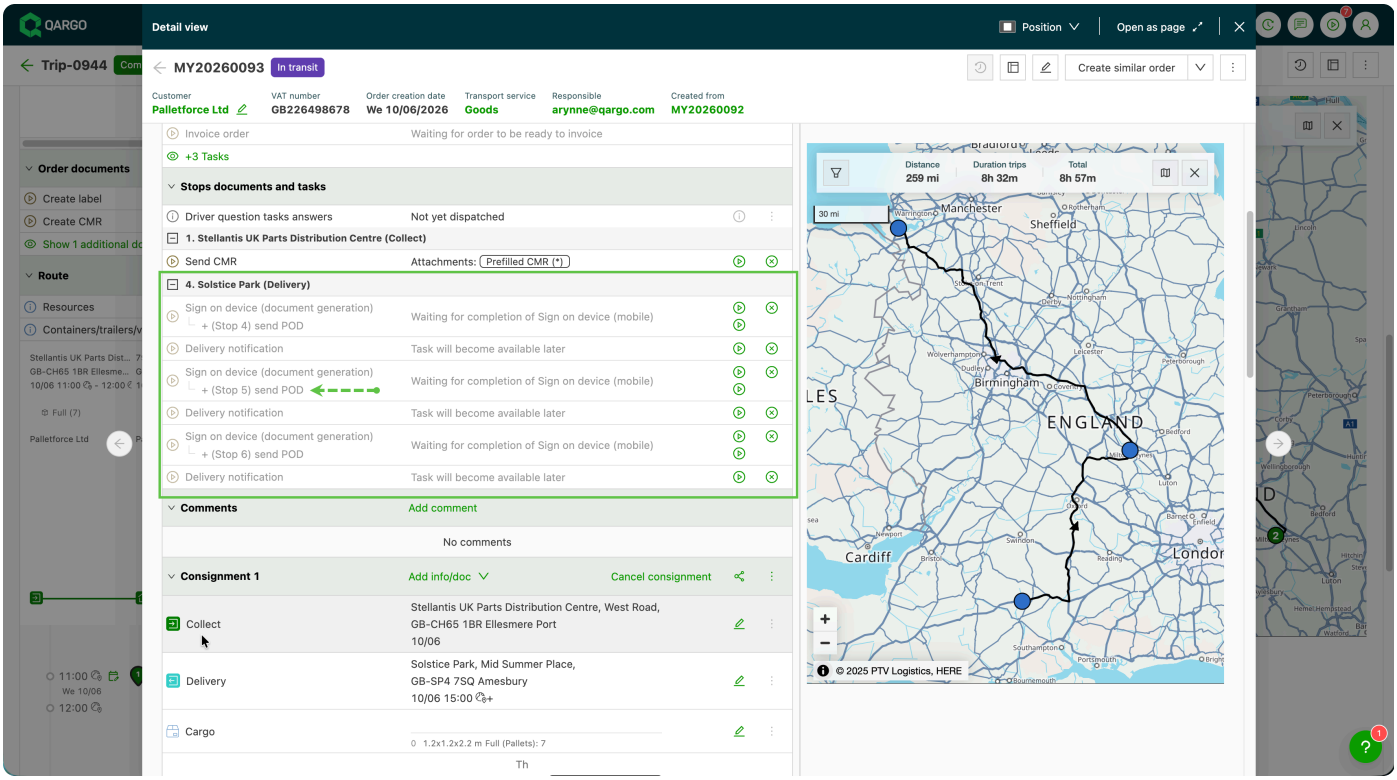
- Completing a **Send** task triggers automatic document generation if the document does not exist yet. The document is then sent in the same action. If the document was already generated, the existing version is sent without regenerating it.

Generate and send workflow

The combined generate and send functionality is active automatically for all Send document tasks. No configuration is required.

Completing a Send task

1. Navigate to the load or order containing the document task
2. Open the **Tasks** panel
3. Select the **Send** action on the relevant document task



If the document has not been generated yet, the system generates it automatically before sending. No separate generate step is needed.

> 📚 If the document was already generated before the **Send** action is triggered, the existing version is sent without regenerating it. To send a new version, regenerate the document first, then complete the Send task.

Reviewing the sent document

Once both steps are complete, the task is marked as done. The document is available in the **Documents** section of the load or order.

Troubleshooting

Issue	Resolution
The recipient did not receive the document	Check that the recipient email address is configured correctly in the task settings or document template.
The task remains open after using the Send action	Refresh the page and check the task status. If it remains open, contact Qargo support.
The wrong document version was sent	If a document had already been generated, that version was sent. Regenerate the document and complete the Send task again to send the updated version.
The Send action is not visible on the task	Confirm that the task is a Send document task type. Generate-only tasks do not include a Send action.

Related articles

- Tasks - What, why and how?
- Tasks - Add workflow tasks