

[\(/s\)](#)

How can we help?

documents

Search

[GETTING STARTED](#)

[\(/S/TOPIC/OTO5G0000010YD8W...](#)

Documents Overview

🕒 **Apr 20, 2022** · Knowledge

With the **Documents** module, you can quickly access documents for your entire account or create fleet documents that do not have to be associated with any record in the system.

Terms Defined

Fleet Document or **Shared Document** - Any document added to Fleetio that is not tied to a particular record type such as a Contact, Service Entry, Vehicle, Vendor, etc.

Permissions

By default, all users in Fleetio will have **View Fleet Documents** permission. When a new Fleet Document is added users will be able to View and Download, but will not be able to Edit the document. Users with the **Manage Fleet Documents** permission can Delete and Rename documents, or add a Description.

[Contact Us](#)

Documents
 Full
 Some
 None

View Fleet Documents
This would allow users to view any unassociated document

Manage Fleet Documents
This would allow users to manage any unassociated document

For documents associated with records (e.g. Vehicles or Contacts), current module permissions via **Role** and **Record Sets** will control the access and functions that users can perform.

Overview

The screenshot shows the 'Documents' interface. At the top, there are tabs for 'All Documents' (1) and 'Demo Company' (2). A large dashed box (3) indicates where to drag and drop files for upload. Below this is an 'Actions' menu (4) with a search bar containing 'insurance' (5) and a 'Filters' button. A table lists documents with columns for File Name, Type, Uploaded, Last Modified, Location, and Vehicle. The first document is 'insurance.png' (6). To the right, a detailed view of 'insurance.png' (8) is shown, including a preview of the document (9) and metadata such as Location (Demo Company), Type (PNG Image), File Size (7.56 KB), Last Modified (08/18/2020), and Uploaded (08/18/2020 by Josh Shores).

File Name	Type	Uploaded	Last Modified	Location	Vehicle
insurance.png	PNG Image	08/18/2020	08/18/2020	Demo Company	—
Insurance Card	PDF	03/01/2019	03/01/2019	Sarah the Jeep	Sarah the Jeep
insurance.pdf	PDF	11/14/2013	04/10/2015	2011 Ford F150 Regular Cab (7M6RRR)	2011 Ford F150 Regular Cab
Insurance Card - Exp. Sept. 2014	PDF	09/25/2013	11/04/2013	Isuzu Moving Truck	Isuzu Moving Truck
Insurance Card - Exp. Sept. 2014	PDF	09/25/2013	11/04/2013	2010 Chevy HHR	2010 Chevy HHR
Insurance Card - Exp. Sept. 2014	PDF	09/25/2013	11/04/2013	B-25 (Lori Dorsey)	B-25 (Lori Dorsey)
Insurance Card - Exp. Sept. 2014	PDF	09/25/2013	11/04/2013	2010 GMC 2500 Van	2010 GMC 2500 Van
Insurance Card - Exp. Sept. 2014	PDF	09/25/2013	11/04/2013	2005 GMC 2500 Cargo	2005 GMC 2500 Cargo

- All Documents** tab will list all documents tied to record types and fleet documents
- Fleet documents will be listed under the **Account Name** tab. In the example above, Demo Company is the account name.
- Adding a document can be done via drag and drop, or with the **Upload Document** button.
- Multi-select documents via checkbox, then **Delete** or **Download** in bulk using the **Actions** menu.
- Filter** and **Search** documents.
- Click the gear icon and **Manage Columns** to control the columns shown in the table.

Contact Us

7. See the associated **Location** and **Vehicle** for the document. Under location, you'll see the Contact name, Vendor, Service Entry, etc. to which the document is attached.
8. See a small **Preview** of the document, or click to see a much larger version.
9. Collaborate with other users by leaving a **Comment**.

Manage Documents

After clicking a document, click the **Information** icon to expose document details. Use the **More Actions** button to see available options.

Due to permissions restrictions, some actions may be grayed out and unavailable. Contact your Account Administrator to adjust permissions.

Insurance Card

View →

Rename ✎

Download ↓

Delete 🗑

Location **Demo Company**

Labels **insurance** ✎ Edit labels

Type PDF

File Size 7.47 KB

Last Modified 08/28/2020 by Demo User

Uploaded 08/28/2020 by Demo User

Add Description ✎

Labels

Use labels to organize documents into easily searchable groups. Use an existing label or create a new one. Click the label name and the system will quickly load all other documents that have that filter, or select the **Filters** button to use the label filter. Add as many labels as you would like and manage them in **Account Settings**. For more information regarding labels visit [Labels Overview \(/s/article/Labels-Overview\)](/s/article/Labels-Overview).

Attaching Shared Documents

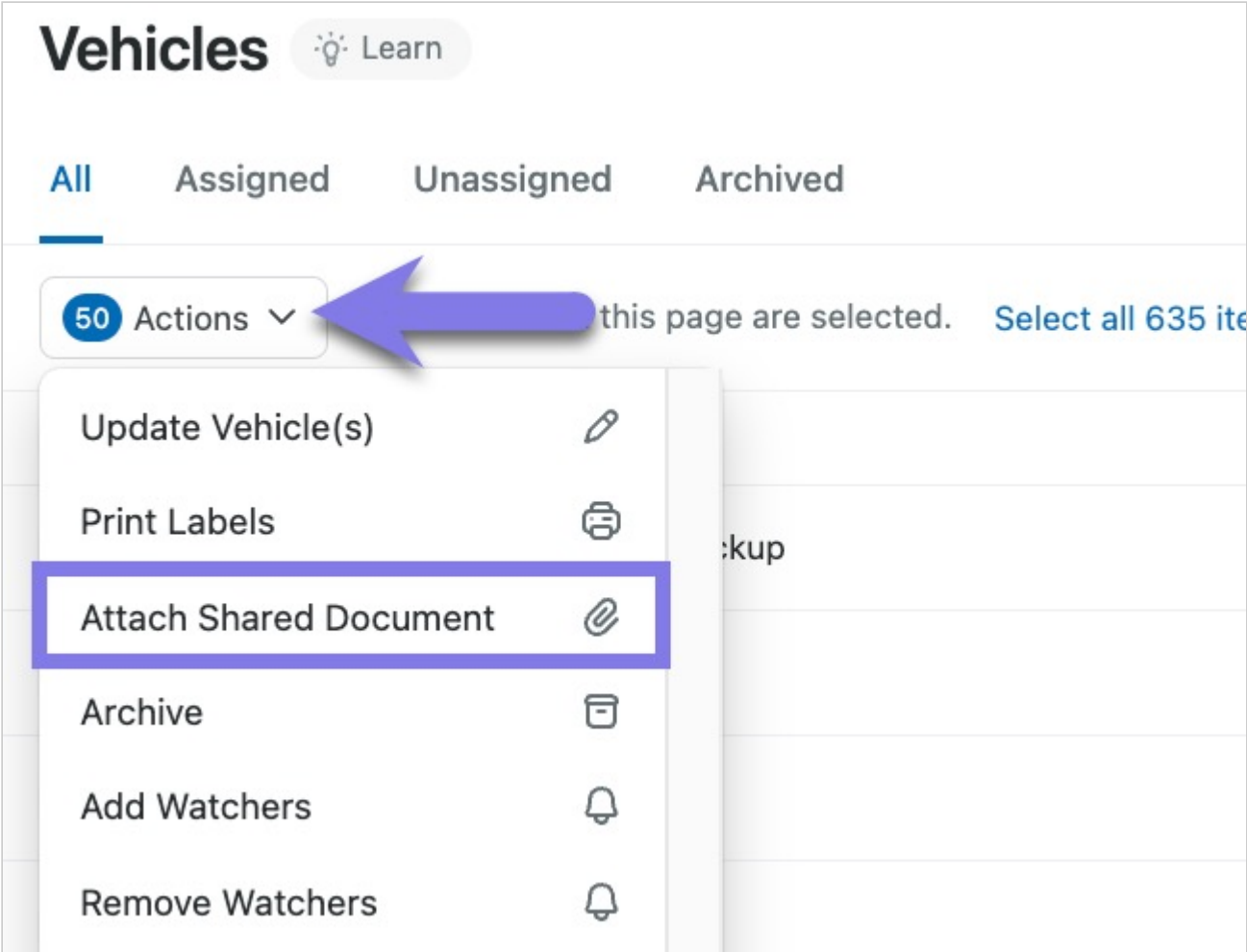
Share files that you store in your account's shared document section with vehicles in your fleet. You can attach documents from the **Vehicle List** or **Documents Module**. **Contact Us**

PERMISSION: Only **Account Owners** and **Administrators** can attach Shared Documents to vehicles.

IMPORTANT: In order for a document to be shared, the document **MUST** be uploaded through the **Documents** page.

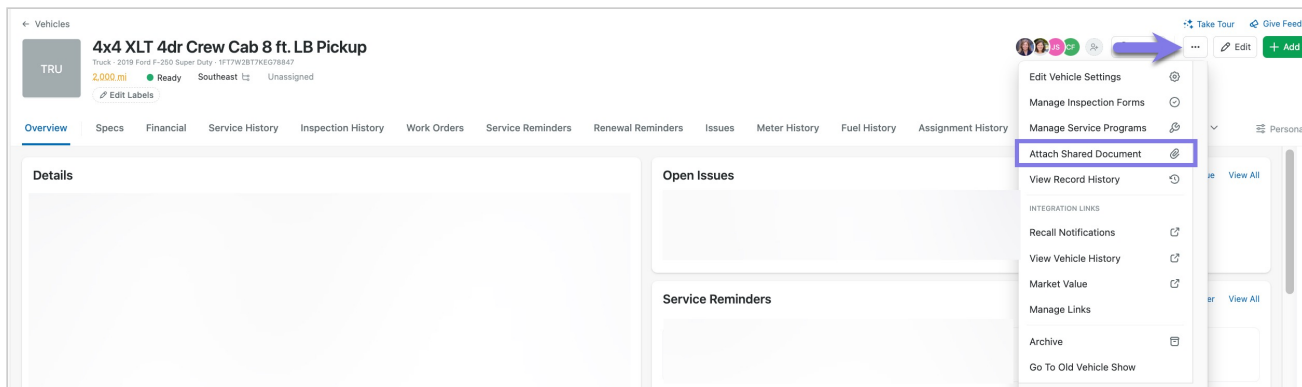
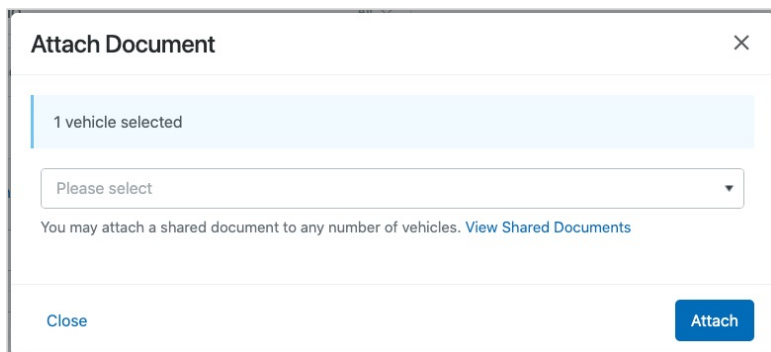
Vehicle List

To attach, go to your **Vehicle List** and select your vehicles. Once selected, click on the **Actions** dropdown and select **Attach Shared Document**. Then, select a shared document from the list. You can also attach a shared document from the **Vehicle Overview** by clicking the **More Actions** menu and selecting **Attach Shared Document**.



The screenshot displays the 'Vehicles' page interface. At the top, there is a 'Vehicles' header with a 'Learn' button. Below the header are tabs for 'All', 'Assigned', 'Unassigned', and 'Archived'. The 'All' tab is selected. A dropdown menu is open, showing '50 Actions' with a downward arrow. A purple arrow points to this dropdown. The dropdown menu lists several actions: 'Update Vehicle(s)', 'Print Labels', 'Attach Shared Document' (highlighted with a purple border), 'Archive', 'Add Watchers', and 'Remove Watchers'. To the right of the dropdown, text indicates 'this page are selected.' and a link 'Select all 635 ite'.

Contact Us



Now that you have associated this document with the selected vehicles you will have visibility in the **Documents** module.

Documents Module

From the **Documents Module**, you will be able to attach documents to **All Vehicles**, **Vehicle Types**, and **Groups**. The benefit of using these main groups is that as vehicles enter and leave these sets, the document will automatically be added or removed.

Users will still be able to select **Specific Vehicles** if there is no need to select a particular vehicle set.

Overview of the **Attach Document** module:

- Search vehicles by **Name**, **Type**, and **Group**
- As vehicles are attached, the count will update. This area will also provide the main overview.
- Browse **Vehicles**, **Types**, and **Groups** and determine if the document should be attached to all vehicles in that set or specific vehicles.
- Quickly **Detach** the document from all vehicles

Contact Us

Attach Document to Vehicles

Fleet Insurance 2021.jpg

Q Find vehicles, types, groups, and more...

Attached Vehicles 216

Attached Vehicles **Detach All**

Documents will be automatically attached to new vehicles in any attached sets. You can manually detach a document from a vehicle within a set.

All Vehicles 216 **Attached**

Current and future vehicles

Browse

- All Vehicles 216
- Vehicle Types 13
- Groups 53

Browsing by **Types** and **Groups** allows for a quick Attach to All action. Users will also be able to click the row to see the vehicle that makes up that set.

The screenshot shows a window titled "Attach Document to Vehicles" with a sub-header "Fleet Insurance 2021.jpg". Below the title is a search bar with the placeholder text "Find vehicles, types, groups, and more...". The main content is divided into two columns. The left column, under the heading "Attached Vehicles" (0), has a "Browse" section with three options: "All Vehicles" (216), "Vehicle Types" (13, highlighted in blue), and "Groups" (53). The right column, under the heading "Vehicle Types", lists several categories: "Boat" (27), "Bus1" (0), "Car" (118), "Electric" (4, with a blue "Attach" button), "Forklift" (1), "Generator" (1), and "Pick-up" (1). Each category includes a small icon and the text "Vehicle Type".

From the row details users can:

- Attach to **all** vehicles in the set.
- Select **specific** vehicles from the vehicle list.

Attach Document to Vehicles

Fleet Insurance 2021.jpg

Find vehicles, types, groups, and more...

Attached Vehicles 0

Browse

All Vehicles 216

Vehicle Types 13

Groups 53

Vehicle Types > Electric

Electric Vehicle Type 4

Vehicles

BHM01 - Hummer EV

BHM02 - Hummer EV

BHM03 - Hummer EV

BHM04 - Hummer EV

NOTE: To bulk-assign vehicles, you **MUST** first click **Select Vehicles** in the **Attached to** column of the Document index. Then, click **All Vehicles** under **Browse**. If you do not have access to the **Attached to** column on the index, it can be added by clicking **Manage Columns**.

Upload Document

1 - 50 of 2

Attached To	Labels
Select Vehicles	—
—	—

Manage Columns

Items Per Page

50

Contact Us

[Getting Started](/topic/OTO5G0000010yD8WA...)
(/s/topic/OTO5G0000010yD8WA...)

[The Basics of Fleetio](/topic/OTO5G0000010yDXWA...)
(/s/topic/OTO5G0000010yDXWA...)

Related Articles

[Upload Documents and Photos \(/s/article/Upload-Documents-And-Photos\)](/s/article/Upload-Documents-And-Photos)

[Attachments - Photos, Documents, and Comments in Fleetio Go \(/s/article/Attachments-Photos-Documents-And-Comments-In-Fleetio-Go\)](/s/article/Attachments-Photos-Documents-And-Comments-In-Fleetio-Go)

[Work Order Overview \(/s/article/Work-Order-Overview\)](/s/article/Work-Order-Overview)

[Parts Overview \(/s/article/Parts-Overview\)](/s/article/Parts-Overview)

[Purchase Orders Overview \(/s/article/Purchase-Orders-Overview\)](/s/article/Purchase-Orders-Overview)

[Issues Overview \(/s/article/Issues-Overview\)](/s/article/Issues-Overview)

[Service Entry Overview \(/s/article/Service-Entry-Overview\)](/s/article/Service-Entry-Overview)

[Fuel Entry Overview \(/s/article/Fuel-Entry-Overview\)](/s/article/Fuel-Entry-Overview)

[Equipment Overview \(/s/article/Equipment-Overview\)](/s/article/Equipment-Overview)

[Labels Overview \(/s/article/Labels-Overview\)](/s/article/Labels-Overview)

Still need help?

Reach out to the Fleetio community or contact us for further assistance.

Contact Us

[Ask the Community](#)

[Contact Support](#)



Help Center

[Home \(/help/s\)](#)

[User Community \(/help/s/community\)](#)

[My Cases \(/help/s/case/Case/Default\)](#)

[Sitemap \(/help/s/topiccatalog\)](#)

Fleetio.com

[Blog \(https://www.fleetio.com/blog\)](https://www.fleetio.com/blog)

[White Papers \(https://www.fleetio.com/resources/white-papers\)](https://www.fleetio.com/resources/white-papers)

[Onboarding Services \(https://www.fleetio.com/onboarding-services\)](https://www.fleetio.com/onboarding-services)

[Fleetio Updates \(https://updates.fleetio.com/\)](https://updates.fleetio.com/)

Contact Us

Call us: 1(800)975-5304 (tel:18009755304)

Monday-Friday 8am-8pm (Eastern Time)

[System Status \(https://status.fleetio.com/\)](https://status.fleetio.com/)

Contact Us