INVOICES - Customise Invoice List View

Customise invoice views by adjusting column visibility and filtering data. Use Edit columns and filtering in columns to select data.

Updated 15 October 2026

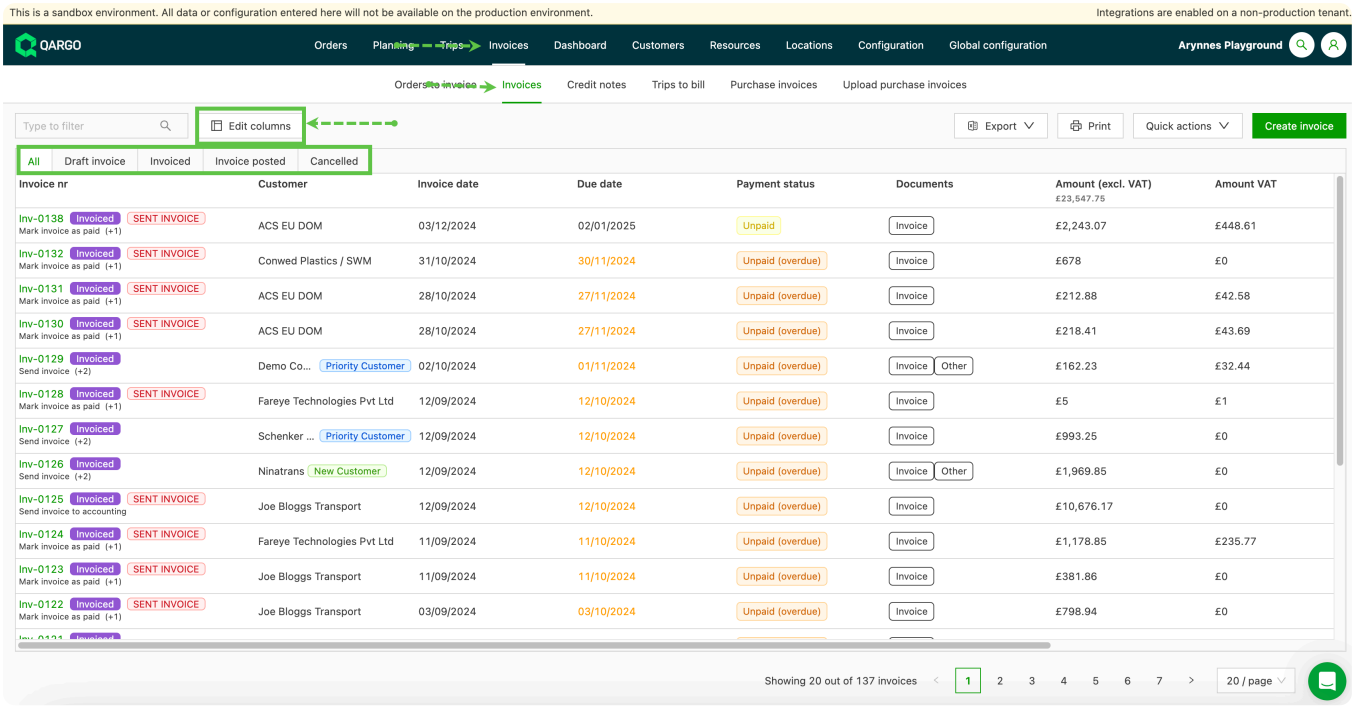
Customise the columns

Navigate to the **'INVOICES'**, when the Invoice page loads, the default view is set to show the ALL tab. There are additional tabs for default list views for:

- Draft Invoice
- Invoiced
- Invoice posted
- Cancelled.

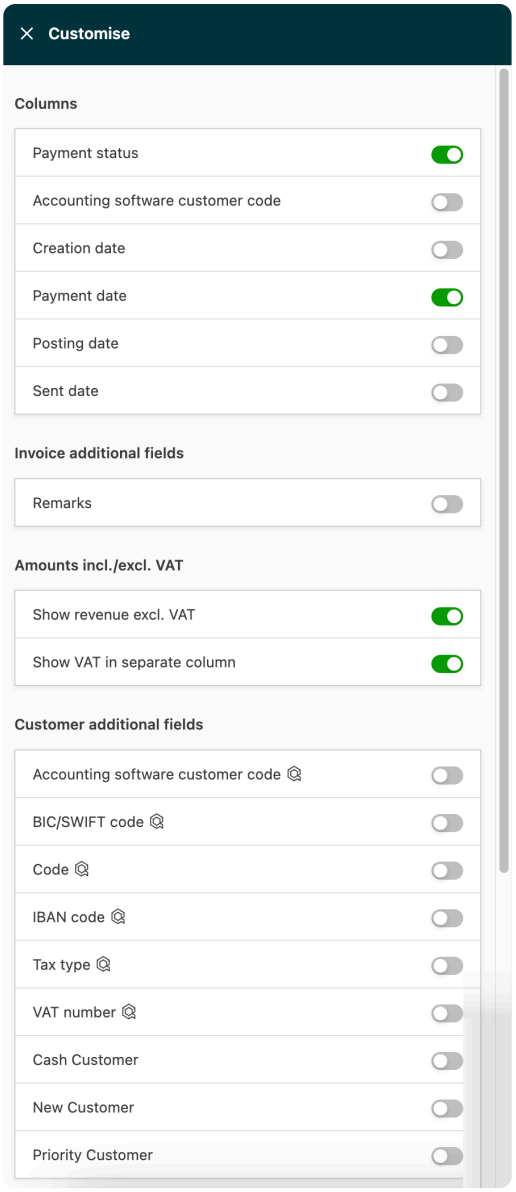
It is possible to customise how you see the invoices and their details in the invoices page.

- Click on **Customise.**



When clicked, a side pane will open on the left side of the screen.

- Select the invoices details you like to see in the page.
- Close the side pane when ready.



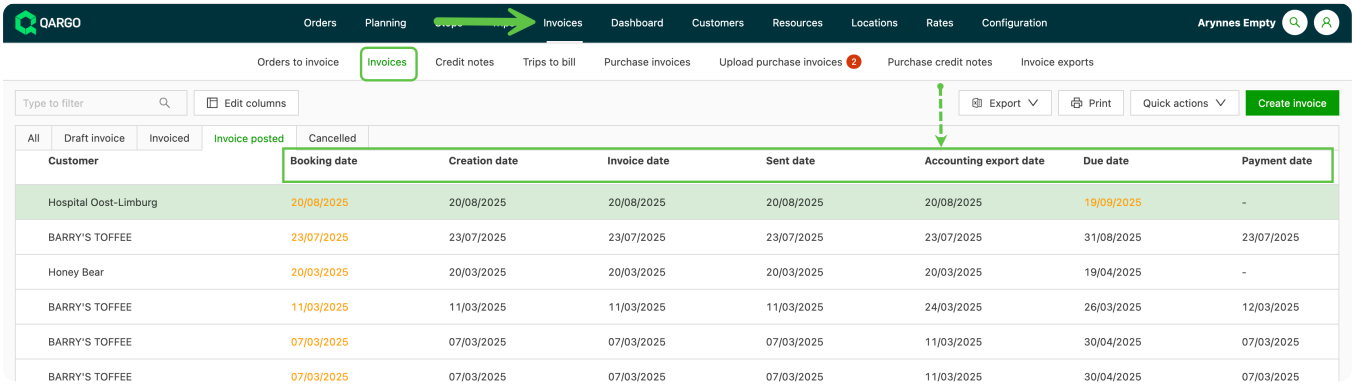
Invoice additional fields are added in Configuration. Once added, those additional fields be shown in the side pane.

Dates on the invoice list

Q: What do the dates on the invoice list mean?
A: The invoice list has 7 date columns. Use **Customise** to show or hide them.

Name changes

- **Posting date** is now **Accounting export date**.
- **Issue date** is now **Invoice date**.



Date columns

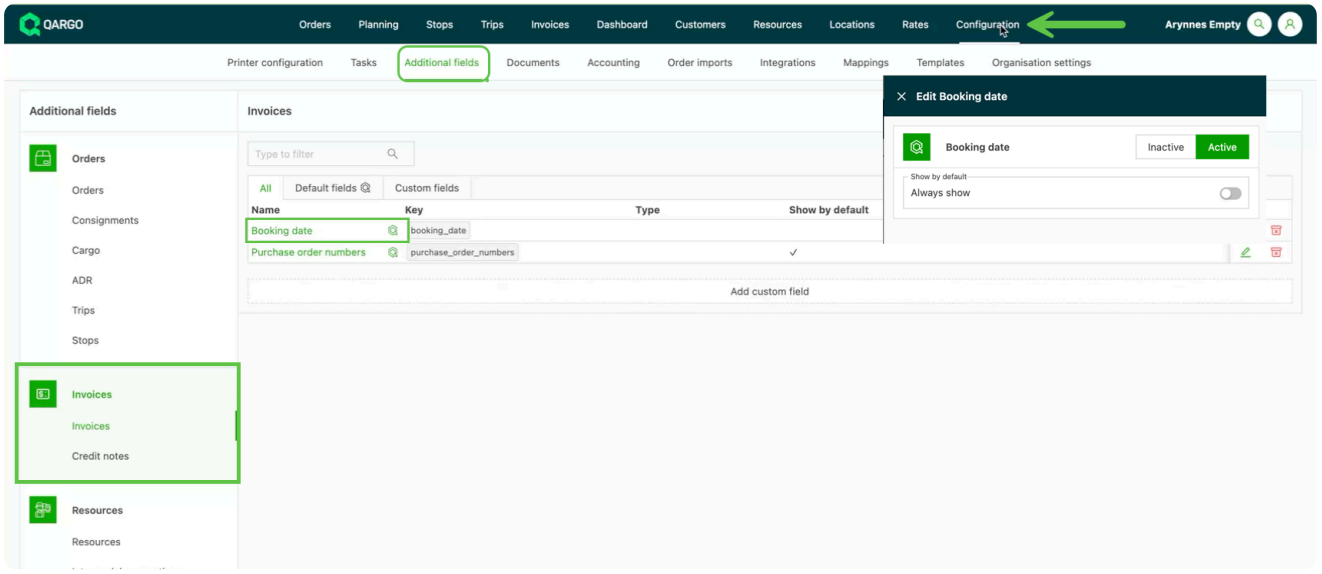
- **Creation date:** when the invoice was created in the system.
- **Invoice date:** the date entered when adding the invoice.

  > A custom date changes the year in the invoice number if the numbering uses YEAR. Example: an invoice created on 1 January 2026 with a custom date of 1 December 2025 gets the year 2025.

- **Sent date:** when the invoice was sent to the customer.
- **Accounting export date:** when the invoice was exported to the accounting software. Previously called “Posted date”.
- **Due date:** when payment is due.
- **Payment date:** when the invoice was marked as paid.
- **Booking date:** the date sent to the accounting package. By default it equals the invoice date. Change it to book the invoice in a different period.

Q: How can the Booking date column be activated?
The Booking date is inactive by default.

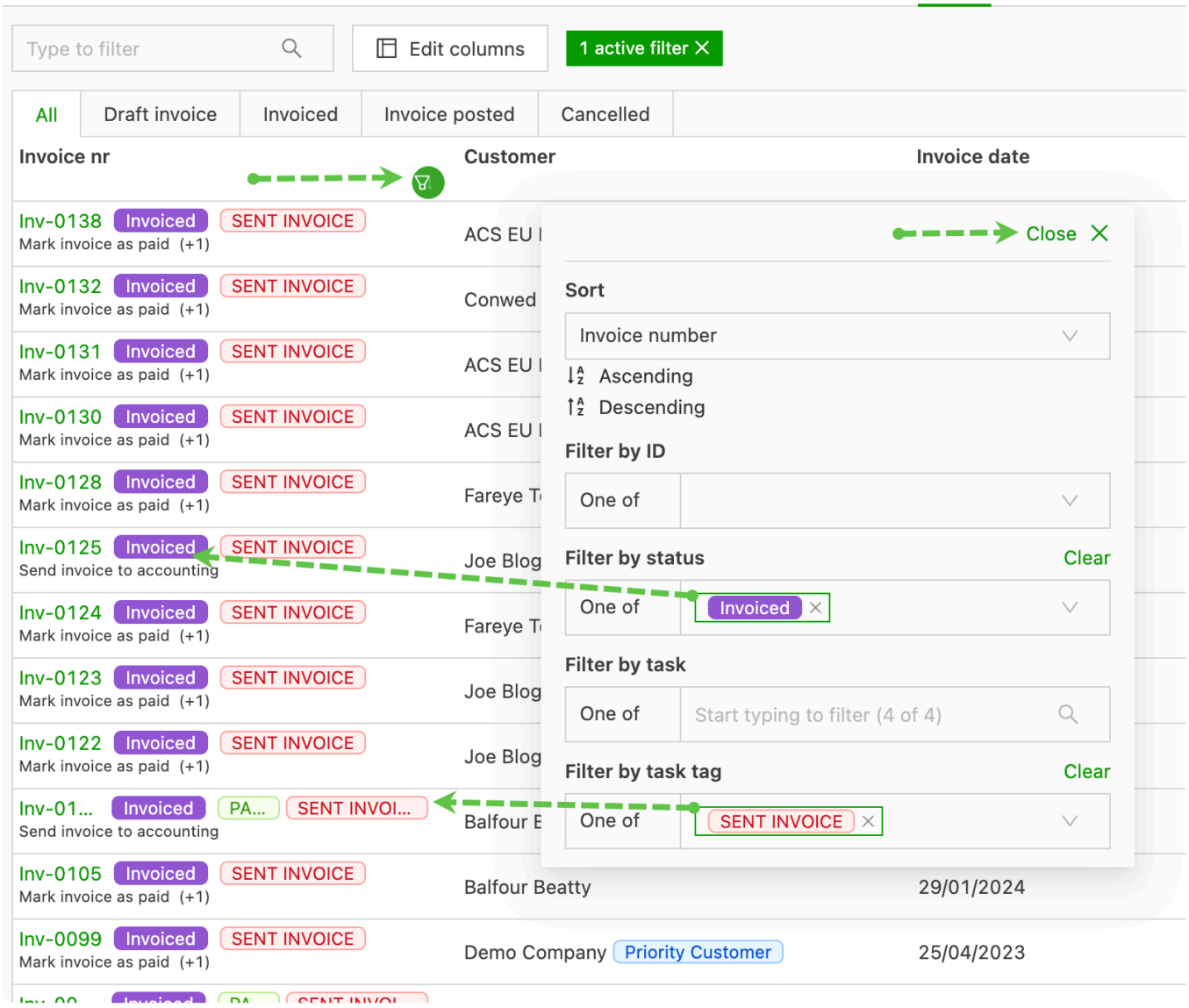
1. Go to **CONFIGURATION** > ***Additional Fields***.
2. Select **Invoices** in the INVOICES side menu.
3. Click **Booking date** and set it to **Active**.



Filter data

You can filter data in the page by using the filter icon in the header of the table. Hover in the column header and the filter icon will show in the bottom right corner.

- Click on the filter icon.
- Select the data you would like to filter.
- The data will update as the filters are selected.
- A label display how many filters are applied - these apply to the filters in the column header, ie: multiple filters in 1 column will show as 1 active filter. The filter icon will highlight green to indicate which column has the filter applied.
- Once the filters are selected, click ***‘Close’*** to close the popup window.



Filters set on 1 tab will be applied to all tabs.

The filter will be saved. The next time you navigate to this page, you will see the same view.

🚨 Custom column views - both the order and size - are **retained by your browser**. If you delete your cookies or have opted to configure your browser to never store cookies in the first place, the views won't be saved and will be reset to the default the next time you use Qargo.

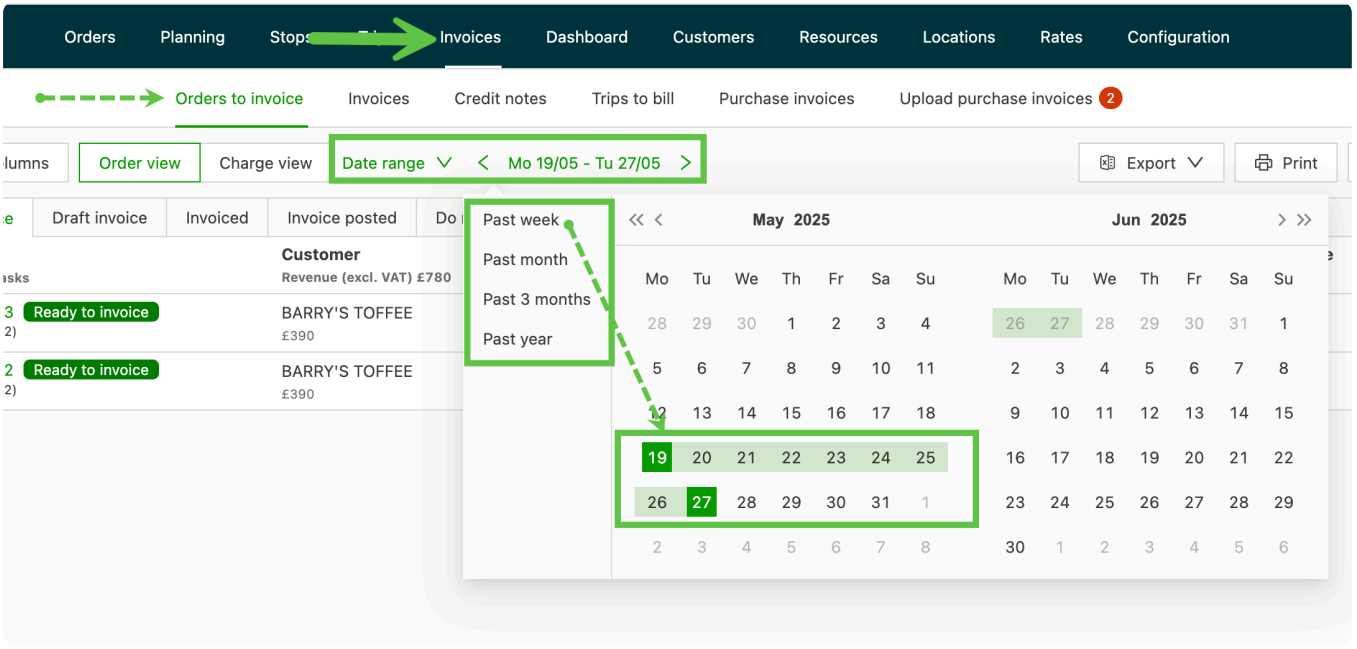
Select Date Range Option:

The following options are available to filter on:

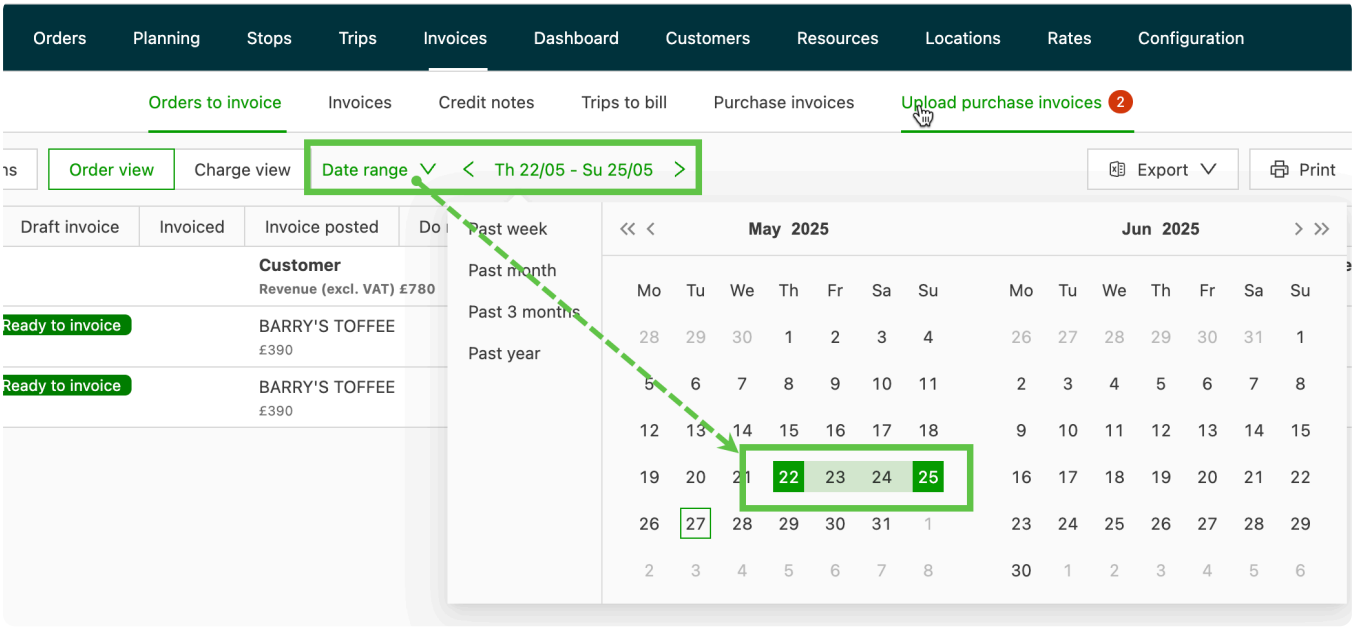
- **Last 90 days + future**: this filter on all orders
- **Date**: to filter on one specific date. By default this will filter on the current date.
- **Date range**: This allows the use to easily select a date range on a calendar . When selecting the date range filtering, two options are available to chose from Additionally, Qargo provides the following date types to refine your filtering:
- **Created Date**: An audit timestamp indicating when the quote was first created. It does not change when the quote is accepted or converted to an order.
- **Requested Date**: Represents the initially requested operational date from the order.

- **Actual Date**: Derived from the trip once the order is planned and executed.
- **Order Start/End Date**: Used for filtering orders during invoicing or other operational tasks.

For convenience, when filtering based on a date range, there are some pre-configured date ranges to allow easy filtering. When selecting one of these options, the dates will automatically be selected:



Users can also select any date range, selecting a start / end date on the calendar.



Date ranges are limited to a 1 year date range.

- For Orders the filter is on ***REQUESTED DATE***.
- For Trips the filter is on ***ACTUAL DATE***. When filtering for invoicing purposes, it is recommended to use the **Order Start/End Date** filter. If an order has different Requested and Actual dates, ensure alignment to avoid discrepancies in results.

🔔 **Pro Tip:** Filtering on the ***Order Start / End*** columns is possible. Column filters are retained on the page when reloading.

Troubleshooting Scenarios

Orders Missing from Weekly Invoicing List

If an order does not appear in the weekly invoicing list, it is likely due to a mismatch in date filters. Follow these steps to resolve the issue:

1. Use the **Order Start/End Date** filter for invoicing purposes.
2. Be aware of the two operational date types:
    - **Requested Date**: From the order.
    - **Actual Date**: From the trip once the order is planned.
3. Ensure you select the correct date type in the **Order Start Date** filter.
4. If an order has different Requested and Actual dates, it may not show under a filter using the other date. Align the dates as needed for your invoicing run.

Orders Not Appearing When Searching or Filtering for PODs

If an order is missing when searching or filtering for Proof of Delivery (PODs), the issue may lie in the date filter selection. To ensure the order appears:

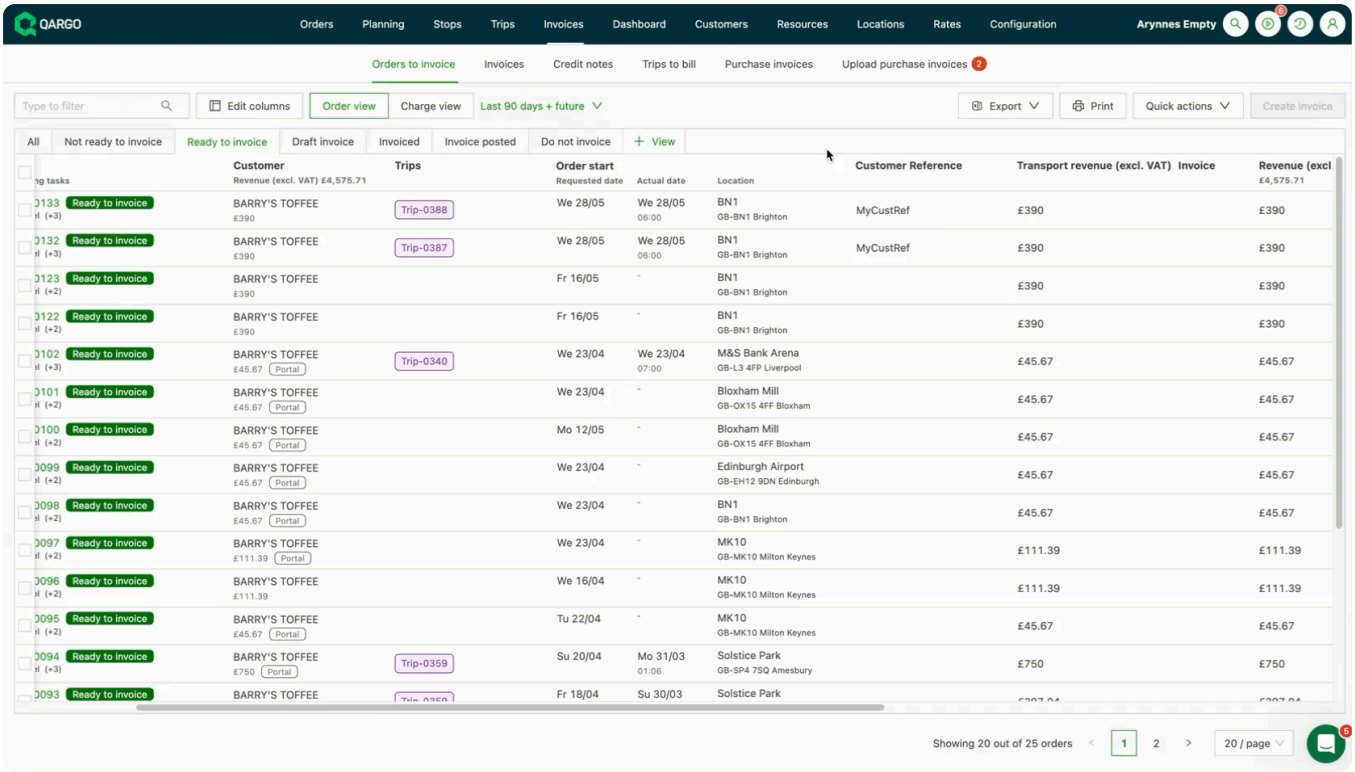
1. Verify the date filter you selected.
2. Use the **Requested Date Range** rather than other date filters.
3. Ensure the Requested Date range includes the order's date.

Best Practices for Date Alignment

- Always confirm the type of date filter required for your task (e.g., invoicing vs. searching for PODs).
- Align Requested and Actual dates where possible to avoid discrepancies.
- Regularly review and update date filters to match your operational needs.

Troubleshooting Tips

- Double-check the date range in your filters to ensure it covers the relevant period.
- If orders are still missing, verify that the correct date type (Requested or Actual) is being used.
- Consult Qargo's support documentation or contact support if issues persist.


QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Customers
Resources
Locations
Rates
Configuration
Arynnes Empty
Orders to invoice
Invoices
Credit notes
Trips to bill
Purchase invoices
Upload purchase invoices 2
Type to filter
Edit columns
Order view
Charge view
Last 90 days + future
Export
Print
Quick actions
Create invoice
All
Not ready to invoice
Ready to invoice
Draft invoice
Invoiced
Invoice posted
Do not invoice
View
Customer
Revenue (excl. VAT) £4,575.71
Trips
Order start
Requested date
Actual date
Location
Customer Reference
Transport revenue (excl. VAT)
Invoice
Revenue (excl
£4,575.71
Ready to invoice
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We 28/05
06:00
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GB-BN1 Brighton
MyCustRef
£390
Trip-0387
Fr 16/05
Trip-0340
We 23/04
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Portal
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Edinburgh Airport
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