INVOICES - Create custom views on invoices & credit notes

Create, save, and switch between custom views on invoice and credit note tabs — with saved filters and column settings — just like order views.

Updated 1 October 2026

Introduction

- **What is this feature?**
  - Custom views are now available on every tab in the INVOICES page. These views allow filters and column settings to be saved and reused, functioning the same way as the existing custom views on the *Orders* tab.
- **Why was it introduced?**
  - With no way to save filter configurations on invoice or credit note screens; accounting and admin teams had to manually re-apply filters each time the page was opened — for example, filtering by **"Paid" or "Unpaid" status**. This feature eliminates that repetitive step and streamlines daily invoice management workflows.
- **How does it work?**
  - Custom views can be created, saved, and switched between on each invoice and credit note tab. Filters, column visibility, and column ordering are all preserved within each view. Views can also be shared with other users, when shared by a Superadmin user.
  - A new ***"filter by status" column filter*** has also been added to the ***Sales and Purchase invoice*** tabs.

Terminology

Term	Definition
Custom View	A saved combination of filters and column settings on a list tab, allowing quick access to a specific data configuration
Sales Invoice	An invoice issued to a customer for services or goods delivered
Purchase Invoice	An invoice received from a supplier or subcontractor for costs incurred
Credit Note	A document issued to adjust or correct a previously issued sales invoice
Purchase Credit Note	A document received from a supplier to adjust or correct a previously issued purchase invoice
Column Settings	The configuration of which columns are visible and in what order they appear in a list view

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Available Tabs with Custom Views

Custom views are supported on four separate tabs within the invoicing section:

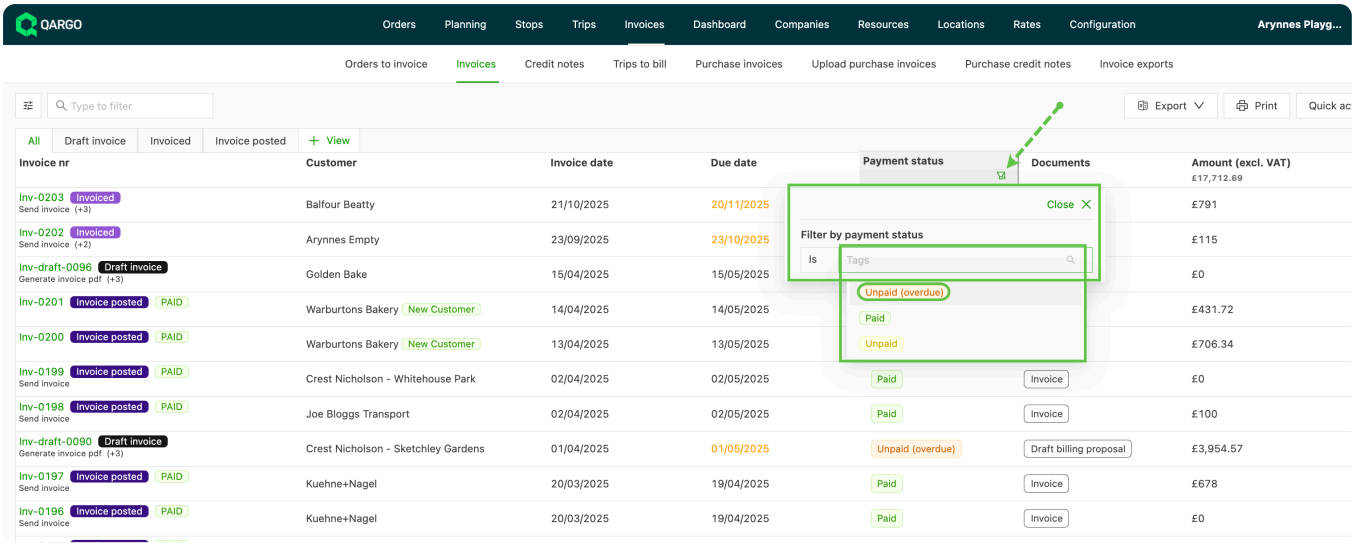
1. **Sales Invoices** — manage views for outgoing invoices
2. **Purchase Invoices** — manage views for incoming supplier invoices
3. **Credit Notes** — manage views for sales credit adjustments
4. **Purchase Credit Notes** — manage views for purchase credit adjustments
5. **Orders to invoice** — manage views for orders and charges awaiting invoicing
6. **Trips to bill** — manage views for trip costs awaiting a purchase invoice
7. **Upload Purchase Invoices** — manage views for supplier invoices scanned in via document upload

Each tab maintains its own independent set of views. Invoice views are not shared with purchase invoice views, and credit note views are not shared with purchase credit note views.

Creating a Custom View

Step 1: Apply Filters and Column Settings

1. **NAVIGATE** to the desired tab in the **INVOICES** page.
2. **APPLY** the desired filters using the column filter options. For example, filter the *Sales Invoices* tab by a specific status such as “Paid” or “Unpaid.”
3. **ADJUST** column visibility and ordering as needed by configuring the column settings.



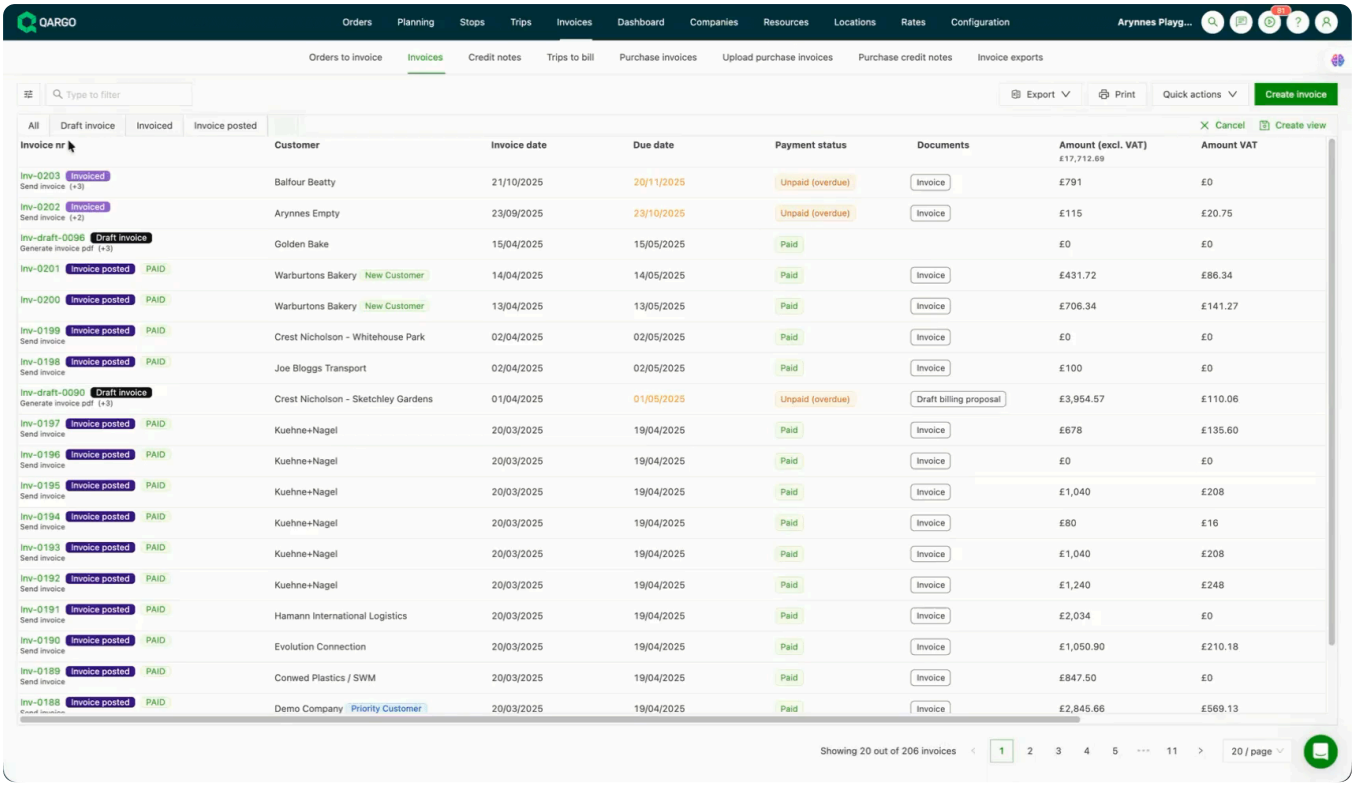
Step 2: Save the View

1. **ENTER** a descriptive name for the view (e.g., “Unpaid Invoices” or “Q1 Purchase Invoices”).
2. **CLICK** the save view option to store the current filter and column configuration.

The new view will now appear in the views dropdown and can be accessed at any time.

Step 3: Switch Between Views

1. **OPEN** the views selector at the top of the invoice or credit note list.
2. **SELECT** the desired saved view from the dropdown.
3. The list will immediately update to reflect the saved filters and column settings.



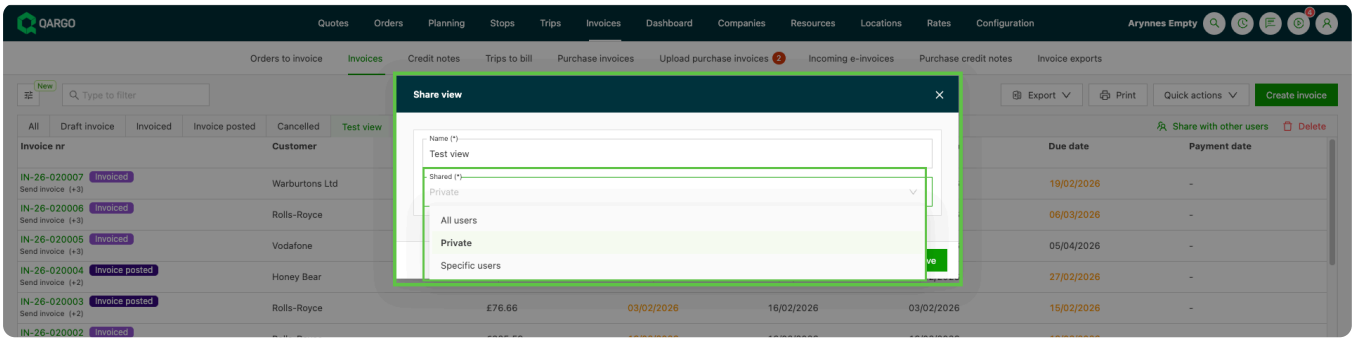
Sharing Views (SuperAdmin users only)

Custom views can be shared with other users. When a view is shared, both the filter configuration and the column ordering and visibility settings are included. This makes it easy for teams to work from a consistent data layout without each user needing to configure their own filters.

> 🧰 Only **super admin users** can share (or manage) shared/custom saved list views. Regular users can still create ***personal*** views, but they cannot share them workspace-wide.

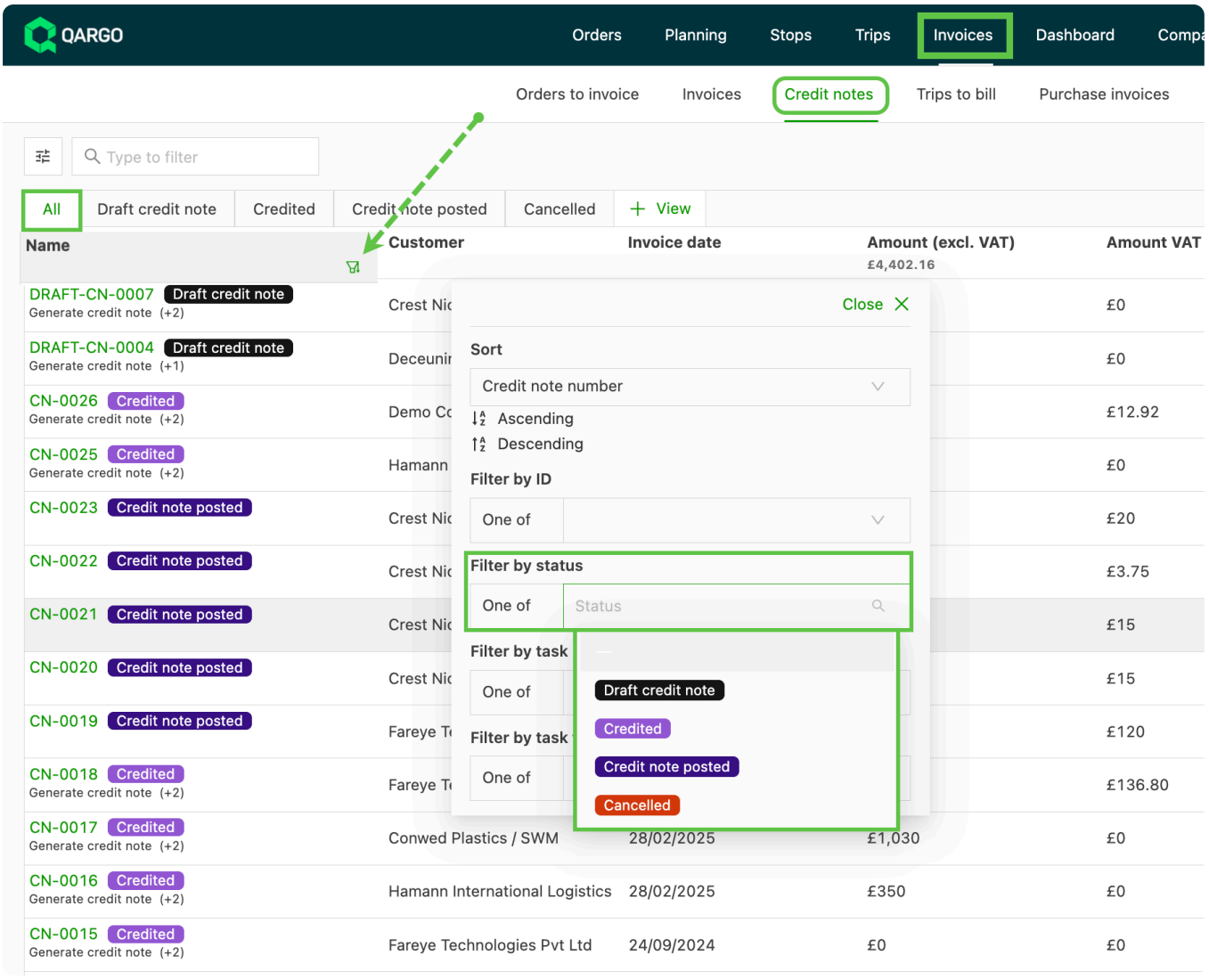
To share a custom view options include sharing to ALL users or to selected users

- Select ‘specific users’
- From the drop down, select which users to share the view with
  - Multiple users can be selected, but must be already a user in the platform



Filter by Status on Credit notes

A new ***filter by status*** column filter has been added to the **Sales and Purchase credit note** tabs.
This filter was previously unavailable on these tabs and allows records to be narrowed down by their current status directly from the column header.



Troubleshooting

Issue	Solution
A saved view does not appear on a different tab	Views are tab-specific across all seven invoicing tabs: Orders to Invoice, Trips to Bill, Sales Invoices, Purchase Invoices, Upload Purchase Invoices, Credit Notes, and Purchase Credit Notes. A view saved on one tab only appears on that tab, not on any other. Verify the correct tab is selected.
Filters reset after navigating away	Ensure the view has been explicitly saved. Unsaved filter configurations will not persist between sessions.
“Filter by status” is not visible on credit notes	Refresh the page to load the latest update. If the issue persists, contact Qargo support for further assistance.
A shared view does not reflect expected columns	Column settings are included when sharing, but any subsequent changes by the original creator may not auto-update for other users. Re-share the view if column settings have changed.

Adding the Refund status column on credit notes tab

Refund status column shows whether each credit note has been refunded, without opening it to read its refund task.

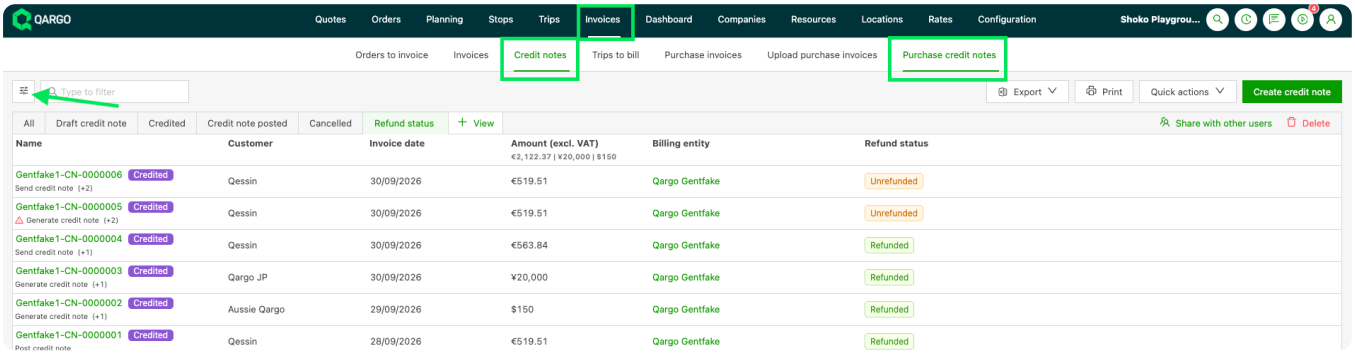
> At least one credit note must exist on the Credit notes / Purchase credit notes tab so the column has rows to show.

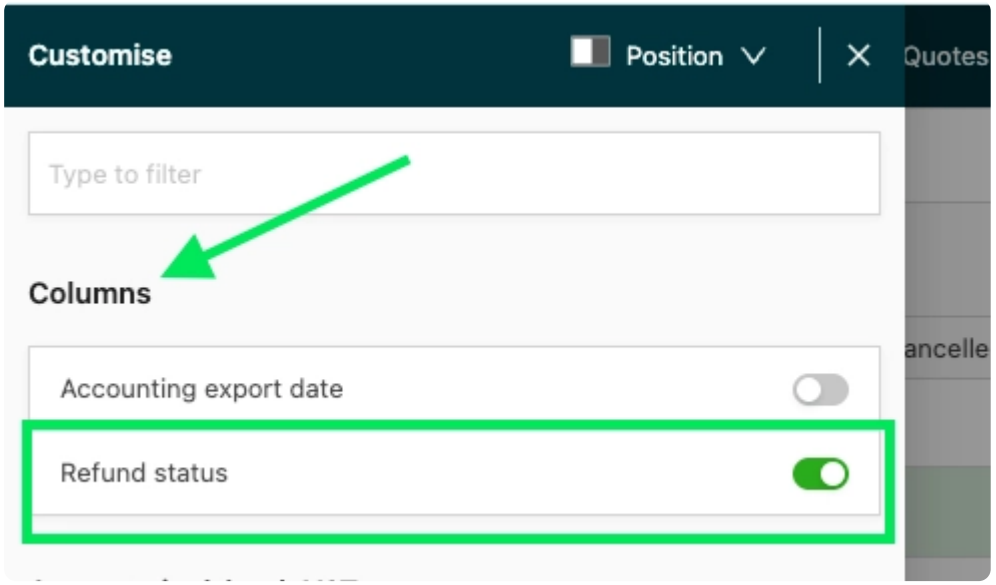
Use case

A finance team wants to see which credit notes still need refunding at a glance. They add the Refund status column, filter on ***Unrefunded***, and save that as a view they open each morning to work through the outstanding refunds.

Walkthrough

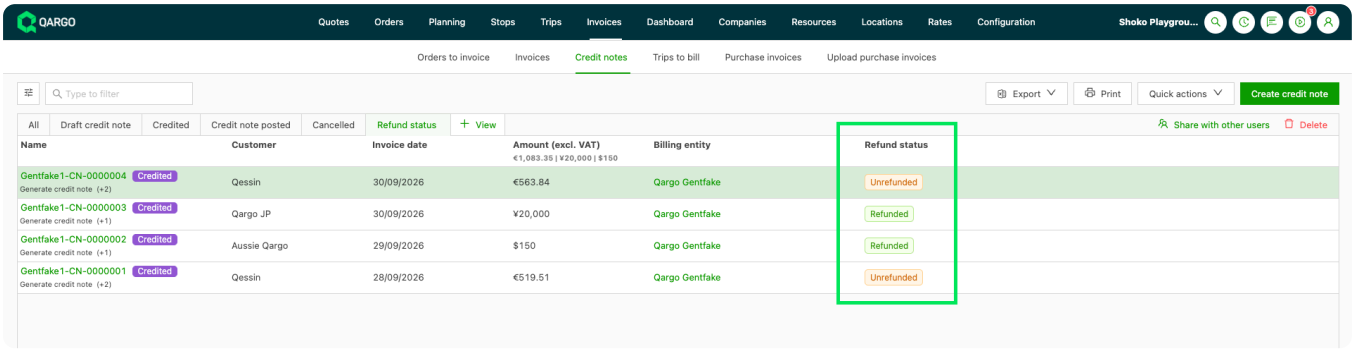
1. Navigate to **INVOICES** > ***Credit notes*** (or ***Purchase credit notes***).
2. Click the **Customise** button.
3. Toggle on the **Refund status** column under the **Columns** section.
4. Save the view (if you created a new view for this column).





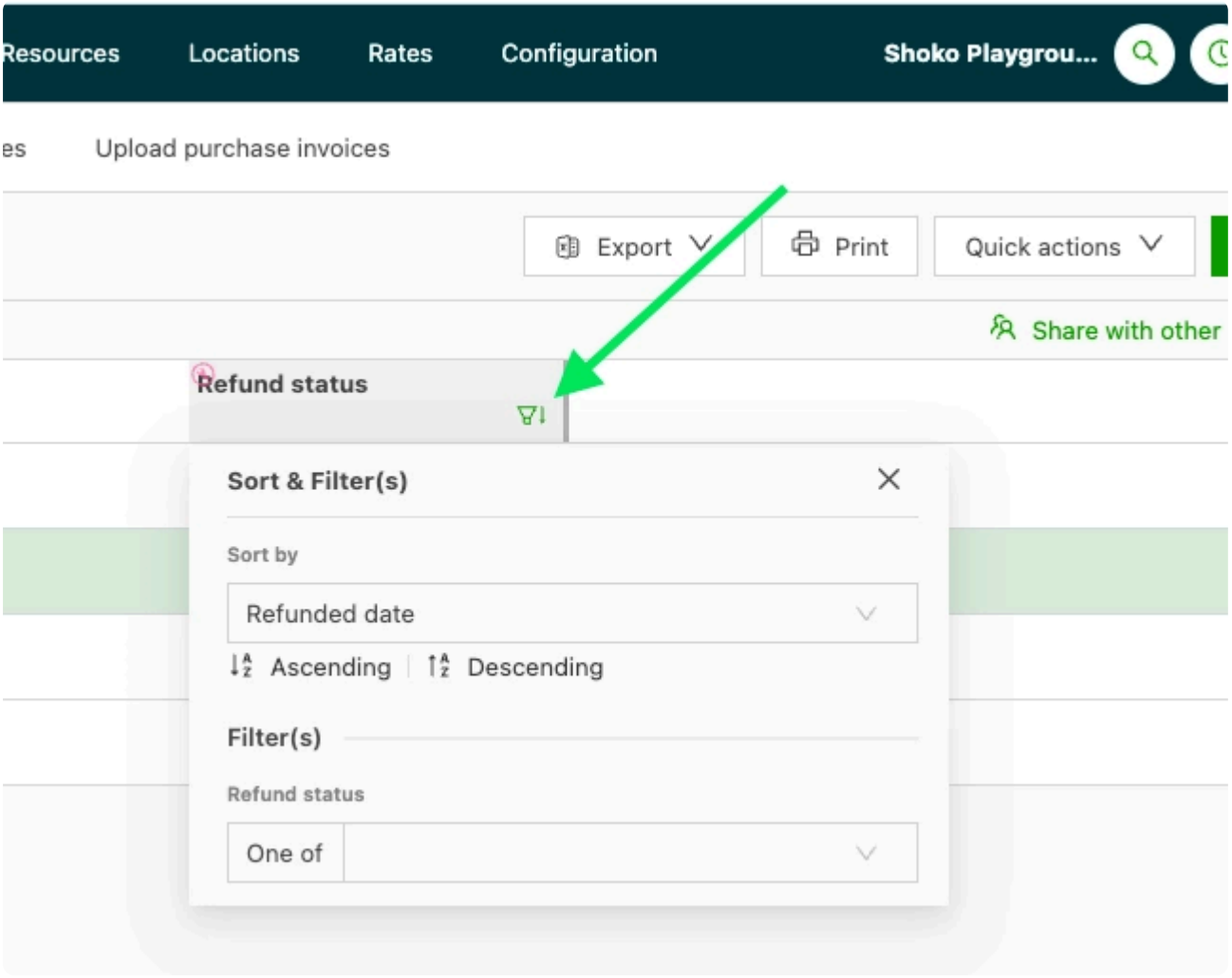
The column shows two values:

- **Refunded** (green): the **Mark credit note as refunded** task on that credit note is complete.
- **Unrefunded** (orange): that task is not yet complete.



Sort and filter on the column

The column can be sorted by Refunded date or filtered on Refunded/Unrefunded to show only outstanding credit notes.

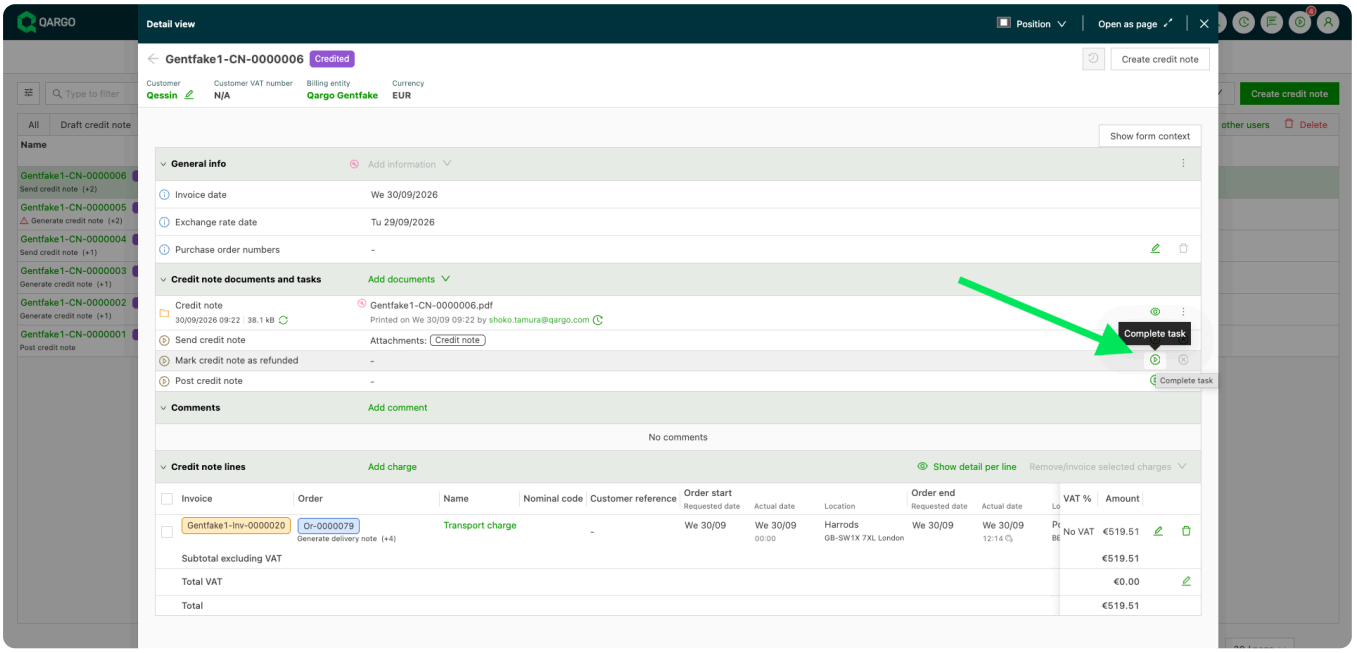


▶ https://watchclueso.com/embed/ti5df6rv2zh70snc

How a credit note becomes Refunded

A credit note becomes **Refunded** as soon as its **Mark credit note as refunded** task gets completed.

1. Open a credit note with **Unrefunded** status.
2. Click **Complete task** button on the **Mark credit note as refunded** row.



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- Where an accounting integration is connected, this task can complete automatically once the refund is confirmed in the accounting software. With any other setup, the task is completed by hand and the column follows.
- The Refund status column only updates when the ‘Mark credit note as refunded’ task is completed. If a credit note is settled in another way, (e.g. deducting its amount from a later invoice), the column will keep showing Unrefunded until that task is completed **manually**.