Cet article n'est pas encore disponible dans votre langue. Vous lisez la version anglaise.

INVOICES - Orders to Invoice View Options

View 'Orders to Invoice' by Orders or Charges. Use tabs to track status, filter columns, and manage invoices efficiently.

Mis à jour 30 septembre 2026

'Orders to be Invoiced' can be viewed based on **Orders or Charges.**

- Each page shows individual tabs based on curated views grouping the invoice details, based on the **STATUS** of the order or charge.
- Once the status has been updated to ***'Invoiced'***, it will show in the **INVOICES** submenu under the generated invoice number.
- Control what data is shown in the tables by using the **'Customise icon'** to toggle on/off relevant columns.

Summary

Tab View	Description
ALL	This shows ALL orders or charges, regardless of status of the order or charge.
To Approve	***CHARGE VIEW ONLY.*** Charges that require approval before they can be invoiced.
Not Ready to Invoice	Not Ready to Invoice status will include all the orders or charges that have not yet been set to a Ready to Invoice status.
Ready to Invoice	Once an order or charge is confirmed it can be set 'Ready to Invoice' which makes it available to be invoiced.
Draft / On draft invoice	A draft invoice allows users to create and review an invoice before finalising it. Draft Invoices are given a unique 'DRAFT' invoice number.
Invoiced	The order / charge will show in the **'Invoiced'** tab view and will include the invoice number assigned to the order / charge.
Invoice Posted	An invoice with a **Posted** status indicates that the invoice has been generated and issued to the customer. Once in a posted status, no further updates can be made to the charges and order details.
Do not invoice	Marking an order or charge as 'Do not invoice' removes the revenue amount and set the value to '0'.
Custom View	Create a custom view, using filtering on column headers to tailor the view to suit individual requirements.

Learn more about how to best use Order and Charge views.

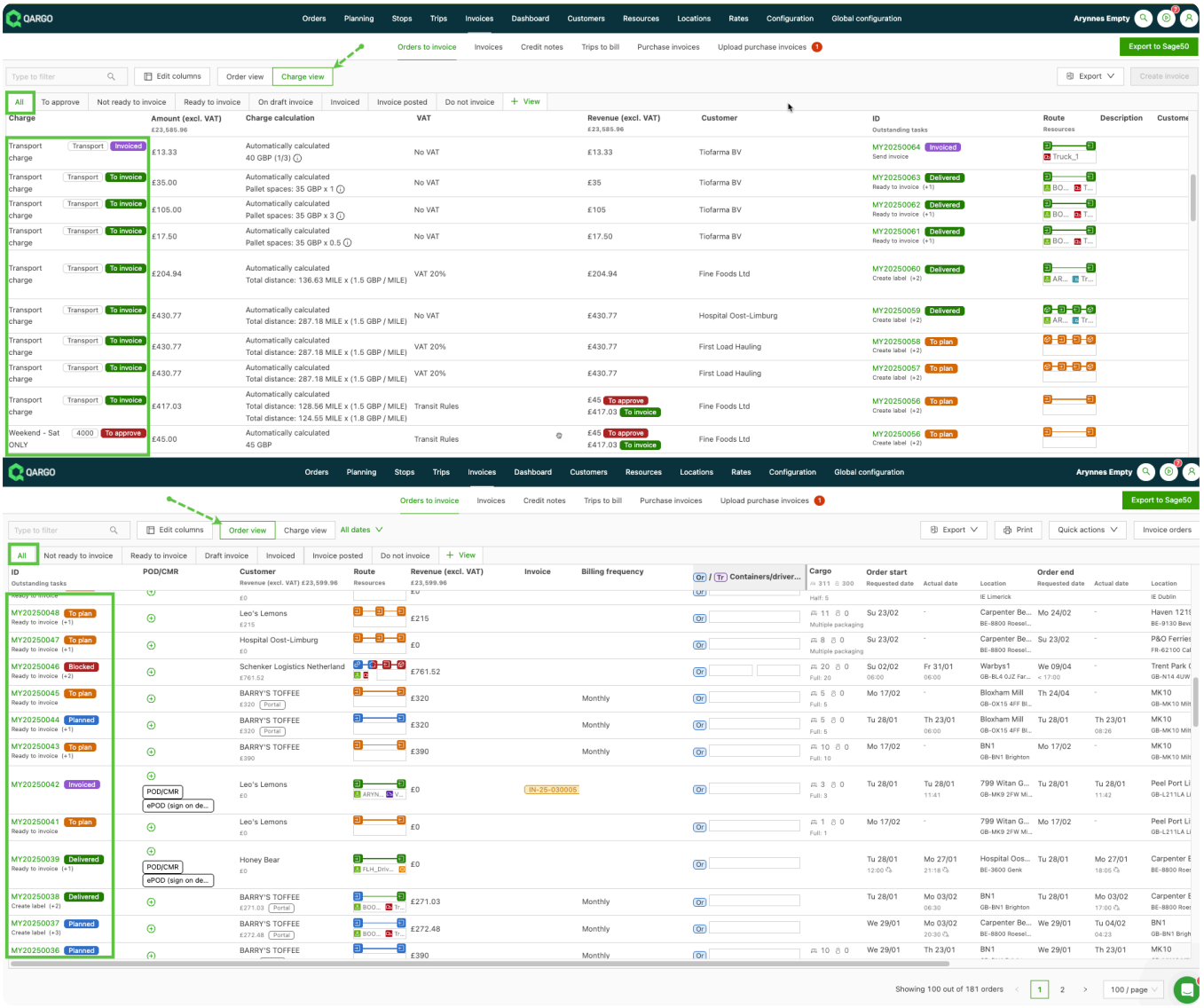
Order view vs Charge View

Invoice by Tab View

All

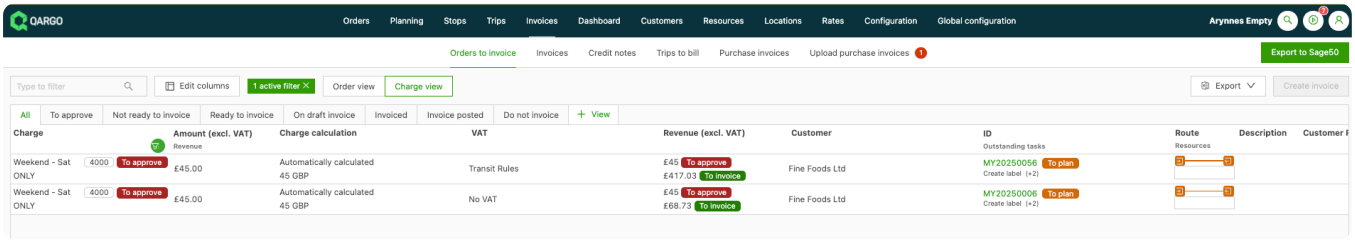
This shows ***ALL*** orders or charges, regardless of status of the order or charge. In the **ORDER VIEW**, the status shown is the status of the order (ie: Delivered, To Plan, Invoiced). In the **CHARGE VIEW**, the status shown is the status of the

charge (ie: To Approve, To Invoice, Invoiced). Column headers can be filtered in each view allowing for better data visualisation. Use this view to gain the widest visibility for all orders or charges.



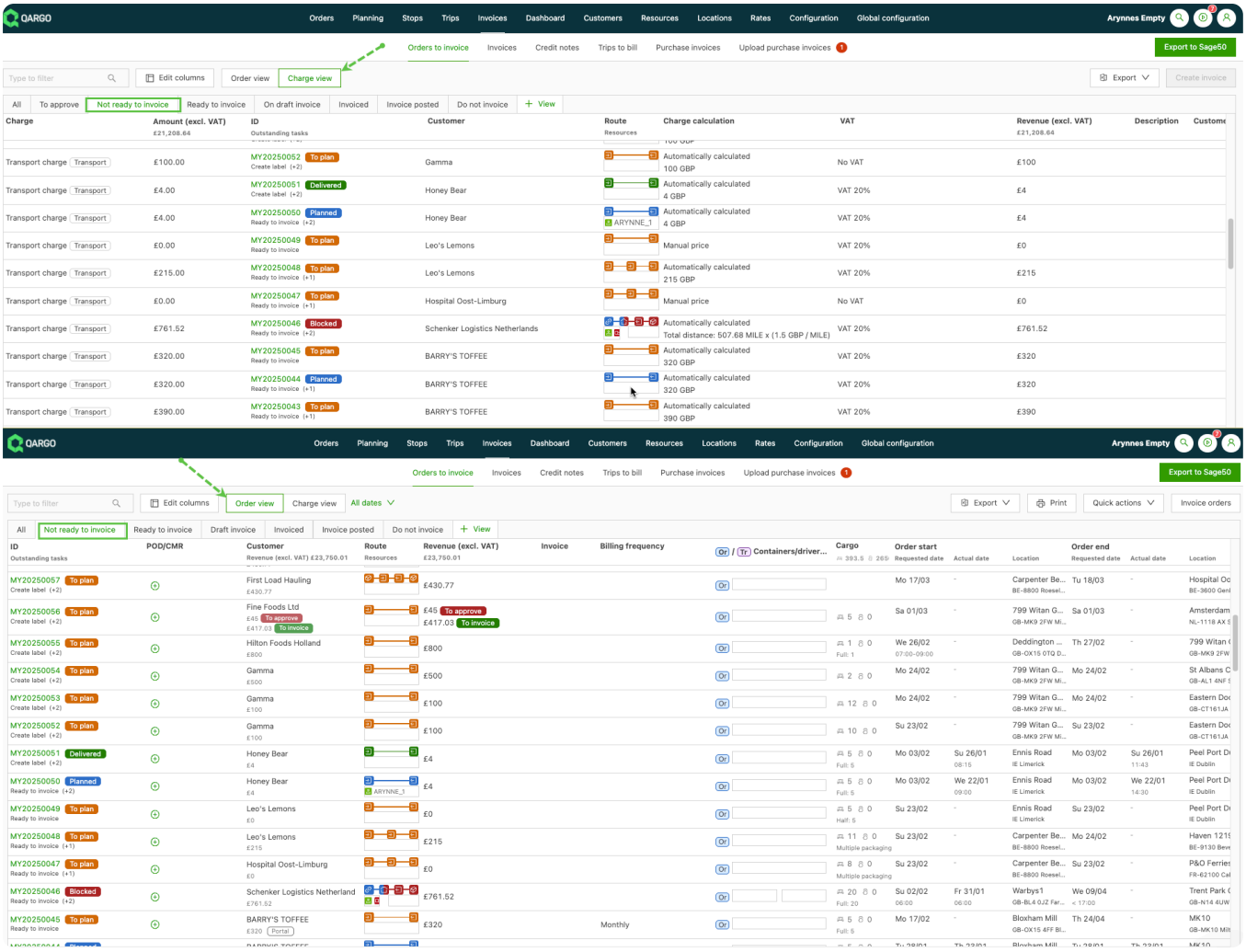
To Approve (Charge View Only):

Charges that are configured to require approval before they can be invoiced will individually be tagged with the status 'To Approve'. This view can be used to filter for outstanding charges that require approval prior to invoicing.

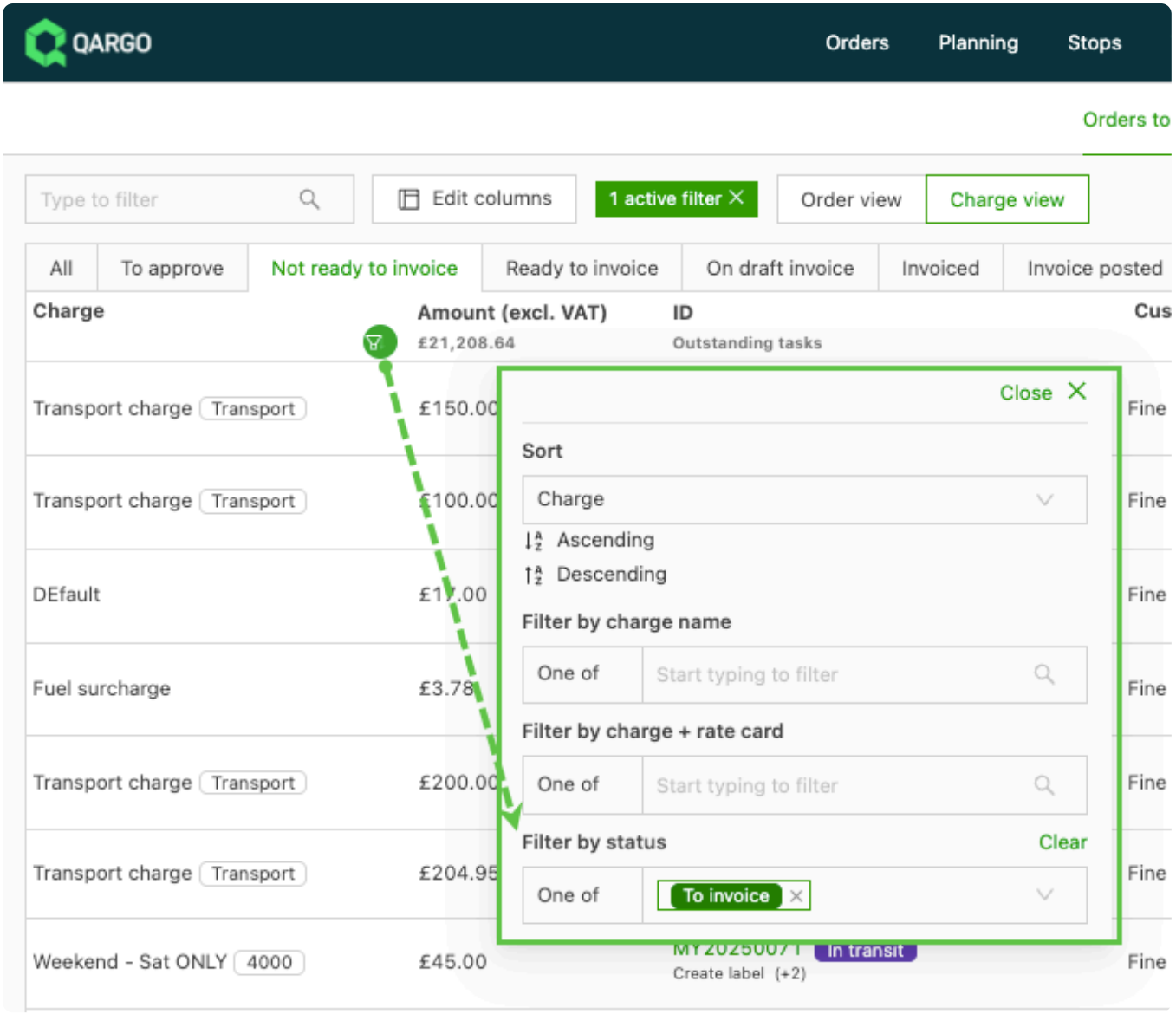


Not Ready to Invoice

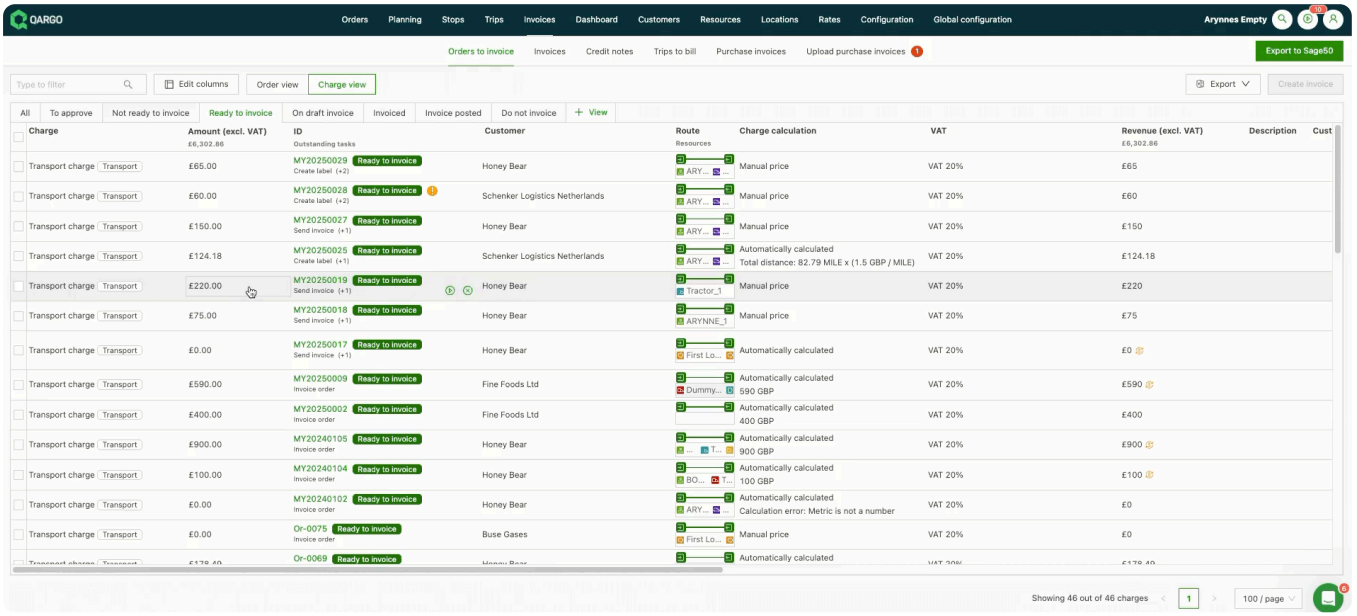
Not Ready to Invoice status will include all the orders or charges that have not yet been set to a *Ready to Invoice* status. This can include various order or charge status. In each view, it is possible to set the individual record (order or charge) to ready to invoice. Column headers can be filtered so it is possible to group the records based on the outstanding task or status.


QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Customers
Resources
Locations
Rates
Configuration
Global configuration
Arynnes Empty
Orders to invoice
Invoices
Credit notes
Trips to bill
Purchase invoices
Upload purchase invoices
Export to Sage50
Edit columns
Order view
Charge view
Export
Create invoice
All
To approve
Not ready to invoice
Ready to invoice
On draft invoice
Invoiced
Invoice posted
Do not invoice
View
Charge
Amount (excl. VAT)
ID
Customer
Route
Charge calculation
VAT
Revenue (excl. VAT)
Description
Transport charge
MY20250052
Gamma
Automatically calculated
100 GBP
No VAT
£100
MY20250051
Honey Bear
4 GBP
VAT 20%
£4
MY20250050
ARYNNE_1
MY20250049
Leo's Lemons
Manual price
£0
MY20250048
£215
MY20250047
Hospital Oost-Limburg
MY20250046
Schenker Logistics Netherlands
Total distance: 507.68 MILE x (1.5 GBP / MILE)
£761.52
MY20250045
BARRY'S TOFFEE
£320
MY20250044
MY20250043
£390

QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Customers
Resources
Locations
Rates
Configuration
Global configuration
Arynnes Empty
Orders to invoice
Invoices
Credit notes
Trips to bill
Purchase invoices
Upload purchase invoices
Export to Sage50
Edit columns
Order view
Charge view
All dates
Export
Print
Quick actions
Invoice orders
All
Not ready to invoice
Ready to invoice
Draft invoice
Invoiced
Invoice posted
Do not invoice
View
ID
POD/CMR
Customer
Route
Revenue (excl. VAT)
Invoice
Billing frequency
Containers/driver...
Cargo
Order start
Order end
Location
MY20250057
First Load Hauling
£430.77
Mo 17/03
Tu 18/03
MY20250056
Fine Foods Ltd
£45
£417.03
Sa 01/03
MY20250055
Hilton Foods Holland
£800
We 26/02
Th 27/02
MY20250054
Gamma
£500
Mo 24/02
MY20250053
MY20250052
MY20250051
Honey Bear
£4
Mo 03/02
Su 26/01
MY20250050
MY20250049
Leo's Lemons
£0
Su 23/02
MY20250048
£215
MY20250047
Hospital Oost-Limburg
MY20250046
Schenker Logistics Netherland
£761.52
Su 02/02
Fr 31/01
Warbys1
We 09/04
MY20250045
BARRY'S TOFFEE
Monthly
Mo 17/02
Bloxham Mill
Th 24/04
MK10

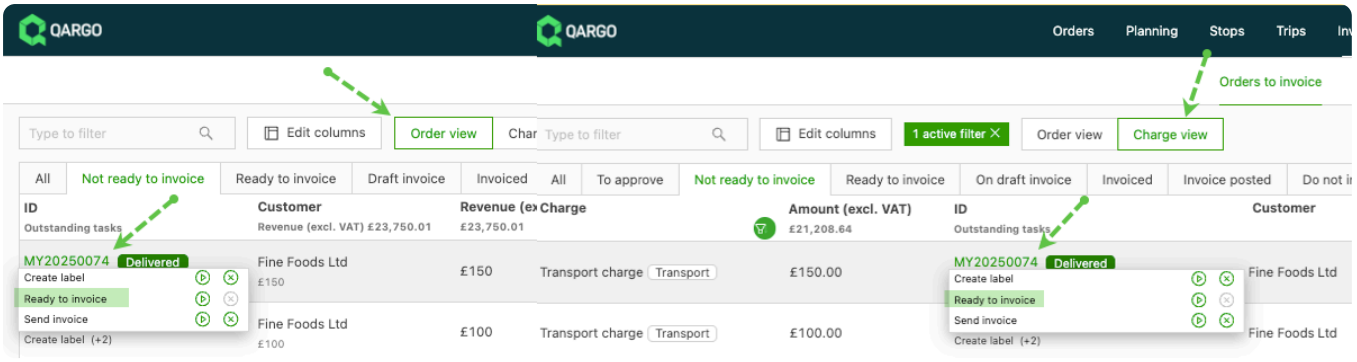


If charges need to be updated, clicking anywhere in the row will open the order details and these can be updated as required. In the ***Charges View*** it is possible to update the charges directly from the screen.

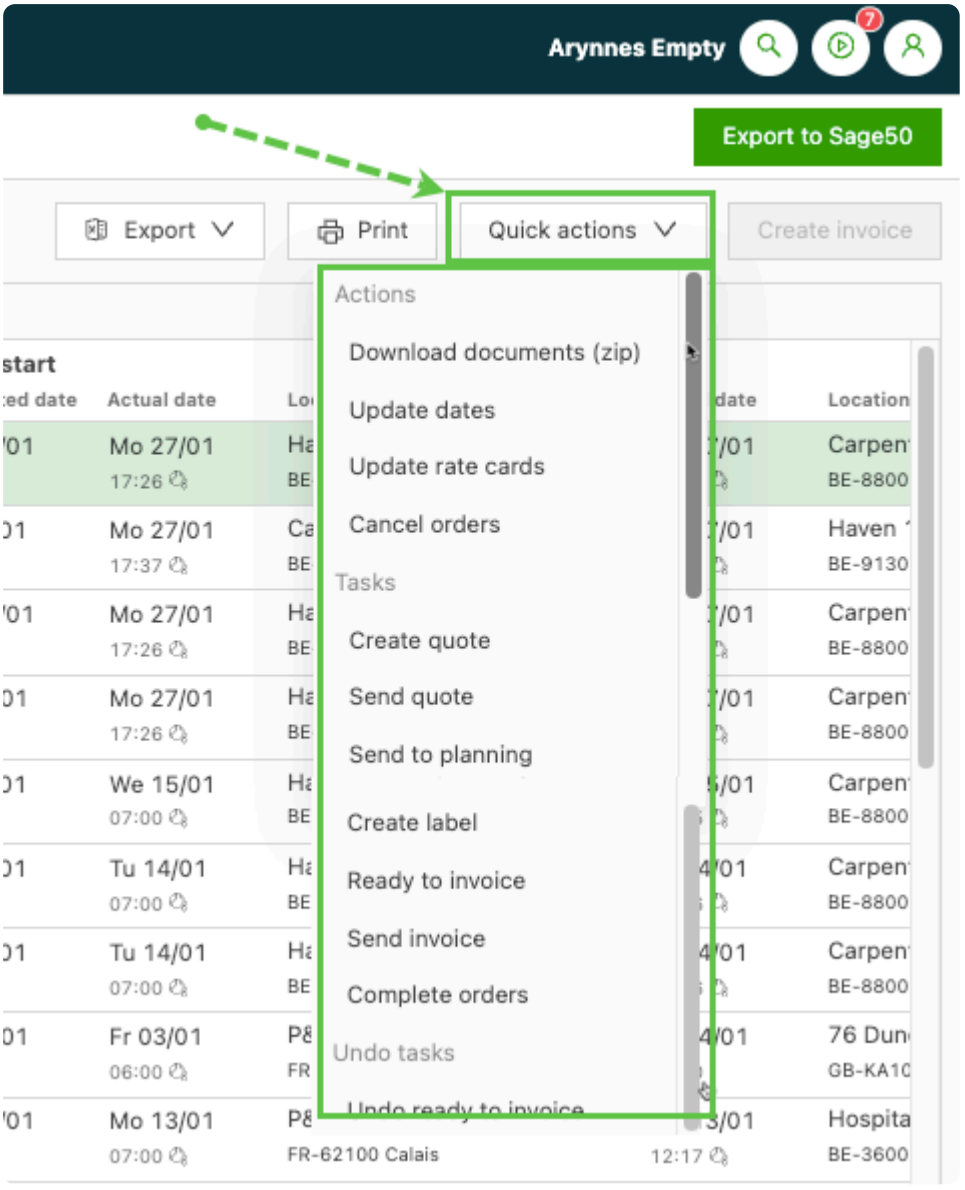


Ready to Invoice

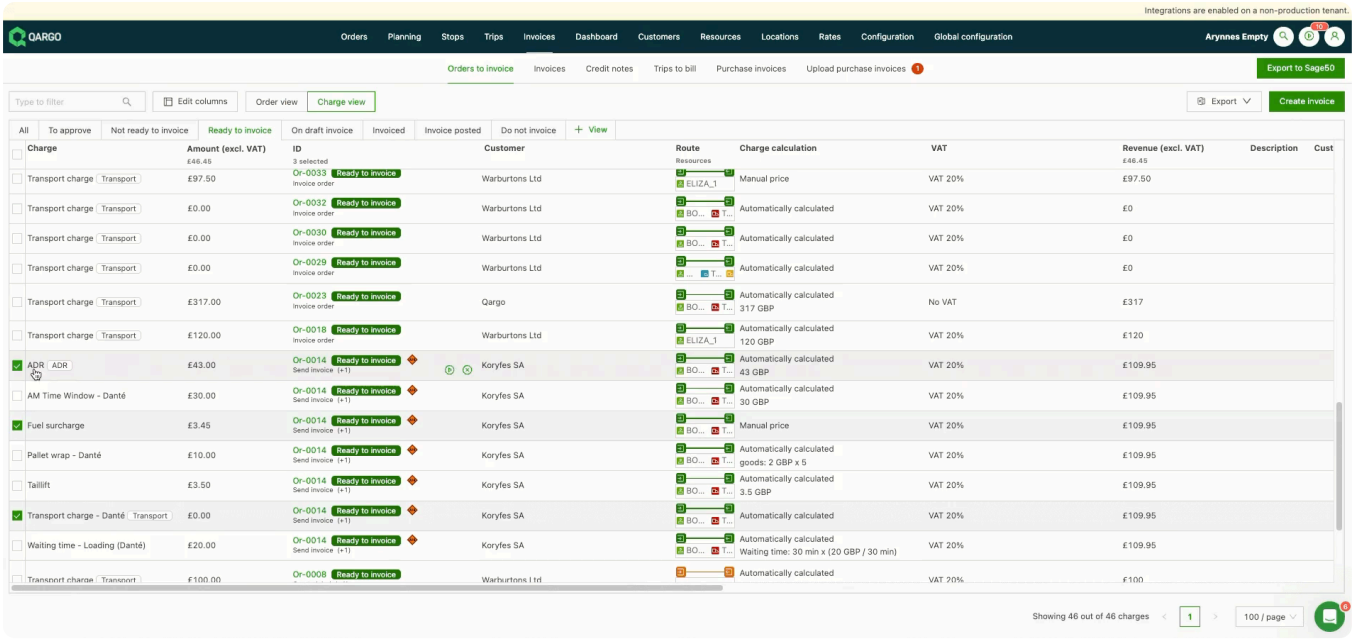
Once an order or charge is confirmed it can be set ***'Ready to Invoice'*** which makes it available to be invoiced.



The ***Order View*** offers a wider choice of functions via the *'Quick Actions'* menu. This allows a variety of functions that can be associated with processing invoices, including downloading documents, or updating the order status back to 'Not ready' if necessary.



From the ***Charges View***, clicking on the check boxes will combine charges to create an invoice. In this way, it is possible to separate charges from a single invoice if necessary.

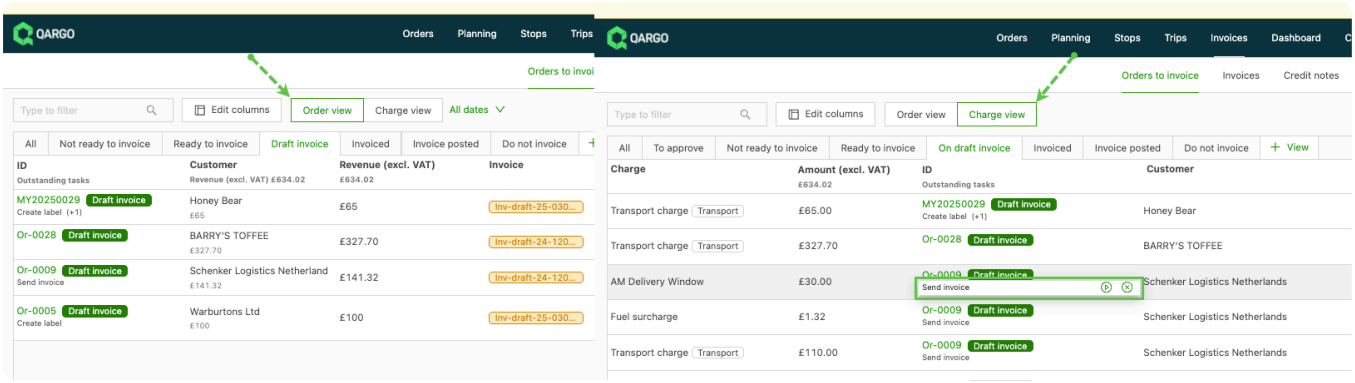


Once all auditing is complete, and the orders or charges are ready to be invoiced, select the check boxes and click the **'Create Invoice'** button. In the Order View, this will automatically include all charges on the order. In the Charge View charges are sorted based on the charge, so be sure to select all the charges to be included on the order.
See the link below for a complete overview of Creating an Invoice.

Create Invoice

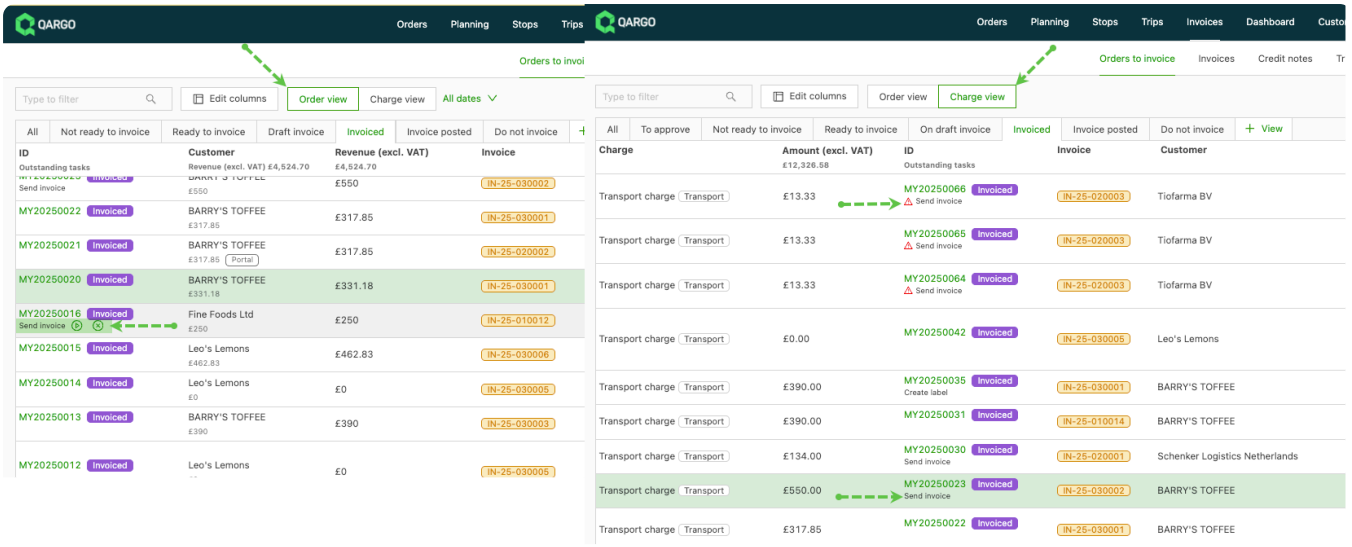
Draft Invoice / On Draft Invoice

A draft invoice allows users to create and review an invoice before finalising it. Draft Invoices are given a unique 'DRAFT' invoice number. When viewing in the *'Orders to Invoice'* screens, these will still show under either order number (Orders View) or by the charge description (Charge View), with a status of **'Draft Invoice'**. The Invoice functionality is limited to the *'Send Invoice'* task in both the *Order View* and the *Charge View*. However in the *Charge View,* the charges can also be updated from the main list.



Invoiced

Once an invoice has been created, the order / charge will show in the **'Invoiced'** tab view. The Invoice column will now include the invoice number assigned to the order / charge. In the ***Order View***, the orders are still group by order number and the ***Charge View*** will still group based on charge type.

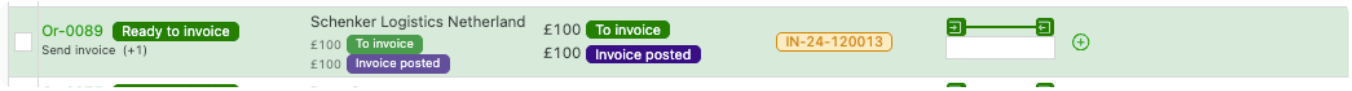


Functionality is limited, it is still possible to update the charges on the ***Charge View*** screen, while in the ***Order View*** clicking on the order number will open the Order Detail where the charges can be updated. Once any changes have been made, the 'Send Invoice' task will show so that the updated details can be resent to the customer. If there are any errors, an alert will show on the task.

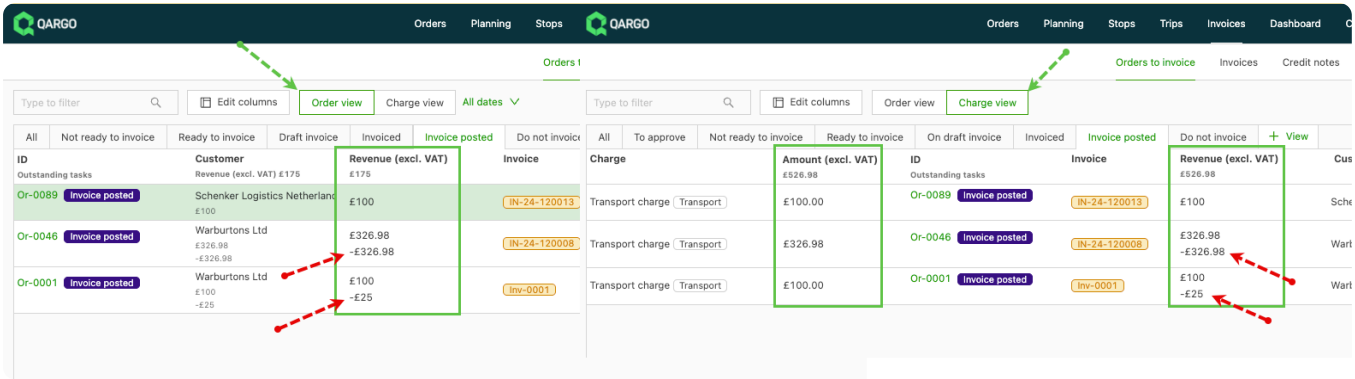
To process invoices, use the INVOICES menu.

Invoice Posted

An invoice with a **Posted** status indicates that the invoice has been generated and issued to the customer. Once in a posted status, no further updates can be made to the charges and order details. It is possible to **ADD additional charges** to an the order, however this will not affect the Posted Invoice. It will move the order back to a ***'Ready to Invoice'*** status for the **new charges** added, which will need to be invoiced separate to the Posted Invoice. For adjustments after posting, consider using credit notes or standalone invoices for additional charges. Credit notes can reverse the original charges and allow for reissuance of a corrected invoice, while standalone invoices address missed charges without altering the original posted invoice. These approaches ensure accurate and transparent financial records.



If any changes are required to the Posted Invoice, a Credit Note can be created, for either a specific charge on the invoice or the whole invoice. If a credit note is created, it will be shown as a negative amount in the Revenue column. Alternatively, if creating a credit note is not preferred, a standalone invoice can be issued to include any additional charges separately. This method is ideal for smaller adjustments and avoids changes to the original invoice.



In some circumstances, it is possible for a Super Admin user to *Unpost* an invoice.

‼️ **Unposting invoices should be used with caution as it can create discrepancies in accounting data.**

Based on individual business requirements, **Posted invoices** may be exported in a format that allows data to be transferred to a 3rd party accounting software. Where integrations exist this process may be conducted through a direct transfer. For a complete guide on correcting or adjusting invoice amounts post-posting, refer to the sections on credit notes, standalone invoices, and editing invoices while in editable statuses. Each method offers flexibility depending on the scope of the adjustment and the status of the invoice.

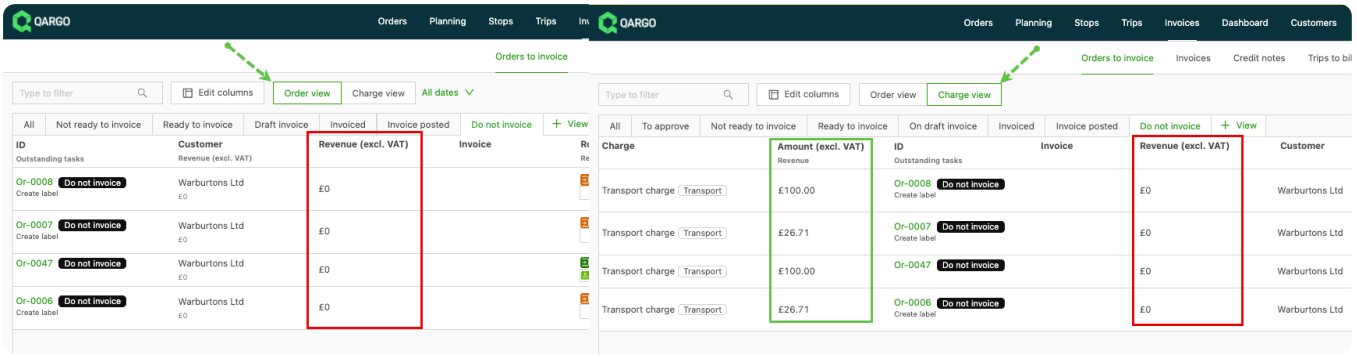
Contact Account Manager for details of Accounting software integrations.

Do not Invoice

Marking an order or charge as 'Do not invoice' removes the revenue amount and sets the value to '0'. When creating an invoice there are 2 ways to use the ***'Do not invoice'*** option:

- Manually mark an order / charge as 'Do not invoice'.
- Configure charges to automatically set to 'Do not invoice' when a ZERO amount. This is configured in the Charge settings as 'don't invoice if amount is 0'.

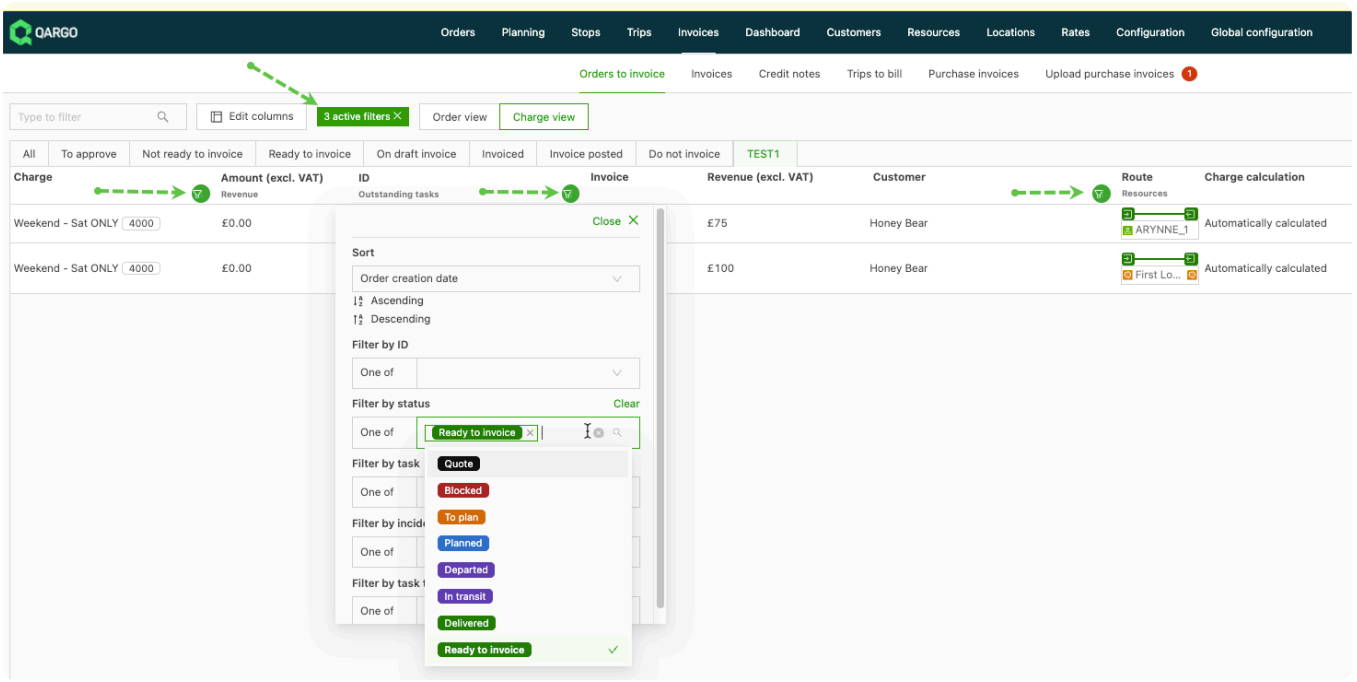
When using 'Do not invoice' the revenue is set to 0 which can impact revenue value for reporting purposes.

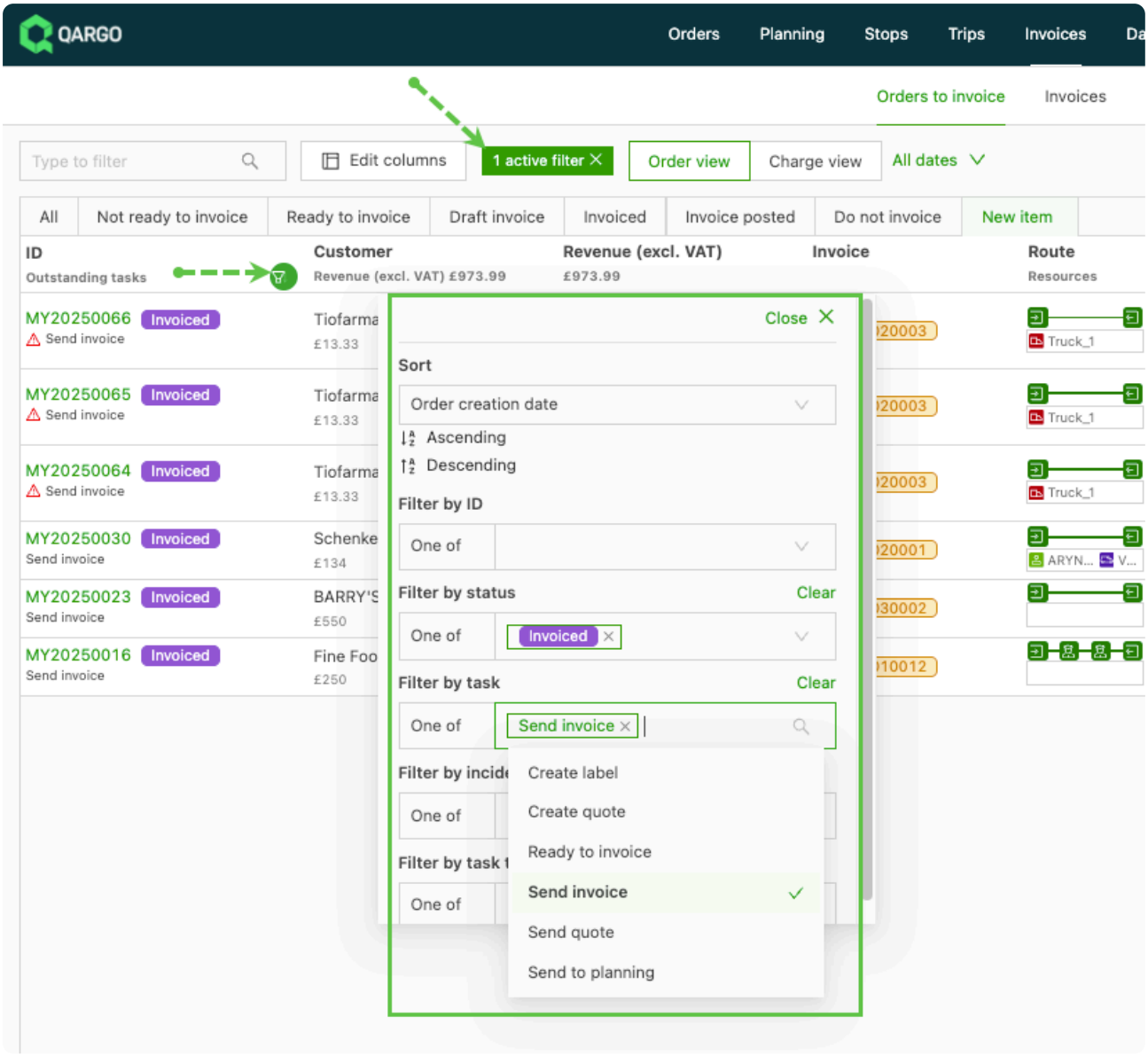


The ***Charge View*** will retain the original charge amount, but the revenue will be set to 0. The ***Order View*** will only show the revenue amount as 0.

Custom View (+)

Each view (*Order / Charge*) offers the option to create a custom view. When first selecting the ***+ View***, the default will show as ALL. Each column header has filtering options which can then be used to tailor the view to suit individual requirements. Once a column has a filter applied, the filter icon will show in green, and there is an indicator showing how many active filters are enabled. In some instance, it is possible to add multiple options on the filter.


QARGO
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Orders to invoice
Invoices
Credit notes
Trips to bill
Purchase invoices
Upload purchase invoices
Type to filter
Edit columns
3 active filters
Order view
Charge view
All
To approve
Not ready to invoice
Ready to invoice
On draft invoice
Invoiced
Invoice posted
Do not invoice
TEST1
Charge
Amount (excl. VAT)
Revenue
ID
Outstanding tasks
Invoice
Revenue (excl. VAT)
Customer
Route
Resources
Charge calculation
Weekend - Sat ONLY
4000
£0.00
£75
Honey Bear
ARYNNE_1
Automatically calculated
Weekend - Sat ONLY
4000
£0.00
£100
Honey Bear
First Lo...
Automatically calculated
Close
Sort
Order creation date
Ascending
Descending
Filter by ID
One of
Filter by status
Clear
One of
Ready to invoice
Filter by task
One of
Quote
Blocked
To plan
Planned
Departed
In transit
Delivered
Ready to invoice


QARGO
Orders
Planning
Stops
Trips
Invoices
Orders to invoice
Invoices
Type to filter
Edit columns
1 active filter
Order view
Charge view
All dates
All
Not ready to invoice
Ready to invoice
Draft invoice
Invoiced
Invoice posted
Do not invoice
New item
ID
Outstanding tasks
Customer
Revenue (excl. VAT) £973.99
Revenue (excl. VAT)
£973.99
Invoice
Route
Resources
MY20250066
Invoiced
Send invoice
Tiofarma
£13.33
MY20250065
Invoiced
Send invoice
Tiofarma
£13.33
MY20250064
Invoiced
Send invoice
Tiofarma
£13.33
MY20250030
Invoiced
Send invoice
Schenke
£134
MY20250023
Invoiced
Send invoice
BARRY'S
£550
MY20250016
Invoiced
Send invoice
Fine Foo
£250
Truck_1
Truck_1
Truck_1
ARYN...
Close
Sort
Order creation date
Ascending
Descending
Filter by ID
One of
Filter by status
Clear
One of
Invoiced
Filter by task
Clear
One of
Send invoice
Filter by incide
One of
Filter by task
One of
Create label
Create quote
Ready to invoice
Send invoice
Send quote
Send to planning

Filters that are set on one tab view will be applied across all tabs.

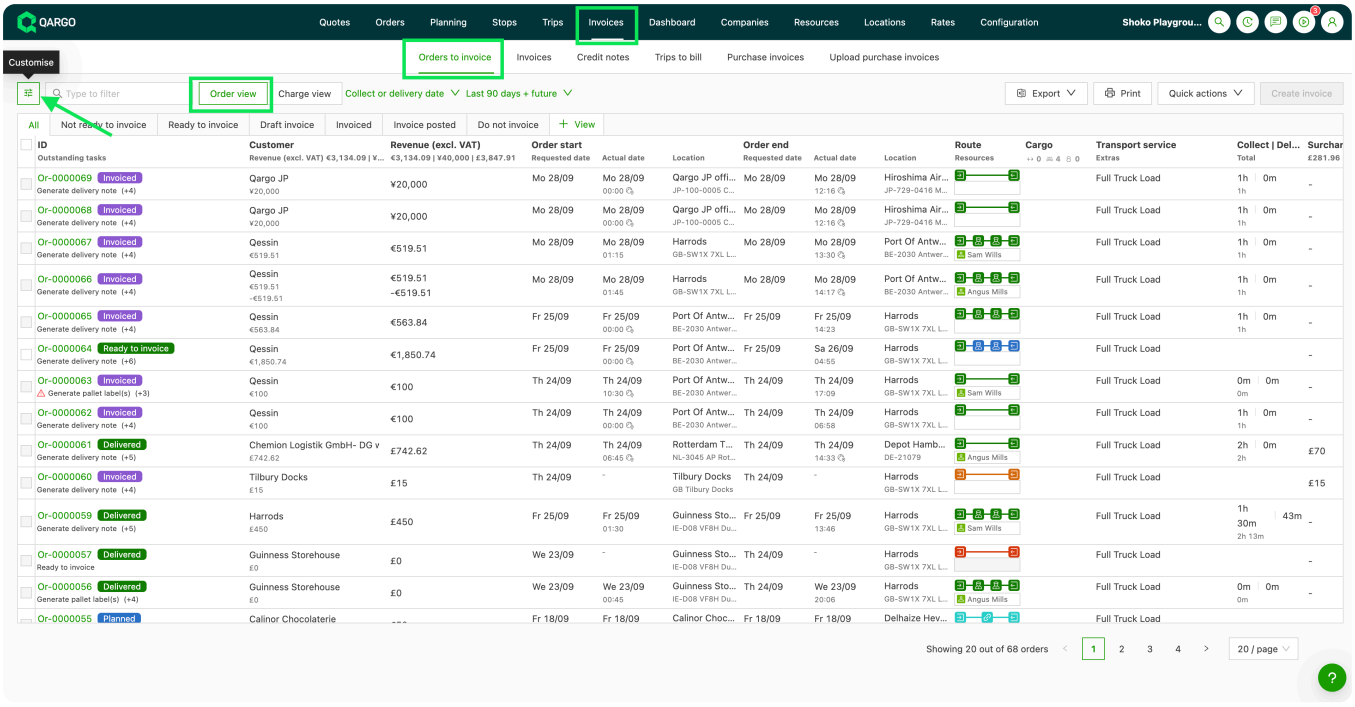
Surcharge revenue column

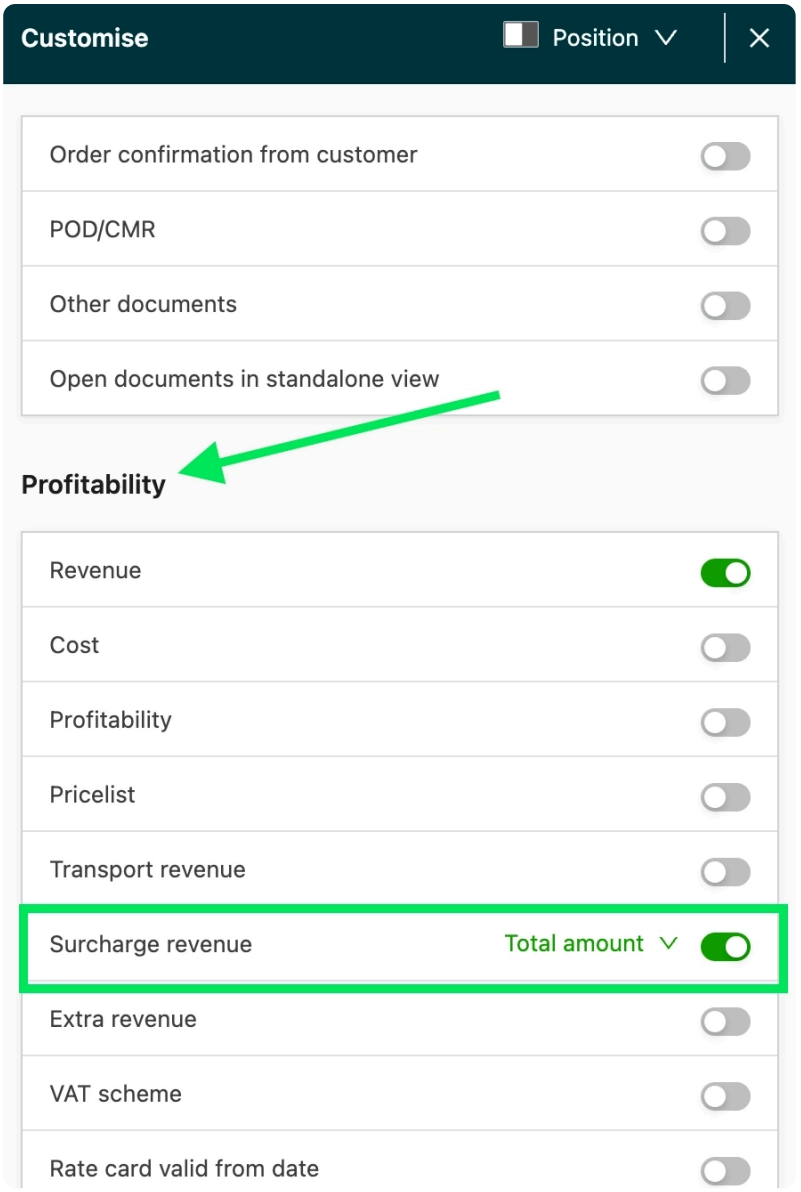
The **Surcharge revenue** column, available in the '***Orders to invoice***' page, also in the **Orders overview** page, shows which surcharges make up the total and can be filtered by surcharge name. This makes it possible to **list every order that is missing a specific surcharge** before invoicing, for example a holiday surcharge on a public holiday.

- In the INVOICES page, the **Charge View** cannot be used for the Surcharge column because an order that lacks a charge has no row there at all.
- The Surcharge revenue column is turned off by default.

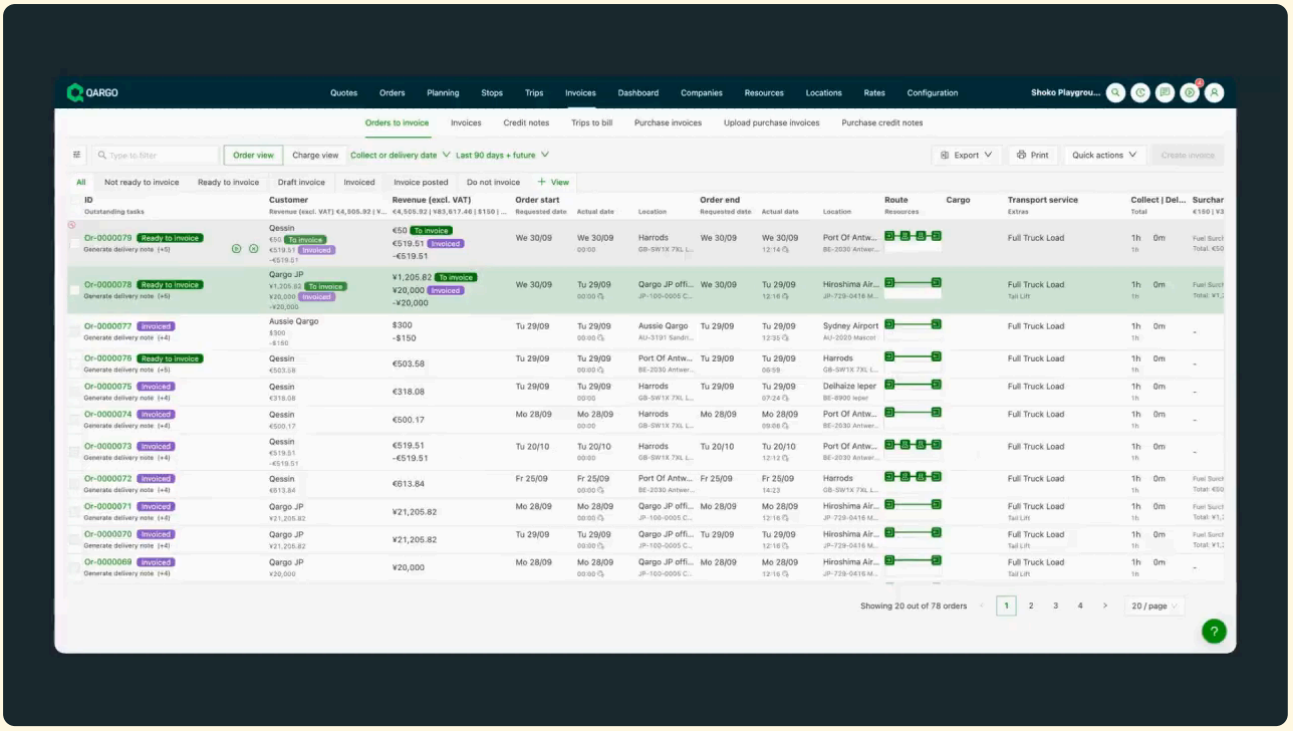
Add the Surcharge revenue column

1. Navigate to **INVOICES > *Orders to invoice,*** then select the **Order View**.
2. Click **Customise**.
3. Toggle on the **Surcharge revenue** column in **Profitability** section.



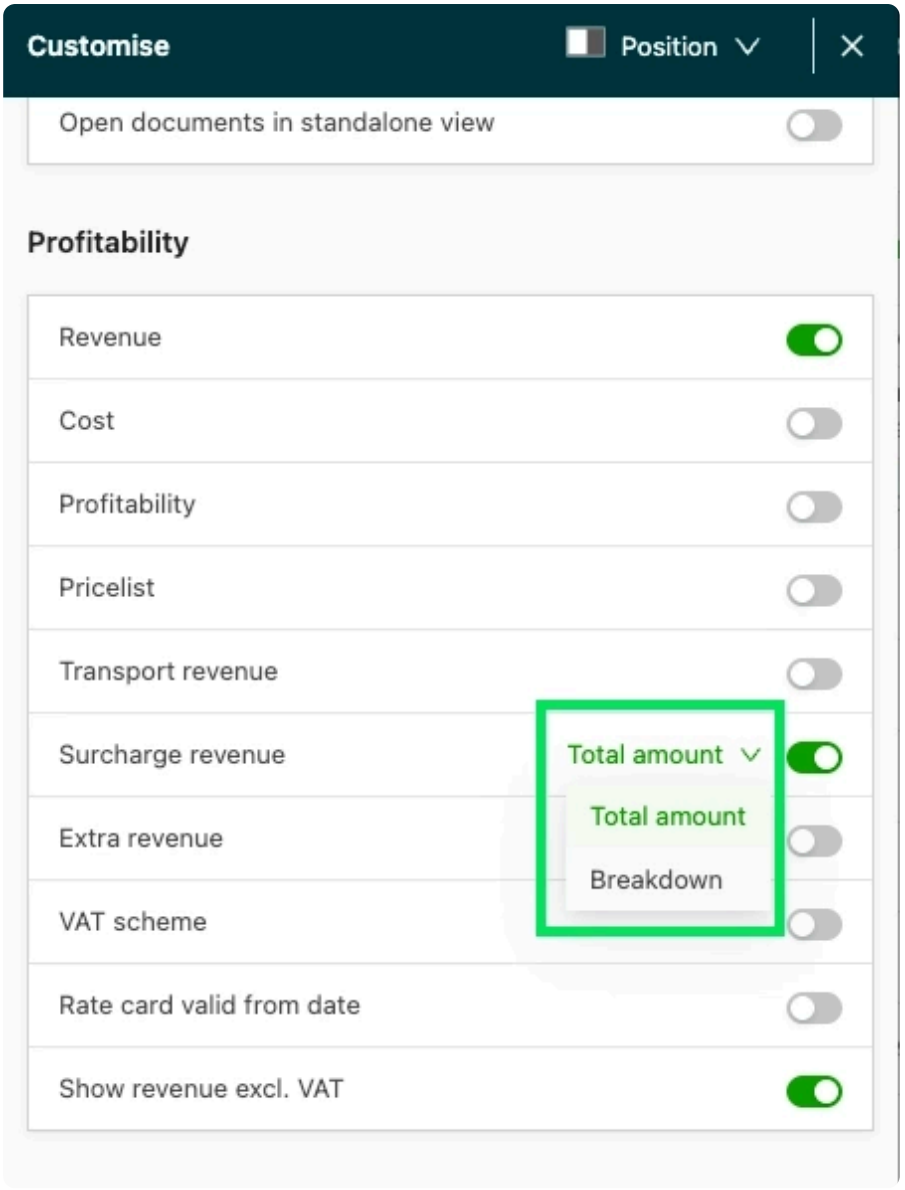

Customise
Position
Order confirmation from customer
POD/CMR
Other documents
Open documents in standalone view
Profitability
Revenue
Cost
Profitability
Pricelist
Transport revenue
Surcharge revenue
Total amount
Extra revenue
VAT scheme
Rate card valid from date

🧰 Once the Surcharge revenue column is on, it will land last in the column order. You can drag the column in where you need to view it best.

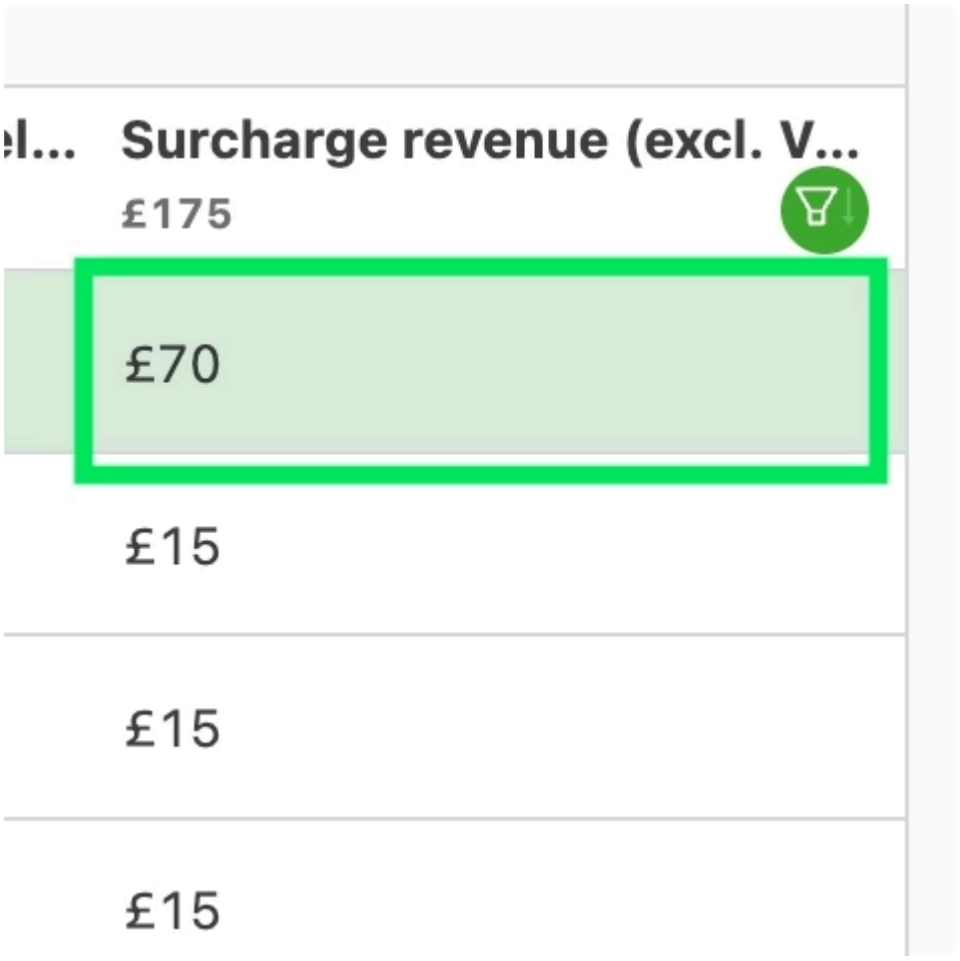


Switch the display mode

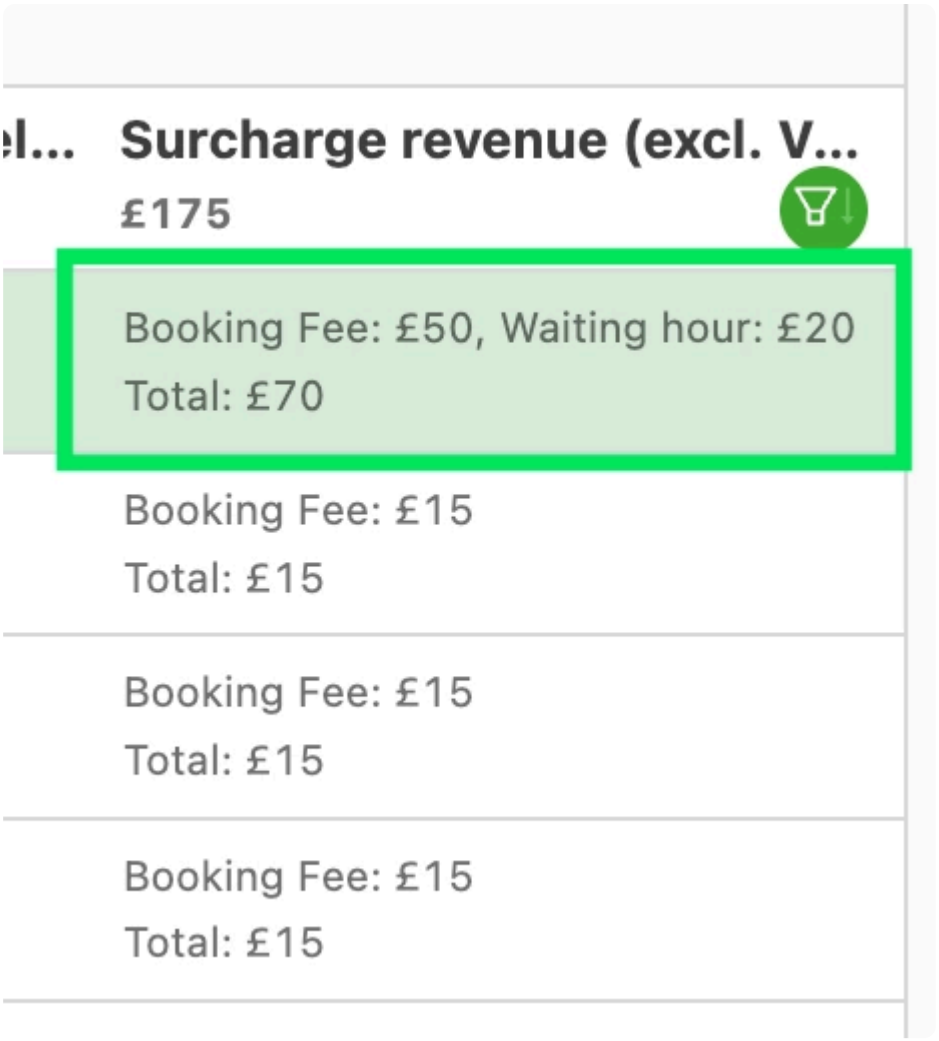
1. Navigate to the **Surcharge revenue** column toggle from **Customise** panel.
2. Click the dropdown button next to the toggle.
3. Select a display mode:
    - **Total amount**: a single combined total.
    - **Breakdown**: each surcharge listed as name and amount, e.g. Booking fee: £50, Waiting hour: £20, followed by the total.



Total amount:

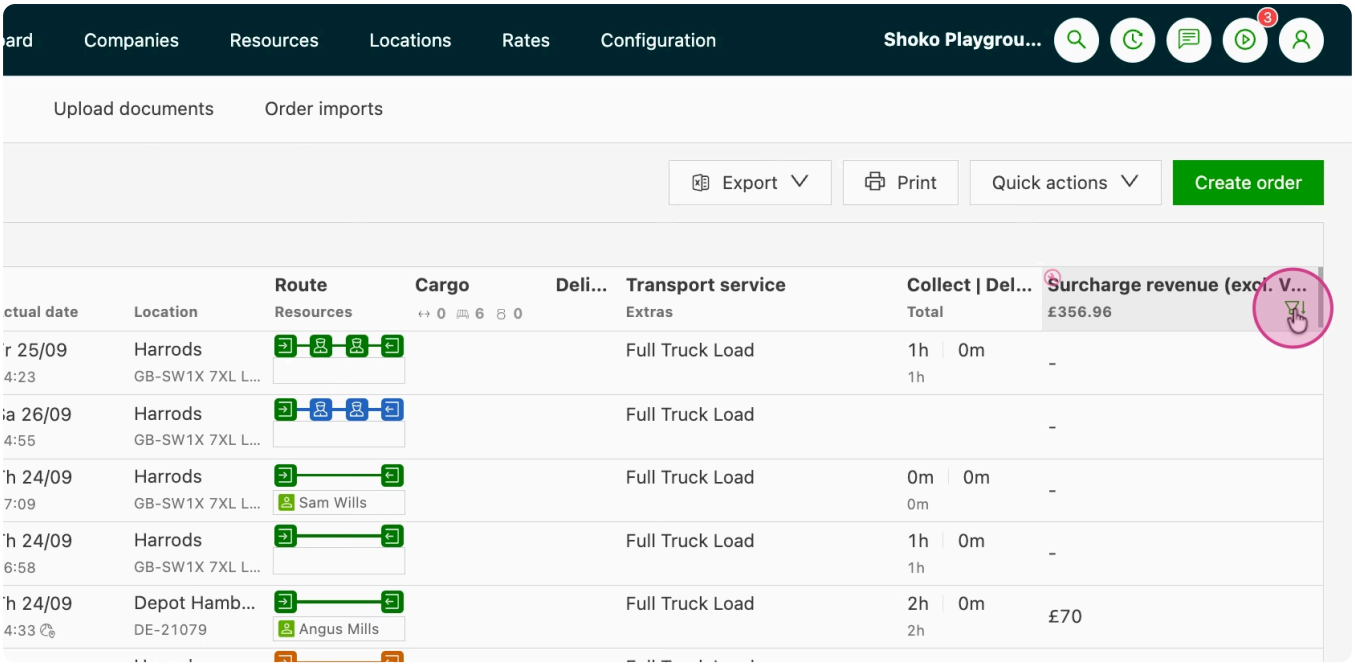


Breakdown:



Filter by surcharge name

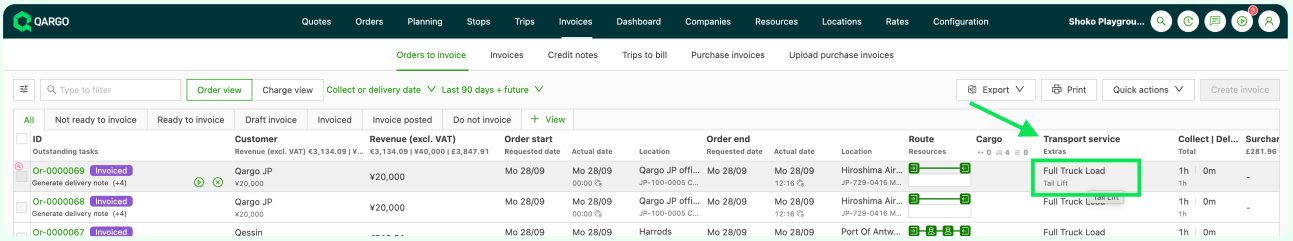
1. Click the filter icon on the **Surcharge revenue** column header.
2. Choose **Is** or **Is not.**
3. Pick a surcharge name.
   For example,
   Is + '**Booking fee**' lists every order containing the Booking surcharge.
   Is not + 'Booking fee' lists orders missing the Booking surcharge.
4. Save the view to keep the display mode and filter for next time.



Video showing how the filtering works:

▶ https://watchclueso.com/embed/jkvtfvbiahp6xs70

🧰 **Surcharges only,** extras aren't broken down here as they already appear in the **Transport service** column.



Troubleshooting:

Issue	Resolution
I cannot see the filter icon on the surcharge revenue column.	If the filter icon isn't visible after enabling the column, scroll the table right (at narrower screen widths (1440px and below), the Surcharge revenue column can sit beyond the visible area). Otherwise, you can turn off a few other columns, which brings it into view without scrolling if it needs to stay visible in a saved view.