Invoices: customize the invoice list view

Customize invoice views by adjusting column visibility and filtering data. Use Edit columns and column filters to select data.

Updated October 15, 2026

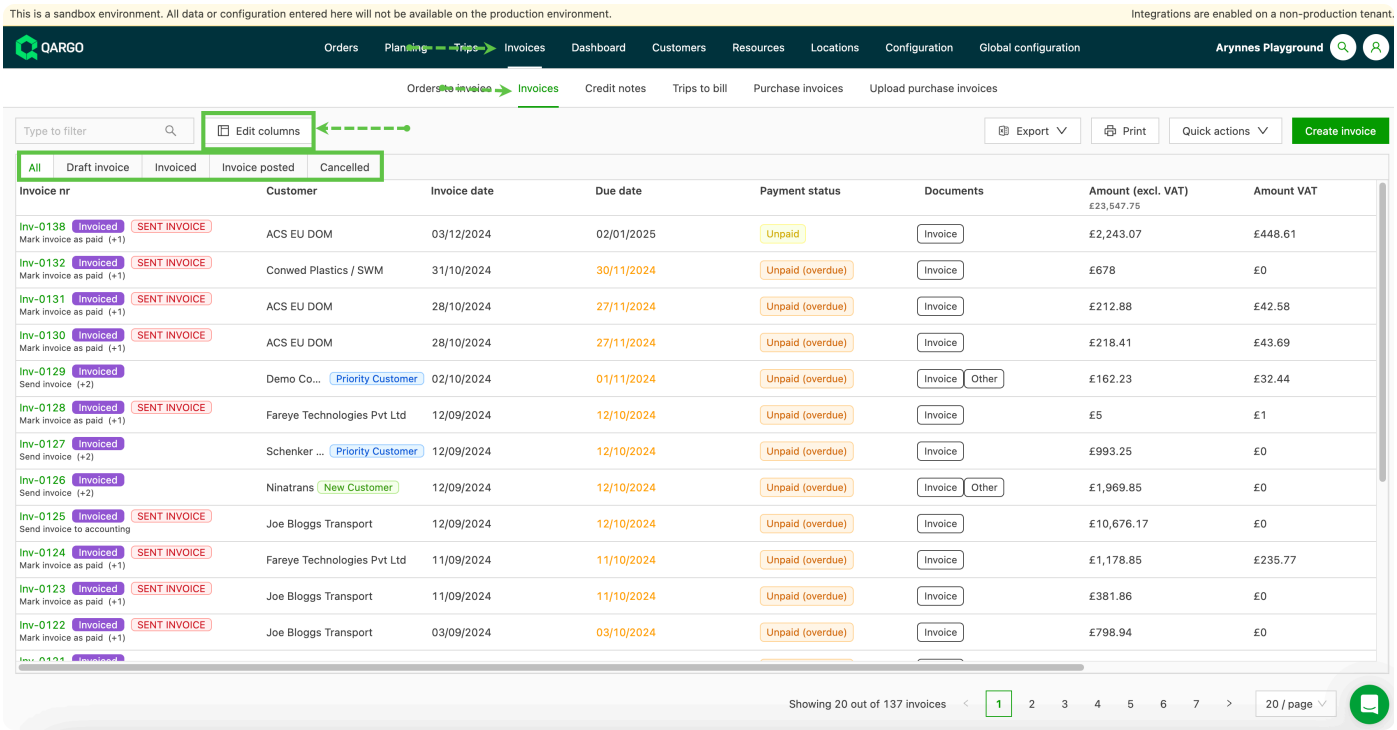
Customize the columns

Navigate to **Invoices**. When the invoice page loads, the default view shows the **All** tab. Additional tabs provide default list views for:

- Draft invoice
- Invoiced
- Invoice posted
- Canceled.

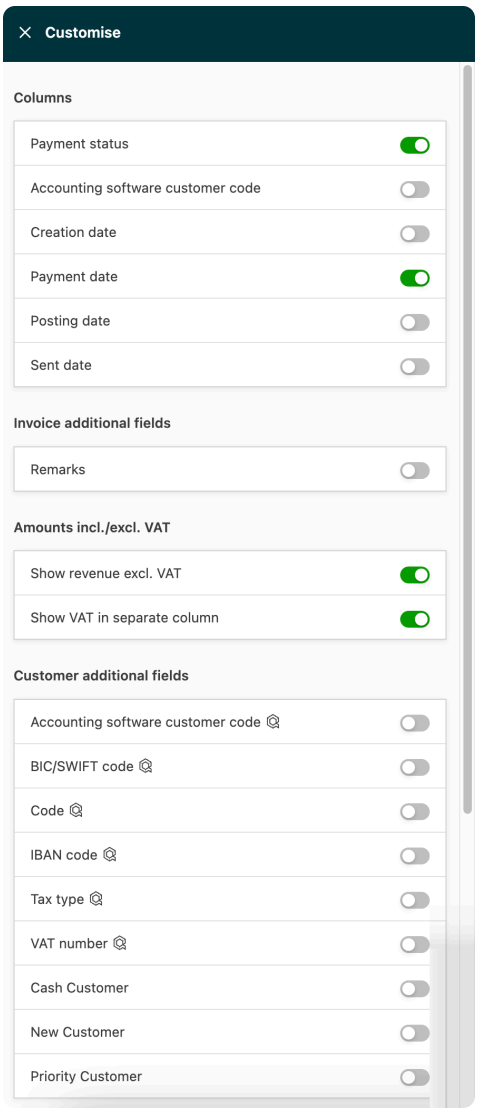
The invoices and their details can be customized on the invoices page.

- Click **Customize.**



A side pane then opens on the left side of the screen.

- Select the invoice details to show on the page.
- Close the side pane when done.



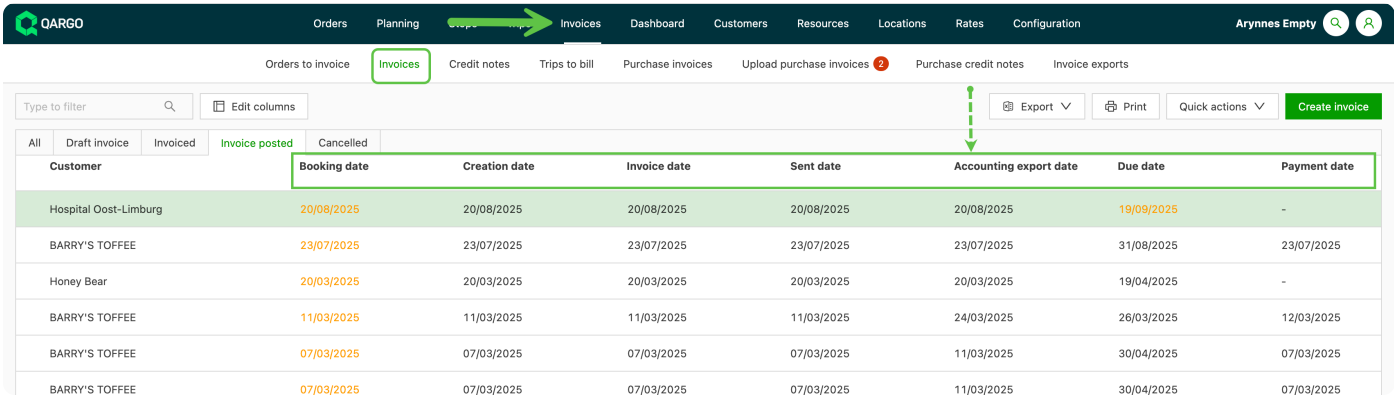
Invoice additional fields are added in Configuration. Once added, those additional fields are shown in the side pane.

Dates on the invoice list

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

Name changes

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



Date columns

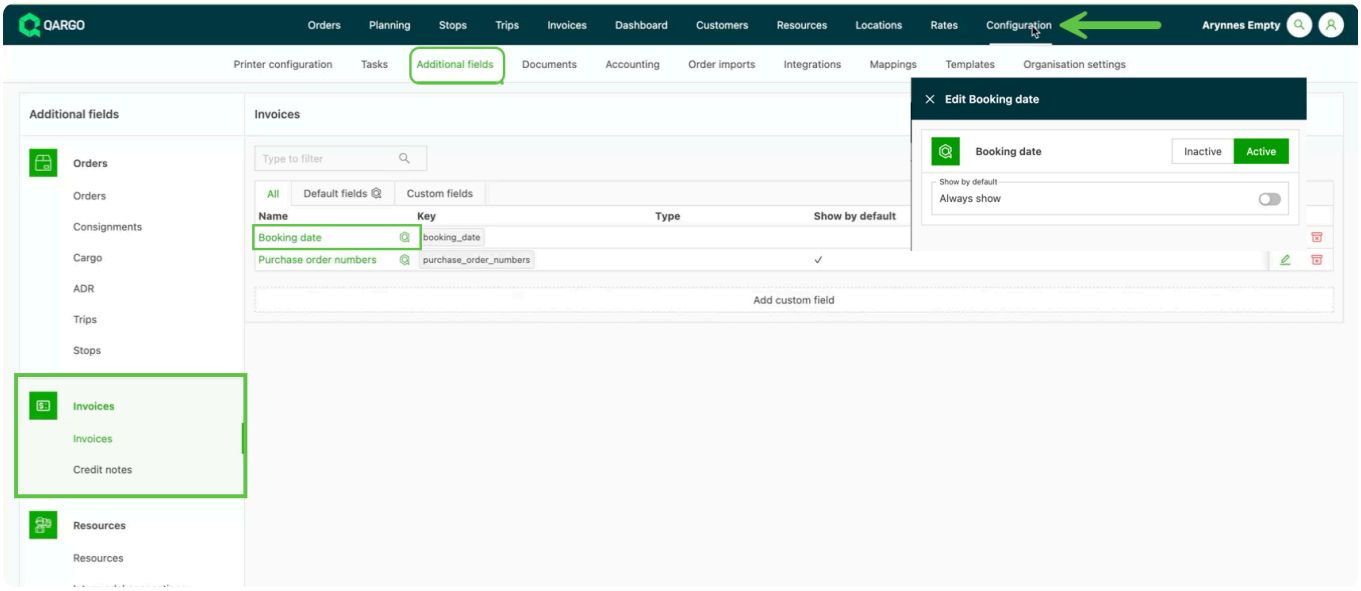
- **Creation date:** when the invoice was created in the system.
- **Invoice date:** the date entered when adding the invoice.

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

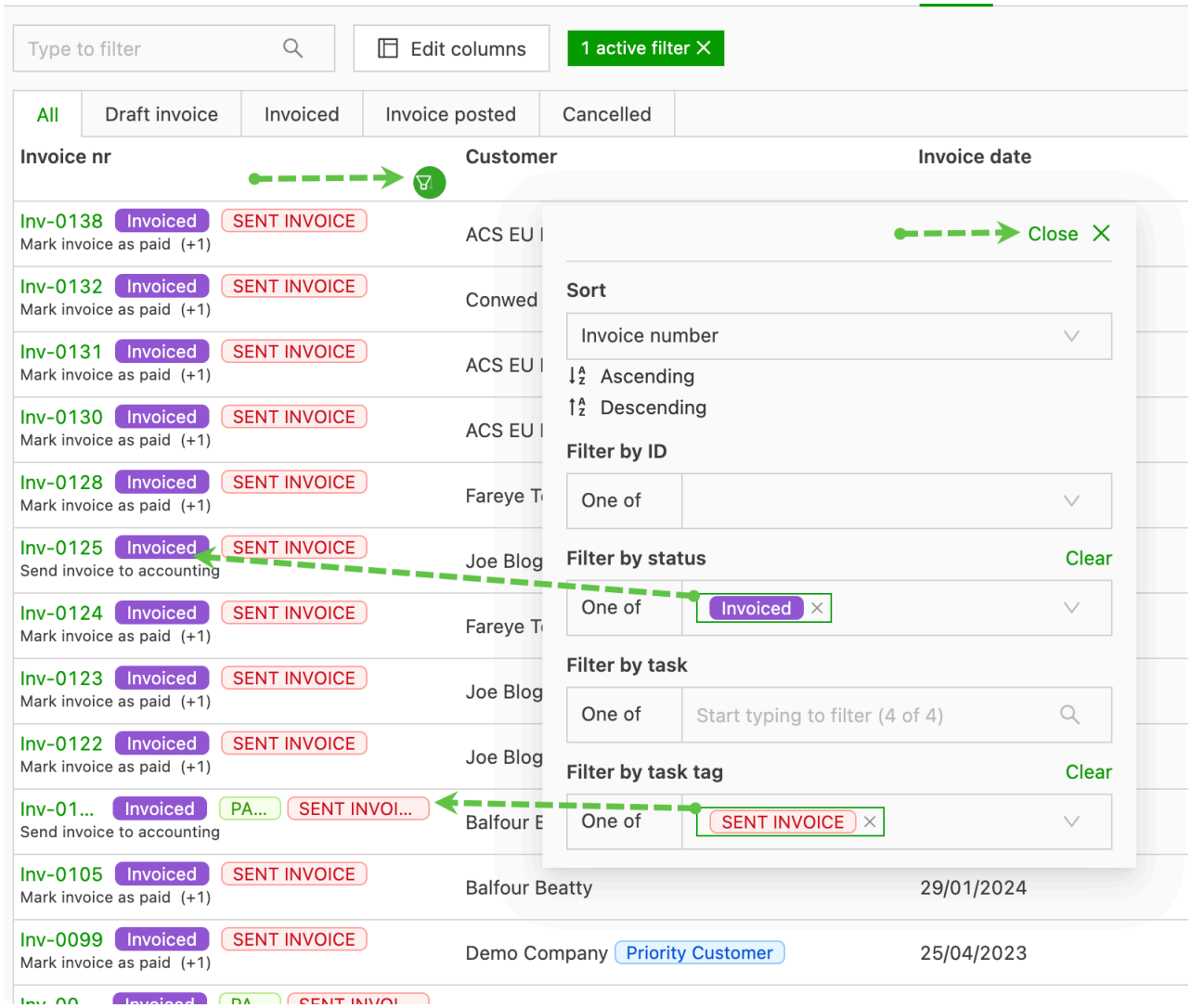
1. Go to **Configuration > Additional fields**.
2. Select **Invoices** in the Invoices side menu.
3. Click **Booking date** and set it to **Active**.



Filter data

Data on the page can be filtered with the filter icon in the table header. Hover over the column header and the filter icon appears in the bottom right corner.

- Click the filter icon.
- Select the data to filter.
- The data updates as the filters are selected.
- A label displays how many filters are applied. These count the filters in the column header; i.e., multiple filters in 1 column show as 1 active filter. The filter icon is highlighted green to indicate which column has the filter applied.
- Once the filters are selected, click **Close** to close the pop-up window.



Filters set on 1 tab are applied to all tabs.

The filter is saved. The next time this page is opened, the same view is shown.

🚨 Custom column views (both the order and size) are **retained by the browser**. If cookies are deleted or the browser is configured never to store cookies in the first place, the views aren't saved and are reset to the default the next time Qargo is used.

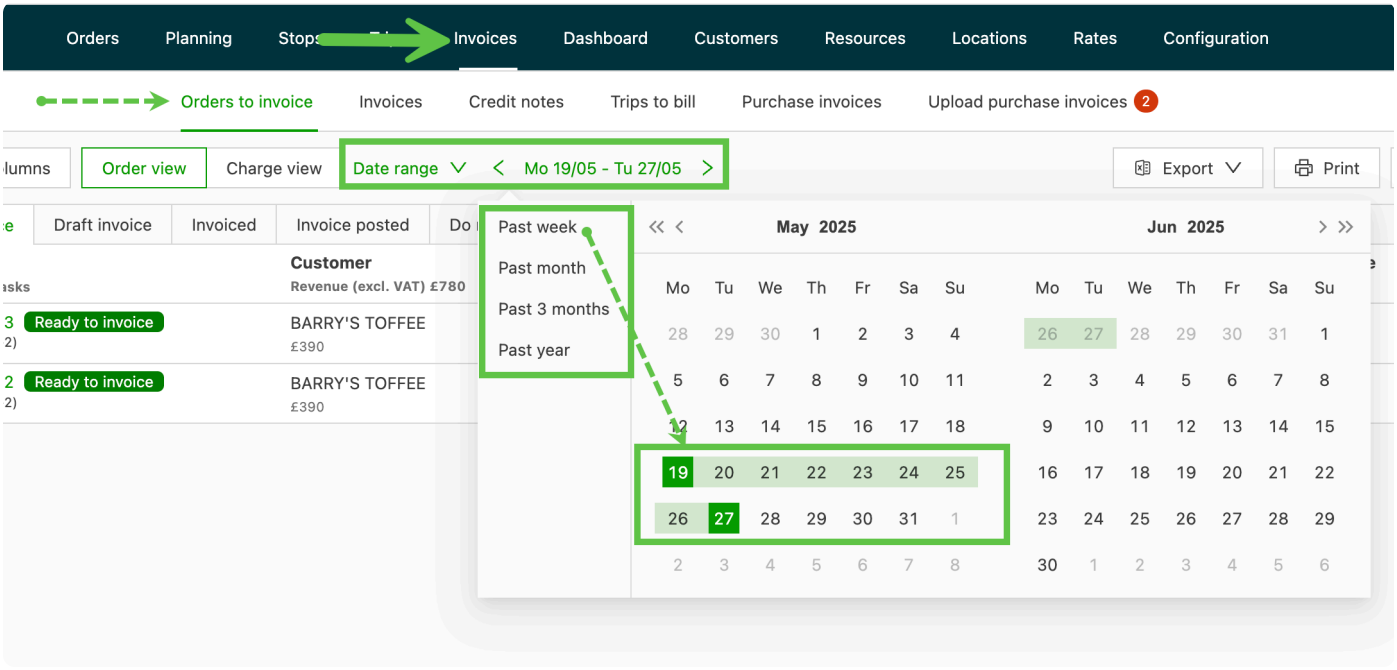
Select date range option:

The following filter options are available:

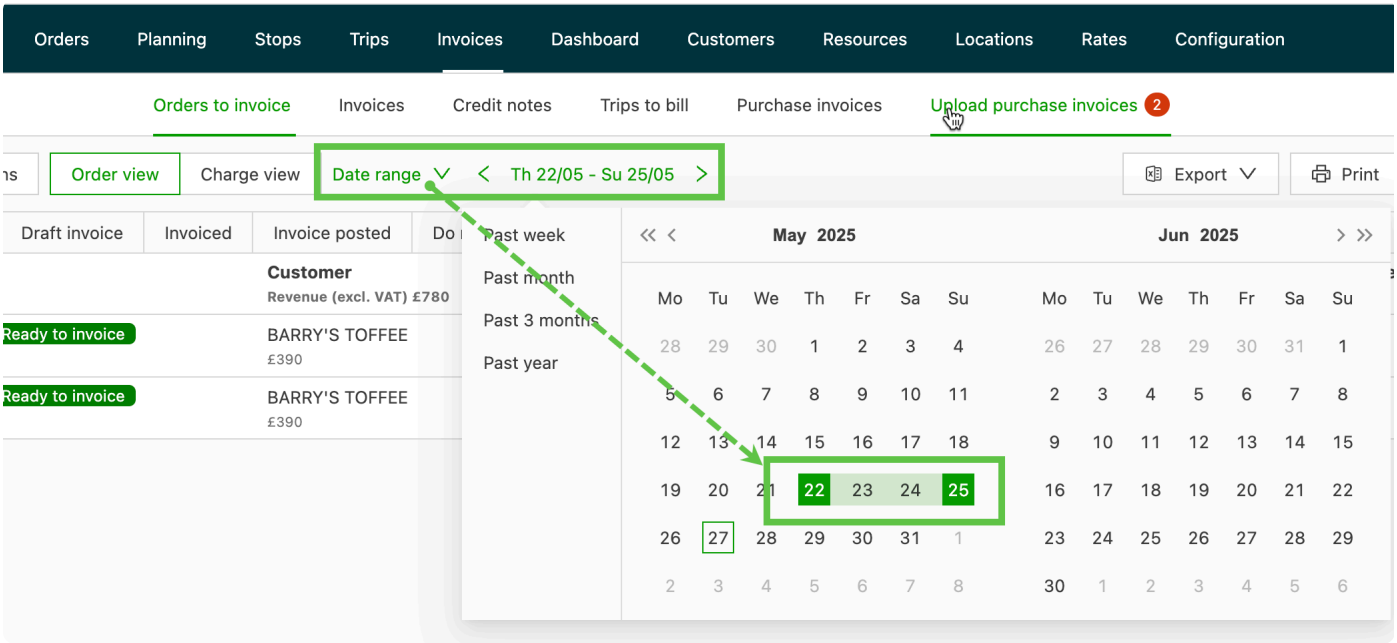
- **Last 90 days + future**: this filters on all orders
- **Date**: to filter on one specific date. By default, this filters on the current date.
- **Date range**: This allows the user to easily select a date range on a calendar. When selecting date range filtering, two options are available to choose from. Additionally, Qargo provides the following date types to refine the 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 load once the order is planned and executed.
- **Order start/end date**: Used for filtering orders during billing or other operational tasks.

For convenience, some preconfigured date ranges are available when filtering on a date range. When one of these options is selected, the dates are selected automatically:



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



Date ranges are limited to 1 year.

- For orders, the filter is on **Requested date**.
- For loads, the filter is on **Actual date**. When filtering for billing purposes, the **Order start/end date** filter is recommended. If an order has different requested and actual dates, align them to avoid discrepancies in the 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 the weekly billing list

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

1. Use the **Order start/end date** filter for billing purposes.
2. Be aware of the two operational date types:
    - **Requested date**: From the order.
    - **Actual date**: From the load once the order is planned.
3. Make sure the correct date type is selected in the **Order start date** filter.
4. If an order has different requested and actual dates, it may not show under a filter that uses the other date. Align the dates as needed for the billing run.

Orders not appearing when searching or filtering for PODs

If an order is missing when searching or filtering for proofs of delivery (PODs), the cause may be the date filter selection. To make sure the order appears:

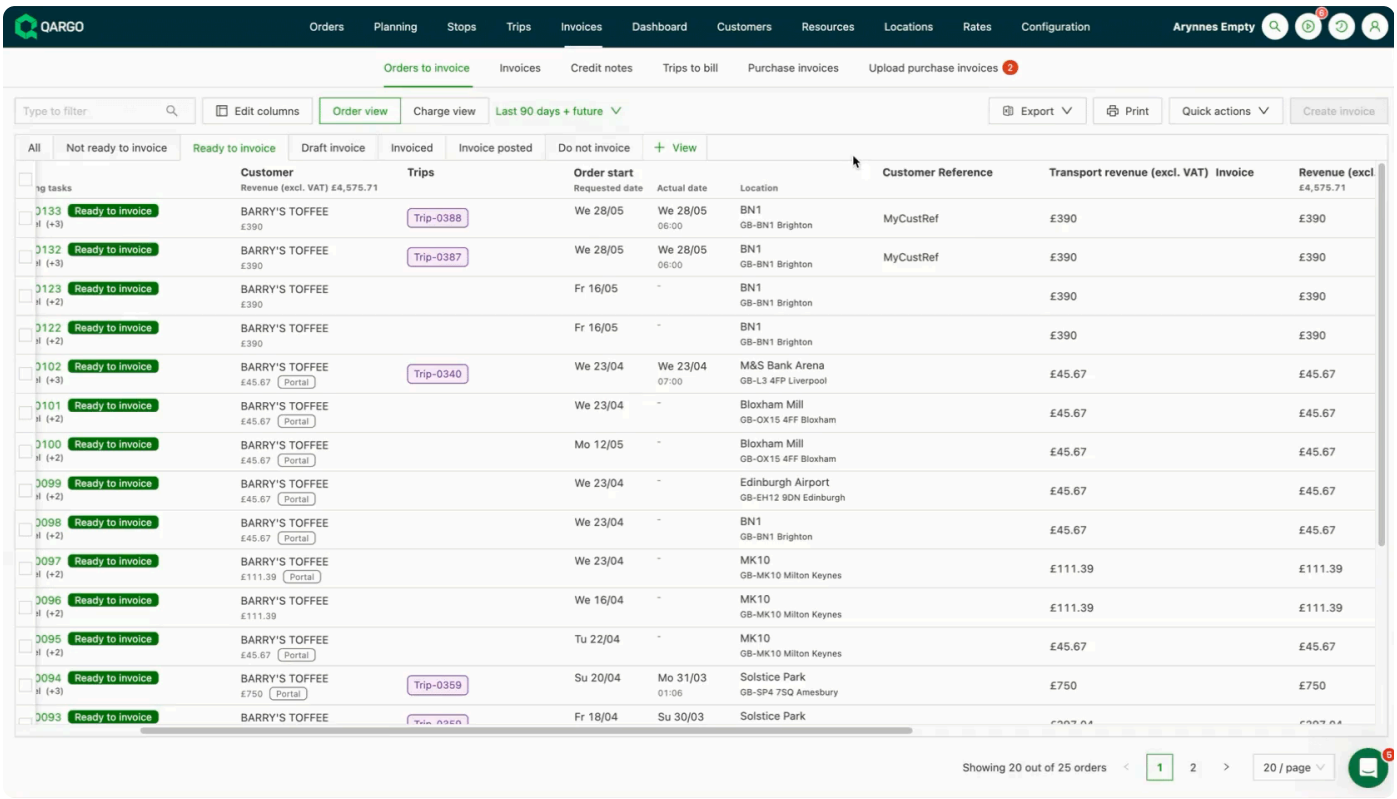
1. Verify the selected date filter.
2. Use the **Requested date range** rather than other date filters.
3. Make sure the requested date range includes the order's date.

Best practices for date alignment

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

Troubleshooting tips

- Double-check the date range in the filters to make sure it covers the relevant period.
- If orders are still missing, verify that the correct date type (requested or actual) is 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
BARRY'S TOFFEE
Trip-0388
We 28/05
BN1
GB-BN1 Brighton
MyCustRef
£390
Trip-0387
Fr 16/05
Trip-0340
We 23/04
M&S Bank Arena
GB-L3 4FP Liverpool
£45.67
Portal
Mo 12/05
Bloxham Mill
GB-OX15 4FF Bloxham
Edinburgh Airport
GB-EH12 9DN Edinburgh
MK10
GB-MK10 Milton Keynes
£111.39
We 16/04
Tu 22/04
Trip-0359
Su 20/04
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Solstice Park
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£750
Fr 18/04
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Showing 20 out of 25 orders
1
2
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