Invoices: Create a carrier invoice from an existing billing proposal.

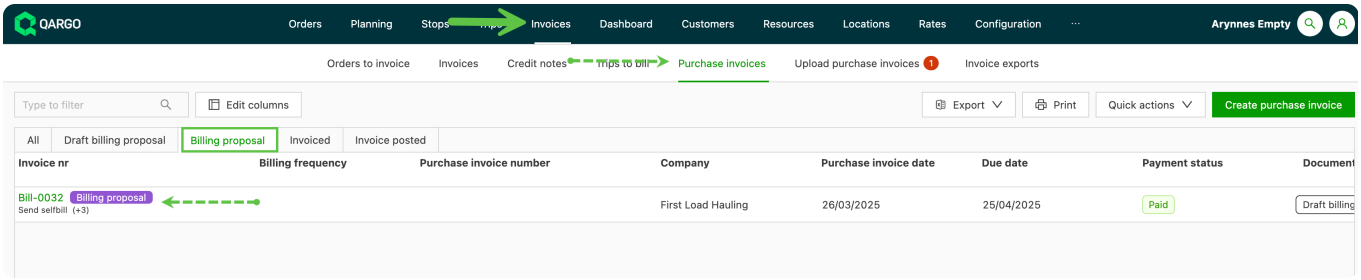
Learn how to convert self-bill billing proposals into carrier invoices: upload and validate contract carrier invoices, adjust charges, add documents, and post invoices to accounting efficiently.

Updated March 27, 2026

Once a billing proposal includes loads and an invoice has been received from the contract carrier, the carrier invoice can be created. A “self-bill” is created as a **Billing proposal** until it is generated into a carrier invoice.

Creating a carrier invoice from an existing billing proposal

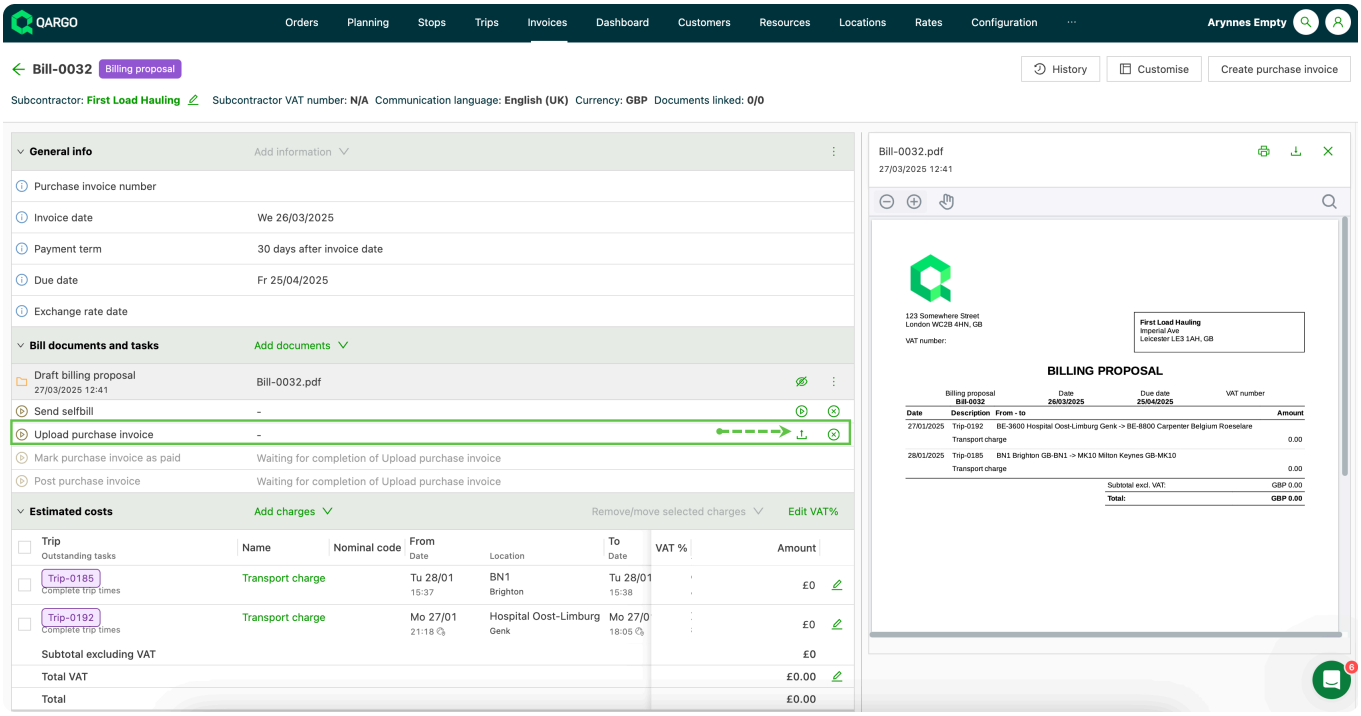
- Go to **Invoices > Carrier invoices**.
- The carrier invoices list view groups invoices into tabs based on status. The statuses are:
  - **All:** A full list of all invoices, regardless of status.
  - **Draft billing proposal:** Billing proposals that have been created, but for which the self-bill hasn’t been generated yet.
  - **Billing proposal:** Once a self-bill has been generated, the invoice shows in this tab. It can then be generated into a carrier invoice.
  - **Invoiced:** Once a self-bill invoice is generated, it can be processed to invoiced. Alternatively, a load can be created directly as a carrier invoice (click here to learn how to create the carrier invoice from a load).
  - **Invoice posted:** Once the invoice charges have been validated, the invoice can be set to a posted status. In a posted status, the invoice is available to export or send to accounting. Changes to charges are limited in a posted status.
- On the **Billing proposal** tab, click the billing proposal number to open the details.



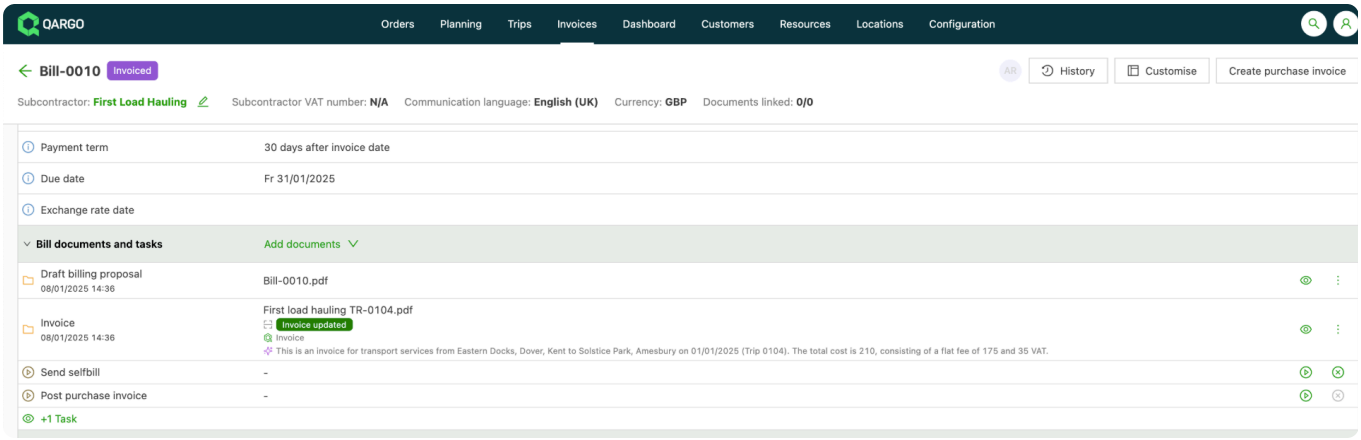
Billing proposals can also be in draft format. Using the **Create self-bill** task updates the draft to a **billing proposal**. Uploading the contract carrier invoice moves the billing proposal to an **Invoiced** status.

Manually adding the carrier invoice:

- Upload the carrier invoice by clicking the upload icon. Qargo Document Intelligence scans and validates the data on the invoice. This updates some of the data, such as the carrier invoice number, and any discrepancy shows in the **Comparison** panel.



- Once the carrier invoice is uploaded, the status changes automatically to **Invoiced**.

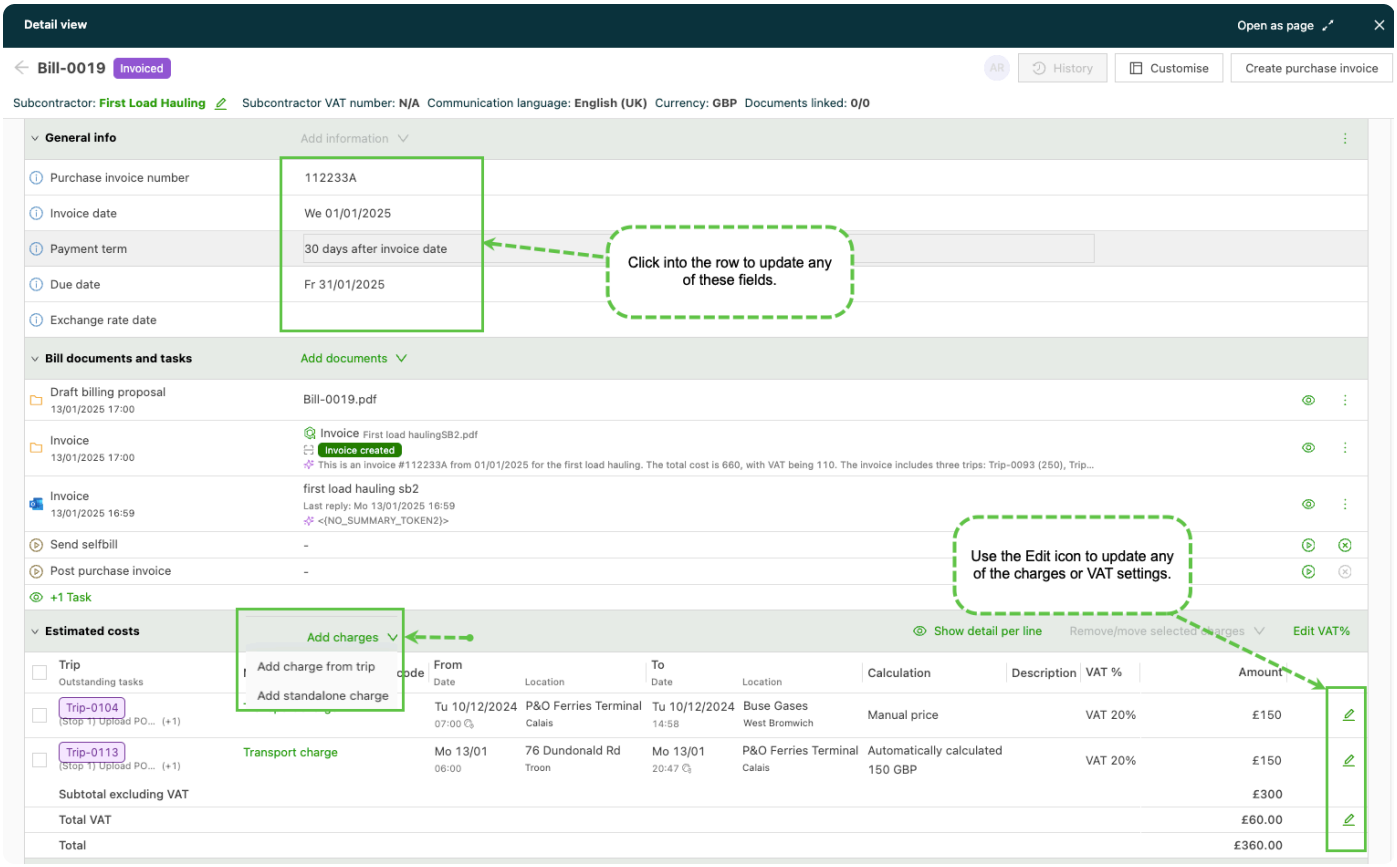


The system shows the invoice amount received on the carrier invoice compared to the estimated costs, and shows any discrepancy.

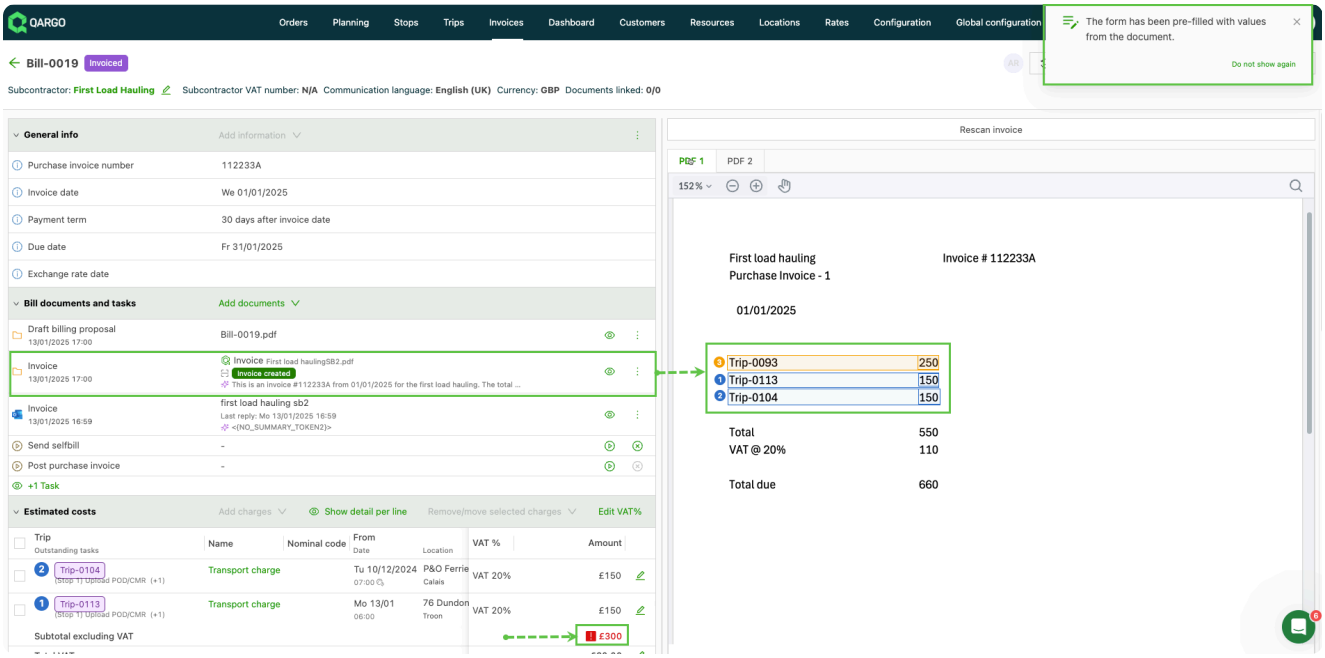
- The charges can be updated using the clipboard icon. This copies the costs over to the invoice.

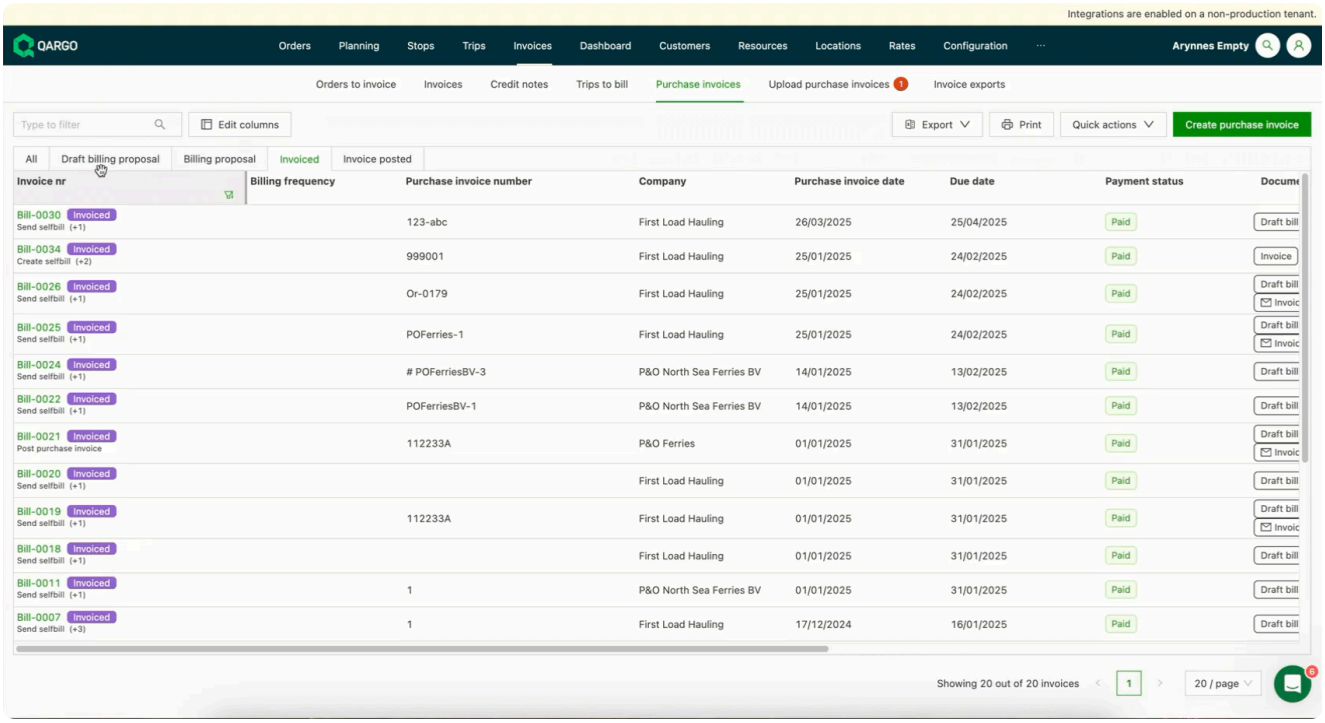
Updating info and charges

- The fields under **General info** can be updated if needed. Click the row to update and change the details. Click the **Save** icon.
- Use the **Edit** icon to update the estimated costs, including charges and tax settings.
- Click **Add charges** if additional costs need to be added to the invoice.

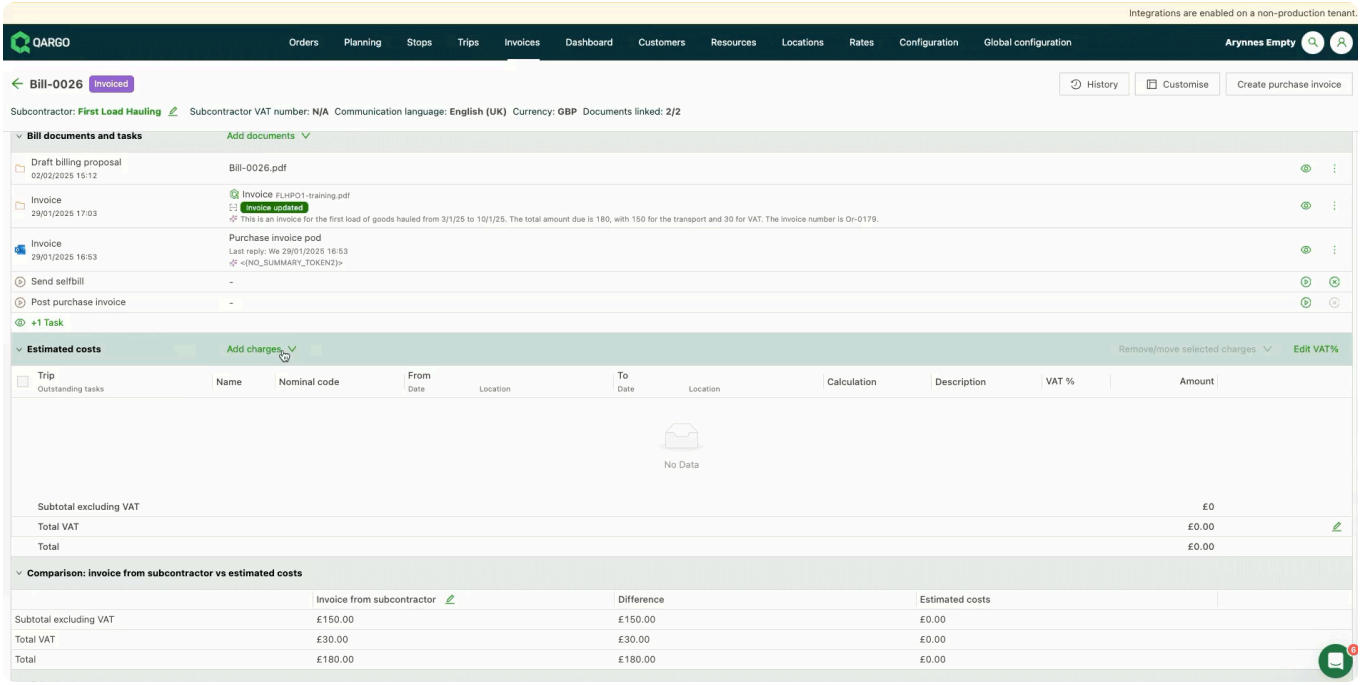


- **Add charge from load:** This opens the **Loads to add** panel, which includes loads that match the contract carrier.
  - If a contract carrier invoice has already been uploaded, a warning icon displays and any missing loads are highlighted in orange.

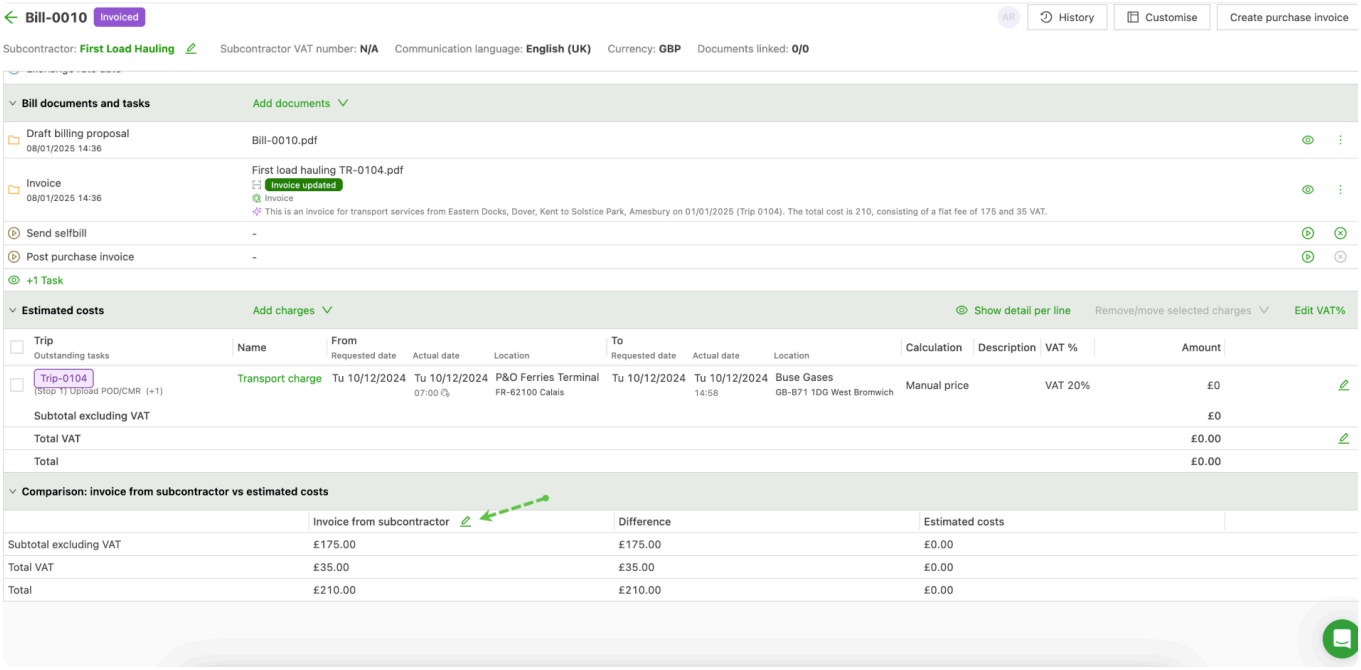




- **Add standalone charge:** This opens the **Add resource cost** window. Under **General info**, click the **Charge** field to show the available charges.
- Select the appropriate charge to add to the invoice. Under the calculation, there are 2 manual options to choose from. **Manual** lets the user enter a specific value. **Manual formula** opens options to calculate a value based on selected variables, for example a cost-over-distance calculation.



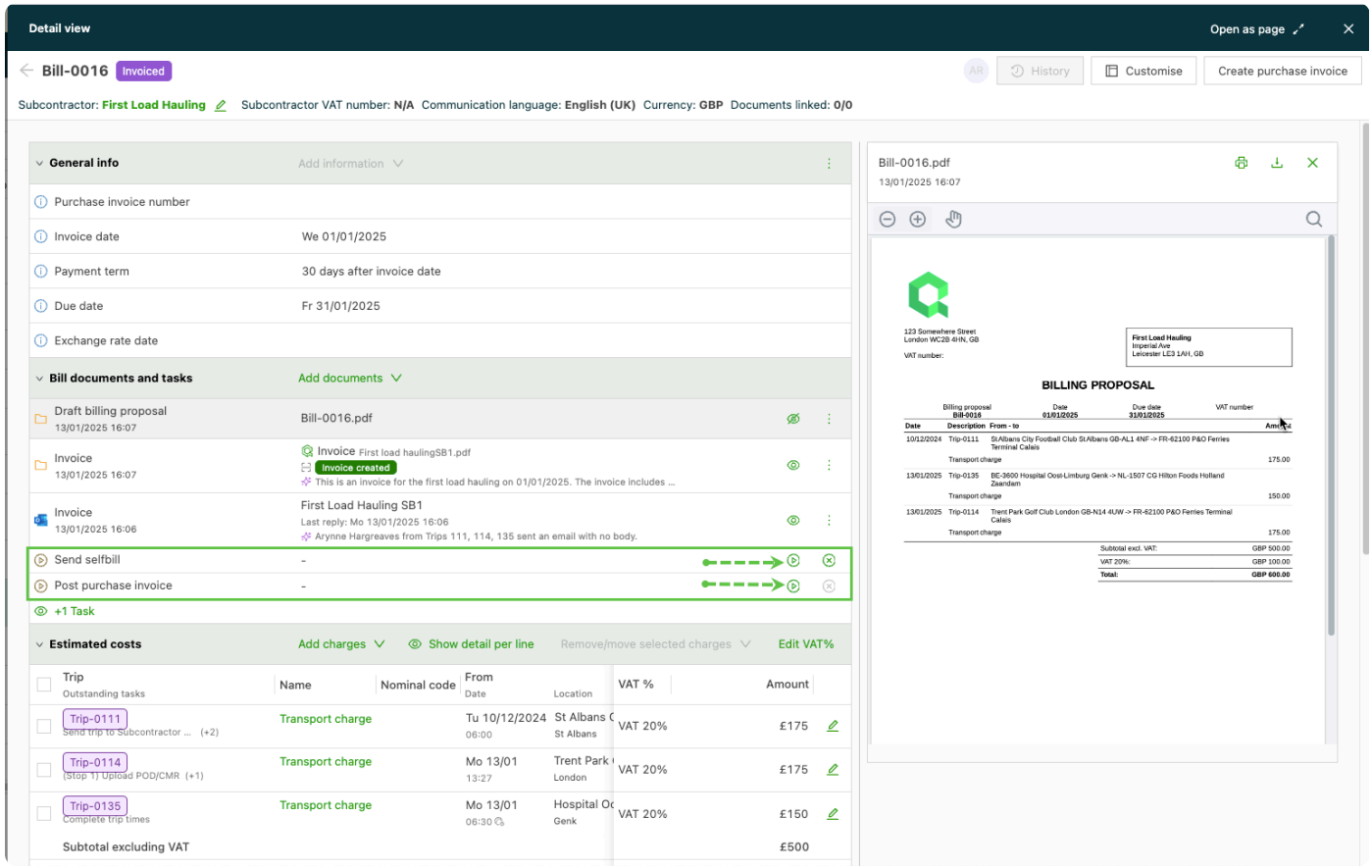
- The charges can be updated manually if necessary. Click the **Edit** icon.

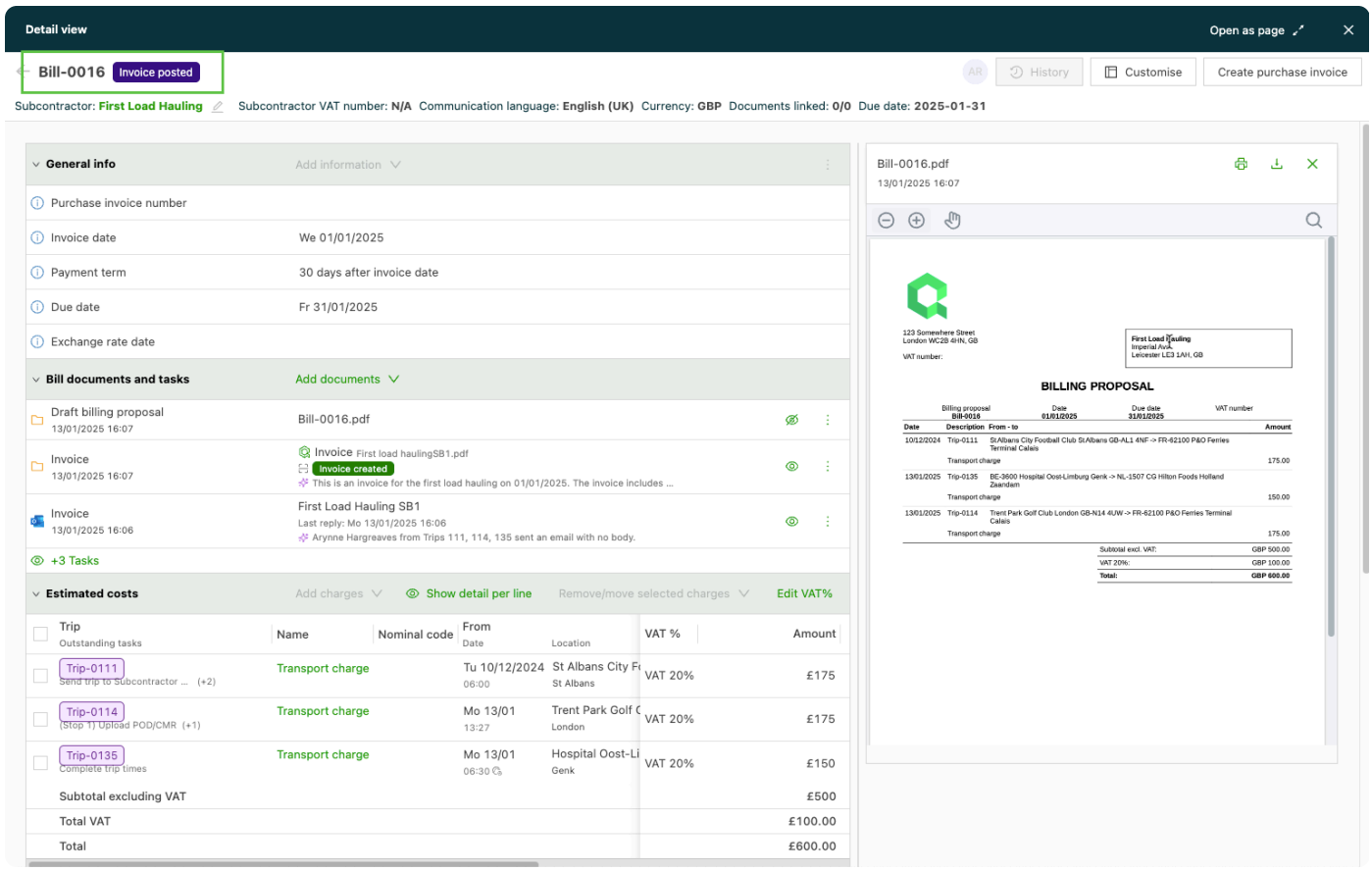


- Enter the revised costs; the **Save** button is highlighted in green. Click **Save**.



- Complete the remaining tasks:
  - Send self-bill to contract carrier
  - Post carrier invoice to accounting


Detail view
Open as page
Bill-0016
Invoiced
History
Customise
Create purchase invoice
Subcontractor: First Load Hauling
Subcontractor VAT number: N/A
Communication language: English (UK)
Currency: GBP
Documents linked: 0/0
General info
Add information
Purchase invoice number
Invoice date
We 01/01/2025
Payment term
30 days after invoice date
Due date
Fr 31/01/2025
Exchange rate date
Bill documents and tasks
Add documents
Draft billing proposal
13/01/2025 16:07
Bill-0016.pdf
Invoice
13/01/2025 16:07
Invoice First load haulingSB1.pdf
Invoice created
This is an invoice for the first load hauling on 01/01/2025. The invoice includes ...
Invoice
13/01/2025 16:06
First Load Hauling SB1
Last reply: Mo 13/01/2025 16:06
Arynne Hargreaves from Trips 111, 114, 135 sent an email with no body.
Send selfbill
Post purchase invoice
+1 Task
Estimated costs
Add charges
Show detail per line
Remove/move selected charges
Edit VAT%
Trip
Outstanding tasks
Name
Nominal code
From
Date
Location
VAT %
Amount
Trip-0111
Transport charge
Tu 10/12/2024
06:00
St Albans
VAT 20%
£175
Trip-0114
Transport charge
Mo 13/01
13:27
London
VAT 20%
£175
Trip-0135
Transport charge
Mo 13/01
06:30
Genk
VAT 20%
£150
Subtotal excluding VAT
£500
Bill-0016.pdf
13/01/2025 16:07
BILLING PROPOSAL
Subtotal excl. VAT:
GBP 500.00
VAT 20%:
GBP 100.00
Total:
GBP 600.00


Detail view
Open as page
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Invoice posted
History
Customise
Create purchase invoice
Subcontractor: First Load Hauling
Subcontractor VAT number: N/A
Communication language: English (UK)
Currency: GBP
Documents linked: 0/0
Due date: 2025-01-31
General info
Add information
Purchase invoice number
Invoice date
We 01/01/2025
Payment term
30 days after invoice date
Due date
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Exchange rate date
Bill documents and tasks
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Location
VAT %
Amount
Trip-0111
Transport charge
Tu 10/12/2024
06:00
St Albans
VAT 20%
£175
Trip-0114
Transport charge
Mo 13/01
13:27
London
VAT 20%
£175
Trip-0135
Transport charge
Mo 13/01
06:30
Genk
VAT 20%
£150
Subtotal excluding VAT
£500
Total VAT
£100.00
Total
£600.00
Bill-0016.pdf
13/01/2025 16:07
BILLING PROPOSAL
Subtotal excl. VAT:
GBP 500.00
VAT 20%:
GBP 100.00
Total:
GBP 600.00

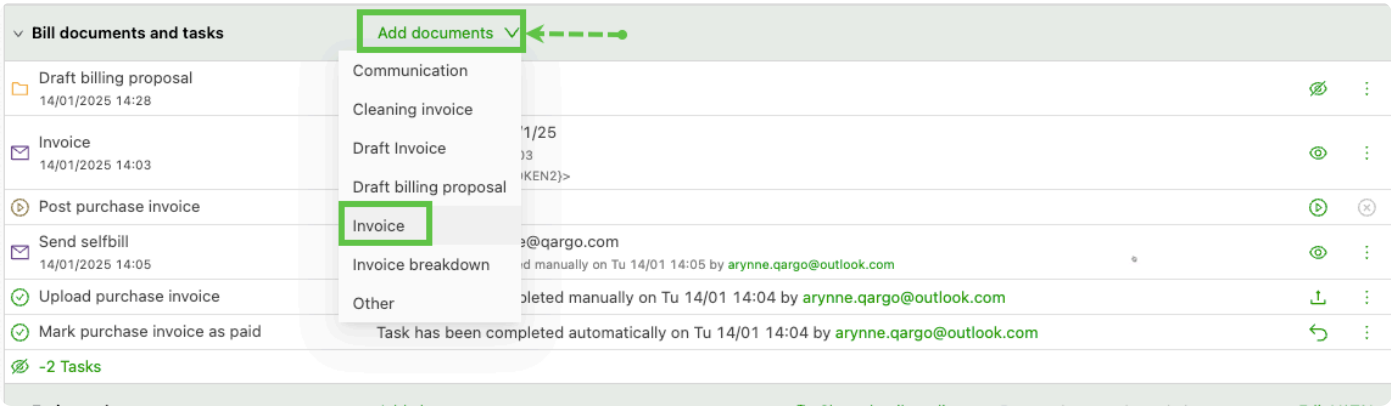
Once the invoice is posted, adjustments are limited. If changes are necessary, contact support.

Add document function:

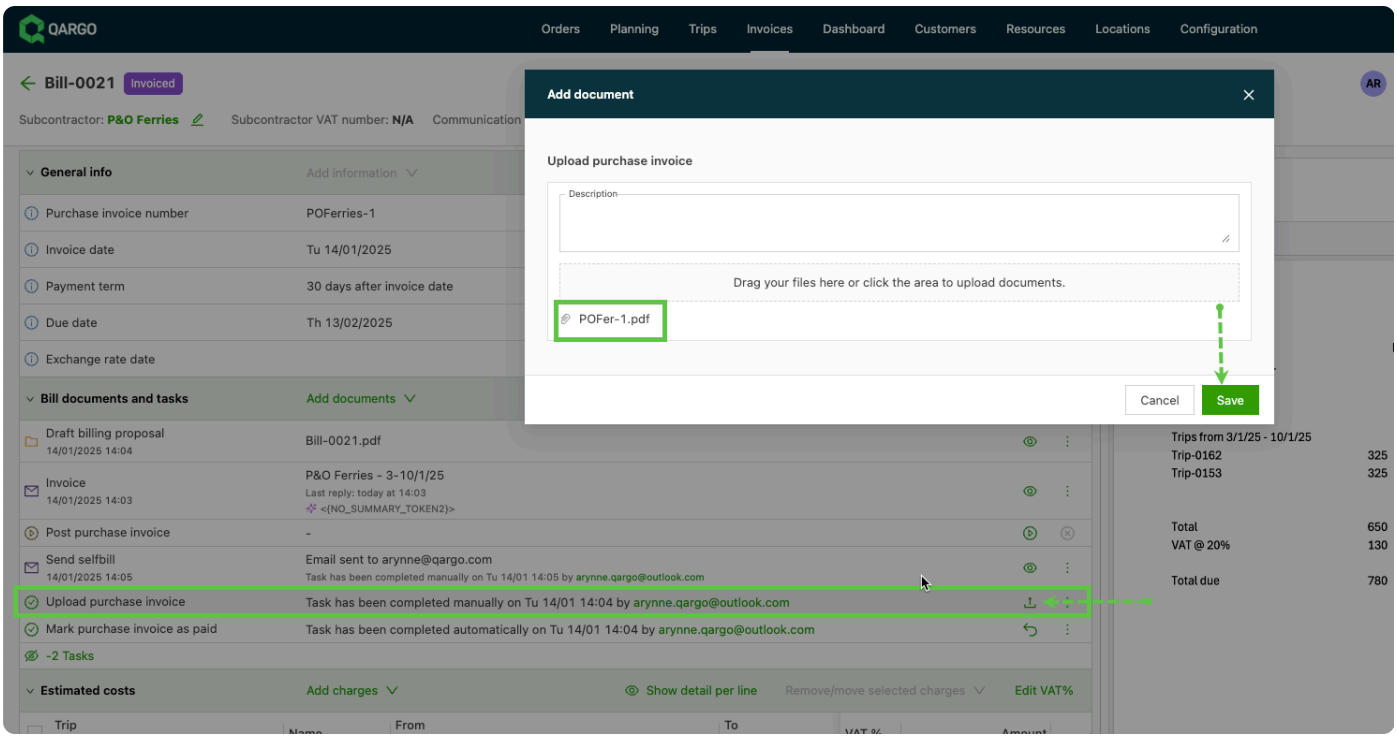
There are 2 other options to add the carrier invoice to the billing proposal:

1. **Create a new invoice from the invoice proposal**
    - Upload the carrier invoice into the invoice proposal.
    - This method ensures that the invoice and the proposal are associated within Qargo, preserving the relationship between the two.
2. **Move costs from the invoice proposal to the existing invoice**
    - Transfer the costs listed in the invoice proposal to the existing carrier invoice.
    - This approach does not create a direct link between the invoice and the proposal in Qargo.

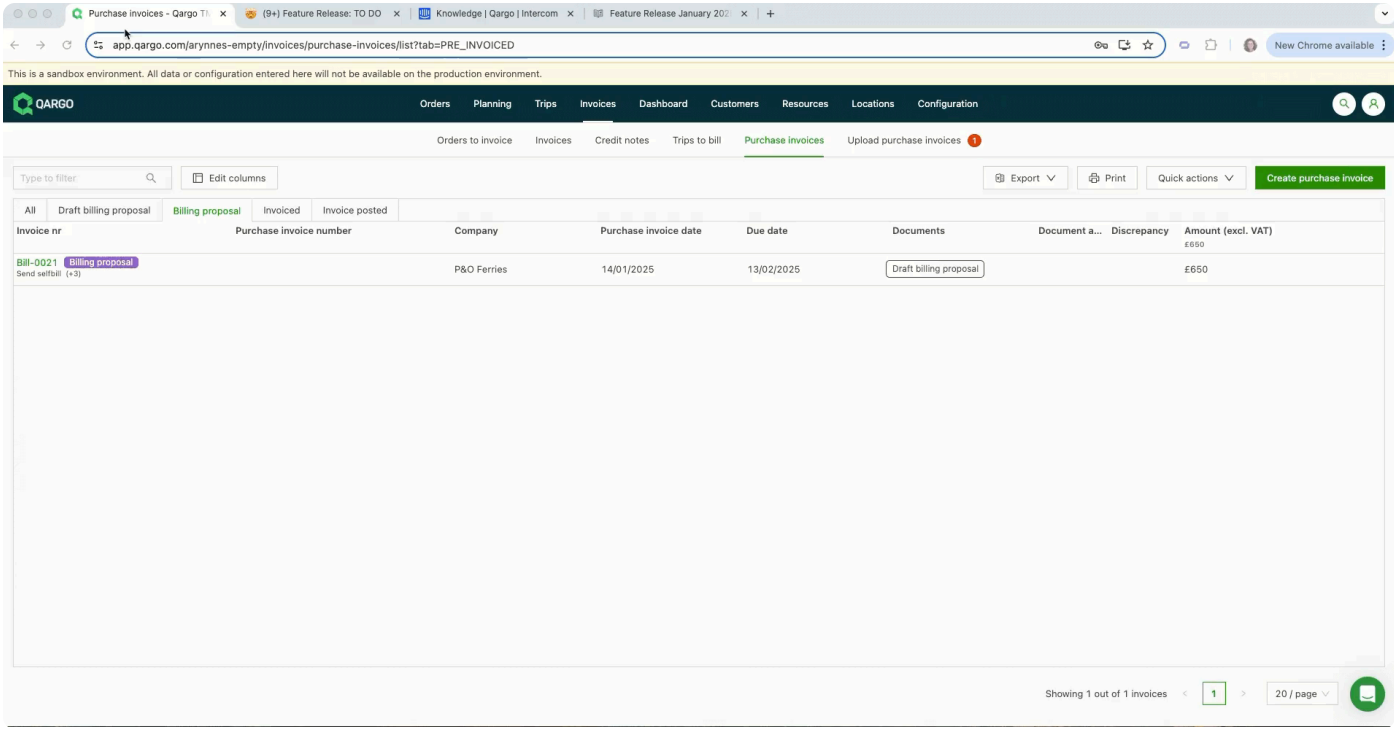
- Select the **Invoice** option from the drop-down.



- The **Add document** window opens. Drag the file, or click and add the document to upload. Click **Save**.

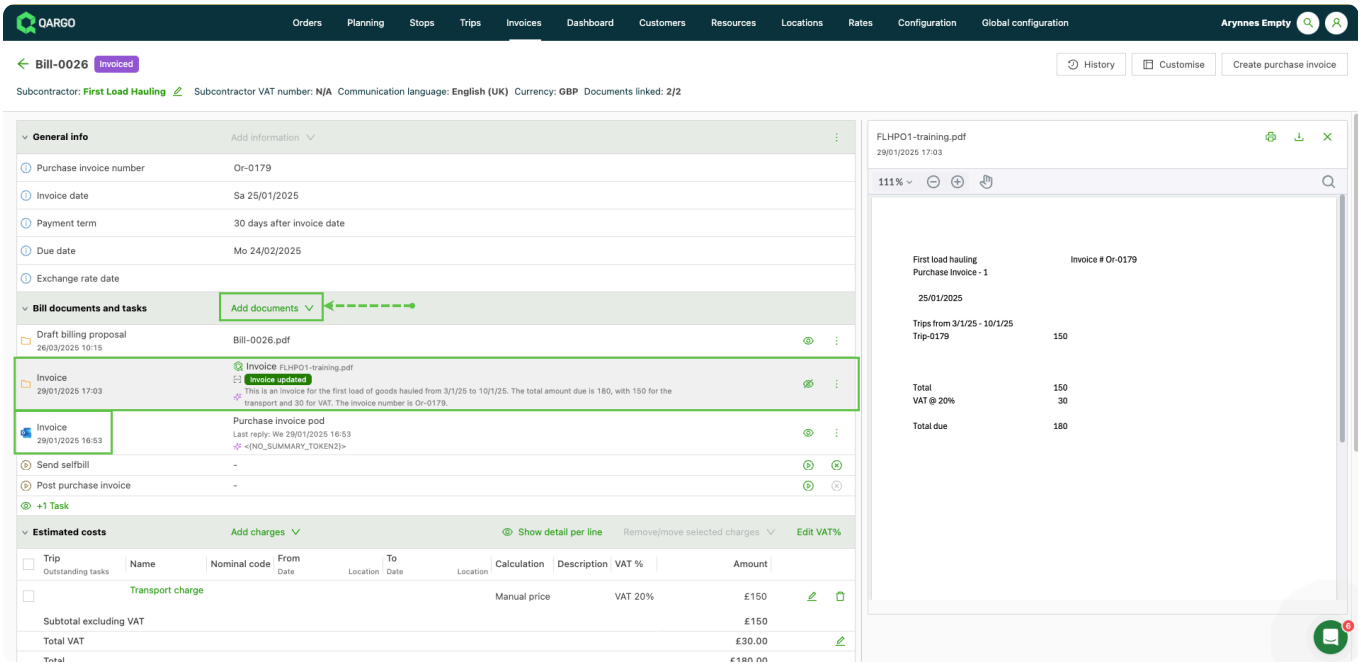


- **Added from an email attachment, using the Qargo add-in for Outlook:**
  - From the email, select the search option in the Qargo add-in panel. Enter the billing proposal number. Find the correct billing proposal and click the **Add** button. This shows options to specify what is being added. Select **Invoice**, and it is added to the proposal.



Note: This is **not** the **Scan carrier invoice** function. Search for the billing proposal reference via the add-in, and manually **add** the **Invoice** option.

- If additional documents are available, they can be added in the **Bill documents and tasks** panel. Click the **Add documents** option. A drop-down shows the available document types.
- Qargo Intelligence adds an AI-generated summary and validation where appropriate. Click the row to fully expand the summary.
- If there are linked emails, these are also available to view, along with any attachments included in the emails.



Click the link below to see what other features Qargo Intelligence offers.

Qargo Document Intelligence

The tasks of generating PDFs, sending emails, marking invoices as paid and posting to accounting can be done in bulk via **Quick actions**. See also how to create these in **bulk.**