Invoices – Create a sales invoice

Manage billing by setting orders ready, creating, adjusting, and sending invoices, and posting them to accounting with manual or automated steps.

Updated October 19, 2026

▶ https://www.youtube.com/embed/amfoNXz9YYU?rel=0

To start billing, the orders must have the status 'Ready to invoice'.



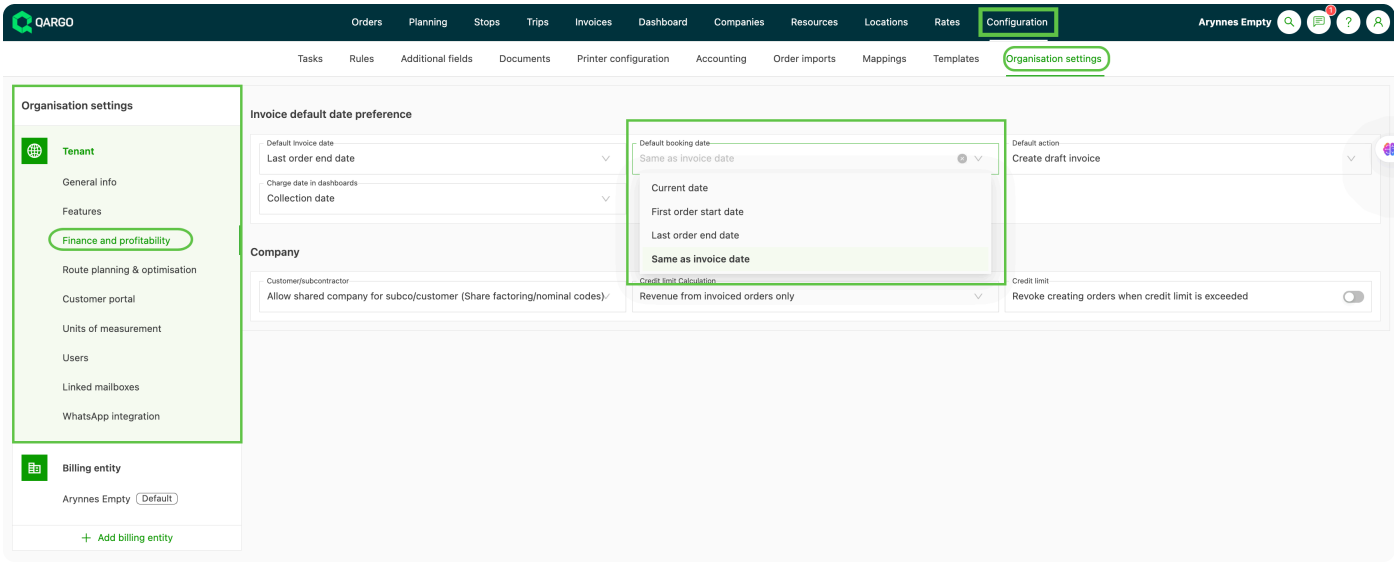
Configuration option (SuperAdmin only)

📚 Make sure **Booking date** is enabled and active under **Configuration > Additional fields > Invoice**. If it is not active, the option to set the booking date is not displayed to the user.

Autofill booking date on invoice

Improve large-volume invoice processing by automatically setting the booking date on invoices. This reduces manual adjustments and speeds up billing workflows. The configurable default mirrors the *Default invoice date,* with additional options for full automation.

- Configuration-based automation *(SuperAdmin only)* to **automatically populate the booking date** on invoices during bulk processing.
- Configuration options include:
  - Current date
  - First order start date
  - Last order end date
  - Same as invoice date
- Bulk invoice creation
  - The **Booking date** field in the creation modal is prefilled according to the configured default.
- Per-invoice control
  - Despite automation, the booking date of each line item remains editable before saving.
- Credit memos
  - The booking date is prefilled based on the configured default, ensuring consistency across related documents.
- Enable automatic setting of the booking date for large-volume invoice processing, removing the need to adjust each invoice manually.



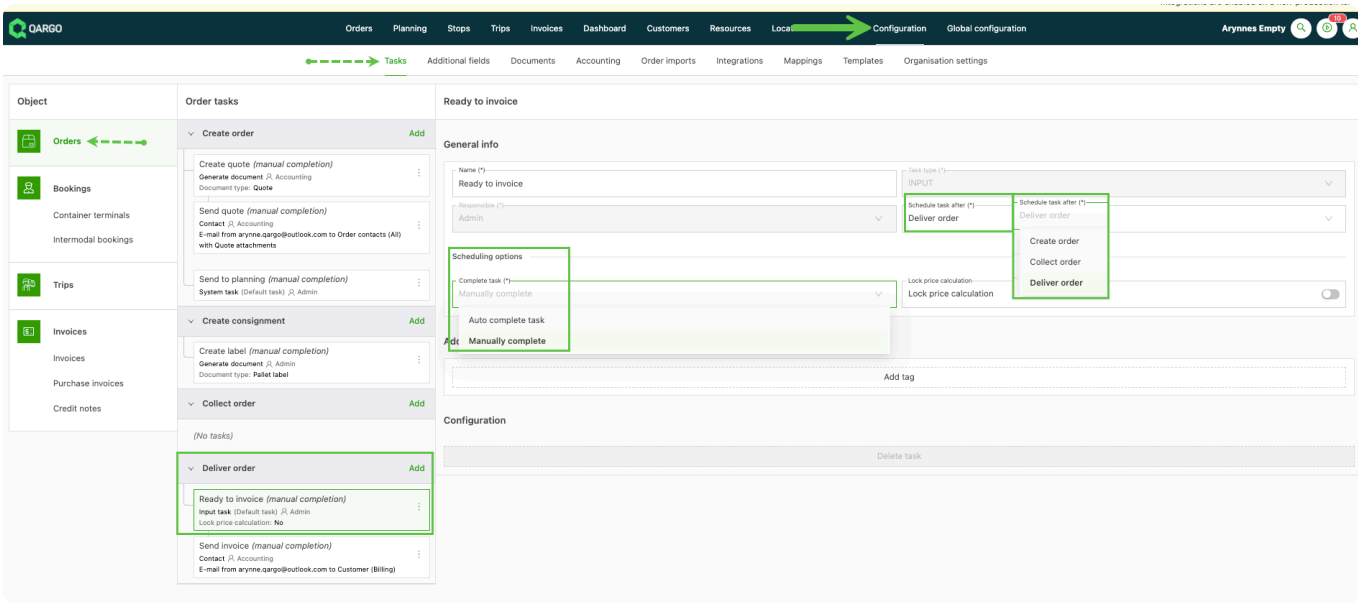
- Navigate to **Configuration** > ***Organization settings*** > ***Finance and profitability***
- The options mirror the default invoice date, plus an additional “Same as invoice date” option.
- Bulk invoice creation: the **Booking date** field in the modal is prefilled according to the configured default.
- Per invoice: the booking date of each line can still be edited before saving.
- Credit memos: the booking date is prefilled based on the configured default.

Setting orders to *Ready to invoice*

Identifying orders to invoice

- Orders can be set to *‘Ready to invoice’* at any point, based on individual business needs. The most typical workflow is to set this status once an order has the status Delivered.

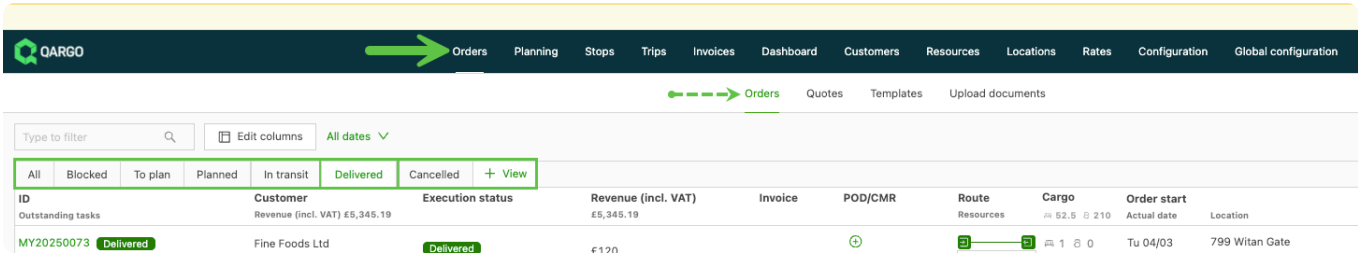
- With tasks, this status can be configured as manual or automatic. When it is set to automatic, the *‘Schedule after’* event determines when the status is updated automatically. The status can still be set manually before the event selected in the configuration.



- If the status is configured to update automatically after *'Deliver order'*, the order status automatically moves from **'Delivered'** to **'Ready to invoice'**. The order then becomes available in the **Invoices** module for further auditing.
- If the update is set to manual, a user must update the task manually once the order has the status **'Delivered'** to set the status to ***'Ready to invoice'***.
- Tasks configured as automatic or manual can affect current and future orders differently. Orders created before changes to the task settings keep their original configuration, which may lead to differences in behavior.

When the status is updated manually, start by determining which orders need to be updated. From the **Orders** menu:

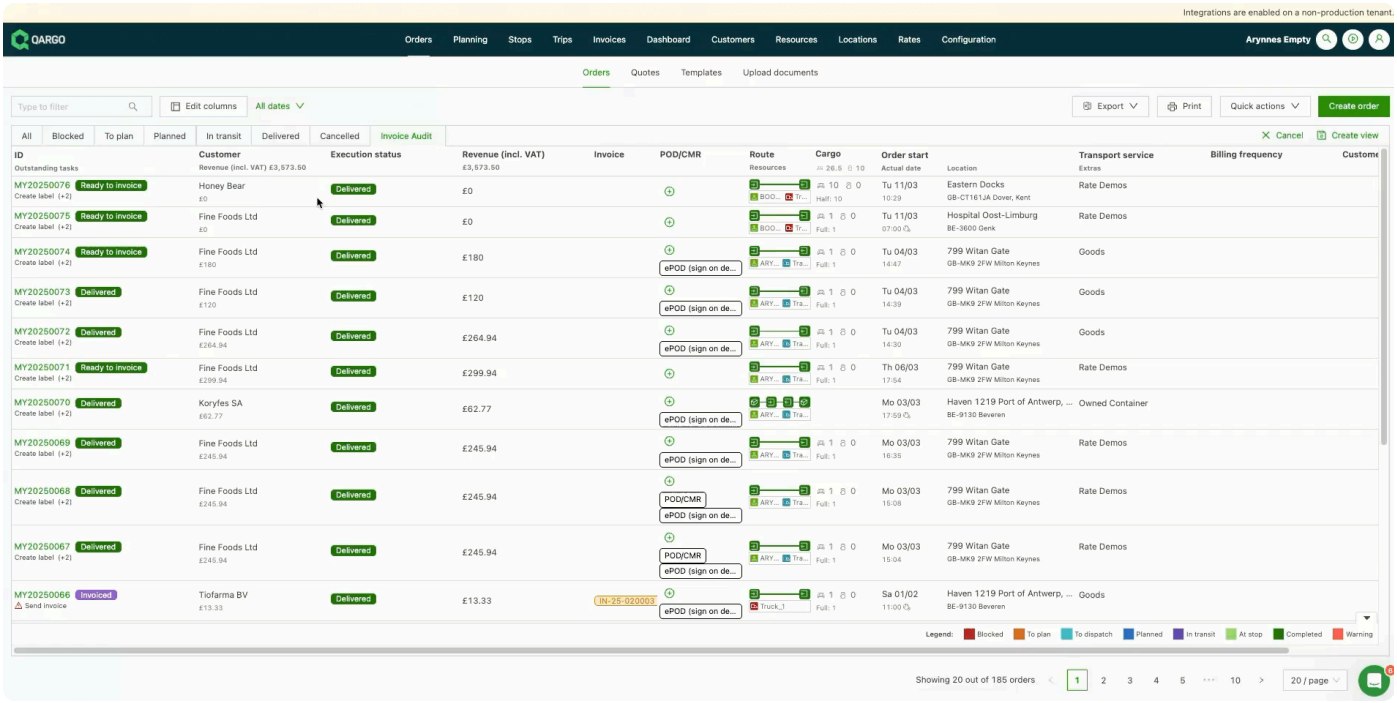
- Use the default tab views, for example 'Delivered', or 'All' if the status does not have to be Delivered.
- Use 'Edit columns' to show or hide data columns.
- Create a custom '+View' and use column filtering to select what to show in the view.



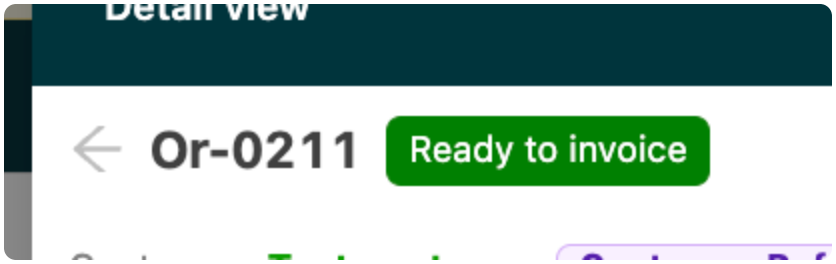
Column filtering options

- Consolidate orders on a single screen, making them easy to audit for billing.
- Customize the view based on specific criteria such as customer names, dates or any other relevant parameters to invoice the related orders.

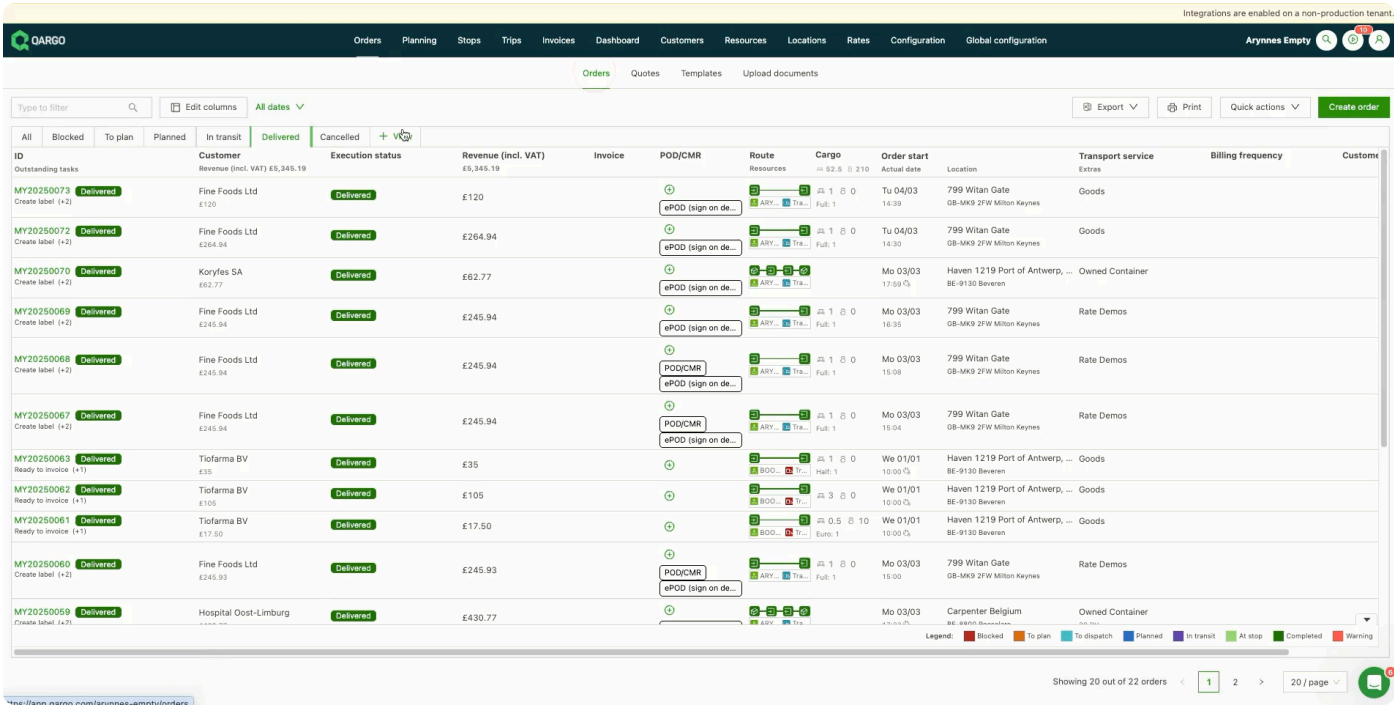
The example below shows a custom view for 'Invoice audit'. The column headers are filtered on customer, order operations status (delivered), order status not set to 'Invoiced', and the task 'Ready to invoice'.
This shows all outstanding orders for the specific customer that need to be audited and set ready to invoice on a single screen.



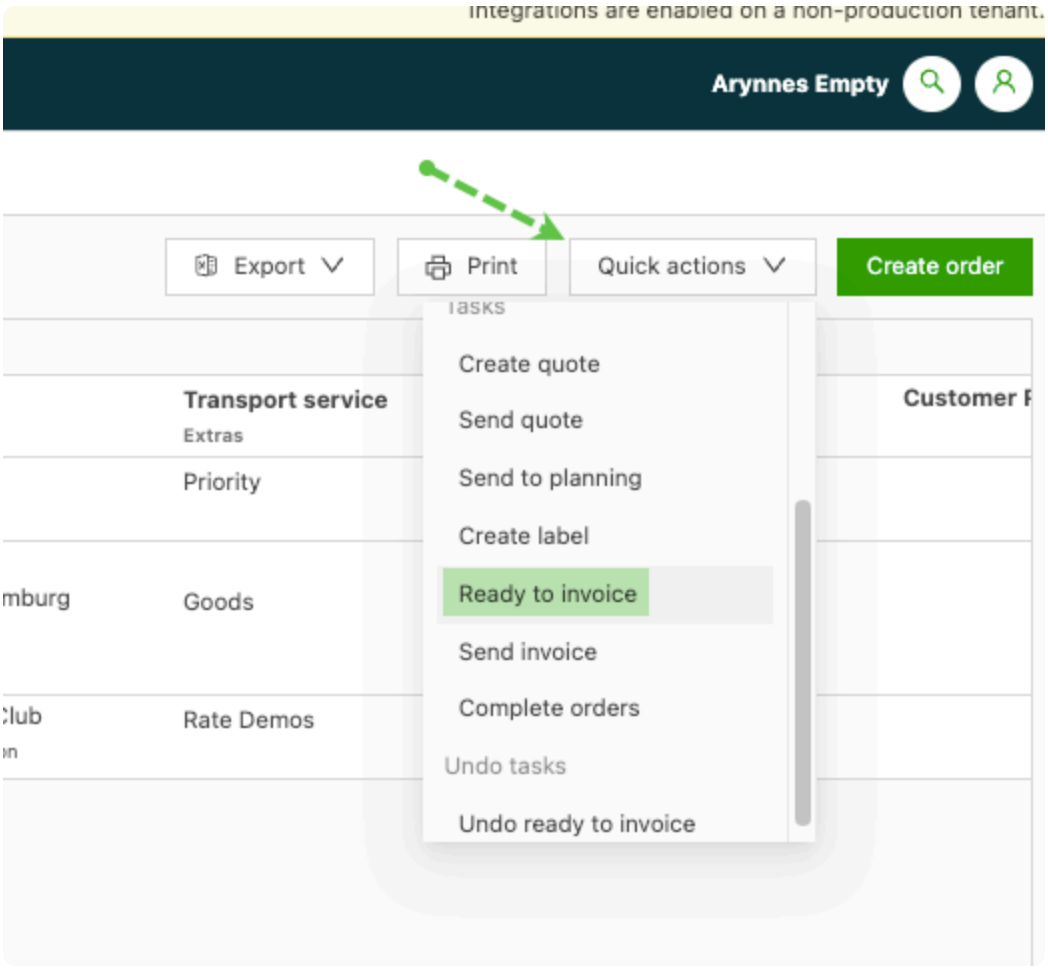
Marking orders ready to invoice

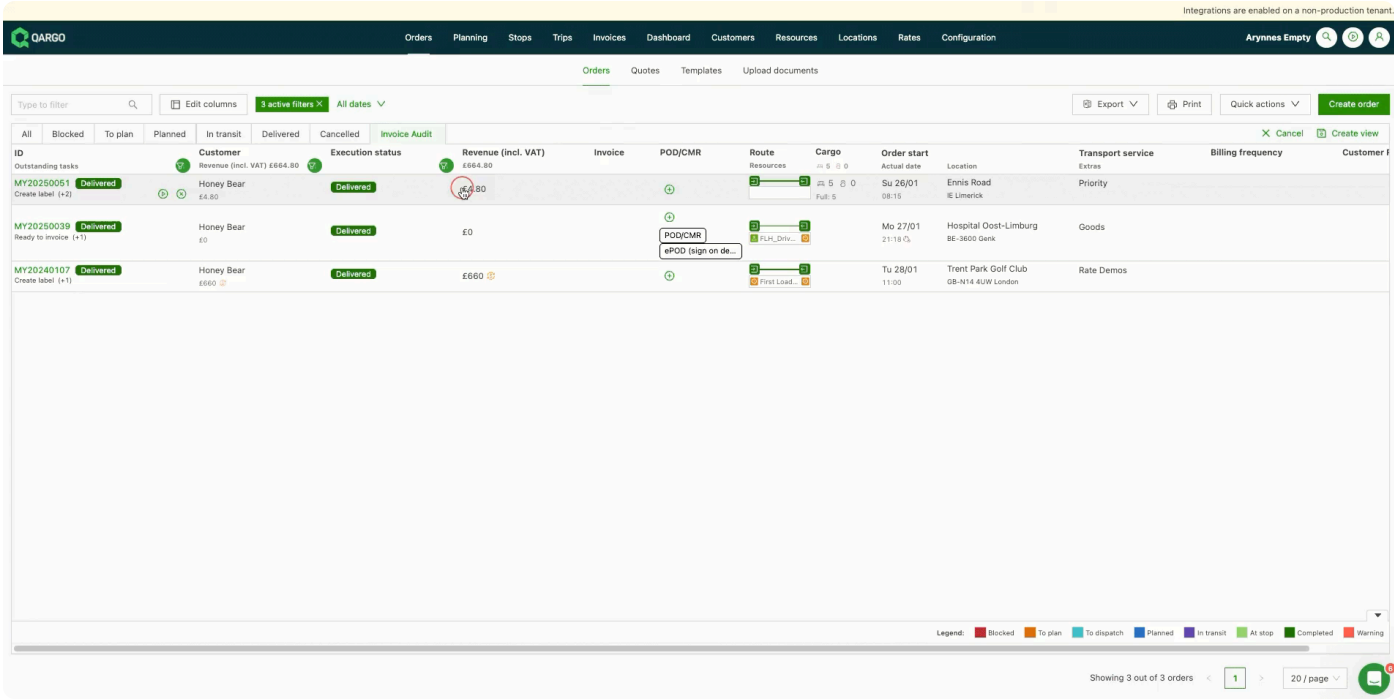


- For orders to move into the **Invoices** module, the status must be *'Ready to invoice'*. Orders can be updated individually or in bulk with the **'Quick actions'** function.
- Mark individual orders as ***'Ready to invoice'*** in the order list view or on the order details page.



- To select multiple orders, click **Quick actions** and select ***'Ready to invoice'***.
- Confirm the selection by checking the box for the chosen orders.
- Click the green **'Complete'** button at the bottom of the screen.


Integrations are enabled on a non-production tenant.
Arynnes Empty
Export
Print
Quick actions
Create order
Tasks
Create quote
Send quote
Send to planning
Create label
Ready to invoice
Send invoice
Complete orders
Undo tasks
Undo ready to invoice
Transport service
Extras
Priority
Goods
Rate Demos
Customer

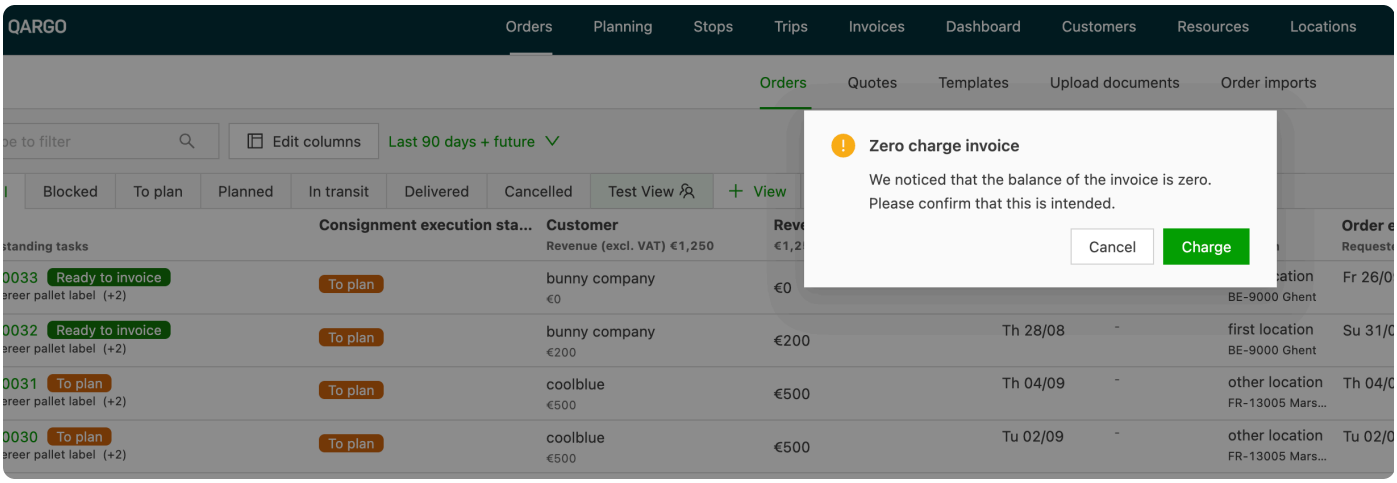

Integrations are enabled on a non-production tenant.
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Orders
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3 active filters
All dates
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Quick actions
Create order
All
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Delivered
Cancelled
Invoice Audit
Cancel
Create view
ID
Customer
Execution status
Revenue (incl. VAT)
Invoice
POD/CMR
Route
Cargo
Order start
Transport service
Billing frequency
MY20250051 Delivered
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In transit
At stop
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Warning
Showing 3 out of 3 orders
1
20 / page

📚 Once orders have been updated, a final check is recommended to confirm that all expected orders are included.

- Use audit logs to verify any updates applied to orders, particularly if electronic data interchange (EDI) updates are involved.
- Check the previous status of the order, for example to make sure it was correctly set to 'Ready to invoice' before changes occurred.

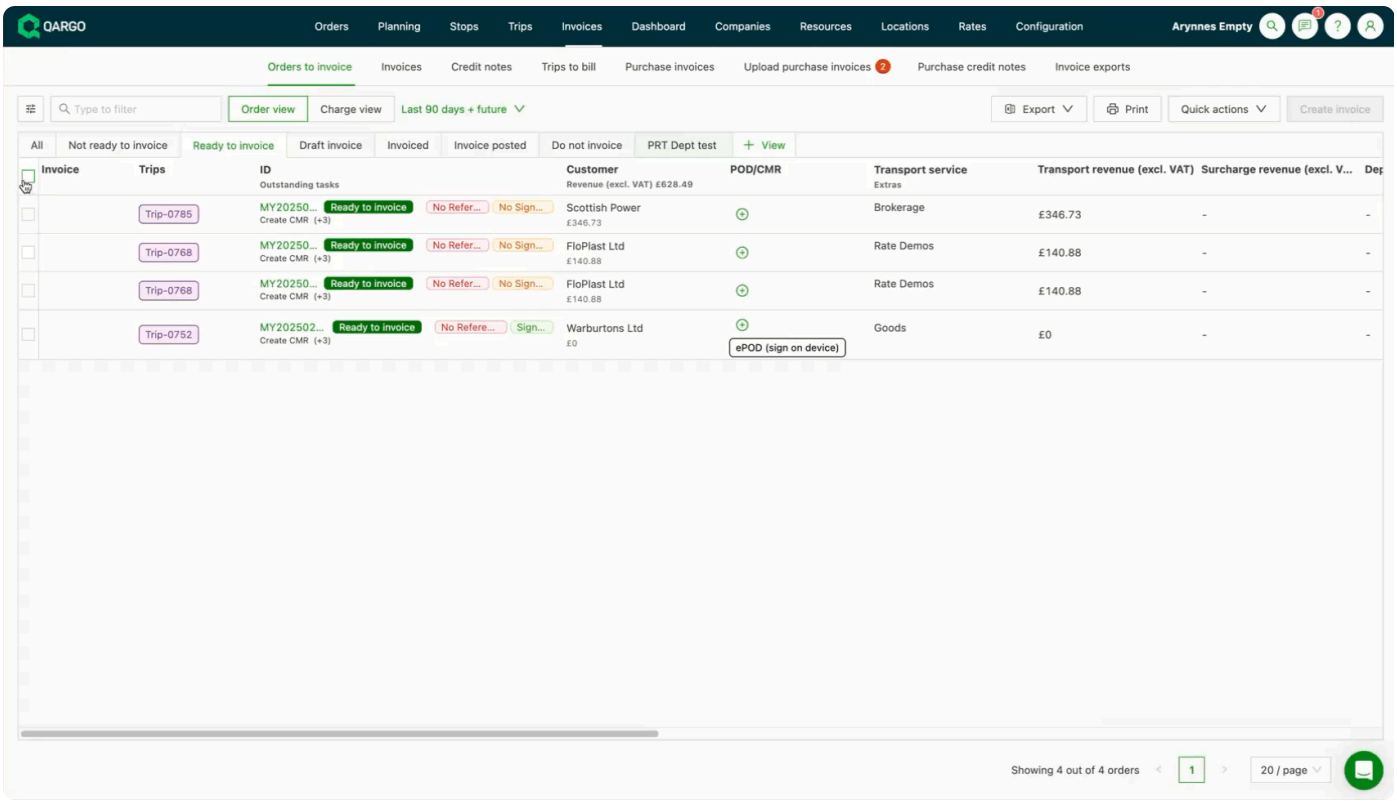
📚 **Transport charges warning added**

To prevent invoicing errors, Qargo now displays a **warning** if the transport charge of an order is zero. This new safeguard appears when an order is set to **Ready to invoice** or when invoices are created in bulk.



Create invoice

Use a default invoice action to set the action once and apply it to all invoices in the batch. **Super Admin users** can configure a **preferred default** (such as *Create draft invoice*), which is prefilled automatically. This reduces repetitive manual changes and streamlines invoice creation for finance and back-office users.

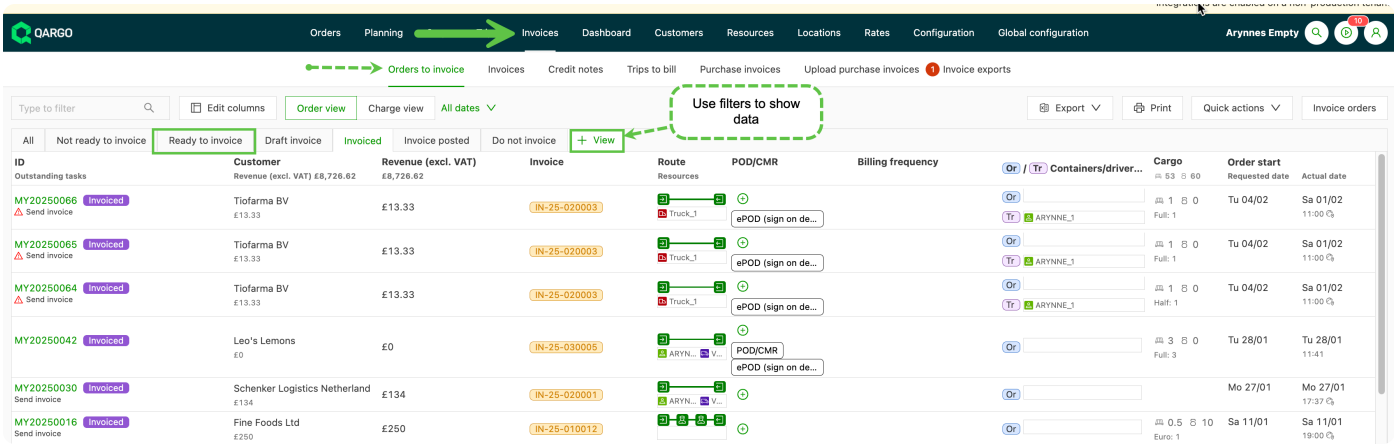


Once orders have been audited and all the necessary benchmarks for billing have been met (order status, received documents, etc.), and the status has been updated to 'Ready to invoice', the order moves into the **Invoices** module. Invoices are created and processed there.

- Navigate to **Invoices** and select ***'Orders to invoice'***. All orders are available here and fall into one of the default tabs (Not ready to invoice / Ready to invoice / Draft invoice, etc.). Click the link below to learn how to get the most out of the available views to best suit business processes.

  Orders to invoice view options

- Select orders with the status 'Ready to invoice'. They can be selected from the default tab or from a custom view, based on user preference.

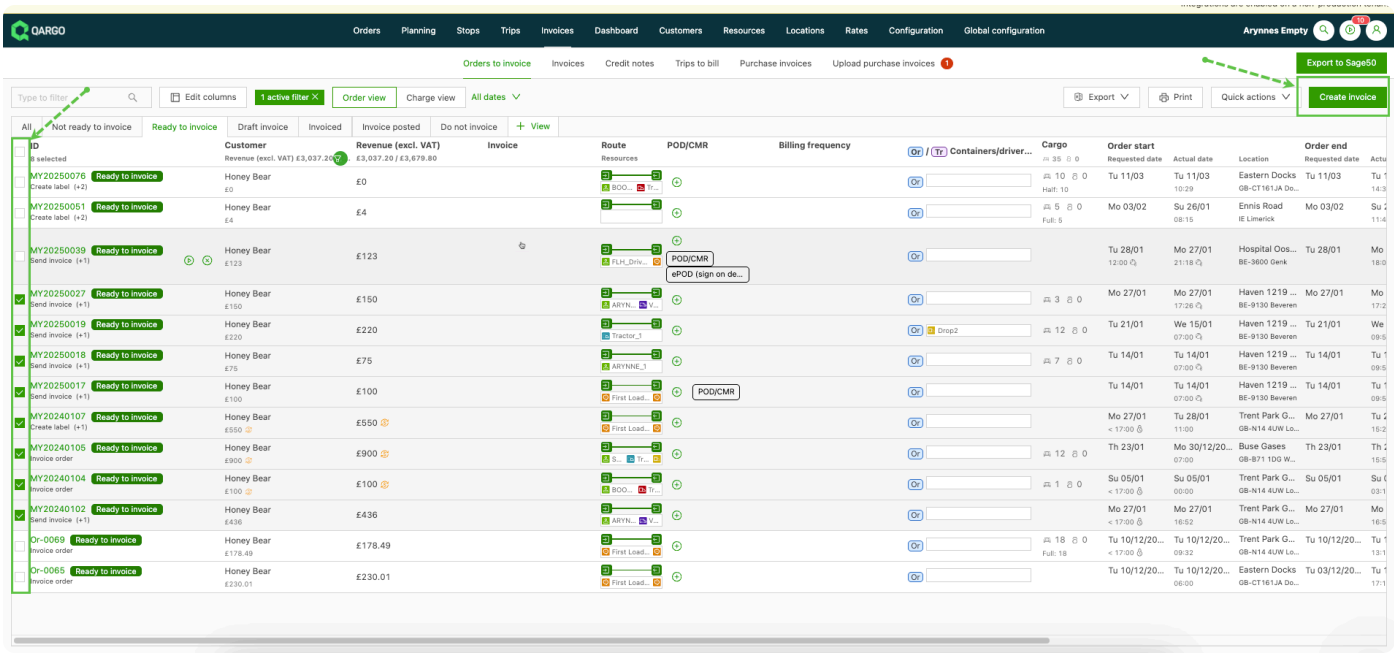


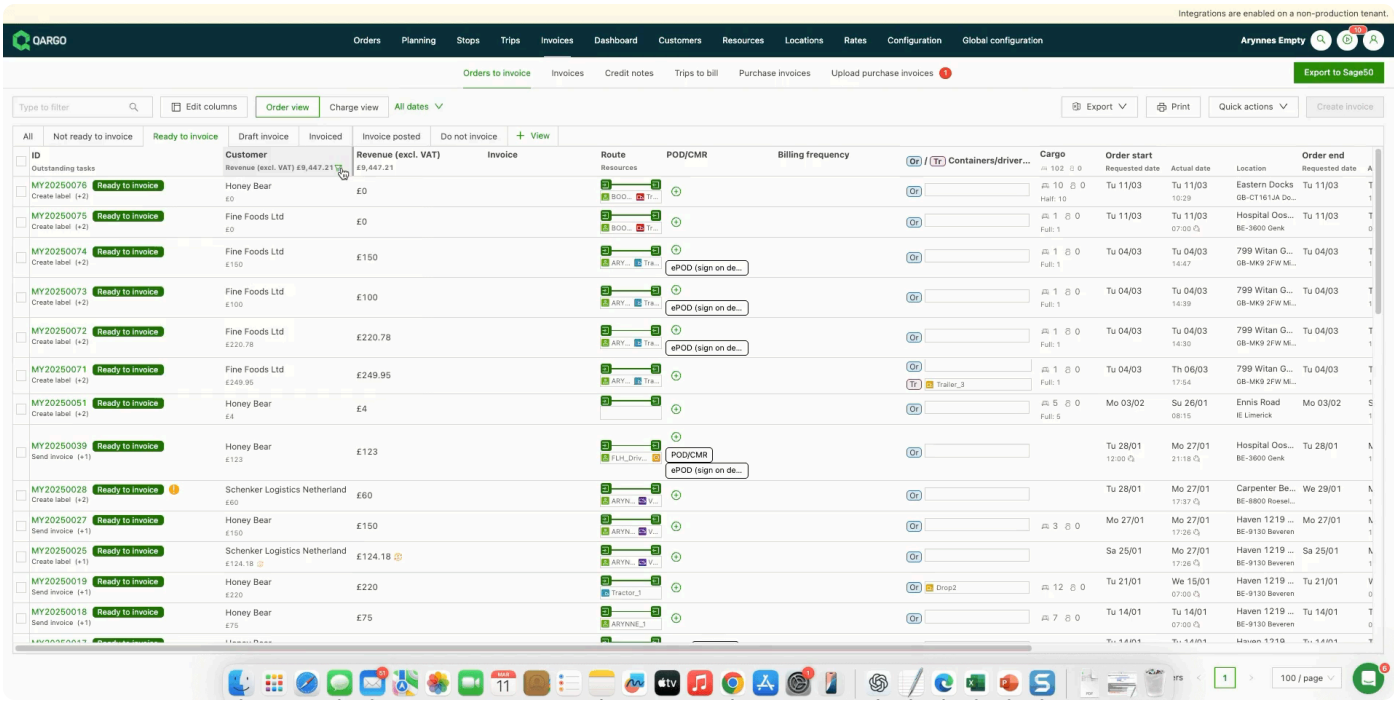
Filters such as customer name or date can be applied to narrow down the selection (see also Customize invoice list view).

Invoice based on order or charges: learn more here.

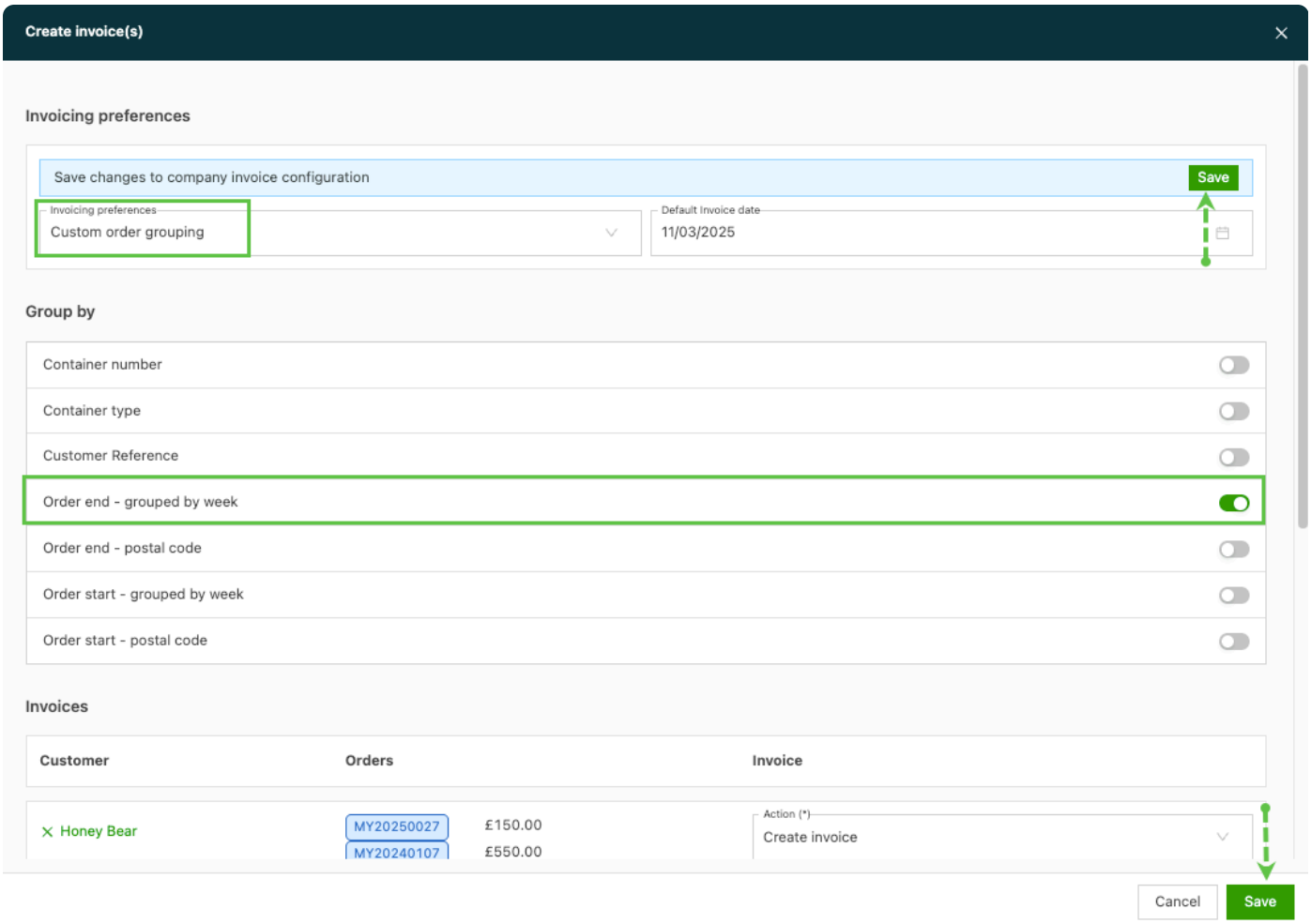
Creating an invoice

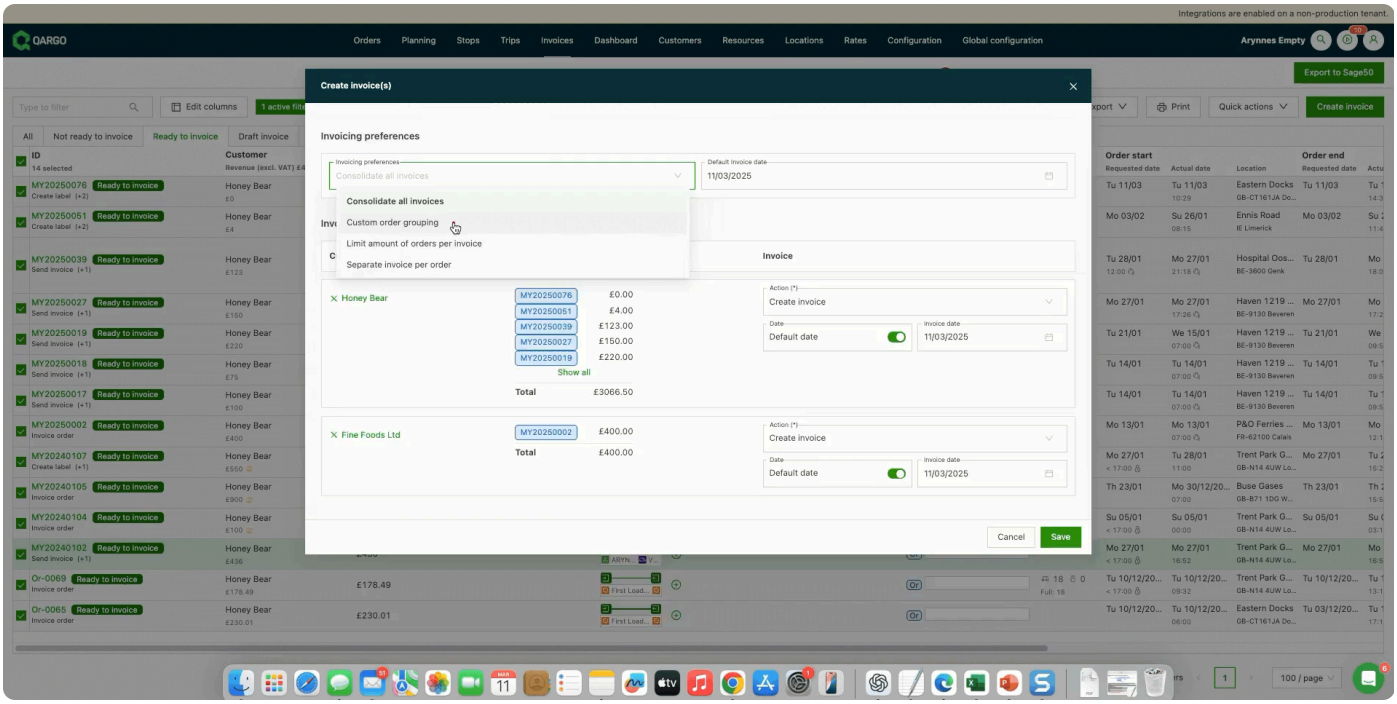
- Choose one or more orders and click **'Create invoice'.**
- Set the preferences by selecting consolidation options or creating separate invoices for each order.



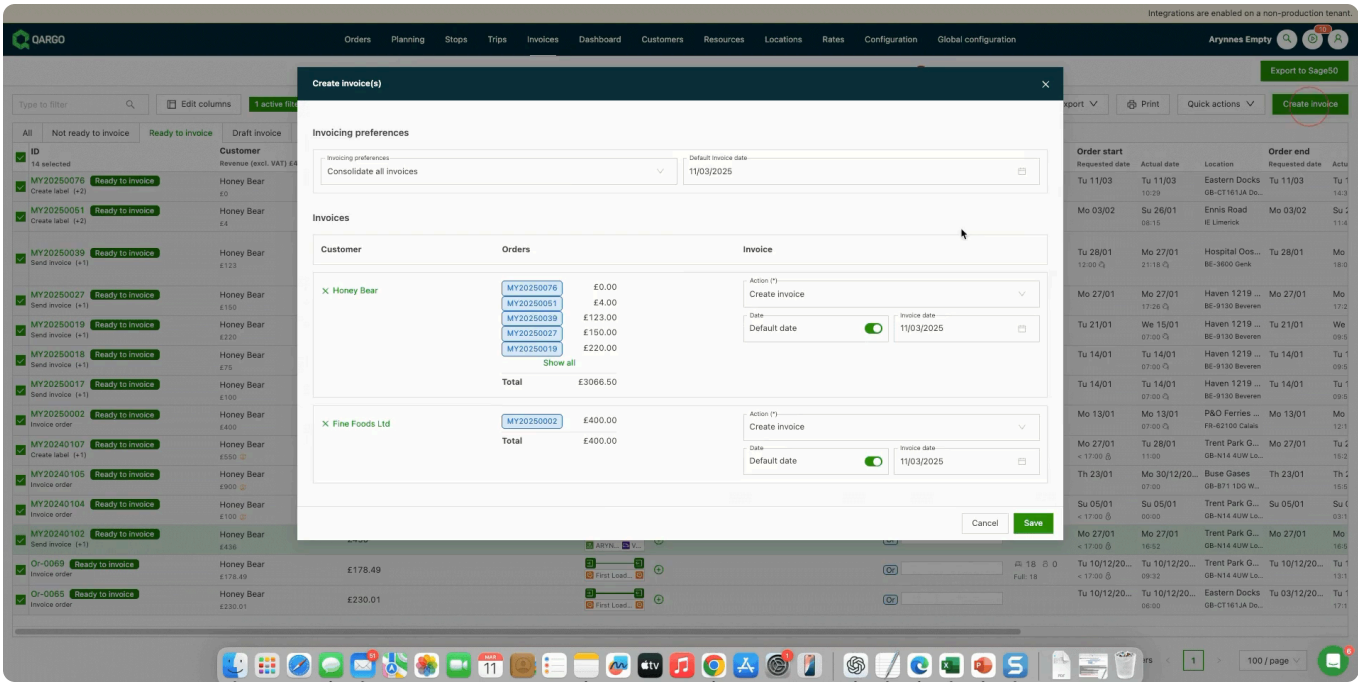


- To consolidate orders on one invoice based on a set of criteria, use the ‘Custom order grouping’ preference and turn the preferred option on or off.
- Click **Save** to confirm the option and generate the invoice.



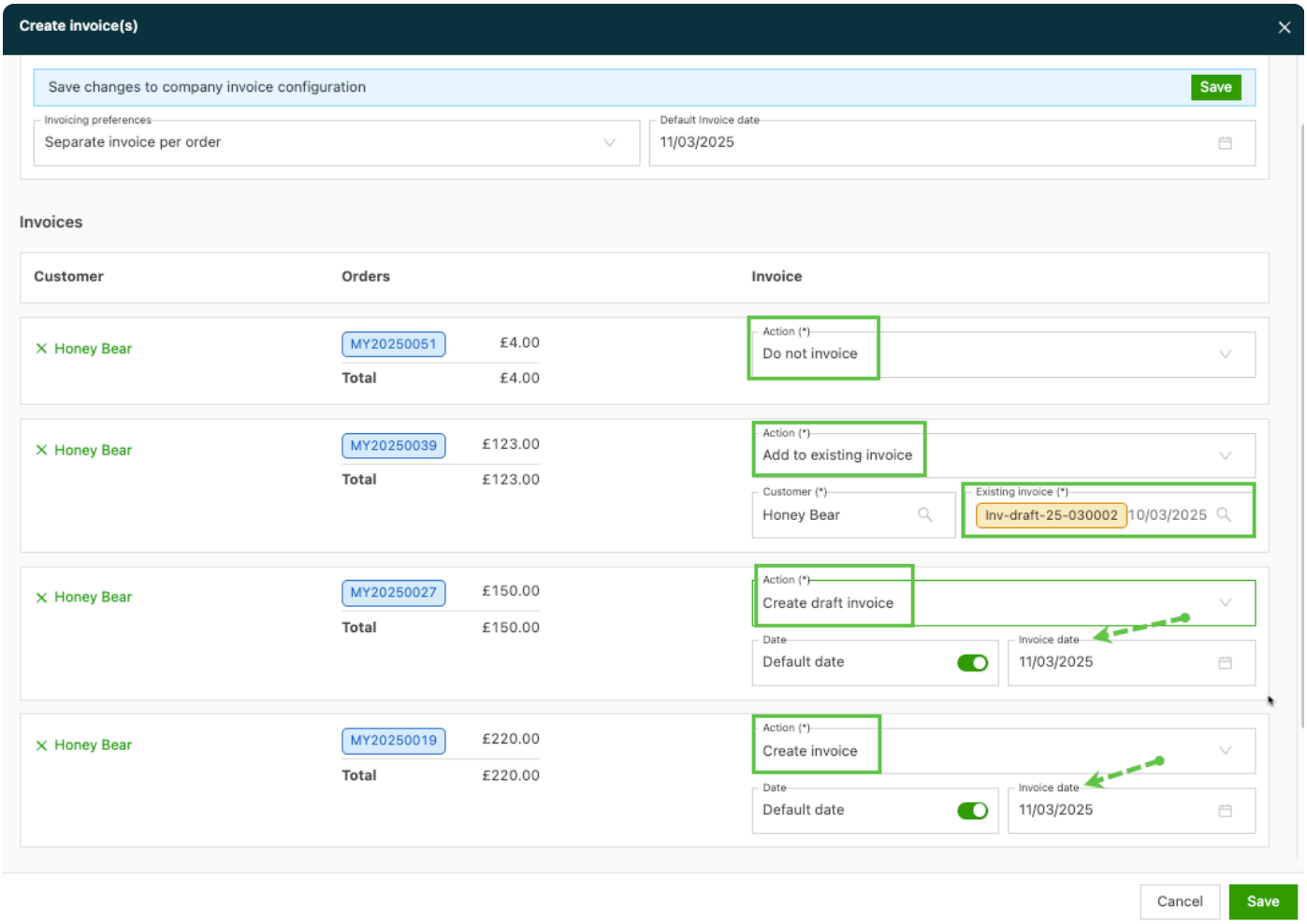


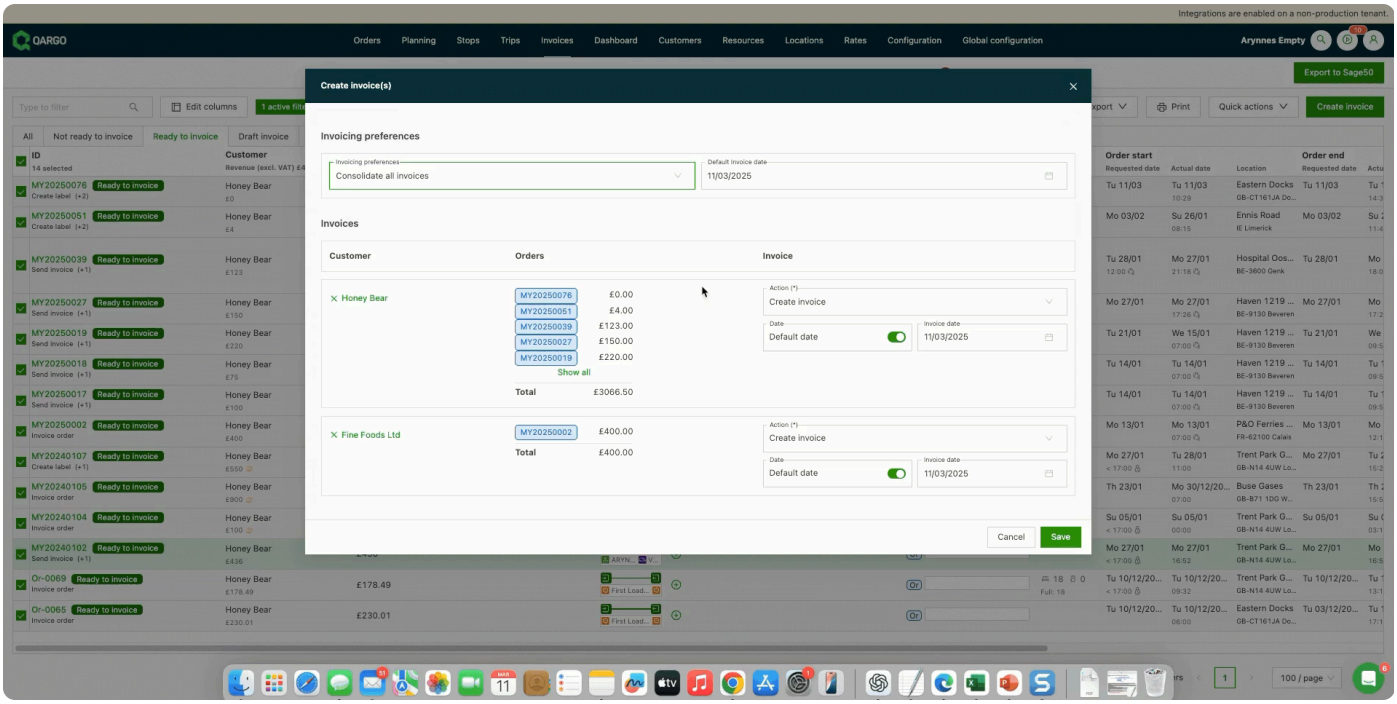
- Other invoice preferences include adjusting the number of orders that can be included in the invoice and creating separate invoices per order.



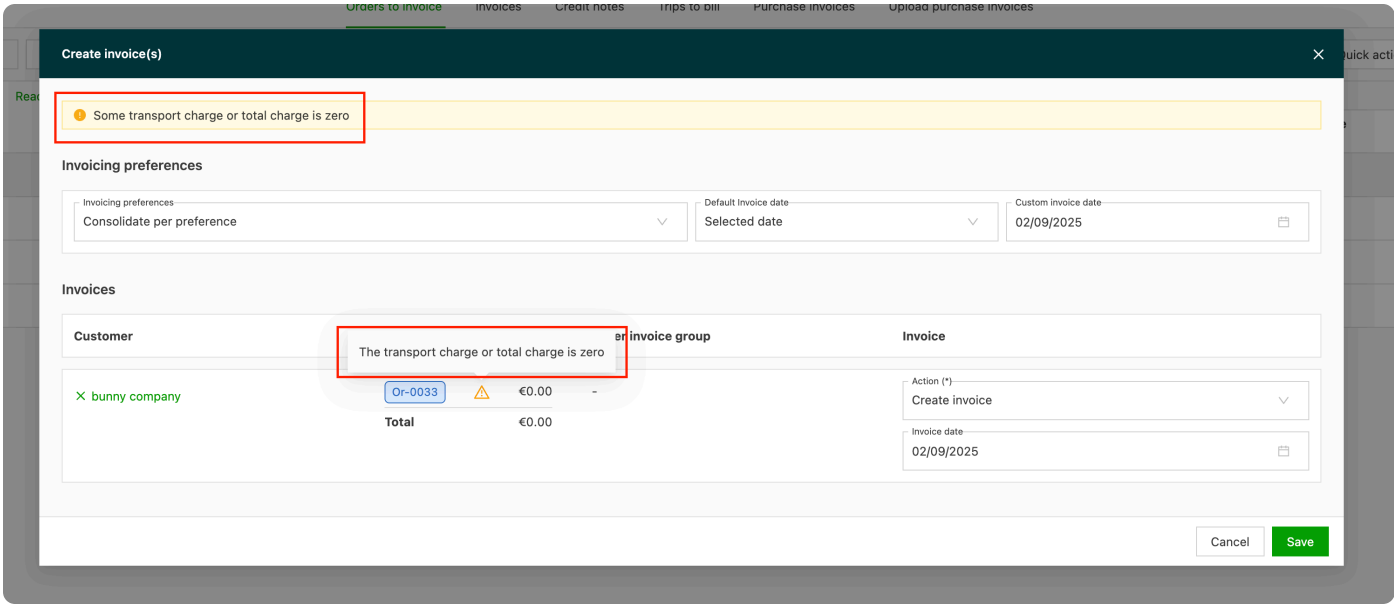
- Select the action for each line, depending on what needs to happen with these orders.
    - **Do not invoice:** Sets the revenue value to 0 and updates the status to Do not invoice. The order then shows in the ‘Do not invoice’ tab.
    - **Add to existing invoice:** Invoices that match the bill-to customer are shown in the ‘Existing invoice’ field. If there are multiple invoices, including draft invoices, all of them are shown. It is not possible to add to an invoice that is already posted.

- **Create draft invoice:** Creates a draft invoice with a unique draft invoice number. The invoice can be sent to the customer for approval if necessary. Changes and additions can be made to the invoice.
  Click here to learn more about draft invoices.
- **Create invoice:** Creates the standard invoice with a unique invoice number that can be sent to the customer. This is the invoice the customer pays, and the one that is transferred or imported to the accounting software.





To prevent invoicing errors, Qargo now displays a warning when an invoice that contains a transport charge of zero is about to be created.

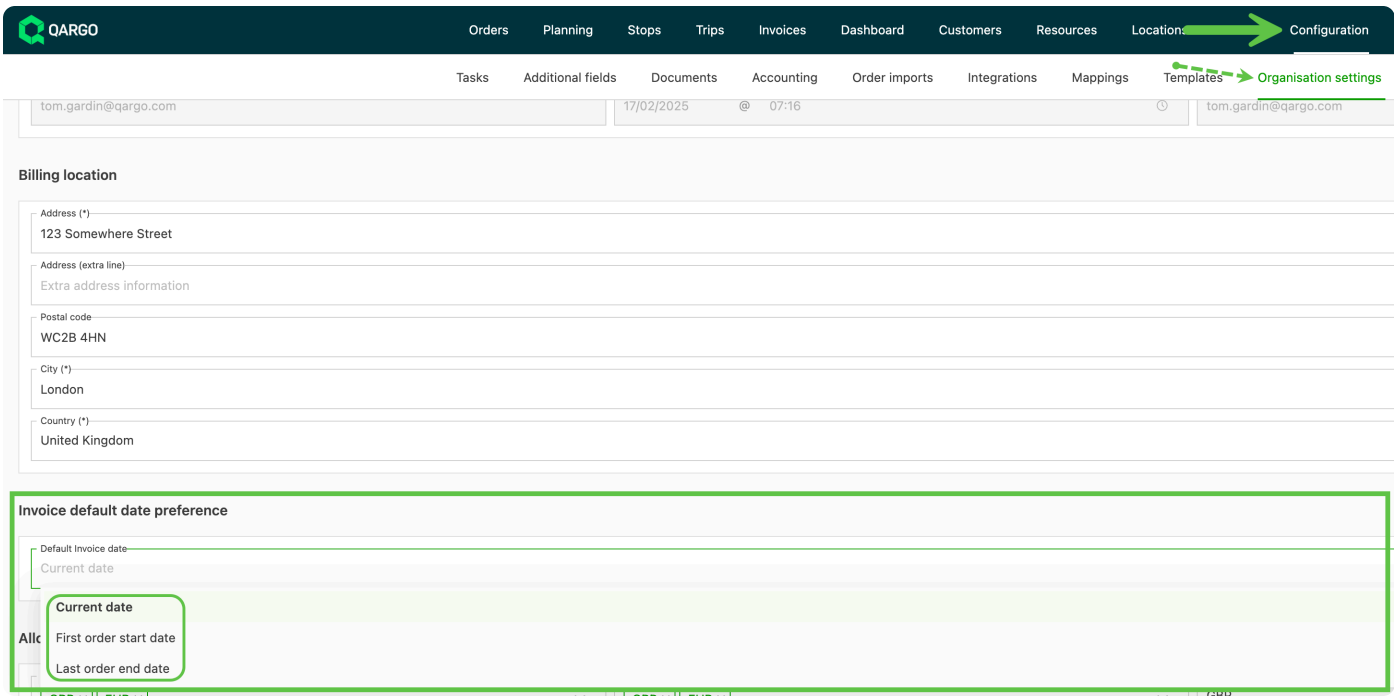


Select the date of the invoice

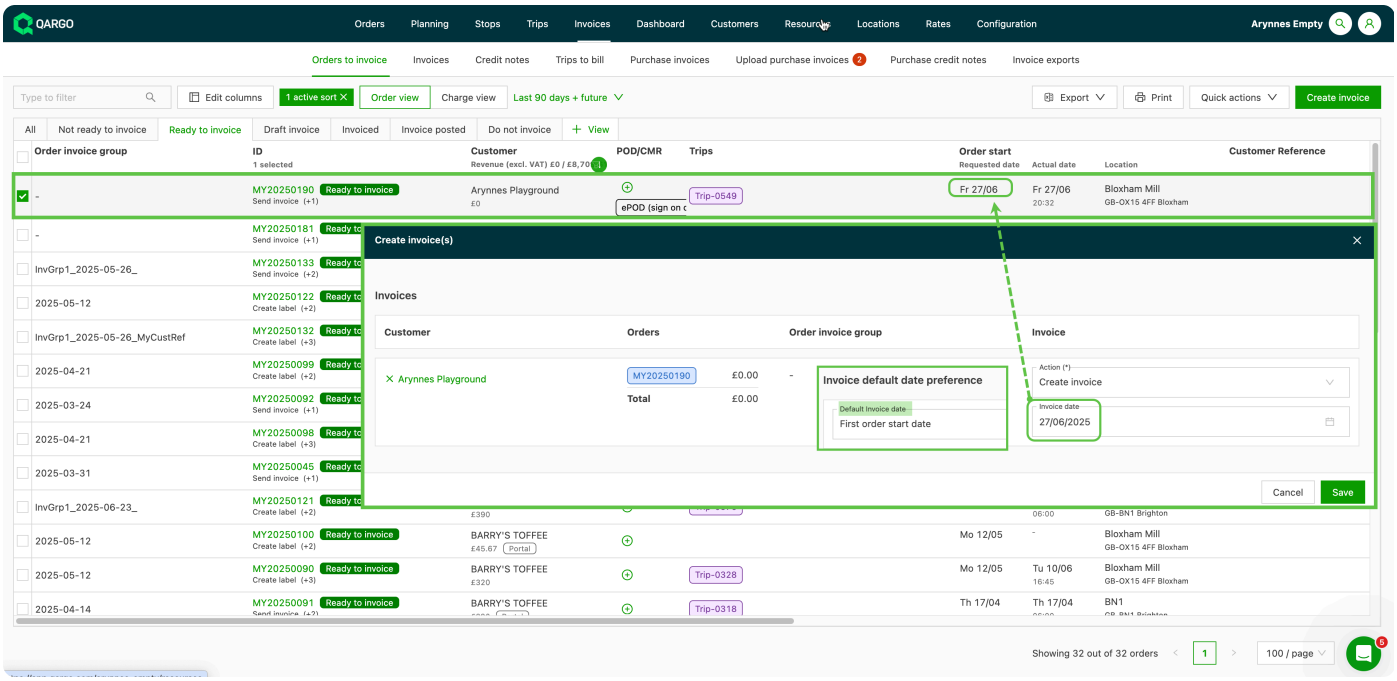
- Choose from **three different options** for setting the default invoice date, to match different ways of working:
  - **Current date**: As before, uses today's date as the invoice date.
  - **First pickup date**: Automatically uses the **first requested start date** of all orders on the invoice.
  - **Last delivery date**: Automatically uses the **last requested end date** of all orders on the invoice.

How it works

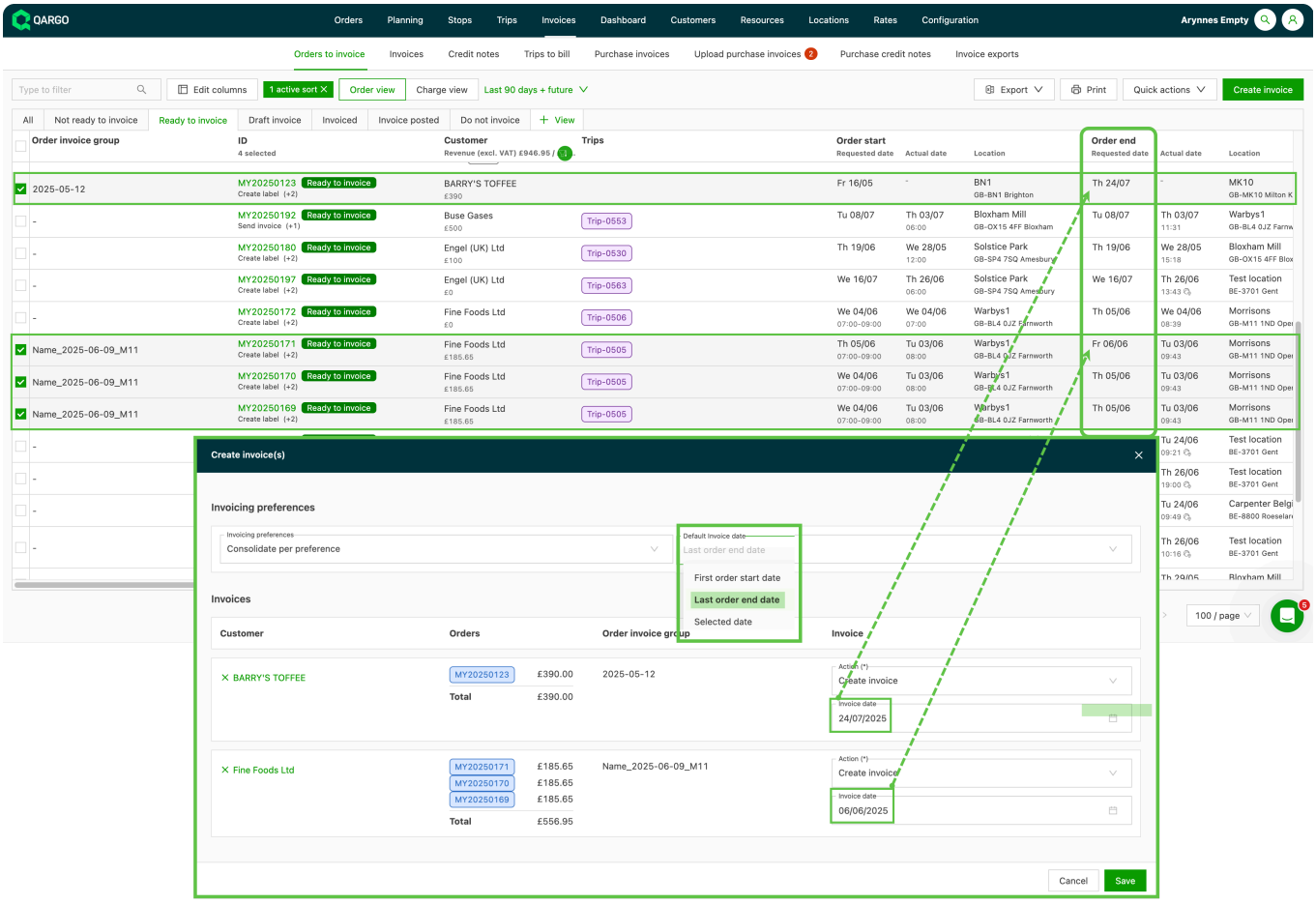
- Set the preferred default invoice date at **tenant level** under organization settings.



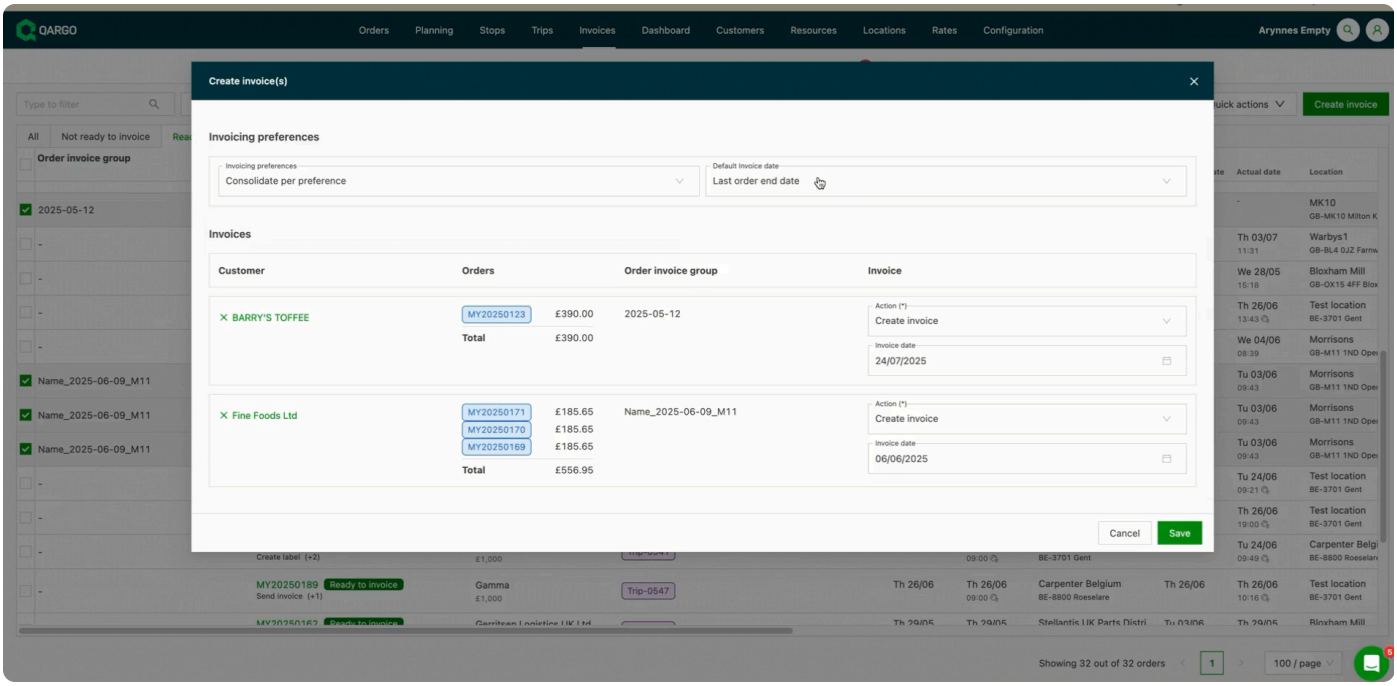
- Once configured, this preference applies automatically when:
  - Creating **single-order invoices** (for example using the requested start date of the order).



- Creating **bulk invoices**, where the system uses the configured default but also allows a manual override.



💡 **Need a custom date instead? That is possible too.**
A **specific date can still be selected manually** during invoice creation, or invoice dates can be updated individually, just as before.



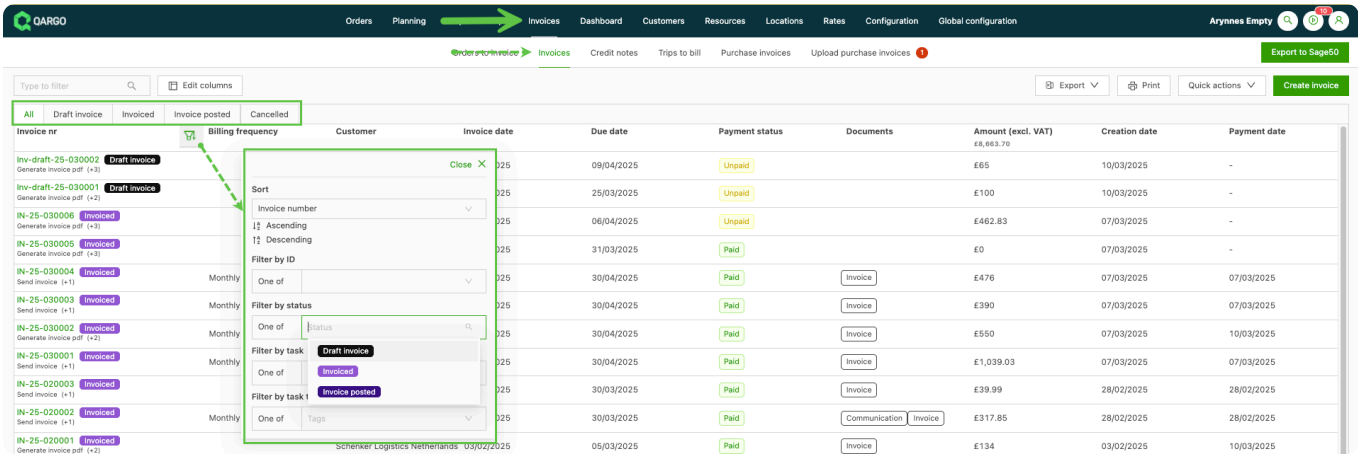
📚 If a custom date with a different year is entered, this is reflected in the generated invoice number (if YEAR is used in the invoice number).
Example:
Creating an invoice on January 1, 2026, with a custom date of December 1, 2025, uses the year 2025.

- This date determines the due date, based on the customer's payment terms (i.e., 15 days, 60 days, etc.).

Adjusting invoices

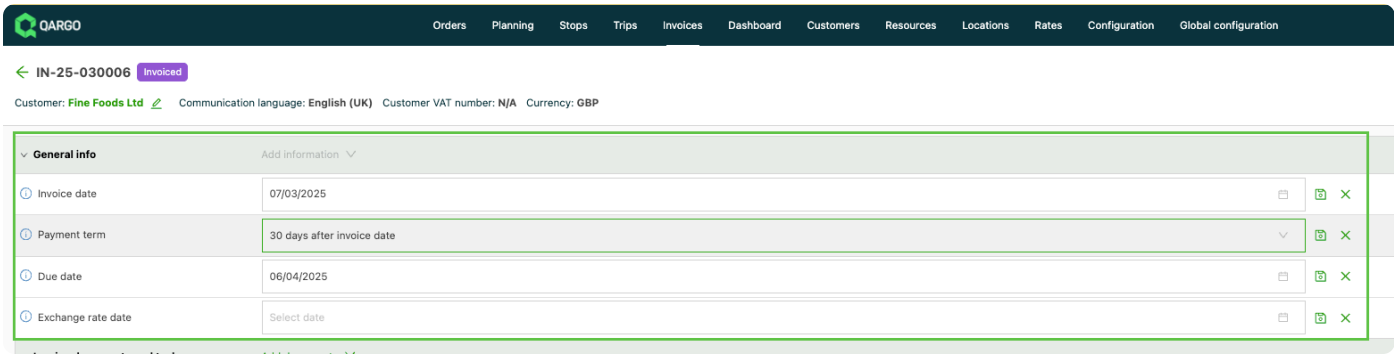
Once an invoice or draft invoice has been created, it can be found under **Invoices**.

- There are default tab views based on the invoice status (draft invoice, invoiced, invoice posted, canceled), as well as an All tab.
- Column filters can also help to create a detailed view of the data.

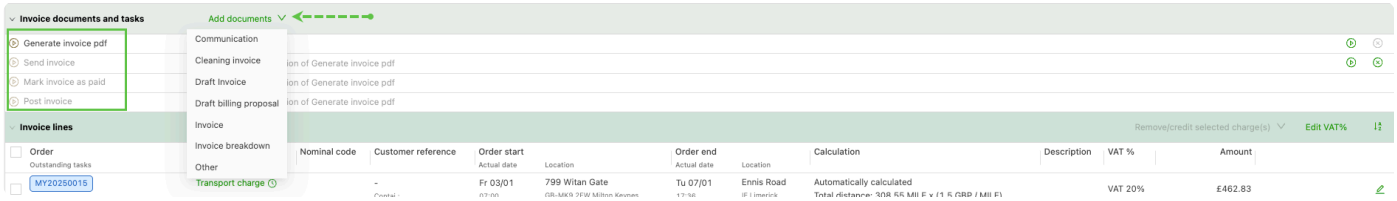


Click the **invoice ID** to open the invoice page and make adjustments.

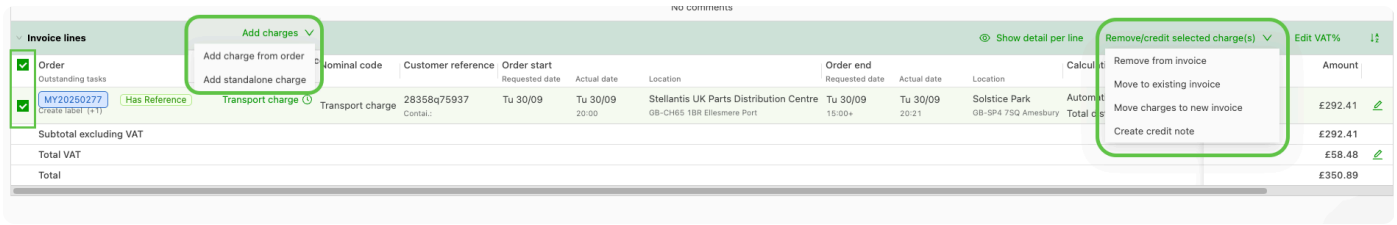
- **General info:** Dates can be updated directly by clicking in the row. **Payment terms** shows a drop-down menu of available options. Click the **Save** icon to update.



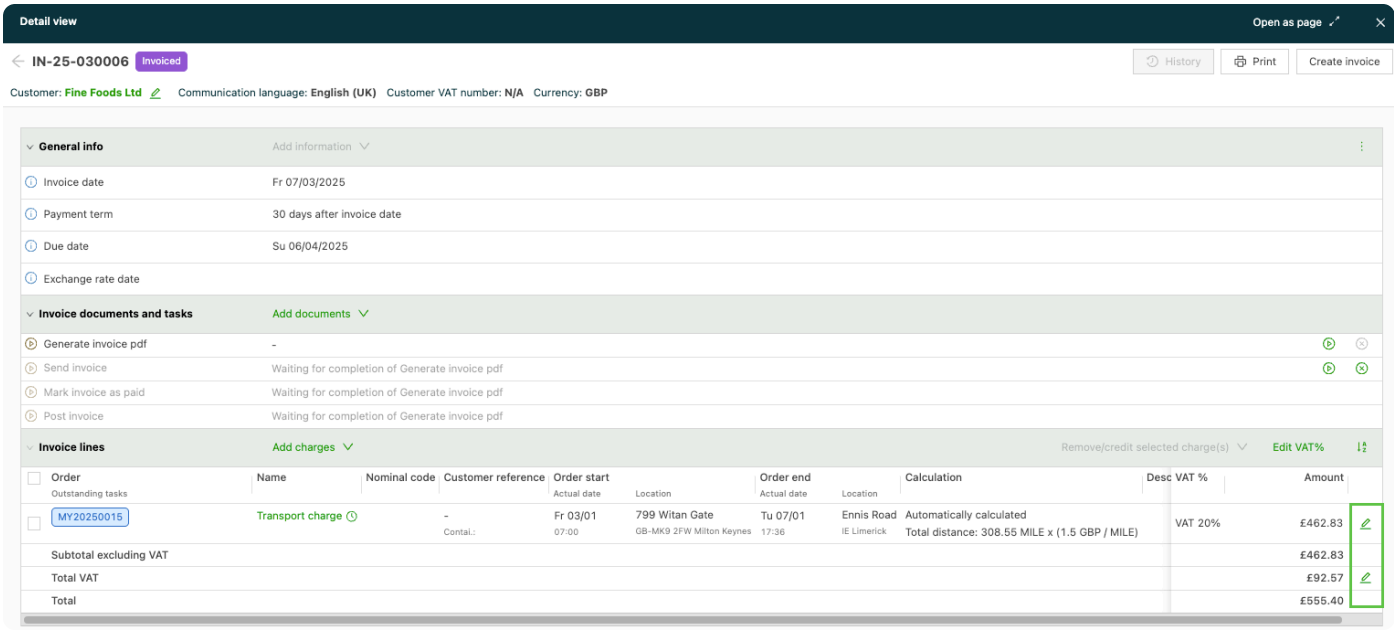
- **Invoice documents and tasks:** Add any additional documents that might be required for billing purposes. The tasks for processing the invoice (generate / send / post) are listed here.

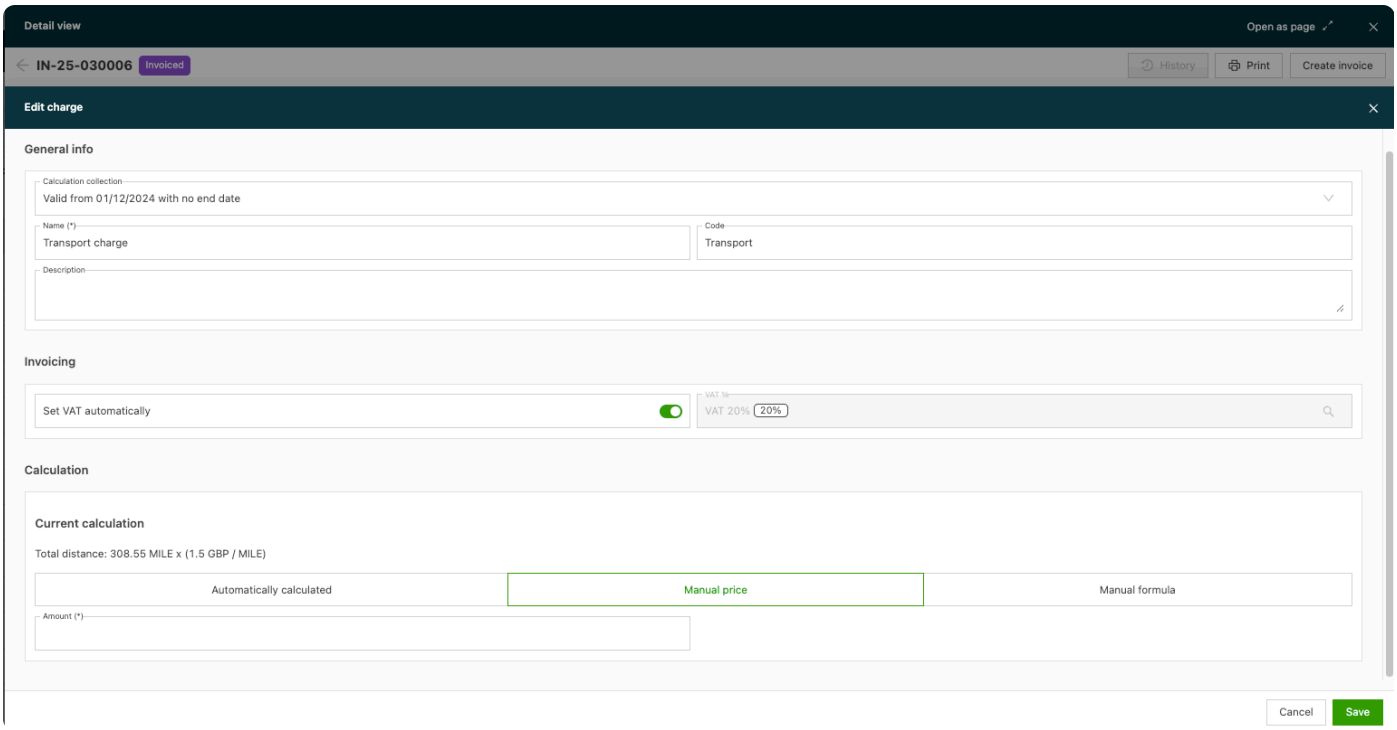


- **Invoice lines:**
  - Click **'Add charges'** to add any charges that might be missing from the invoice.
    - Add charge from order shows charges based on other orders for the same customer.
    - Standalone charge uses the standard charge types available in the various price lists.
  - Use **'Remove/credit selected charges'** to update a specific charge (or all charges): check the box next to the line item, then select the required action.
    - ***Remove from invoice*** sets the charge status back to 'To invoice' or 'Do not invoice'.
    - ***Move to existing invoice*** shows a list of available invoices for the same customer that the charge can be moved to.
    - ***Move charges to new invoice*** removes the charge and creates a new invoice that shows this charge.
    - ***Create credit memo*** creates a credit memo (CM) with a unique number that shows the charge as a negative value. The existing invoice shows the CM number as a label next to the negative amount. This is typically used when the invoice is posted and adjustments are required.
  - Select **'Edit tax %'** to change the tax rate on the invoice. A drop-down menu shows the available options.



- Edit the charge data or add descriptions with the "pen" icon.

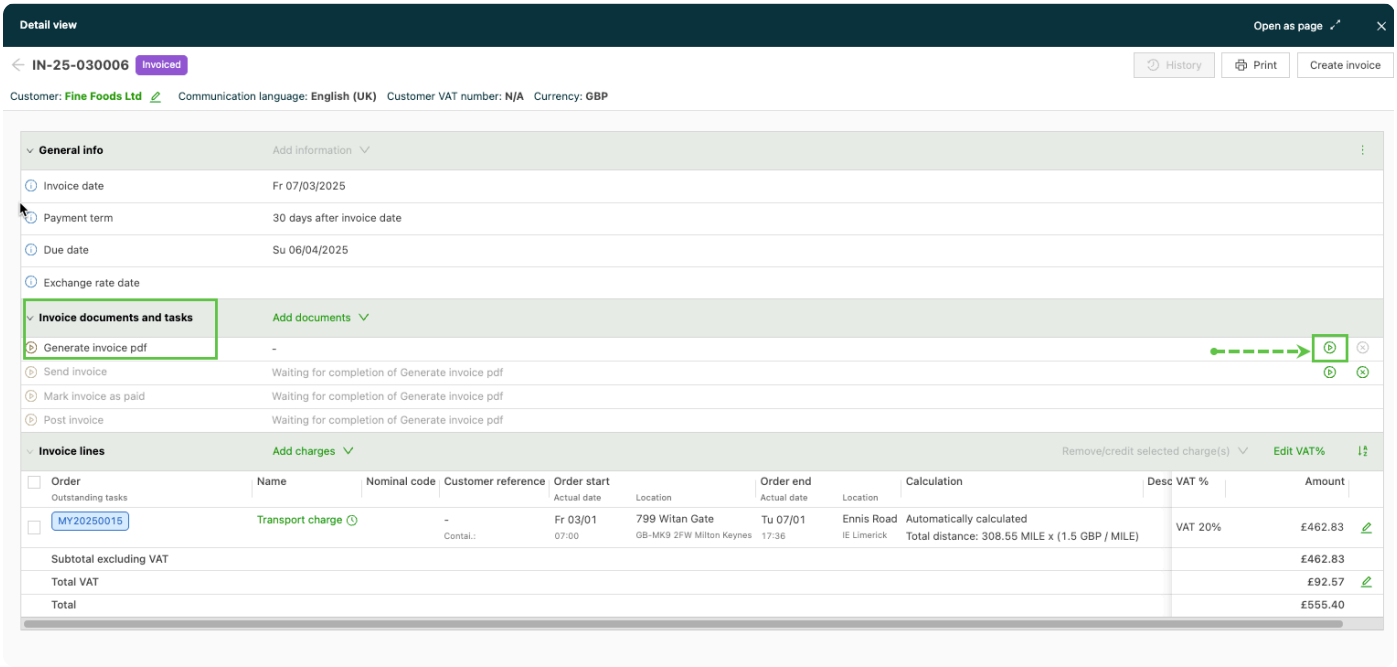




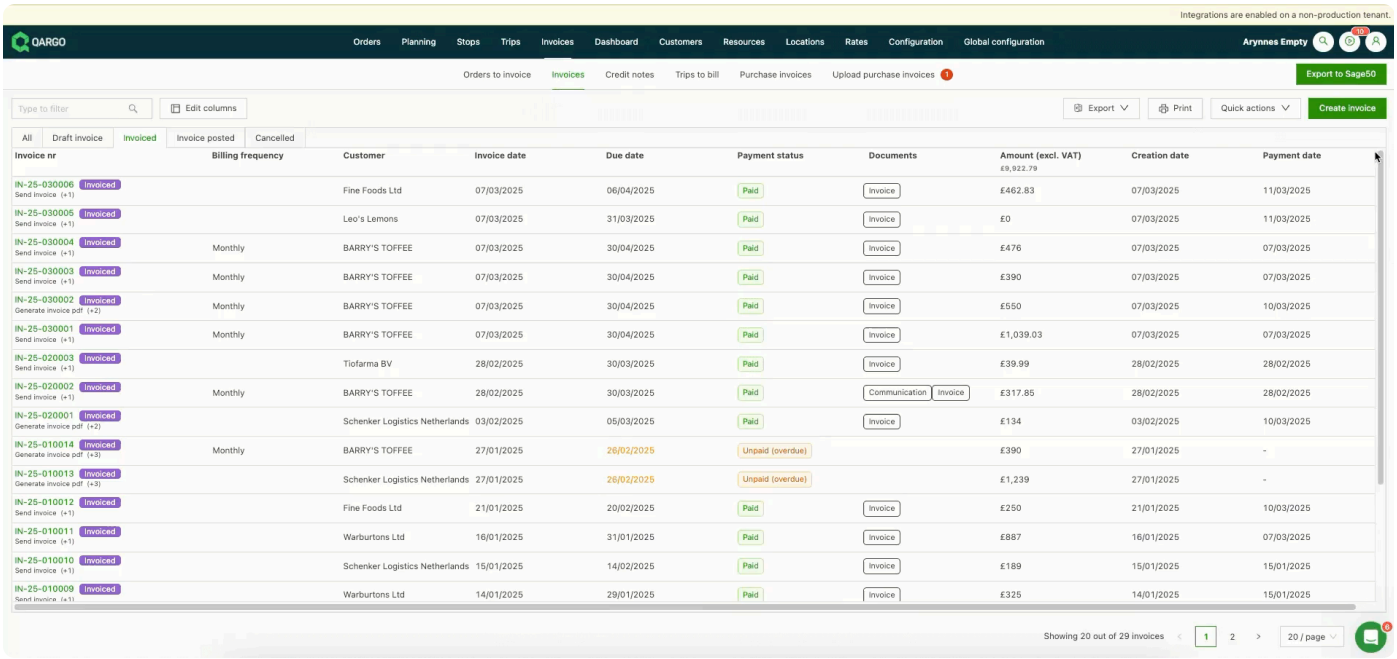
Generating invoice PDFs

Verify that the invoice details are correctly registered on the invoice page.

Click the play button on the right side of the task line:

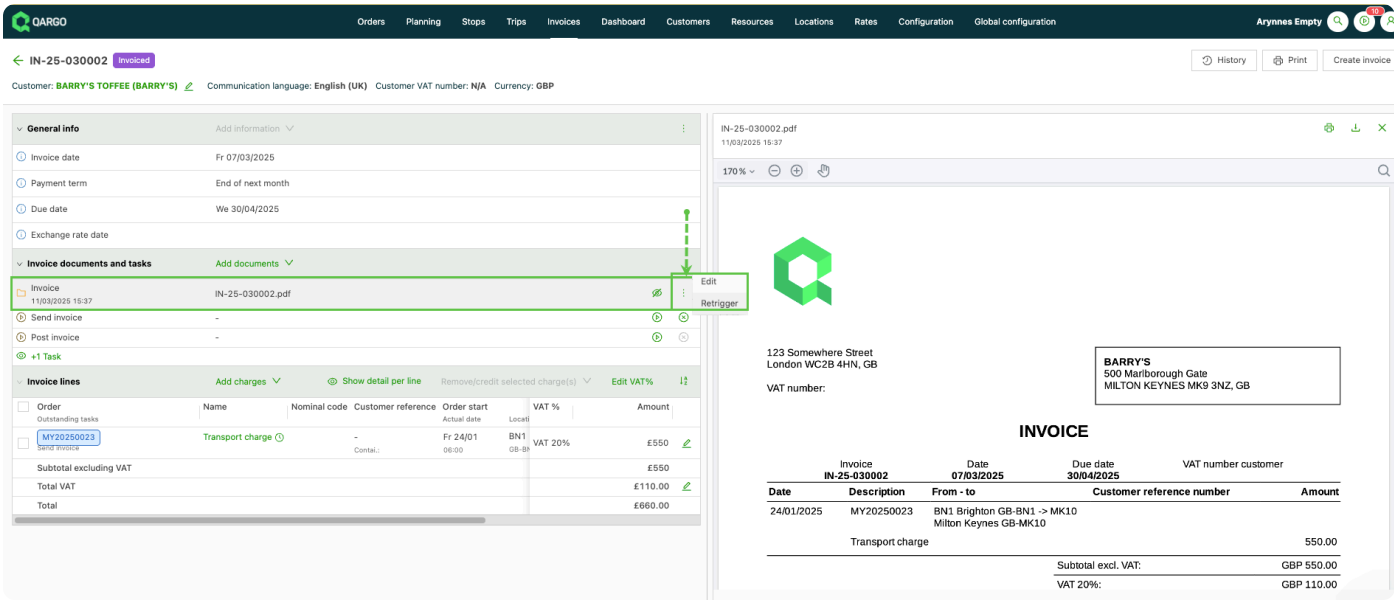


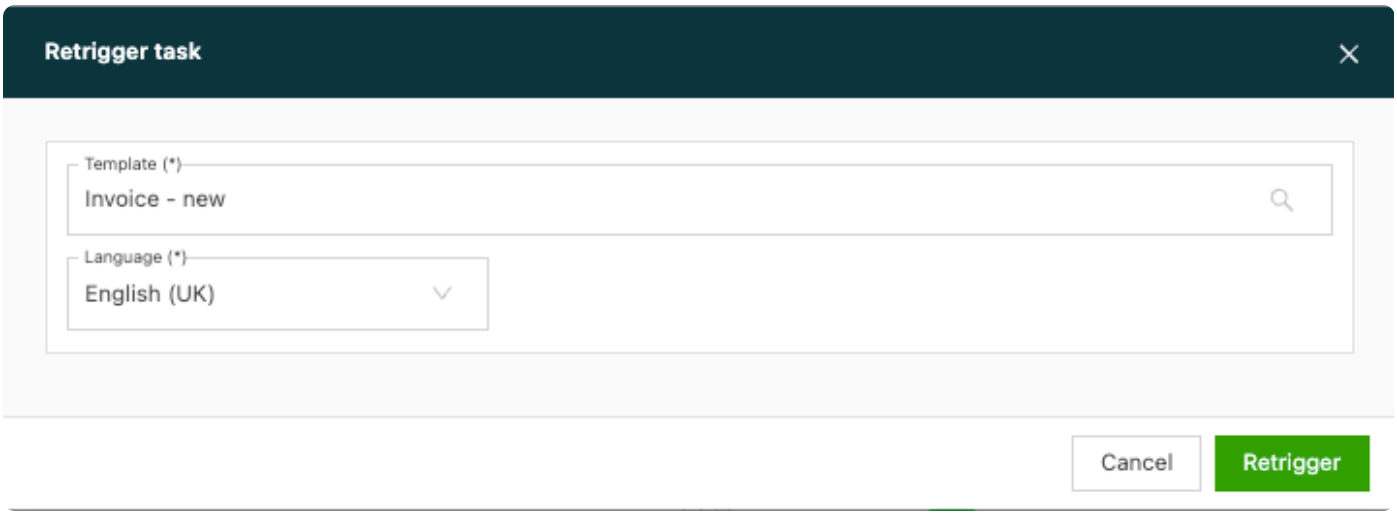
Tasks can also be completed in bulk via Quick actions in the invoice list view.



Once the invoice has been generated, the PDF preview is also visible for any final checks on the invoice.

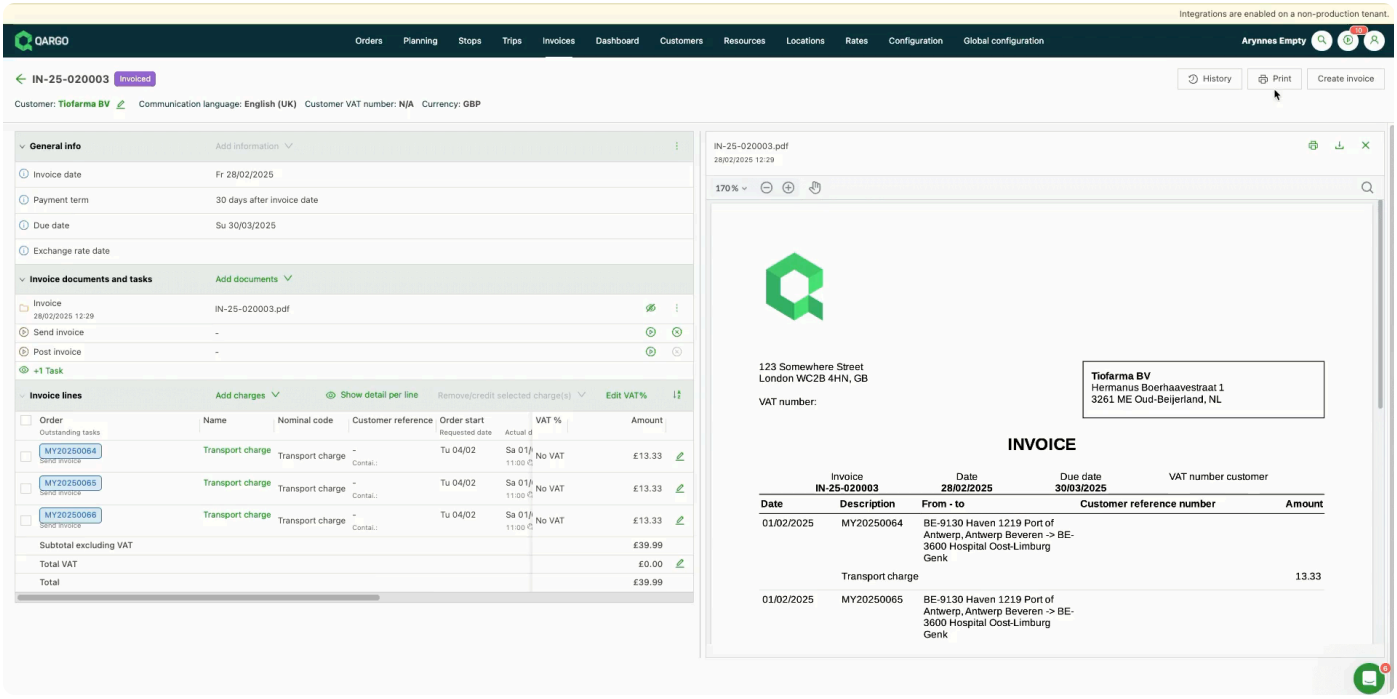
- If any changes are made to the invoice (e.g., adjusting the date or removing/adding an order), the PDF must be regenerated to show the changes.
- Click the three dots next to the task and click **'Retrigger'**.





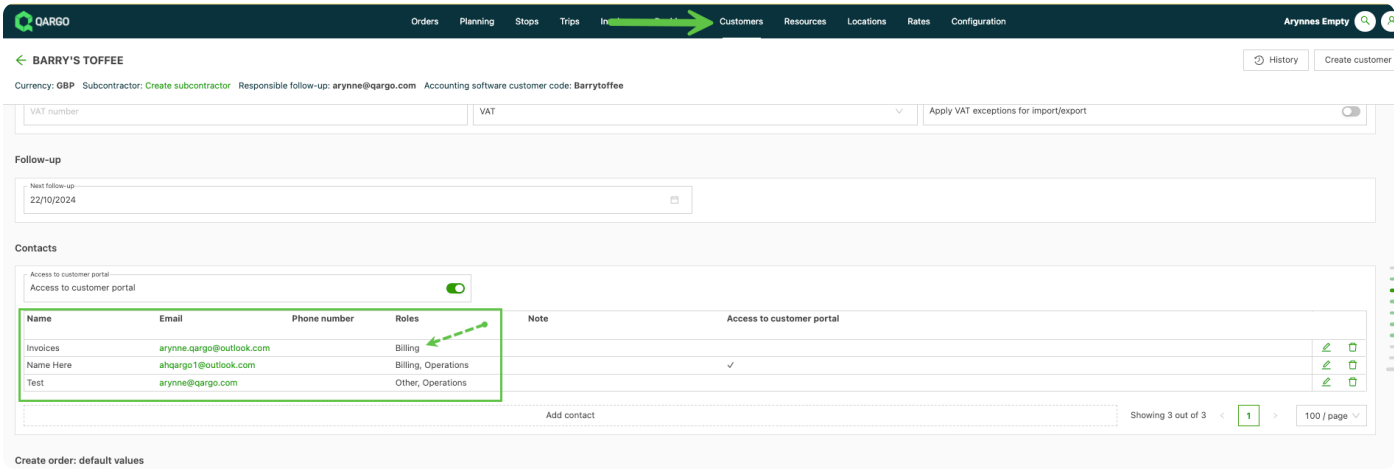
Print documents from invoice detail

Documents can be printed directly from the invoice detail page. If the **Print** option is selected before the invoice has been generated, the print preview displays any associated documents selected for printing. Once the invoice has been generated, it also shows in the print preview.

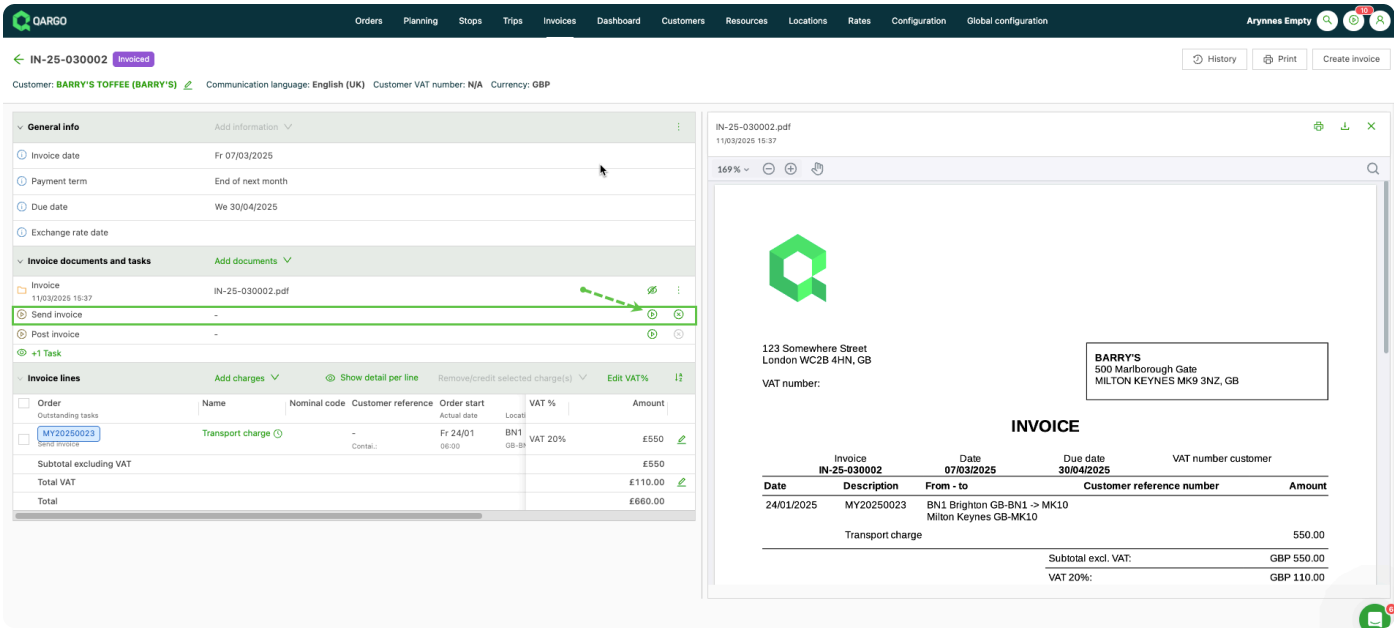


Sending invoices to customers

Once the invoice has been generated (Generate PDF), the *'Send invoice'* option becomes available. To send the invoice, the customer profile must have a contact with the **Billing role**.

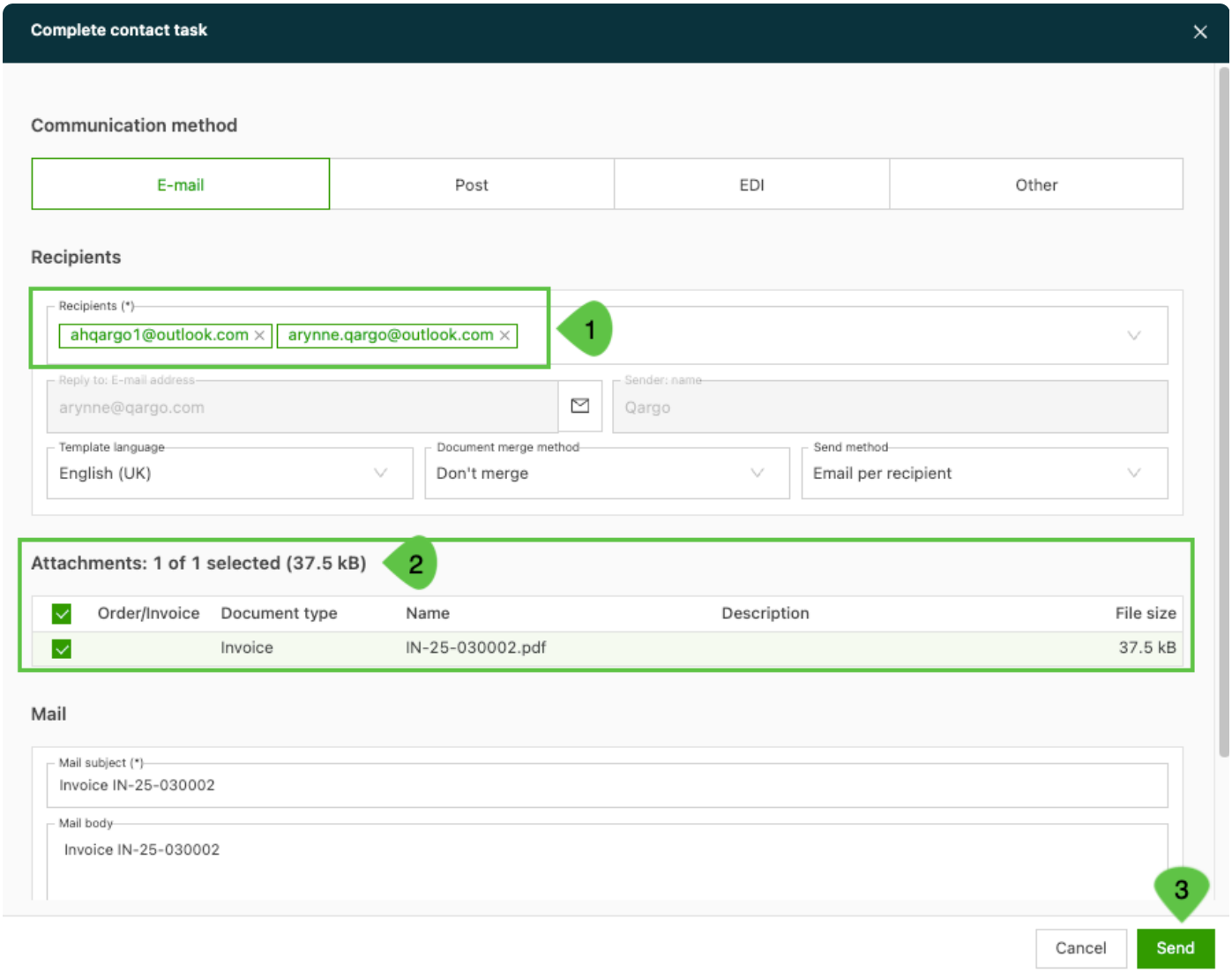


- Click **'Send invoice'**, carefully reviewing the details before starting the sending process.

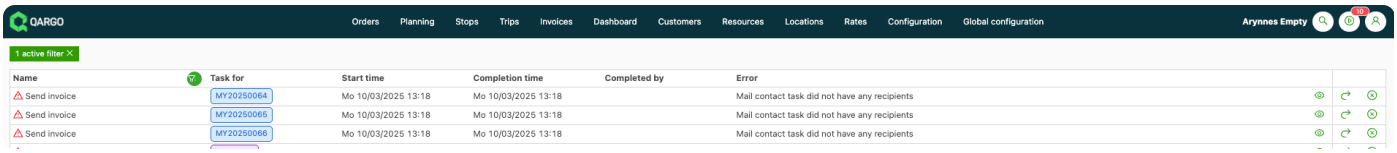


Once the **Send invoice** task is selected, a new window opens where the task can be completed.

1. Verify that the recipient email address is correct.
    1. A single email address can be added in Bcc on the invoice email. Enter the address in the **Bcc** field in the **Send invoice** window.
2. Confirm that the required attachments are selected. Any additional documents that are required and available can also be selected, i.e., POD/CMR, etc.
3. Click **Send**.

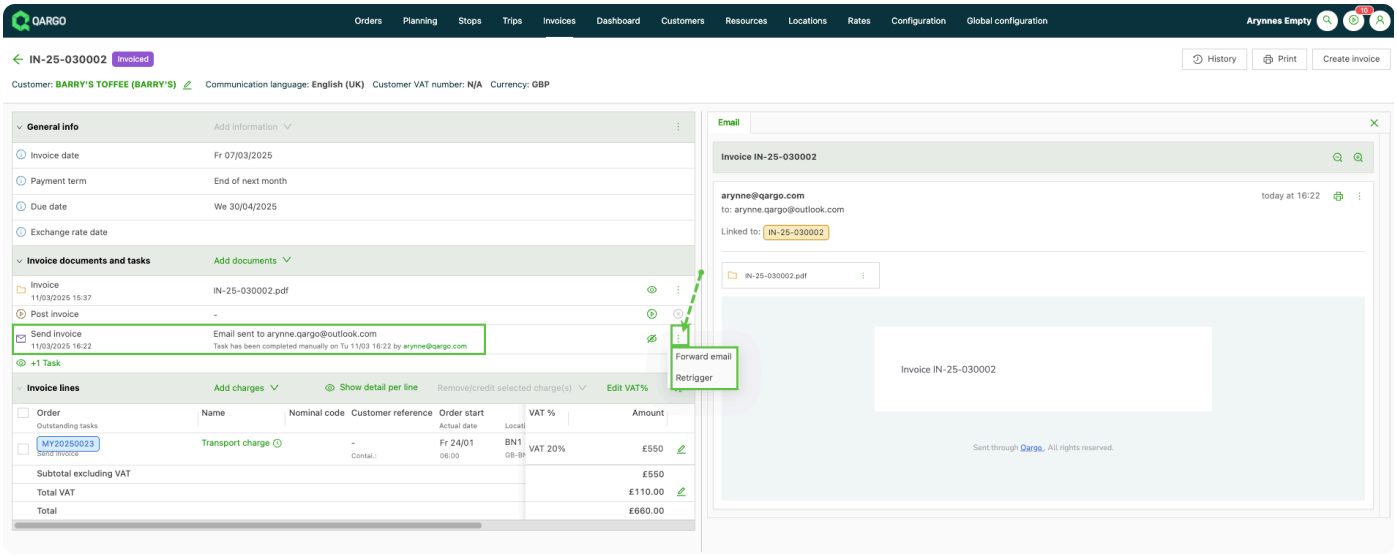


If there are any issues with the **Send invoice** task, an alert is generated.



Once the invoice has been sent successfully, a note is added to the invoice with the details of the completed task (user / date and time stamp).

- Click the eye icon to preview the email that was sent, along with the invoice and any other attachments.
- If the recipient does not receive the email, it can be retriggered, which reopens the ‘Send invoice’ screen.
- Use the ‘Forward’ option if the email needs to be forwarded to another email address.



Tasks can also be completed in bulk via Quick actions in the invoice list view.

Depending on individual business requirements, additional tasks may be configured as part of the invoice process.

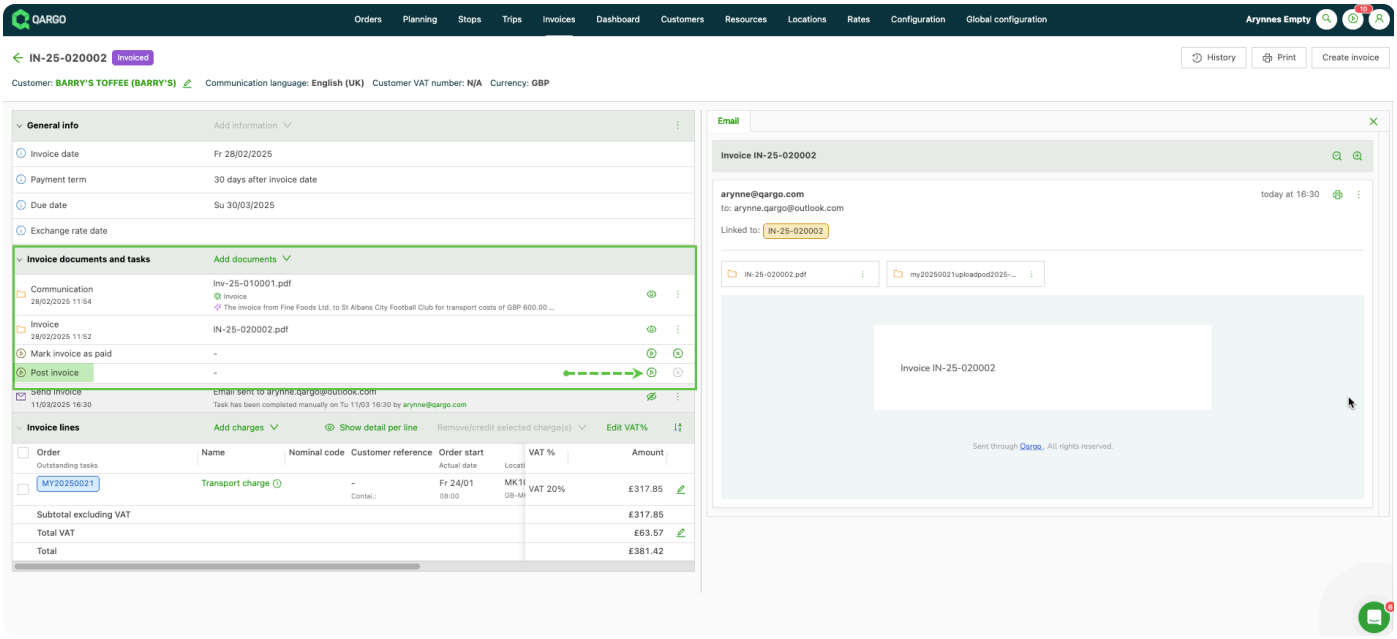
Posting the invoice

The final default task is to set the invoice to the status **Posted**.

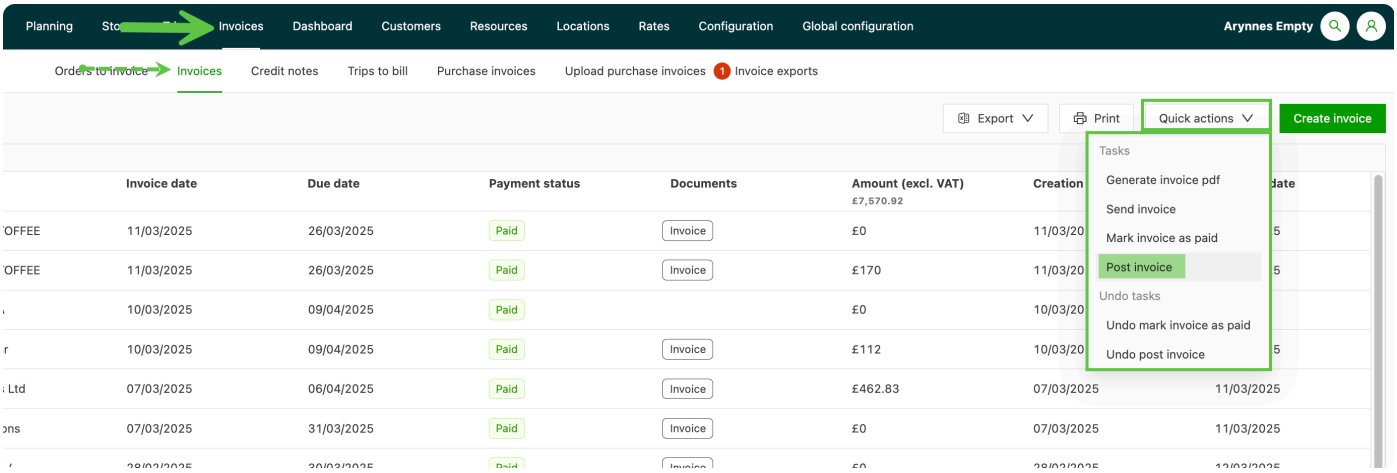


When third-party accounting software is used with an integration, the option may be to send directly to accounting, which transmits the data directly. Alternatively, a manual export of the data to a format that can be uploaded may be required.

- Navigate to **Invoices** > *Invoices* and select the ***'Invoiced'*** tab.
- Invoices can be updated individually by clicking the invoice number. Under *'Invoice documents and tasks'*, the option to post the invoice (send to accounting, etc.) shows as a task.
- Click the 'Play' button to complete the task. The status updates to Invoice posted.



Tasks can also be completed in bulk via Quick actions in the invoice list view.



Once posted, invoices cannot be adjusted. Click here for posted invoice restrictions.

Once the invoice is posted, it is ready to be exported manually so that the data can be used in the accounting software.