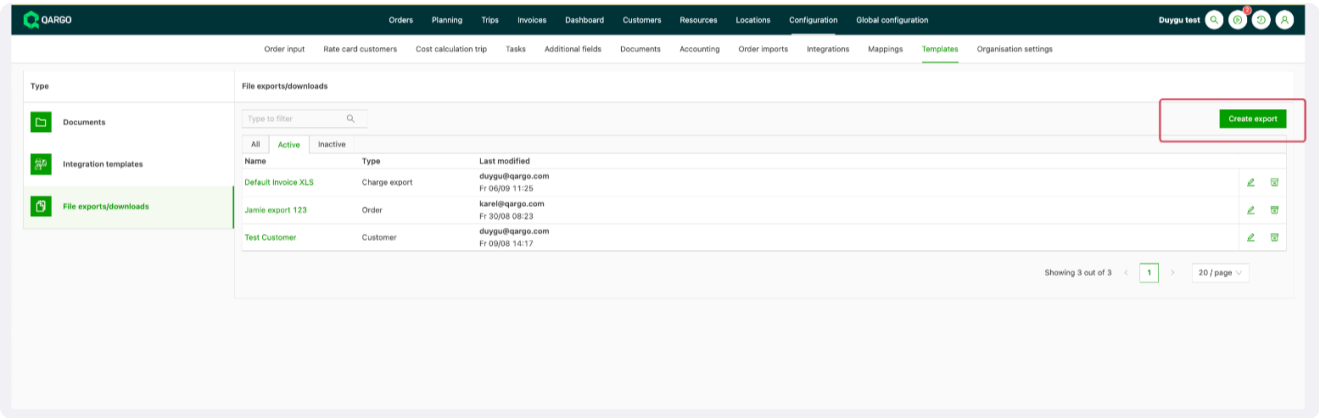
How to: Generate invoice XLS/CSV export

Updated October 24, 2024

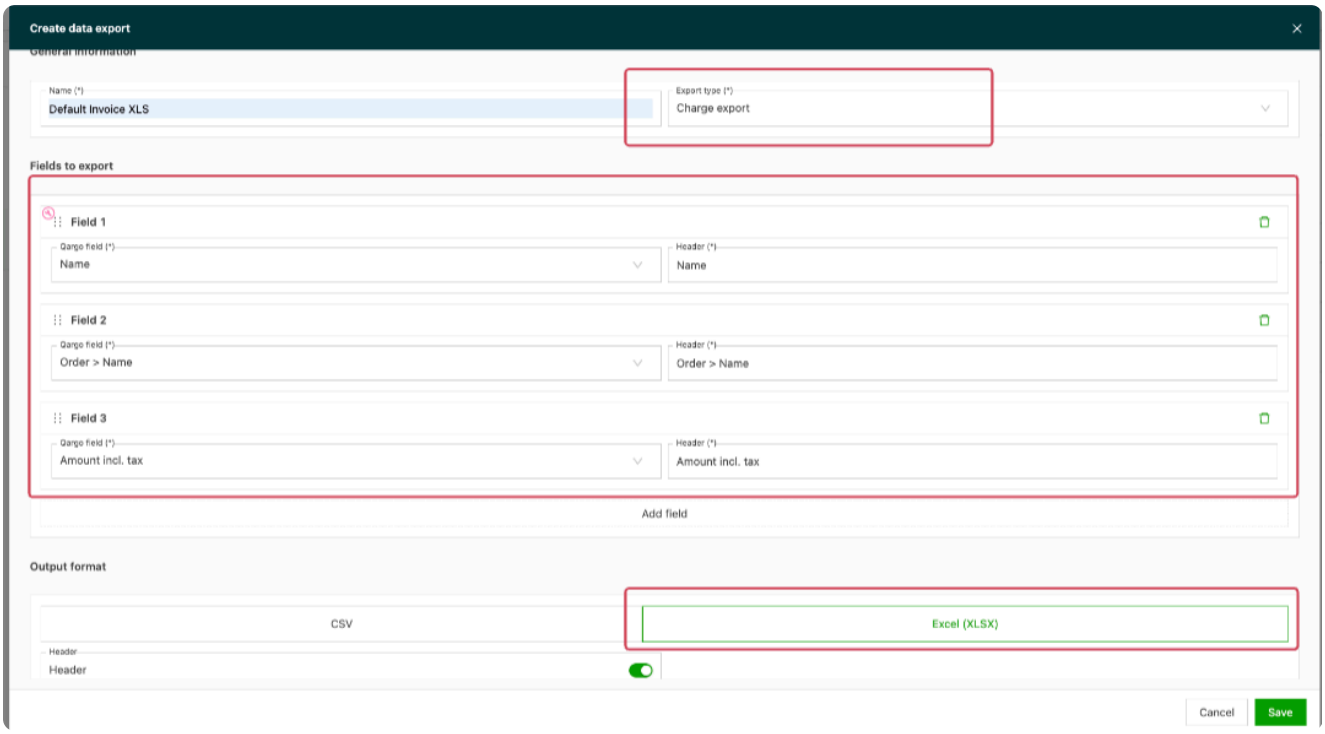
How to: Generate invoice XLS/CSV export

▶ https://www.loom.com/embed/7aa8440d53744c2aadbd6b0b07cb3566

1. Configure the Excel template and layout for the invoice:
    - Navigate to **Configuration > Templates > File exports and downloads**.

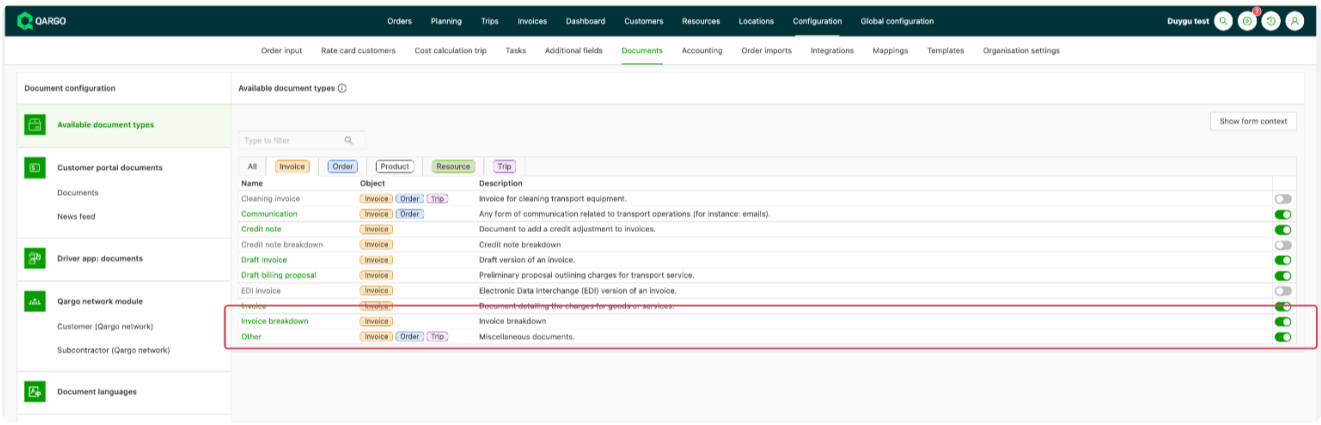


    - Create a default invoice XLS (charge export) and define the fields:
      Define the columns to show in the export, e.g.:
        - First column: Invoice name
        - Second column: Order name
        - Additional columns: Charge description, amount excluding tax, amount including tax, and tax separately.
        - Save the template.

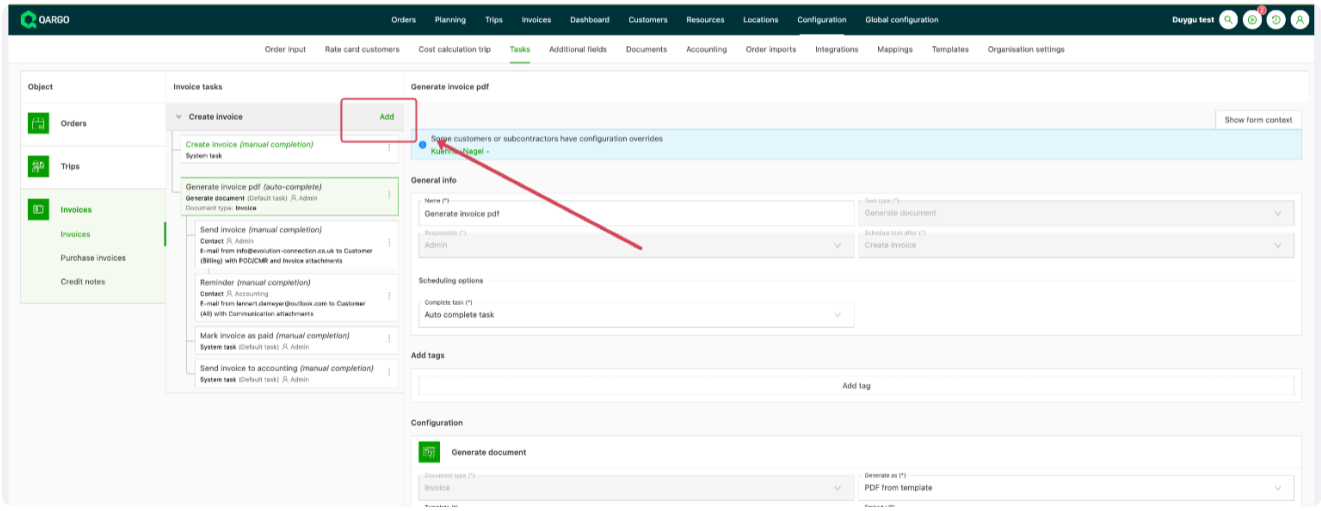


2. Set up the task to generate the invoice XLS file:

- Make sure the **invoice breakdown document type** is activated under **Configuration > Documents > Invoices**

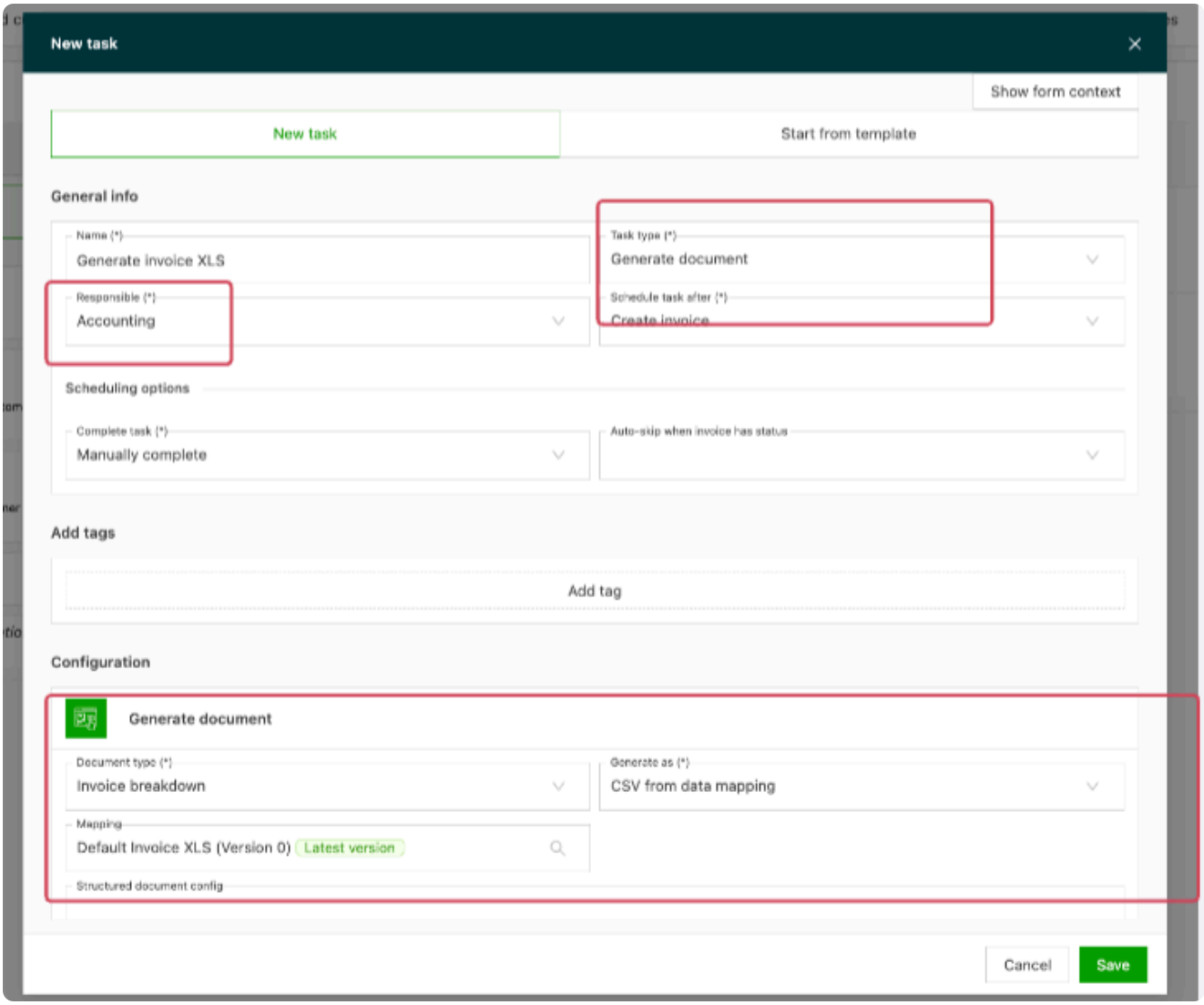


- Go to **Configuration > Tasks > Invoices**.
- Create a **Generate invoice XLS** task (generate document task).

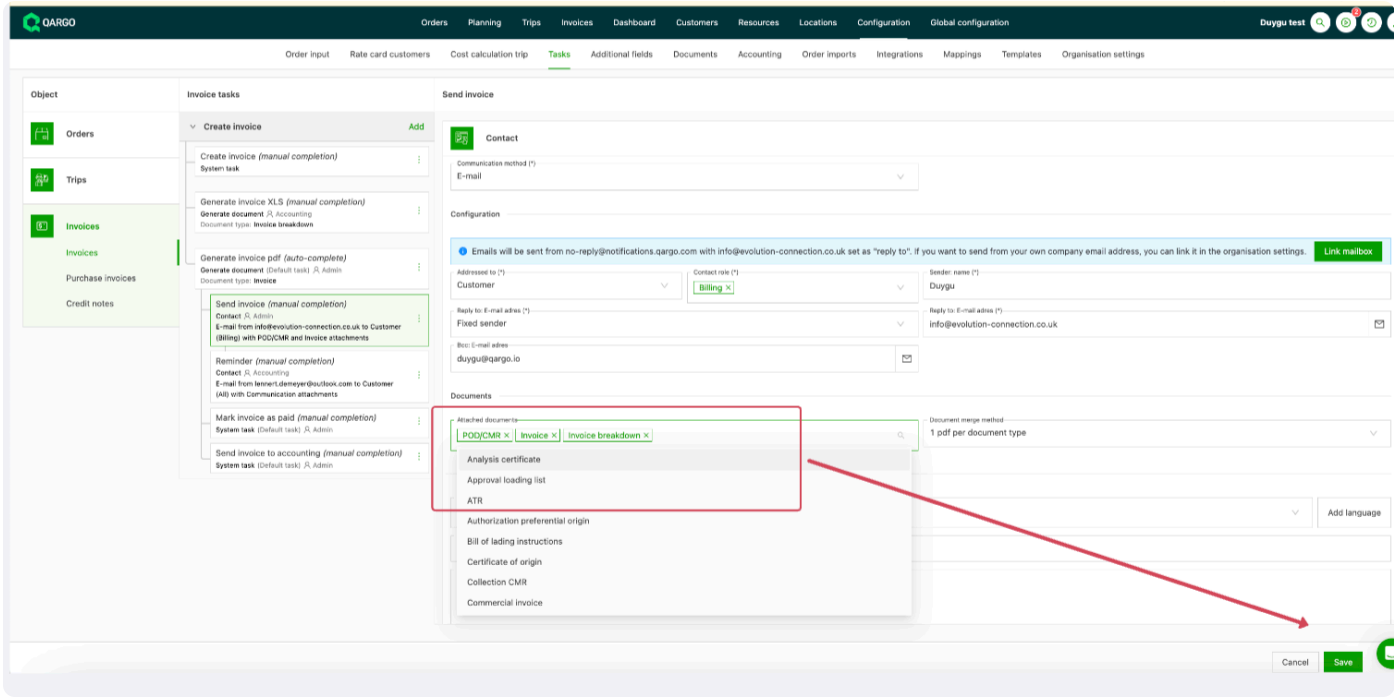


3. Configure the XLS task:

- Select **Invoice breakdown** as the document type.
- Choose **Generate as CSV** and select the default invoice template created earlier.
- Save the task and test it by generating an invoice.



4. Attach the invoice XLS when sending the invoice:
    - Go to **Tasks > Send invoice**.
    - Replace or add the invoice PDF document type with the **Invoice breakdown document type**.
    - Save and test sending the invoice with the attached Excel file.


QARGO
Orders
Planning
Trips
Invoices
Dashboard
Customers
Resources
Locations
Configuration
Global configuration
Duygu test
Order input
Rate card customers
Cost calculation trip
Tasks
Additional fields
Documents
Accounting
Order imports
Integrations
Mappings
Templates
Organisation settings
Object
Orders
Trips
Invoices
Invoices
Purchase invoices
Credit notes
Invoice tasks
Create invoice
Add
Create invoice (manual completion)
System task
Generate invoice XLS (manual completion)
Generate document
Accounting
Document type: Invoice breakdown
Generate invoice pdf (auto-complete)
Generate document (Default task)
Admin
Document type: Invoice
Send invoice (manual completion)
Contact
Admin
E-mail from info@evolution-connection.co.uk to Customer (Billing) with POD/CMR and Invoice attachments
Reminder (manual completion)
Contact
Accounting
E-mail from lennert.demeyer@outlook.com to Customer (All) with Communication attachments
Mark invoice as paid (manual completion)
System task (Default task)
Admin
Send invoice to accounting (manual completion)
System task (Default task)
Admin
Send invoice
Contact
Communication method (*)
E-mail
Configuration
Emails will be sent from no-reply@notifications.qargo.com with info@evolution-connection.co.uk set as "reply to". If you want to send from your own company email address, you can link it in the organisation settings.
Link mailbox
Addressed to (*)
Customer
Contact role (*)
Billing
Sender: name (*)
Duygu
Reply to: E-mail adres (*)
Fixed sender
Reply to: E-mail adres (*)
info@evolution-connection.co.uk
Bcc: E-mail adres
duygu@qargo.io
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Attached documents
POD/CMR
Invoice
Invoice breakdown
Analysis certificate
Approval loading list
ATR
Authorization preferential origin
Bill of lading instructions
Certificate of origin
Collection CMR
Commercial invoice
Document merge method
1 pdf per document type
Add language
Cancel
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