Invoices: create a draft invoice

Updated March 12, 2025

A draft invoice allows users to create and review an invoice before finalizing it. This can include:

- Pre-approvals. A draft invoice can be sent to a customer for review and confirmation. Once it is approved, an actual invoice can be generated quickly with the **Generate PDF** task on the draft invoice.
- Batch processing. Users can add multiple orders to a draft invoice over time before creating the final invoice.
- Review and modification. Draft invoices offer the flexibility to make changes and update charges easily.

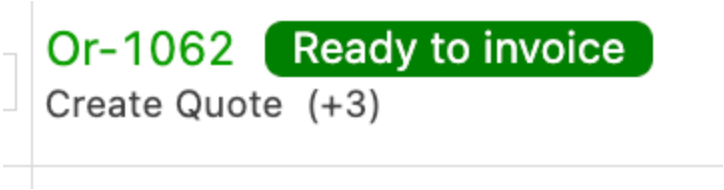
Creating a draft invoice

There are 2 options for creating a draft invoice.

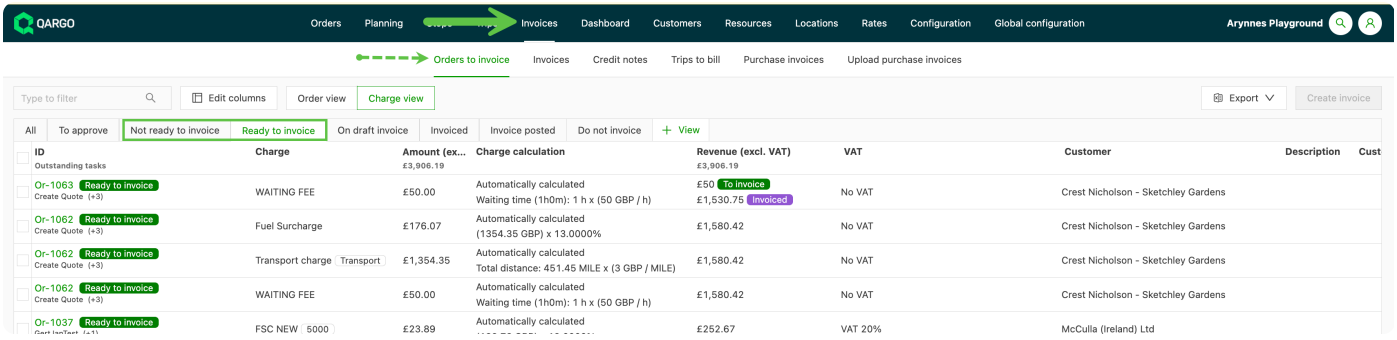
1. Create a standalone invoice as a draft
2. Create a draft invoice for an order

Standalone invoices are typically used to invoice for services outside a typical transport order, such as storage fees. When a standalone invoice is created, the invoice moves to the draft invoice status by default as the first step.
Click here to learn more about standalone invoices.

Orders must have the **Ready to invoice** status before a draft invoice can be created.

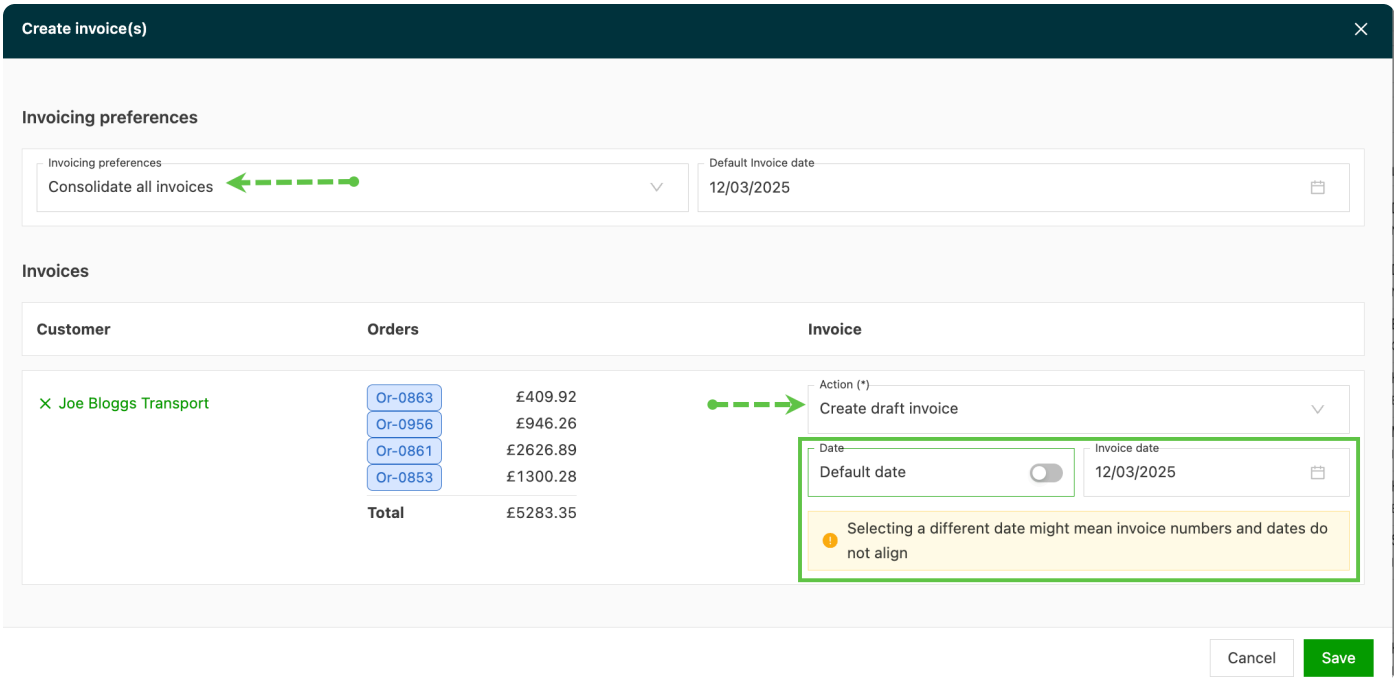


Go to **Invoices > Orders to invoice**.

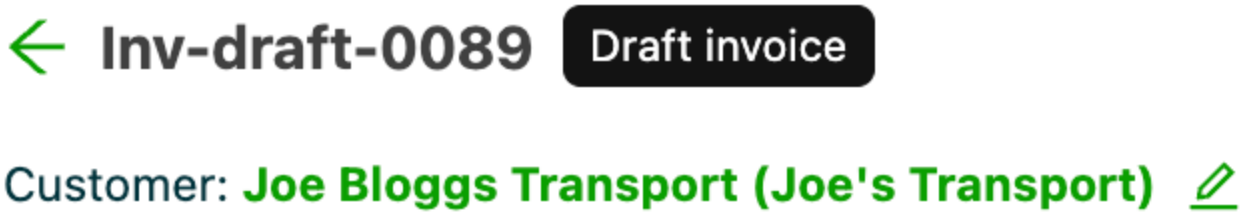


- On the **Ready to invoice** tab, select the orders to place in the draft. In the charge view, select the charges instead.
- Click **Create invoice**.

A new window opens, where the invoice preferences can be selected. All selections on the draft are copied to the standard invoice.



- When multiple orders are selected, they can be consolidated into a single invoice or grouped based on preferences. They can also be split into a separate invoice for each order.
- Under **Actions**, select **Create draft invoice**.
- The date defaults to the current date. Using a different date may put the invoice number sequence out of order.
- Click **Save**.
- The draft invoice is generated with a unique draft invoice number.



General info:

- This section includes the invoice date and the payment terms for the invoice.
- If exchange rates are used, enter the date to use for the exchange.
- Remarks can be added to give more context or details for the draft invoice.
- Click these rows to update this information, then use the save icon to apply the changes.



Invoice documents and tasks:

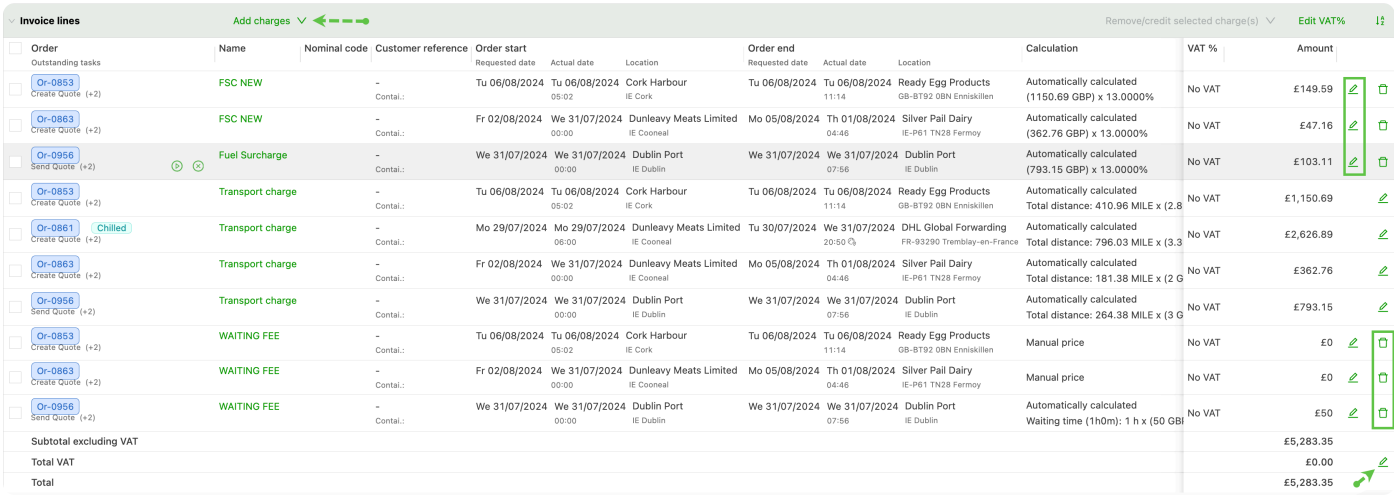
- Add any documents to include with the invoice, for example when sending a billing proposal to a customer.
- When the draft invoice is ready to become a standard invoice, use the **Generate PDF** task to convert it.

- If pre-approval is required before the invoice is generated, use the **Send invoice** task.

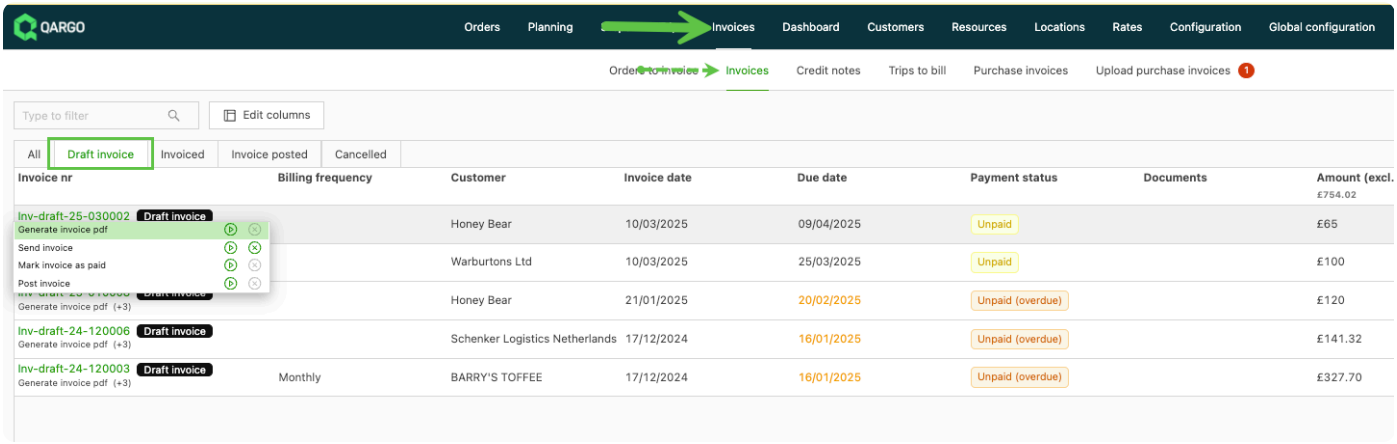


Invoice lines:

- Charges are shown as line items linked to the order. Use the pencil icon to make any required edits.
- The delete icon removes a charge. Note: use it with caution. This permanently deletes the charge.
- Click **Add charge** to add more charges. These can be standalone charges or charges from other orders for the same customer.
- To change the tax, use the pencil icon to select the right calculation method.



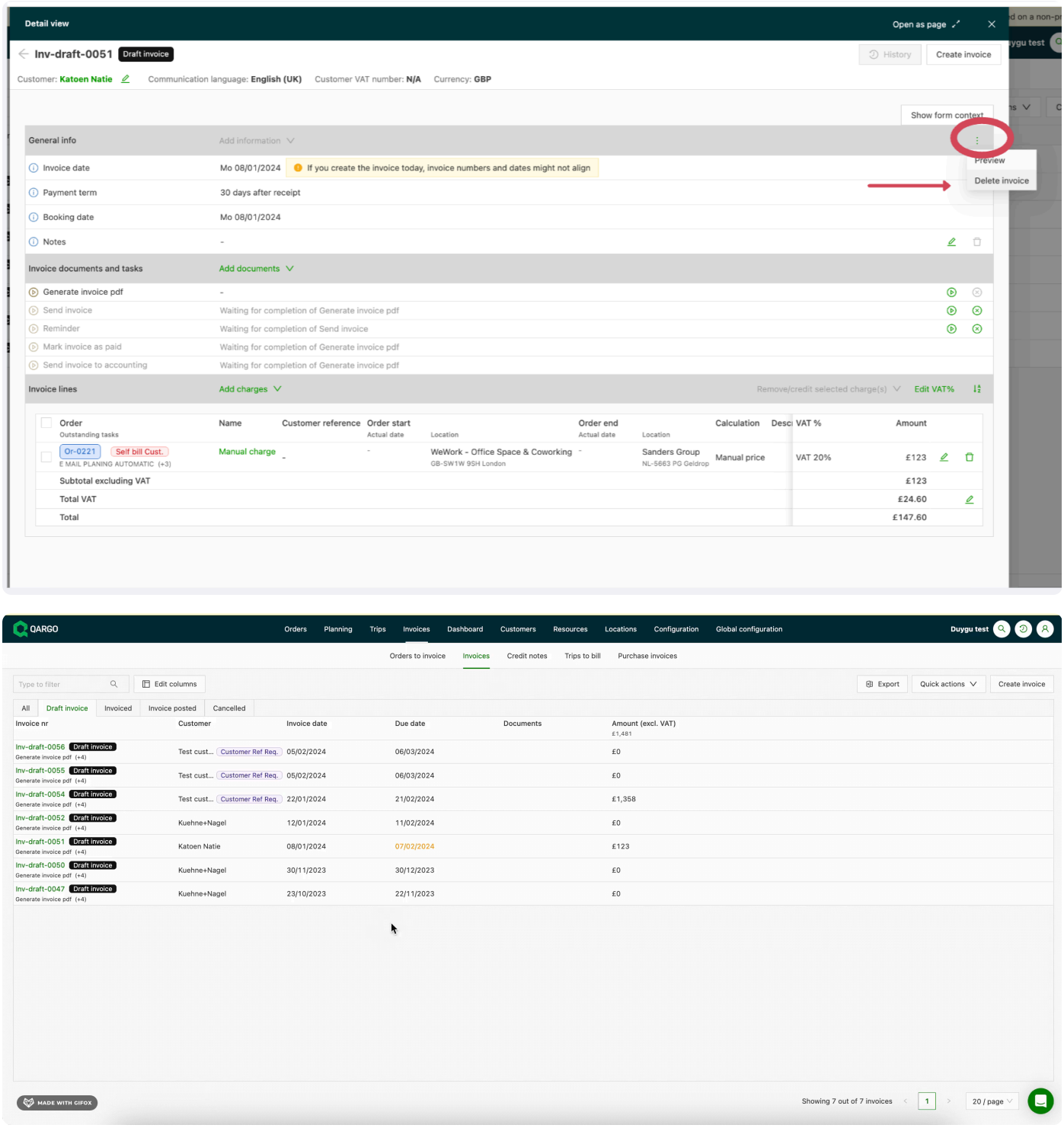
Once the draft invoice is approved or ready, it can be converted to a final invoice with a single click on the **Generate PDF** task. This creates the final invoice with its unique invoice number.



Deleting a draft invoice

- Go to **Invoices > Draft invoices**.
- Open the invoice page and locate the three dots on the right side of the page.
- Click the three dots and select **Delete invoice**.

Any orders linked to the draft invoice are automatically removed from the invoice and get the **Ready to invoice** status.



Click the link below for more details on creating invoices.

Create invoice