Invoices: create a carrier invoice from a contract carrier invoice

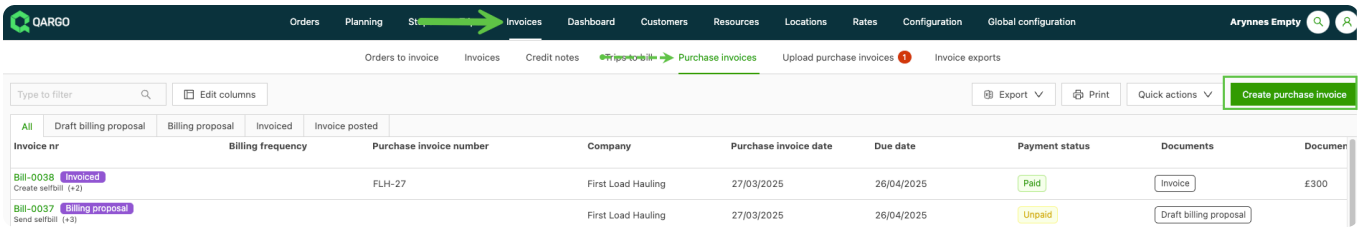
Upload and validate contract carrier invoices with AI-powered scanning, color-coded matching, and simple invoice processing steps.

Updated July 27, 2026

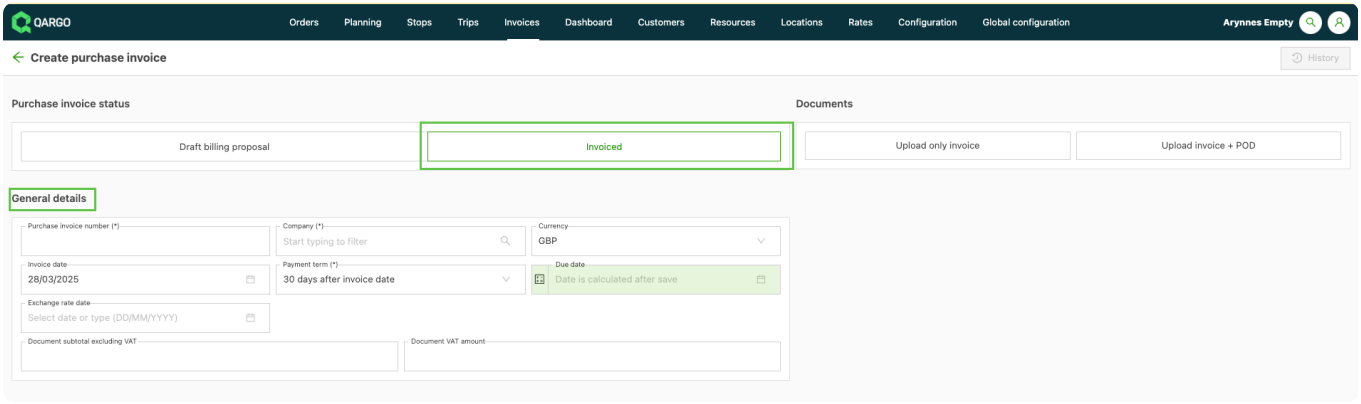
Once an invoice from the contract carrier is received, upload it to the system. Qargo Intelligence scans the document, validates the invoice data, and matches it to the contract carrier and loads.

Create a carrier invoice

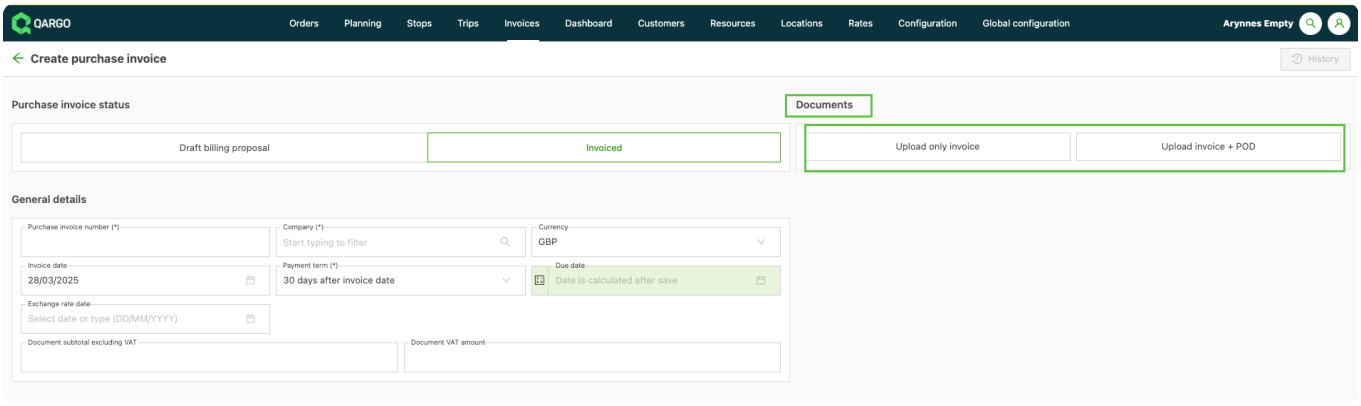
- Go to **Invoices > Carrier invoices**.
- Click **Create carrier invoice**.



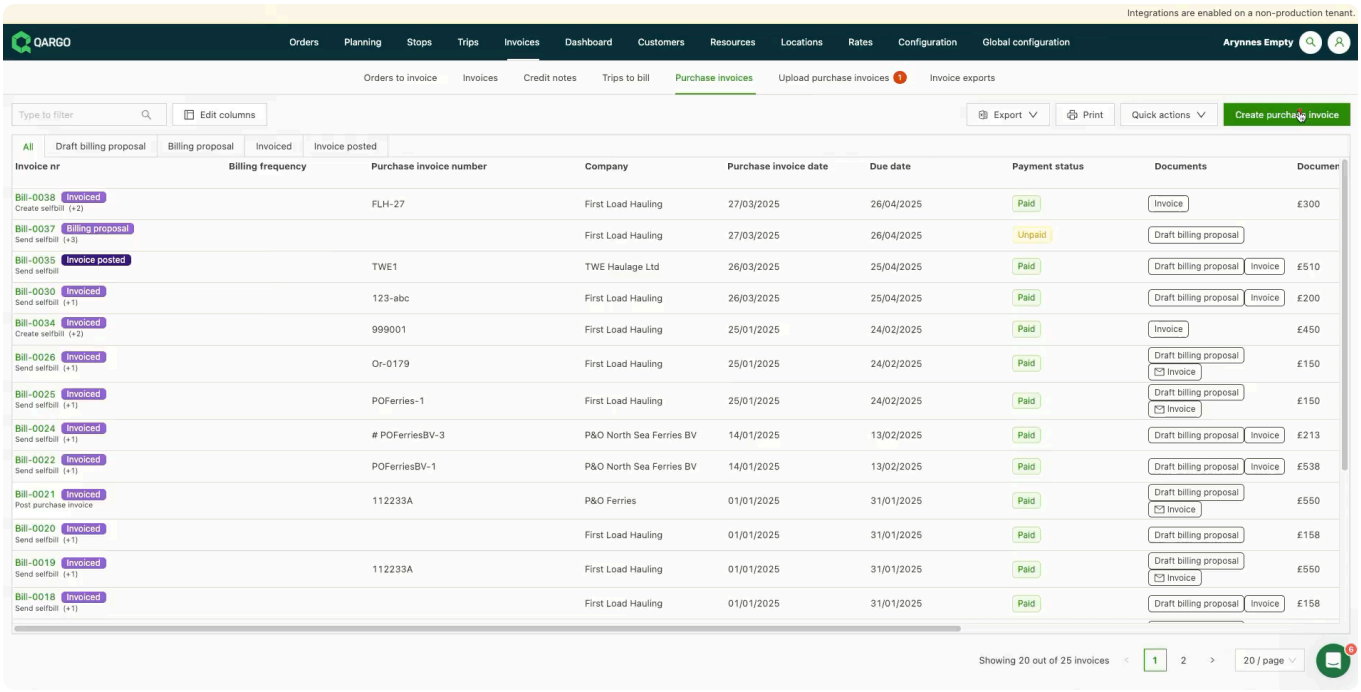
- A new screen opens with 2 status options for carrier invoices (**Draft billing proposal** / **Invoiced**). The selected option determines which **General information** is required.
- Select the **Invoiced** option.



- There are 2 upload options: the invoice only, or the invoice and POD together. Select the option to upload the invoice or the invoice + POD.



- Qargo Intelligence scans and validates the document and the costs. If the amounts or references match the data in the system, it suggests the loads and costs linked to the uploaded document.
- The invoice scan uses color-coded matches to show the result for each line:
  - 🔹 **Blue**: The document charge line matches a shipment.
  - 🔸 **Orange** The document does not match a shipment. This alert indicates that the charge needs extra attention.



- The system also checks prices for discrepancies and displays an error in red.

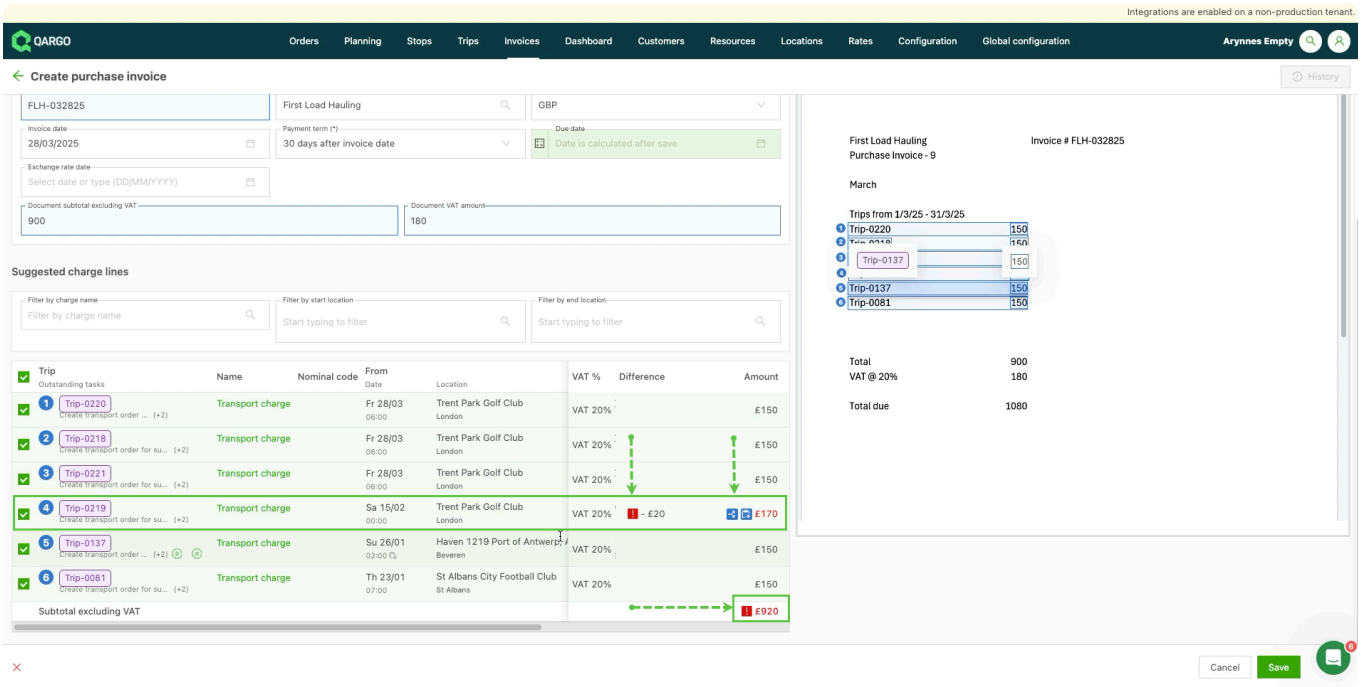
Below is a list of all the available fields Qargo scans and uses when looking for matching records:

- load name
- order name
- intermodal booking reference
- container no.
- CMR reference
- shipment reference
- Pallex shipment number
- Hazchem shipment number
- Palletforce shipment number

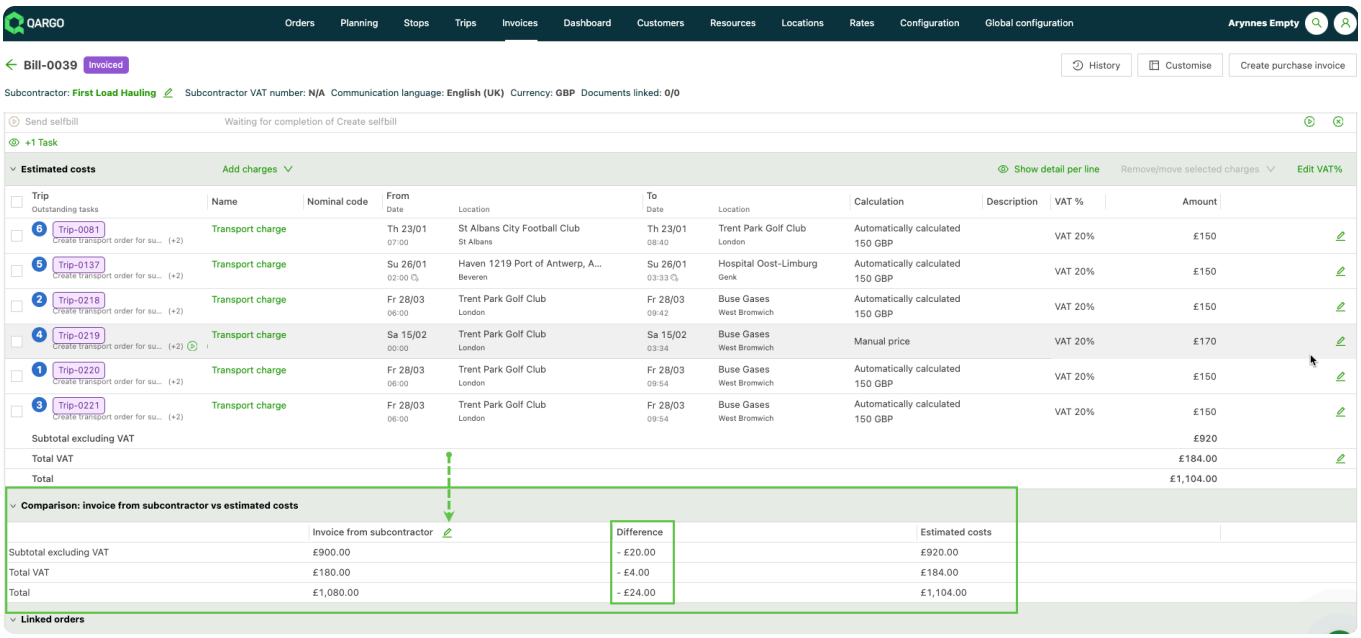
- Palletways shipment number
- Palletways tracking ID
- TPN shipment number
- UPN shipment barcode

Discrepancies:

- **Charge discrepancy** shows on the individual row. The alert shows the amount of the discrepancy between the system and the submitted document.
- Click the *copy icon* to copy the charge submitted on the document.
- Click the *discrepancy icon* to create the discrepancy against the document.
- **Subtotal/total discrepancy** shows for the full amount.



- The charge amounts can be edited in the table before the invoice is created. This lets the user reconcile the charge amounts in the TMS with those on the received invoice.



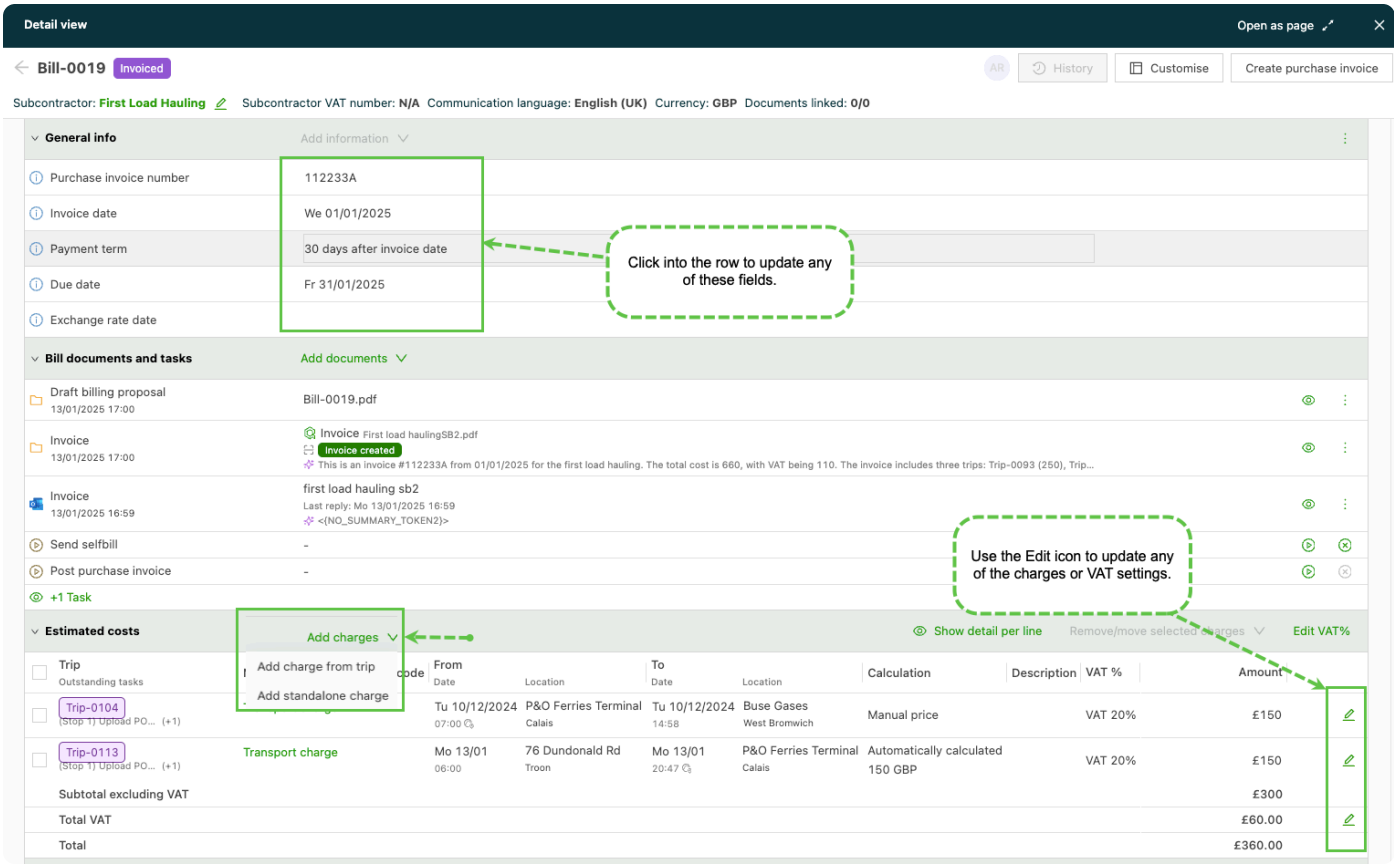
What happens if none of these references appear on the invoice?

- The contract carrier's invoice may not include any of the references listed above, for example if it only shows a job number or a reference that Qargo does not recognize.
- In this case, the invoice line shows in 🔸 **orange**. This indicates that it could not be matched and needs manual attention.
  - ⚠️ **Job numbers are not currently a supported matching field.** If contract carrier invoices only reference job numbers, automatic matching does not work. The invoice must then be linked manually to the correct load with the **Add charge from load** option.
- **To improve automatic matching, the recommended approach is:**
  - Asking the contract carrier to include the **Qargo load name** or **order reference** on their invoices
  - Alternatively, using the **Add charge from load** option to manually select and link the correct load after uploading the invoice

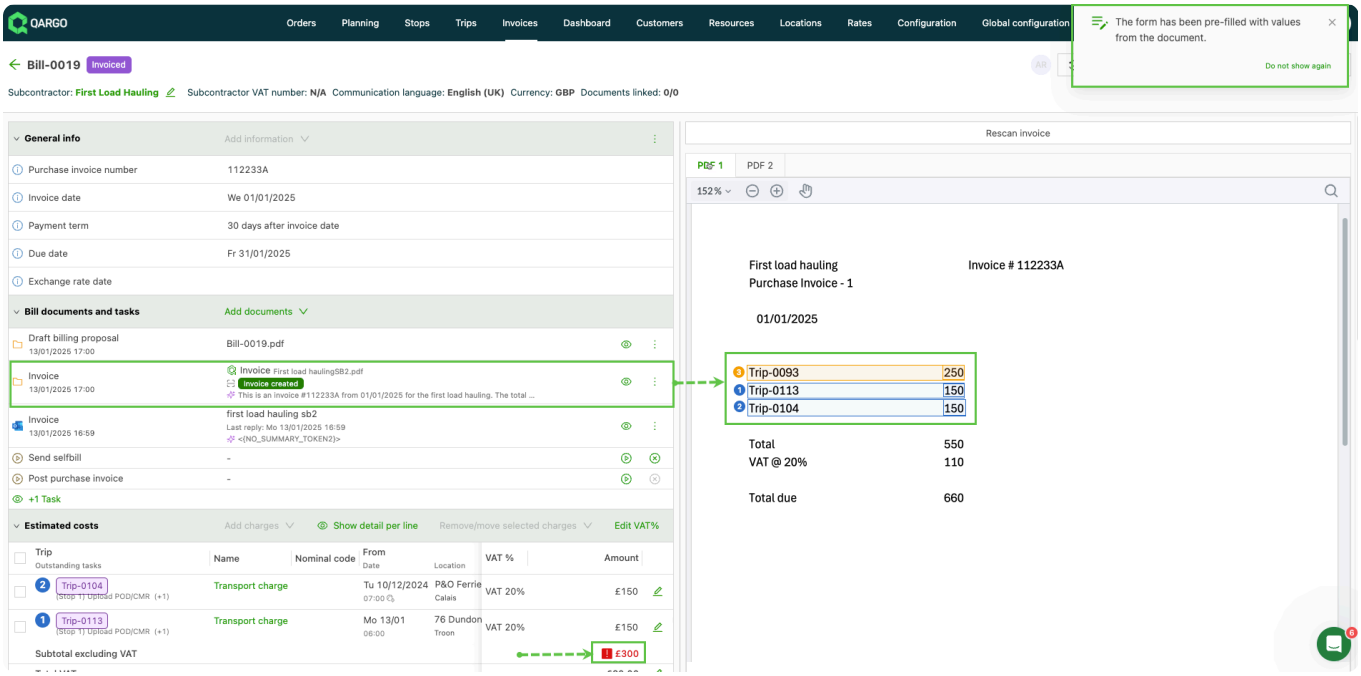
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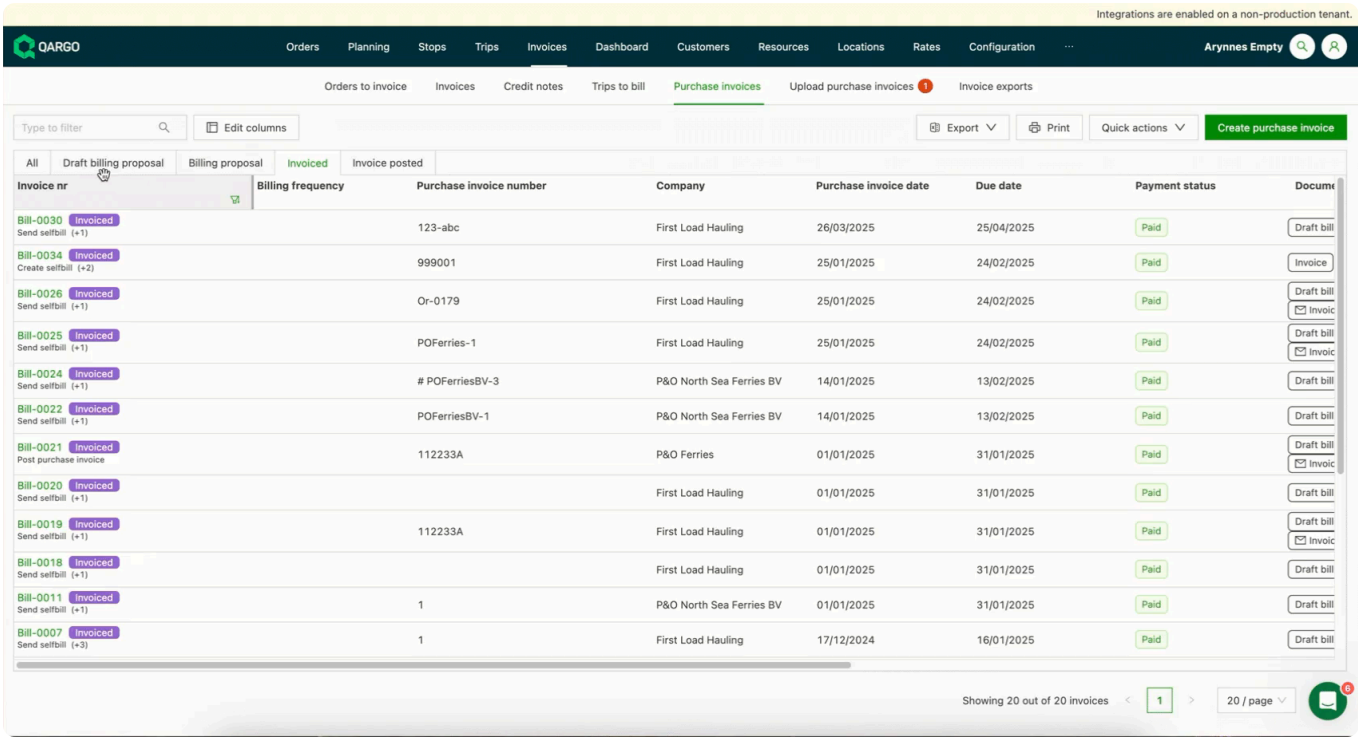
Update info and charges

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

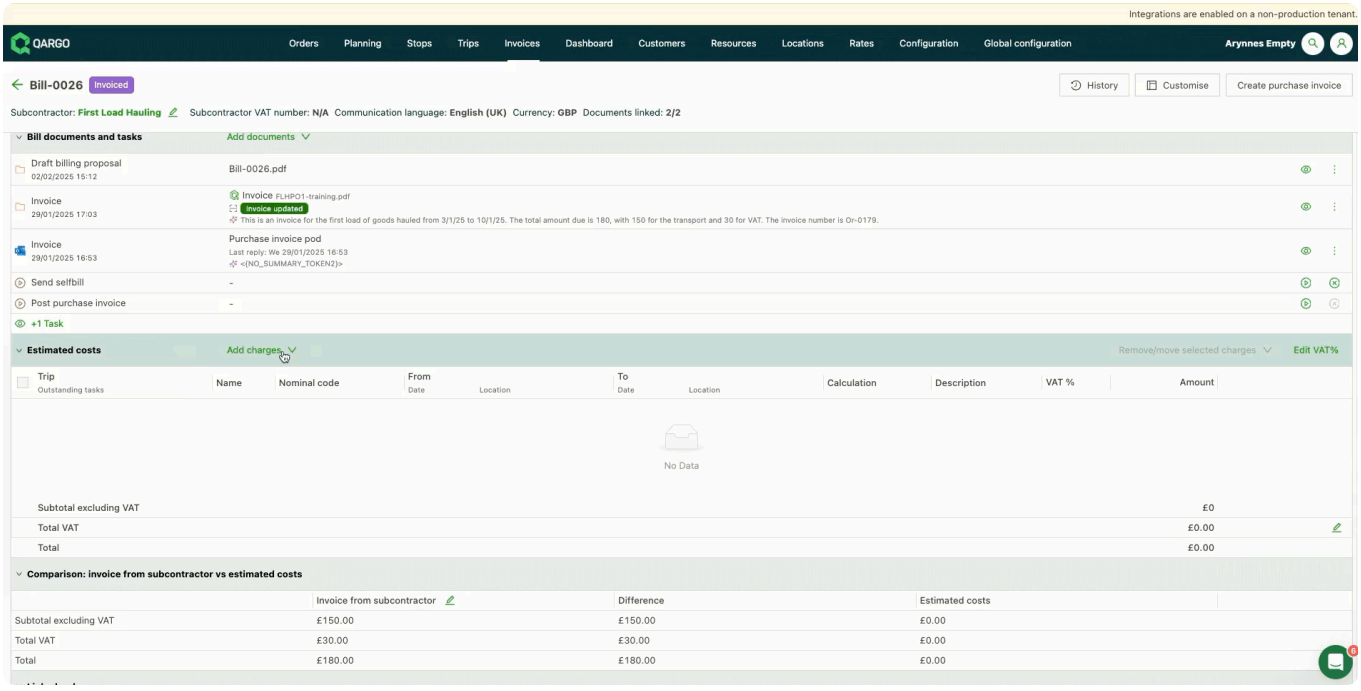


- **Add charge from load:** This opens the **Loads to add** panel, which includes the loads that match the contract carrier. If a contract carrier invoice is already uploaded, a warning icon displays and any missing loads are highlighted in orange.

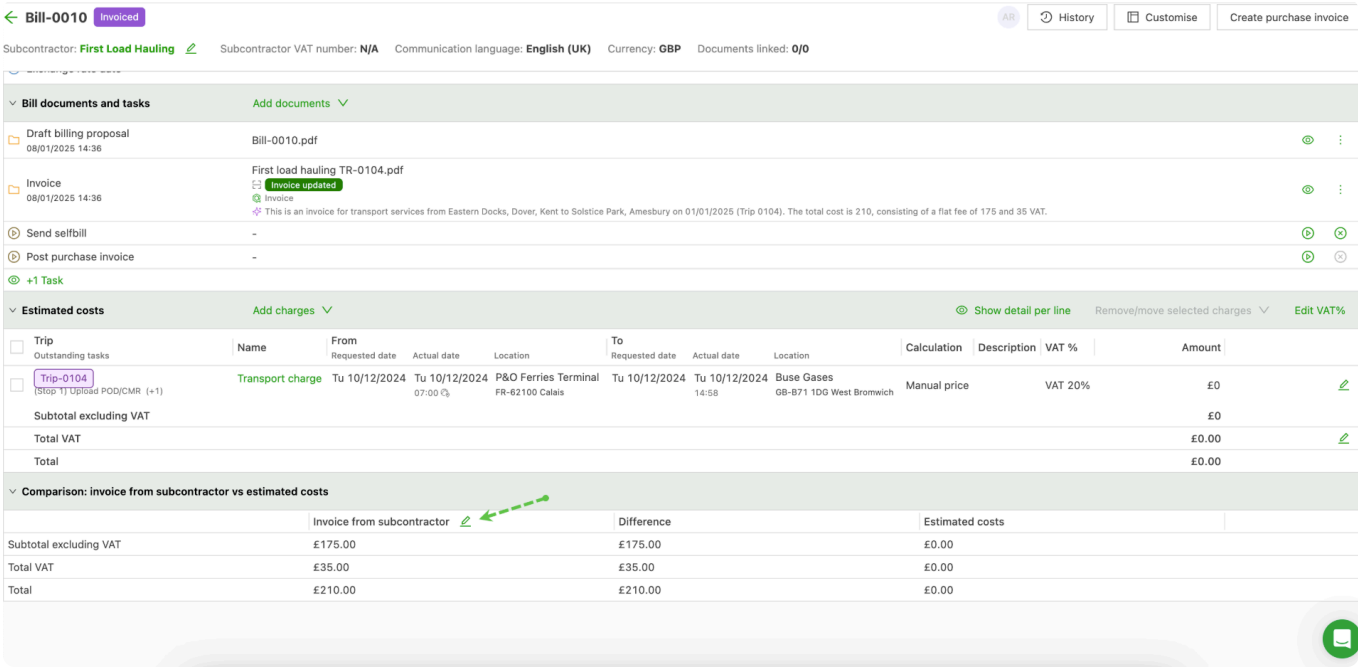




- **Add standalone charge:** This opens the **Add resource cost** window. Under **General info**, click the **Charge** field to show the available charges.
- Select the appropriate charge to add to the invoice. Under the calculation, there are 2 manual options. **Manual** lets the user enter a specific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



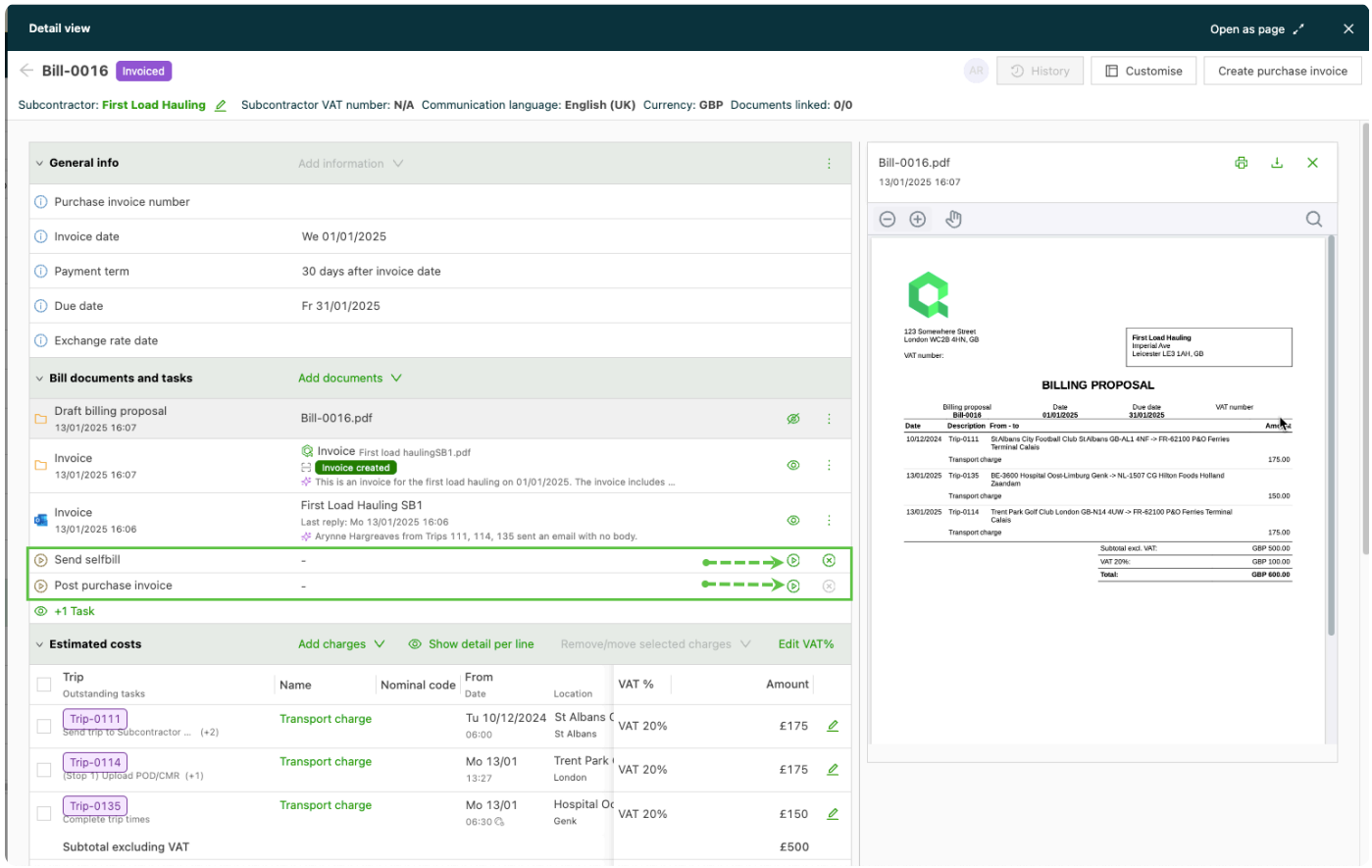
- The charges can be updated manually if necessary. Click the **Edit** icon.

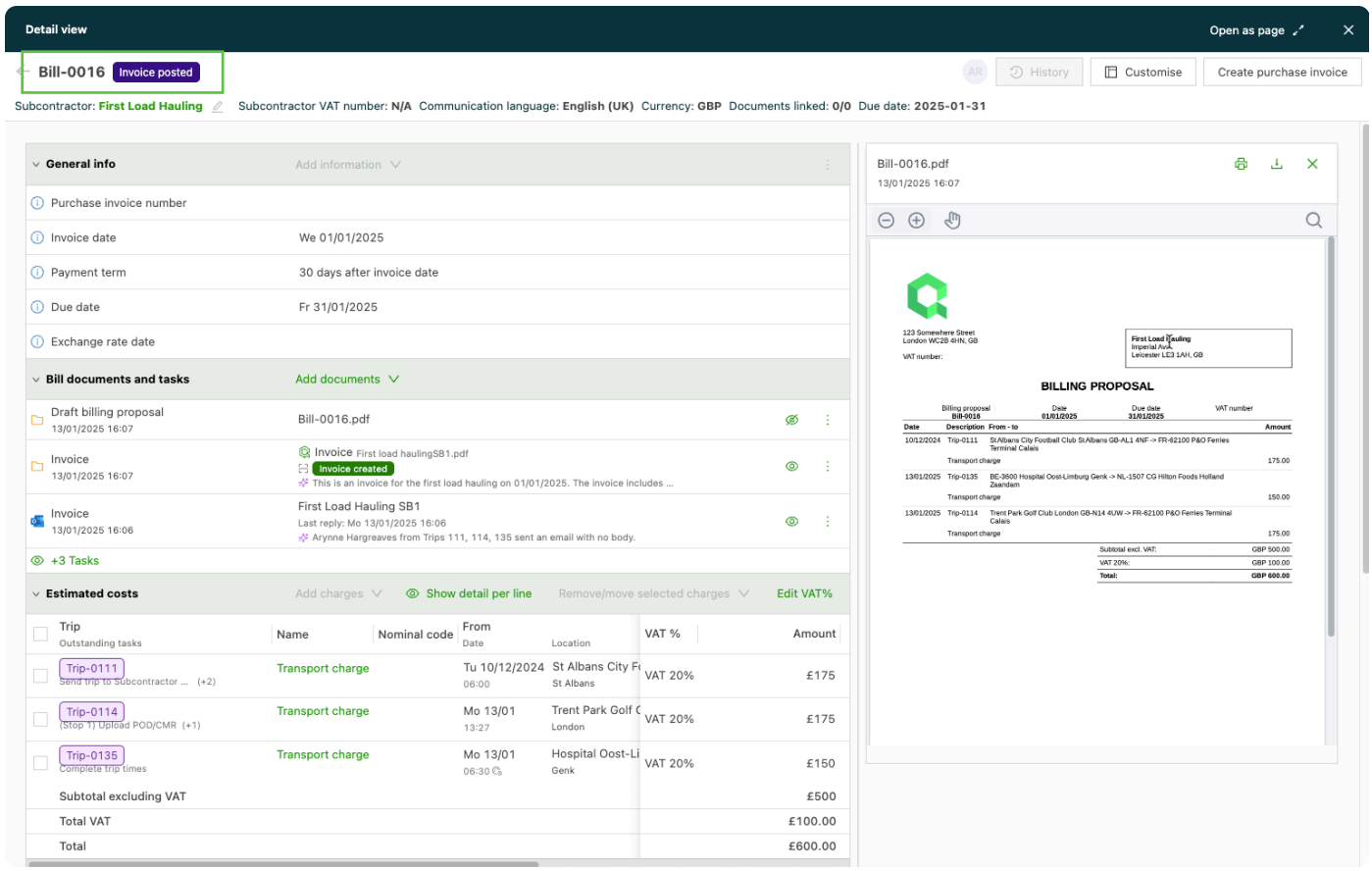


- Enter the revised costs; the **Save** button turns green. Click **Save**.



- 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
123 Somewhere Street
London WC2B 4HN, GB
First Load Hauling
Imperial Ave
Leicester LE3 1AH, GB
BILLING PROPOSAL
Subtotal excl. VAT: GBP 500.00
VAT 20%: GBP 100.00
Total: GBP 600.00

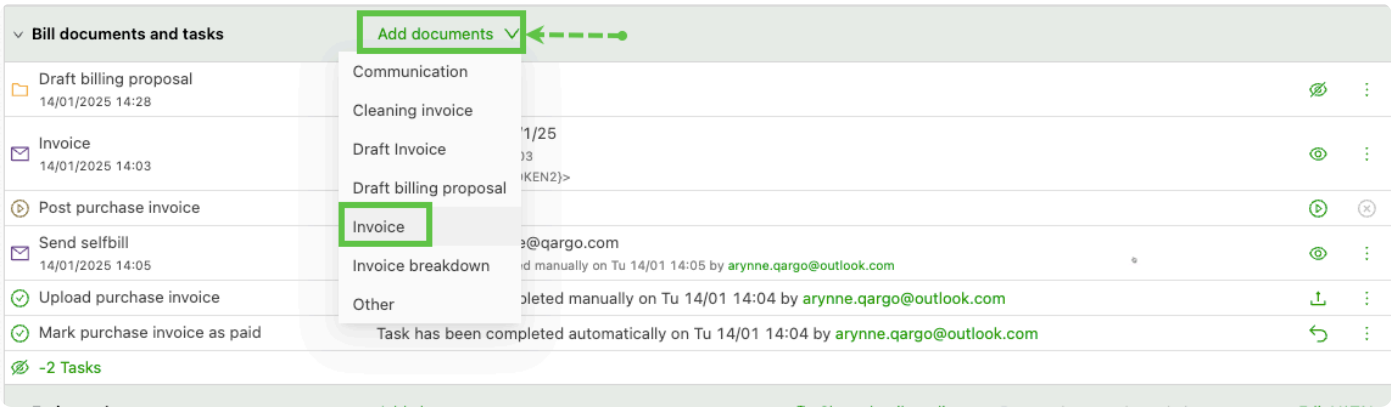

Detail view
Open as page
Bill-0016
Invoice posted
History
Customise
Create purchase invoice
Subcontractor: First Load Hauling
Subcontractor VAT number: N/A
Communication language: English (UK)
Currency: GBP
Documents linked: 0/0
Due date: 2025-01-31
General info
Add information
Purchase invoice number
Invoice date
We 01/01/2025
Payment term
30 days after invoice date
Due date
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.
+3 Tasks
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
Total VAT
£100.00
Total
£600.00
Bill-0016.pdf
13/01/2025 16:07
123 Somewhere Street
London WC2B 4HN, GB
First Load Hauling
Imperial Ave
Leicester LE3 1AH, GB
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.

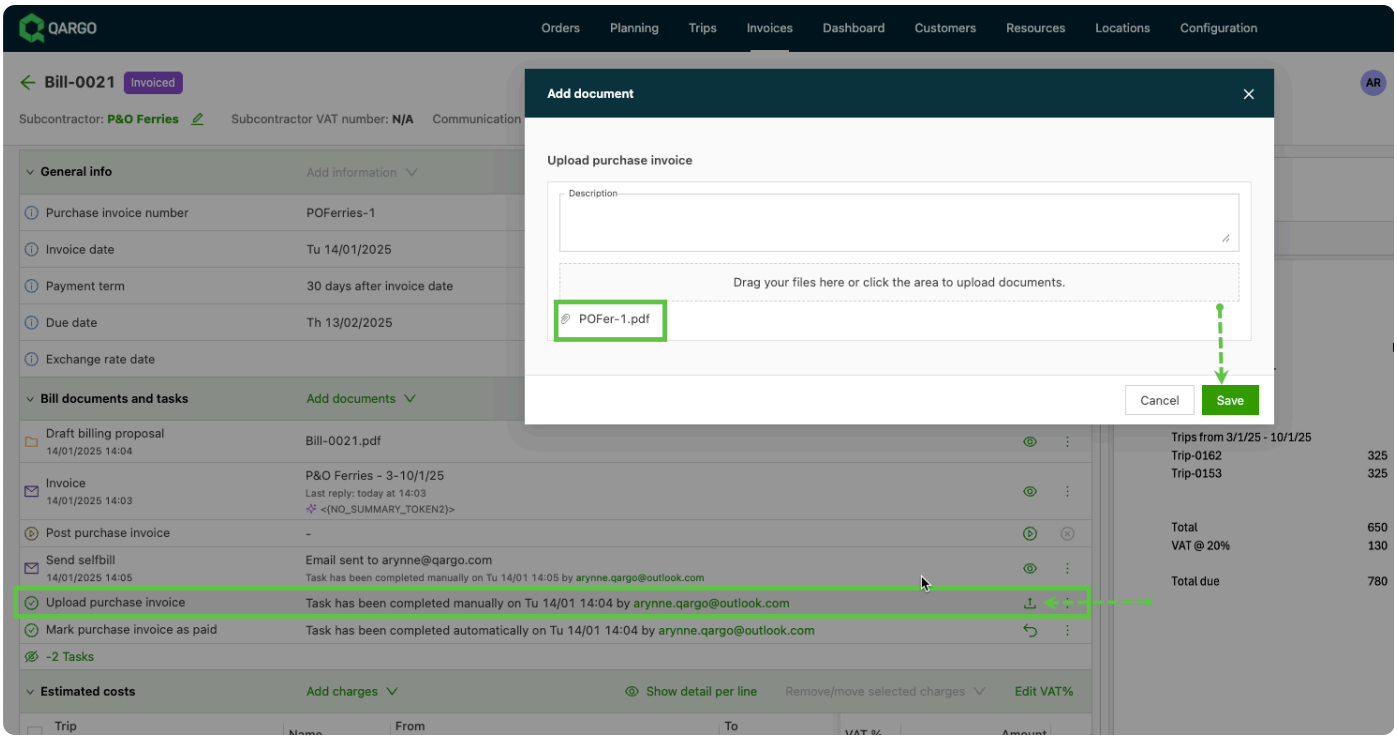
Add document function:

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

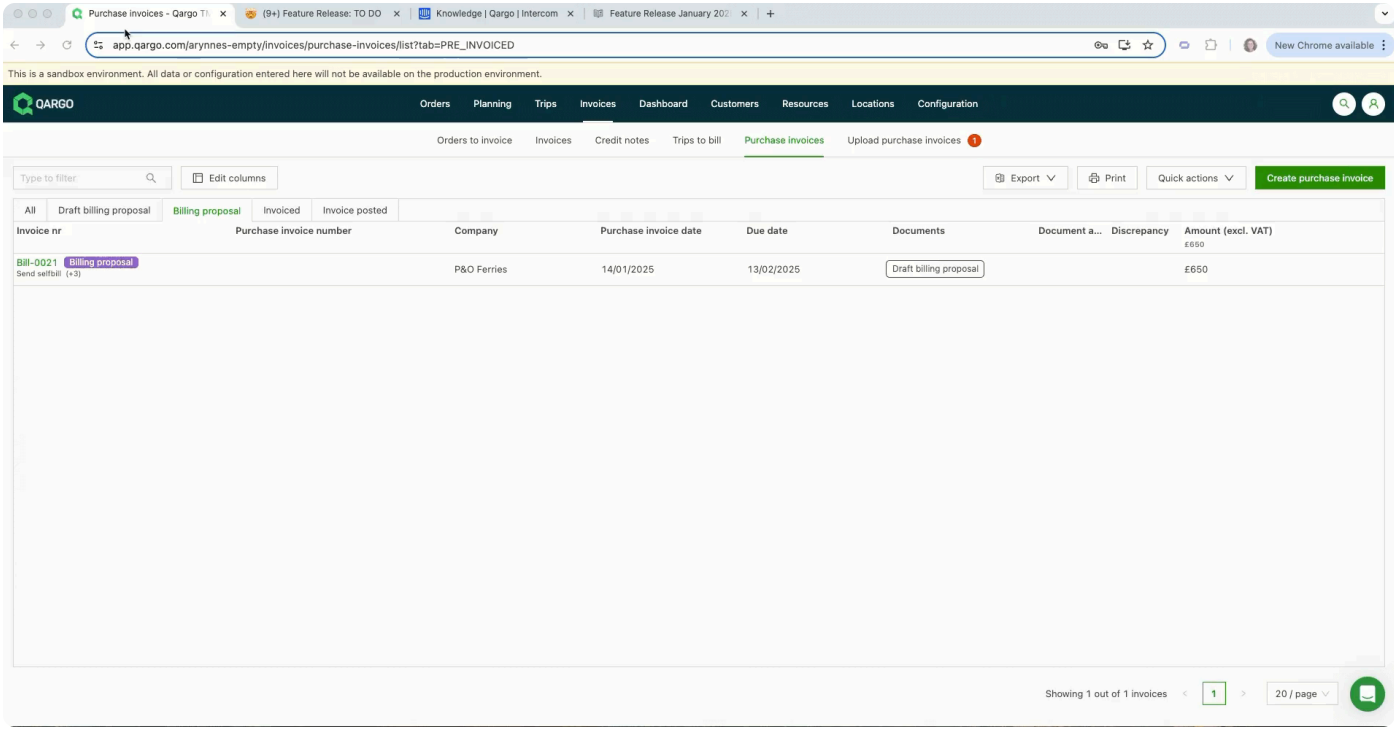
- Select the **Invoice** option from the drop-down.



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

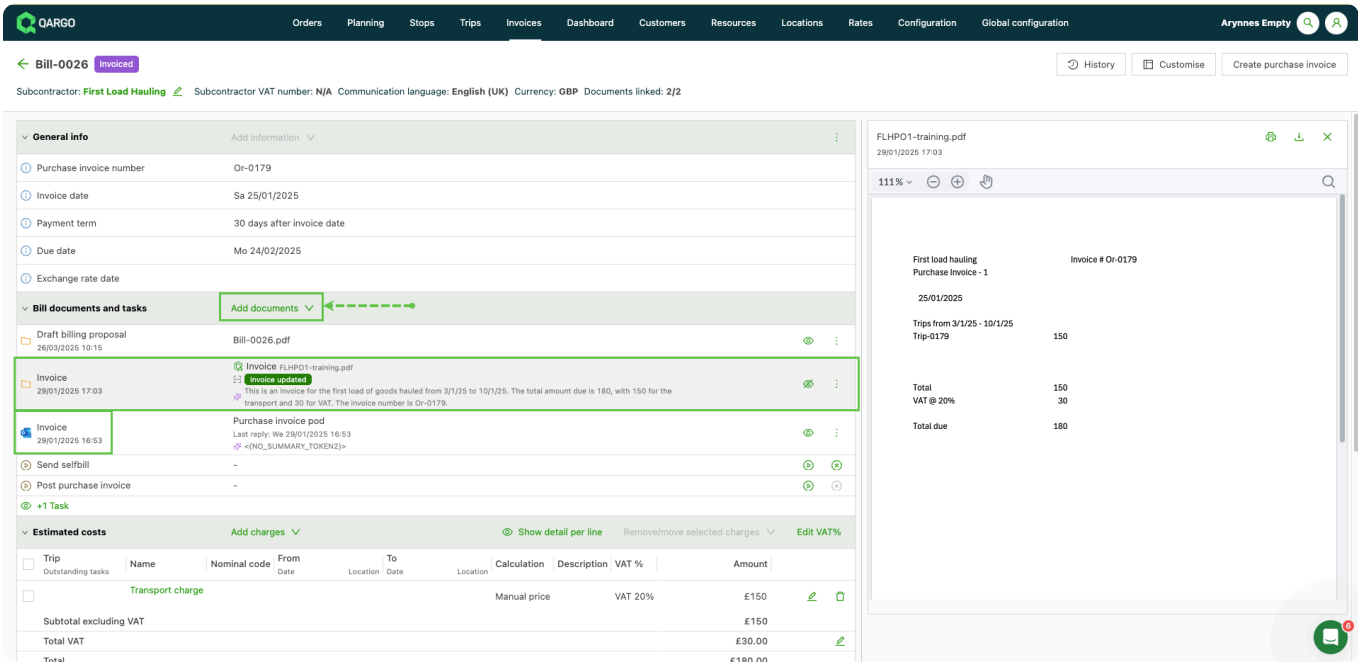


- **Added from an email attachment, using the Qargo add-in for Outlook:**
  - From the email, select the search option in the Qargo add-in panel. Enter the billing proposal number. Find the correct billing proposal and click the **Add** button. Options appear to specify what is being added. Select **Invoice**,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



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

- If additional documents are available, they can be added under 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.
- Any linked emails 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

Tasks such as generating the PDF, sending the email, marking invoices as paid, and posting to accounting can be done in bulk with **Quick actions**. See also how to complete these in **bulk.**