Invoices: Auto-assign invoice groups to orders

Orders are auto-assigned to invoice groups based on customer preferences (field- or time-based) when marked "Ready to invoice."

Updated March 17, 2026

Introduction Understanding how Qargo manages order grouping and billing is essential for efficient operations. This article explains the key factors that determine how orders are grouped into loads and invoices. These include the role of customer references and the ‘order invoice group’ field.

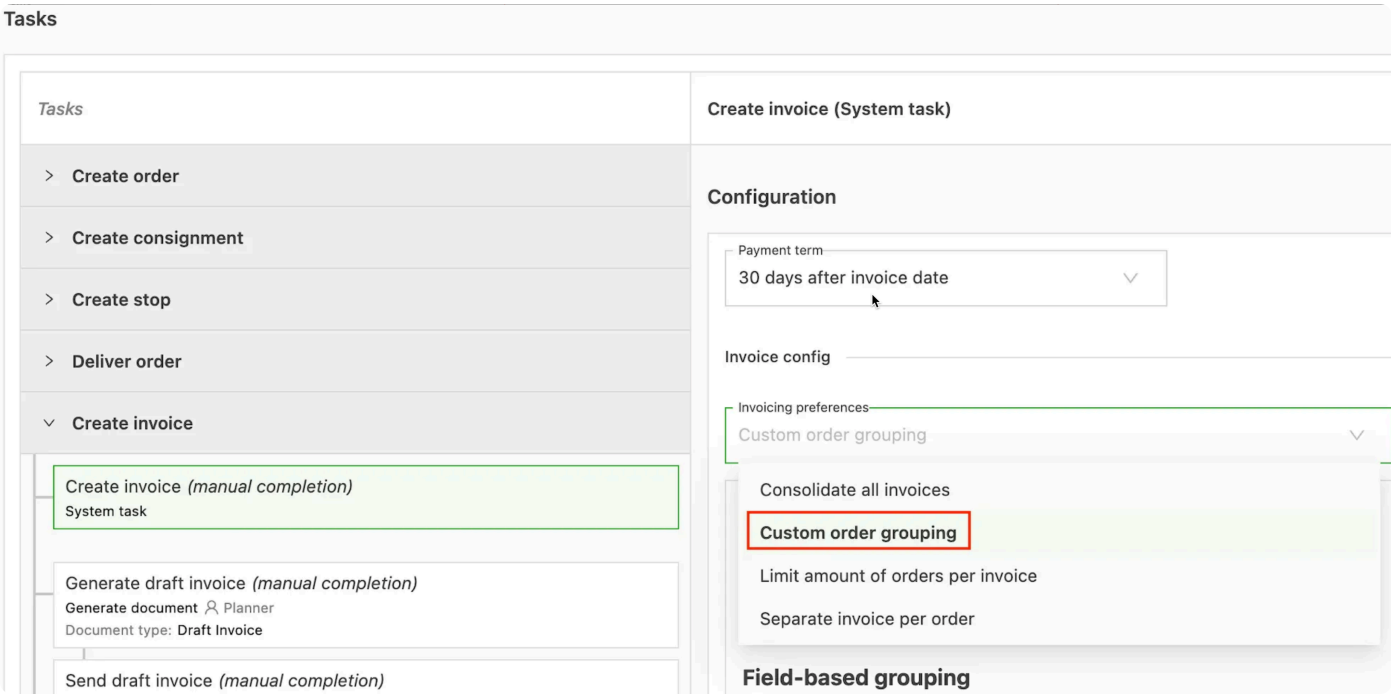
- **New feature**: Orders can now be automatically assigned to billing groups based on the customer configuration
- **Configuration options**:
- Field-based grouping (e.g., by ZIP code)
- Time-based grouping (daily, weekly, monthly)
- Optional conditional filters
- **Process**: Groups are assigned when the “Ready to invoice” task is completed
- **Flexibility**: Manual assignment is still available and will not be overwritten
- **Customer references**: Customer references can be reused across orders, but they do not directly affect invoice grouping. Always check the ‘order invoice group’ field for correct grouping.
- **Note**: When the customer changes, manual action is needed to recalculate the correct group

> The order invoice group is separate from the charge invoice group. For more details on how **charges** are grouped, click here.

Set up the invoice group

Billing groups can now be assigned to orders automatically. To do this, configure custom billing groups on a customer. The ‘order invoice group’ field is the main factor that determines how orders are grouped on an invoice. Orders with the same value in this field are automatically combined into a single invoice. Orders with different values or no value are invoiced separately.

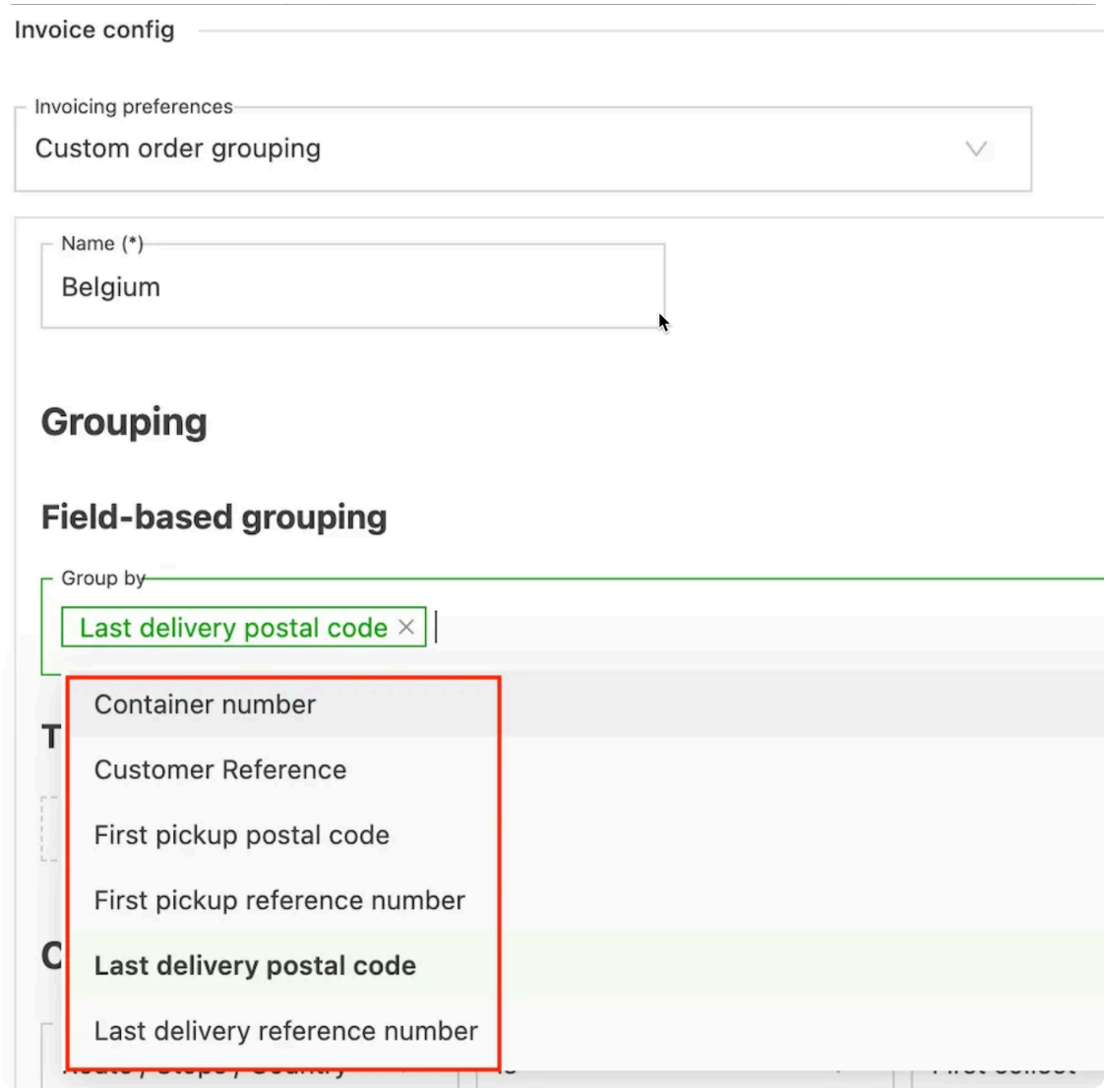
- Set the billing preferences on the customer page to *Custom order grouping*:



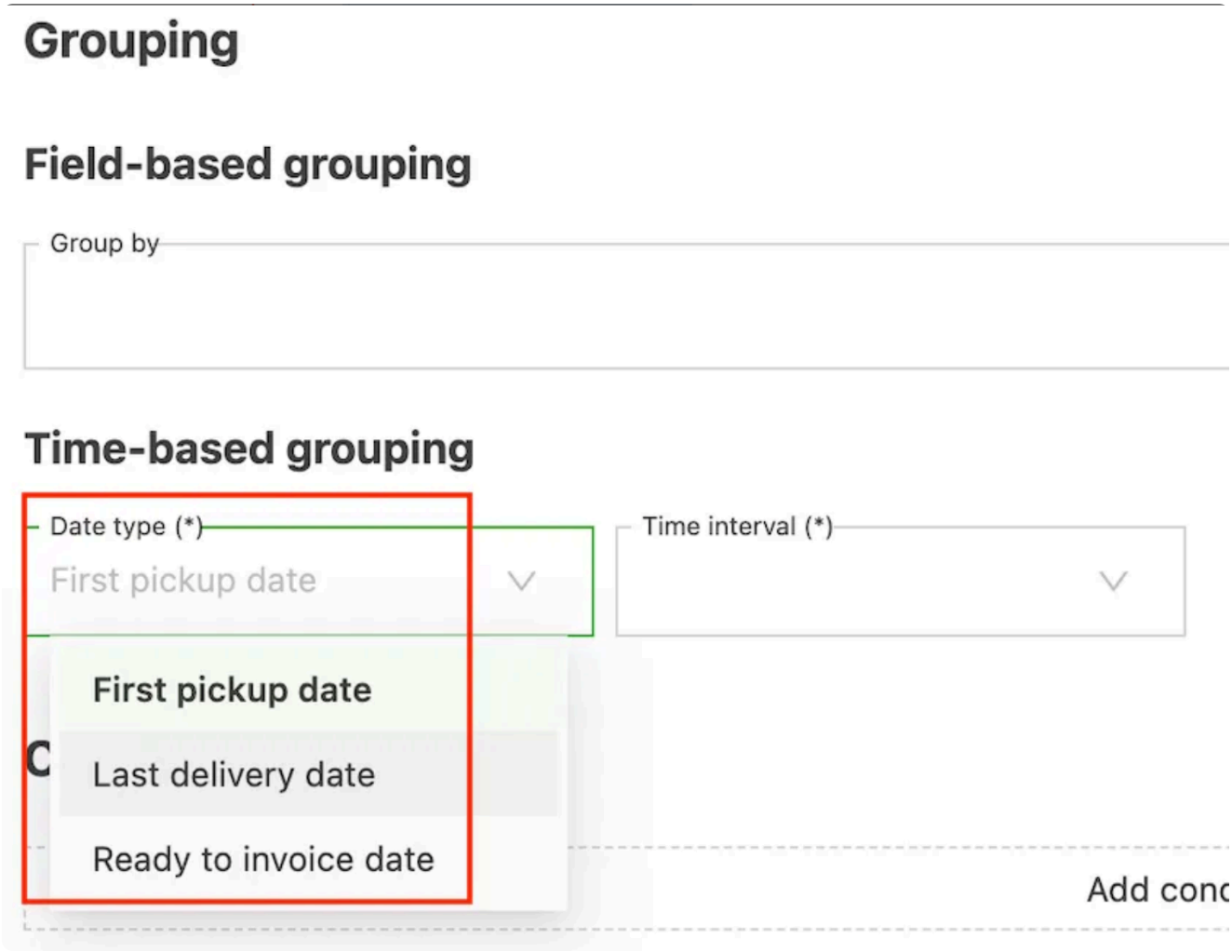
Grouping

This configuration defines the grouping.

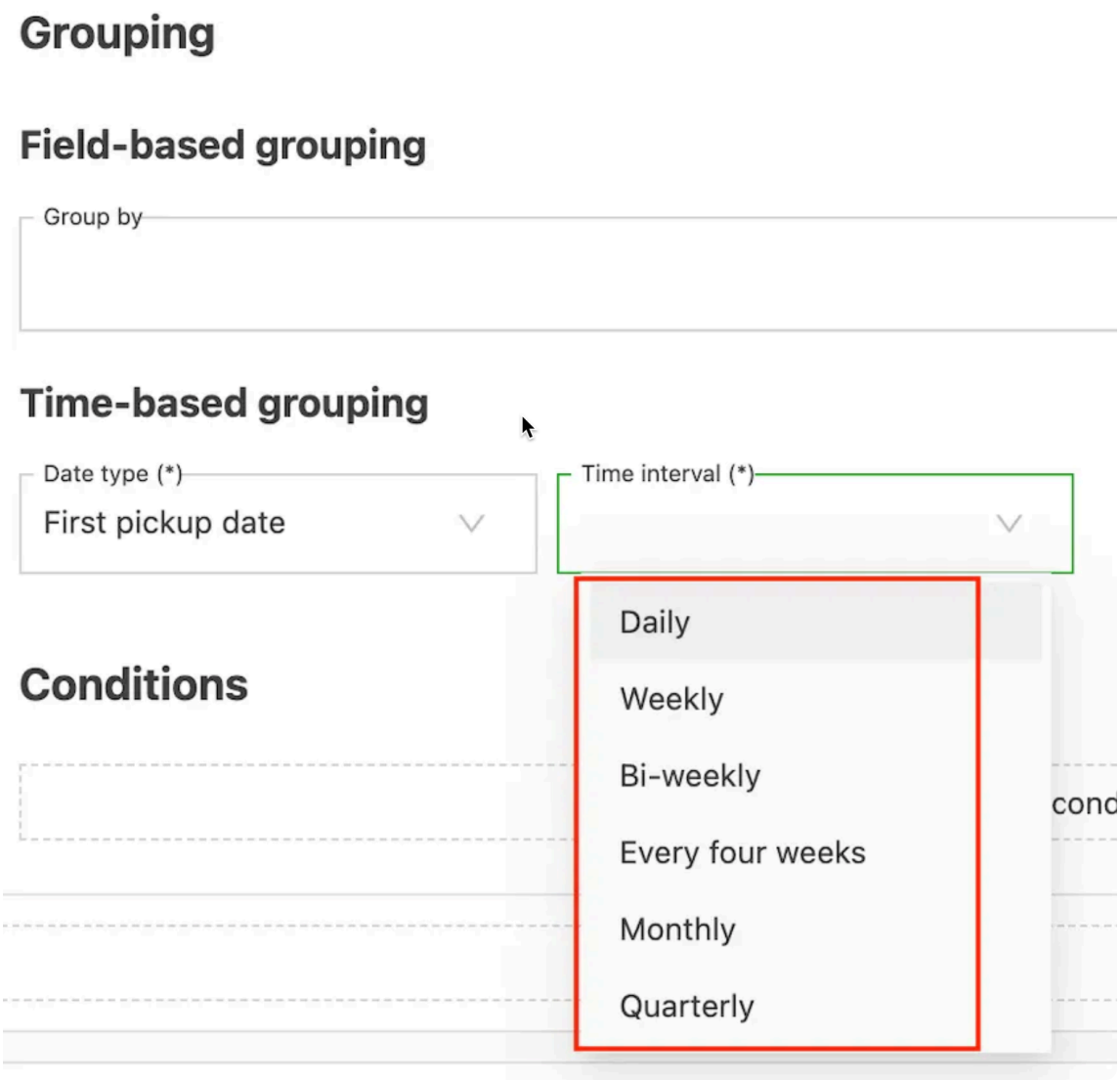
- **Field-based grouping**: defines the field by which orders receive the same billing group
  - E.g., if group by = last delivery ZIP code, all orders with the same last delivery ZIP code receive the same billing group



- **Time-based grouping**: groups orders on invoices by a defined time interval.
  - E.g., with weekly grouping and the date type *'first pickup date'*, all orders with a first pickup date in the same week are put on the same invoice.
  - ***Date type:*** the order date used for the time-based grouping

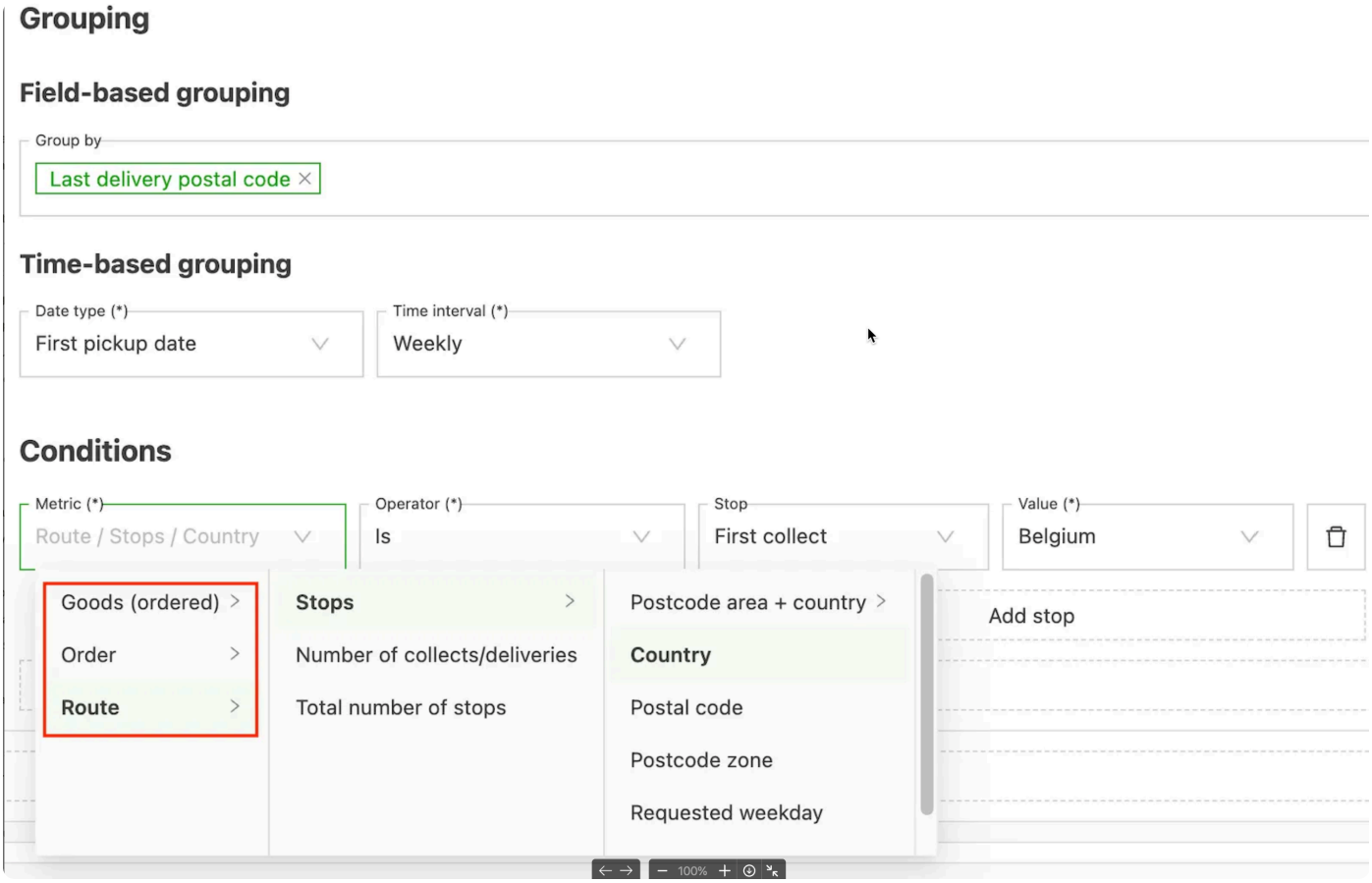


- ***Time interval:*** the time interval by which orders are grouped



Conditions

- Specify the conditions under which custom order invoice grouping applies.
    - E.g., if orders with the first pickup in Belgium should be invoiced together, add this to the conditions:

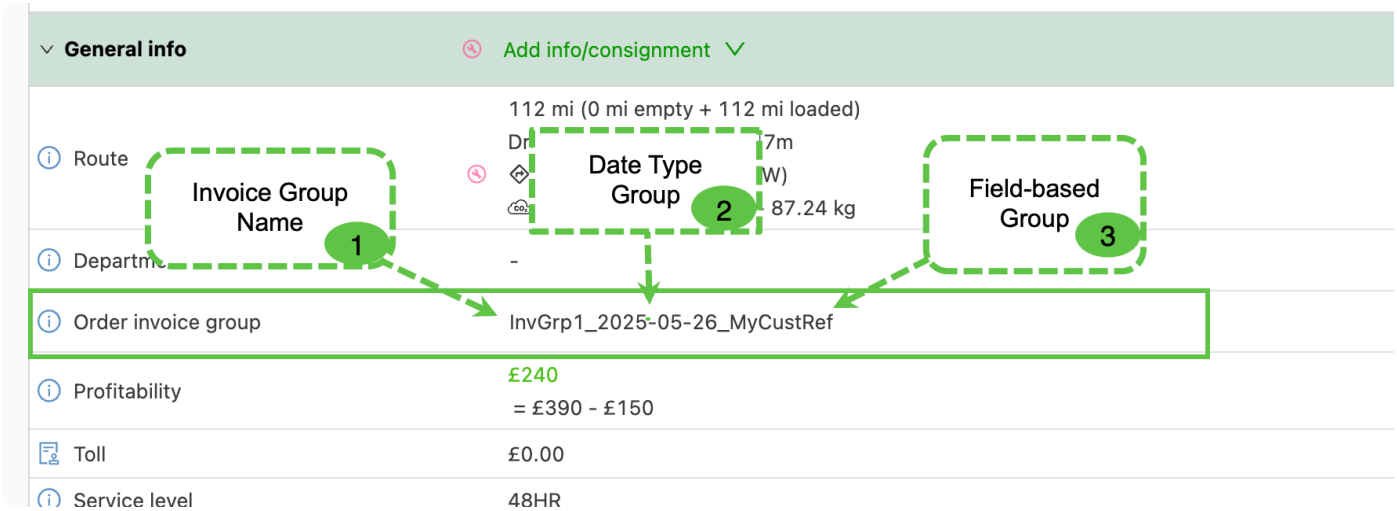


Rules can be reordered with drag and drop.

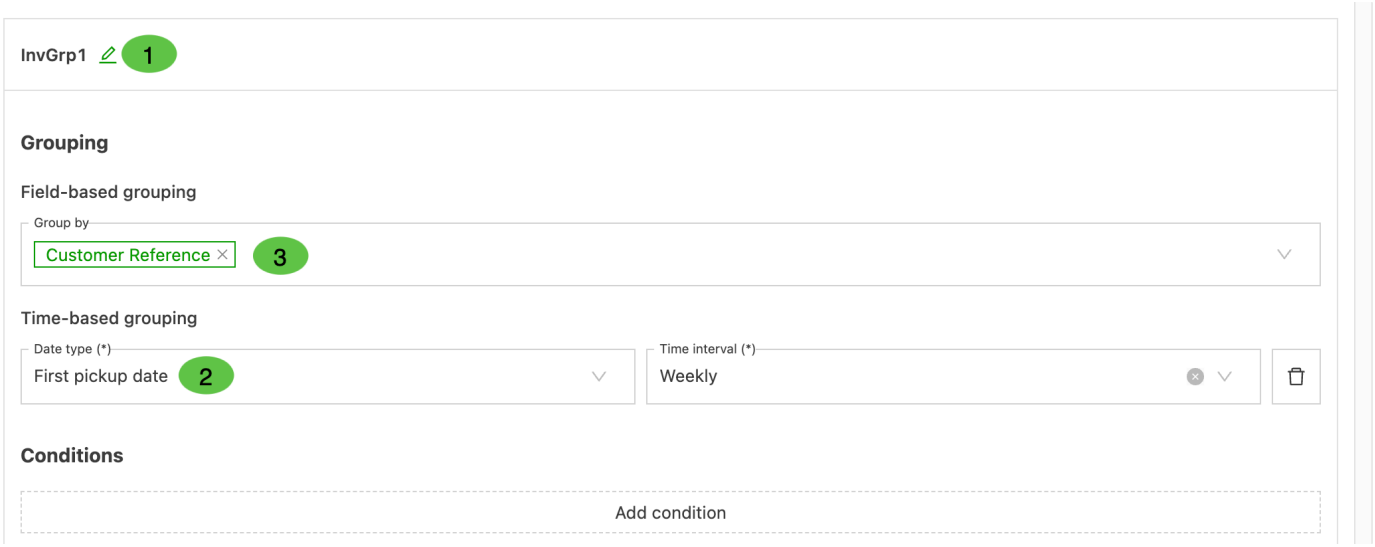
Billing group calculation and invoice creation

The automatic billing group is determined and assigned to the order when the ***Ready to invoice*** task is completed. Orders that share the same customer reference are not grouped into one invoice unless they also share the same 'order invoice group' value. This ensures flexibility and accuracy in managing invoices.
Creating and posting the actual invoice remains a manual process controlled by the user, which ensures flexibility and accuracy.

Example of an automatically calculated billing group



Configuration:

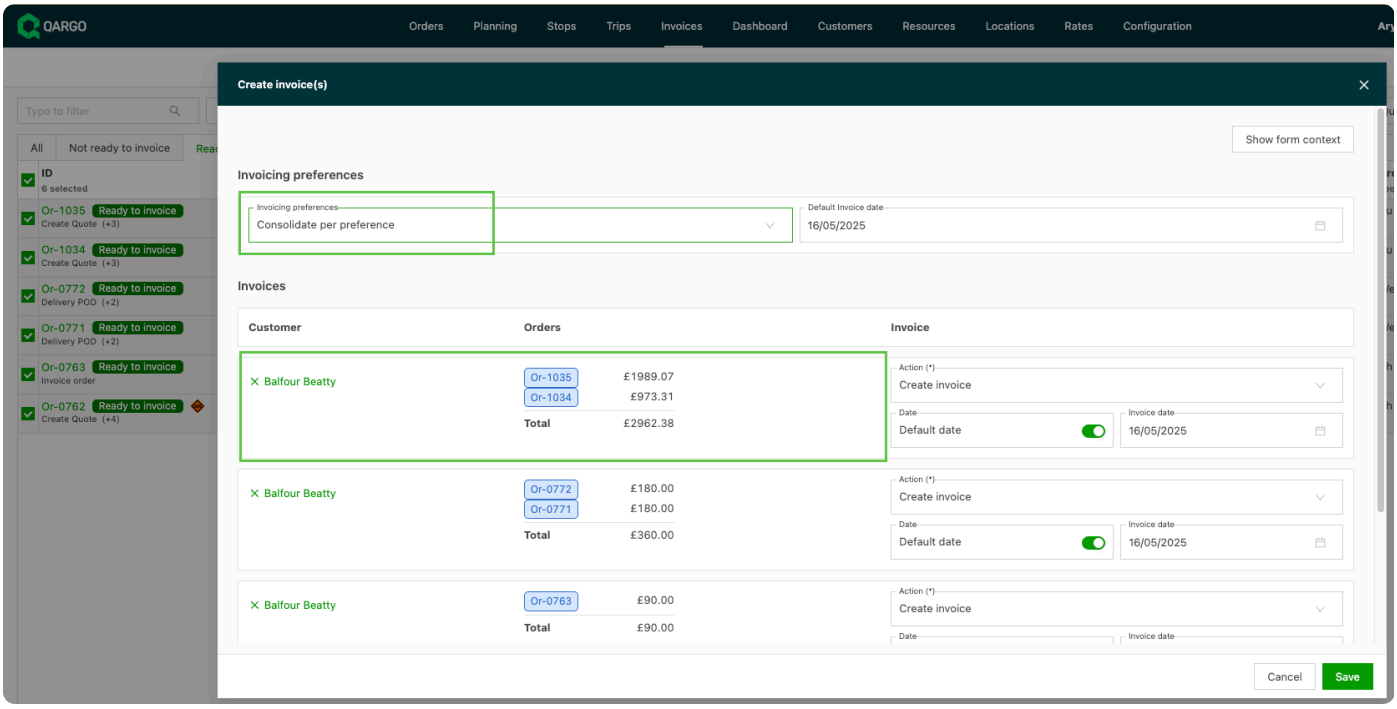


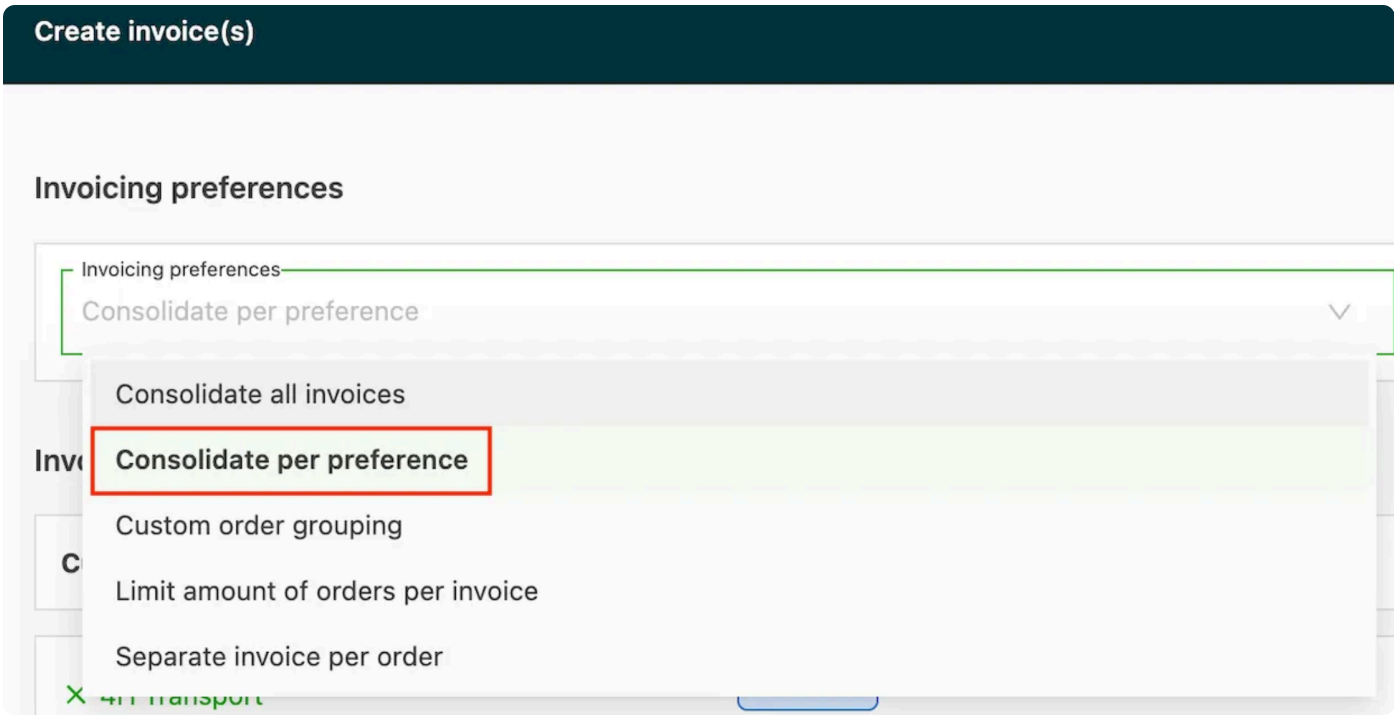
‼️ With multiple rules, ***'first match wins'*** logic applies. If all conditions in Rule 1 are met, Rule 1 is applied. If not, the system goes through the rules until all conditions of a rule are met.

Create invoice

When creating invoices, select ***Consolidate per preference*** under billing preferences. The orders with the same automatically assigned billing group are then put on one invoice.
This step ensures that grouped orders are manually confirmed and invoiced, so the user keeps control of the process.

E.g., with time-based grouping, if the time interval is set to 'weekly' and the date is the pickup date, the system groups the invoices based on the Monday of that week.

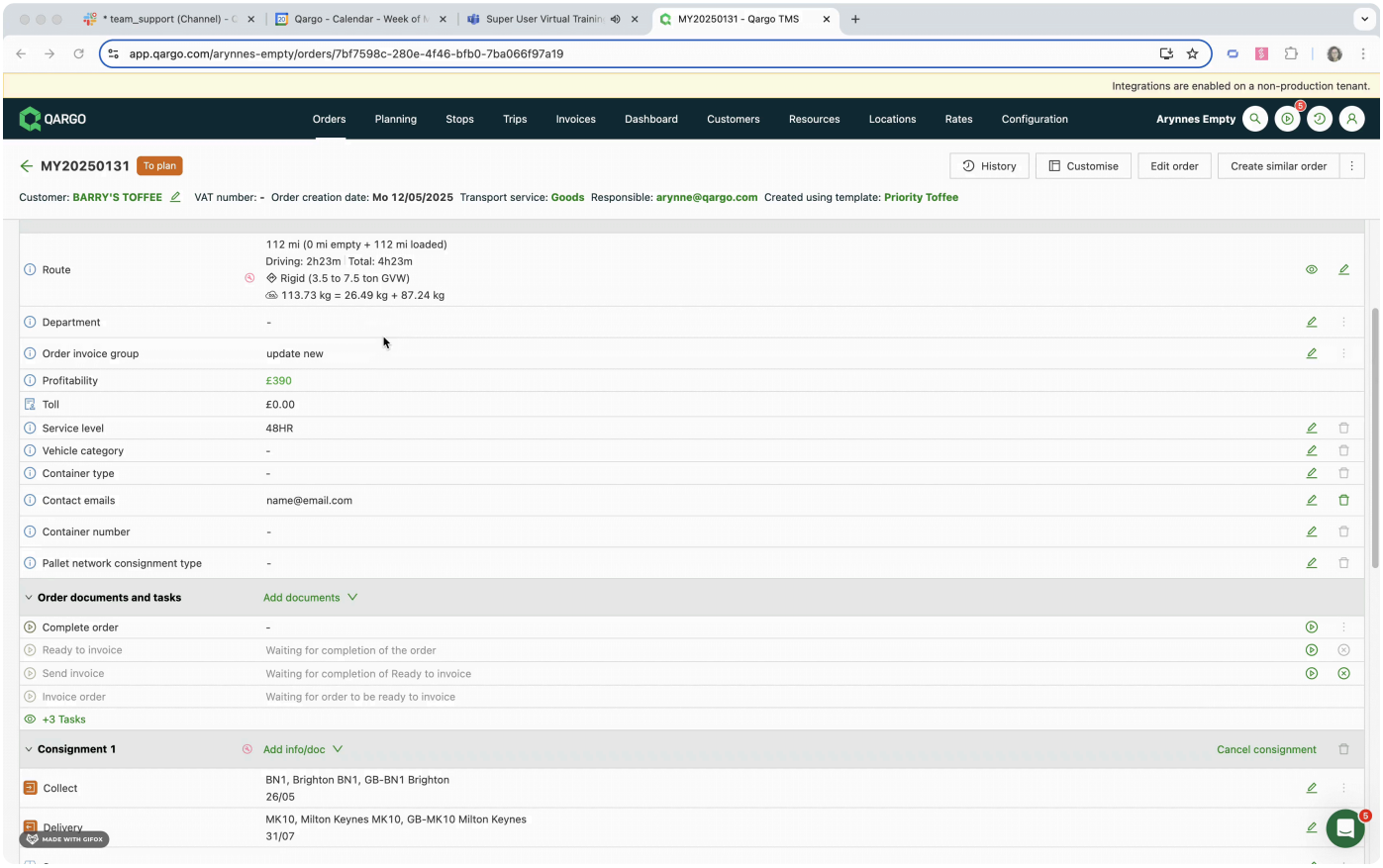




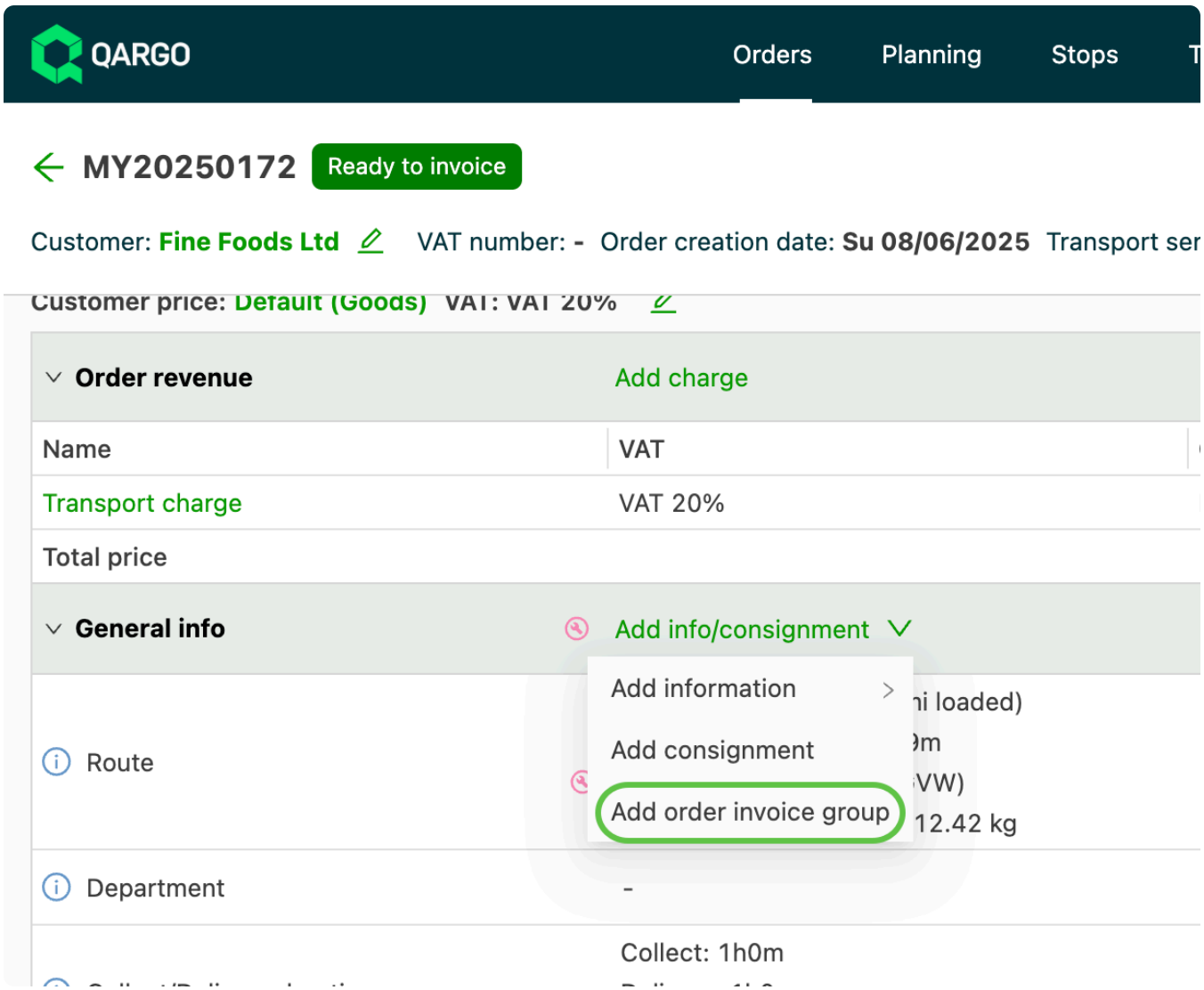
💡 **Pro tip:** To use billing groups without the automatic behavior, a billing group can also be assigned to an order manually. If some orders have the 'order invoice group' field set and others do not, the system generates separate invoices. This distinction is key to understanding why invoices may not match customer references alone.

- On the order detail page, click the ***Add shipment/info*** button
- Or enable the ***Billing group column*** in the order list and edit it in place.
  - A billing group added manually is not overwritten by the automatically calculated billing group.

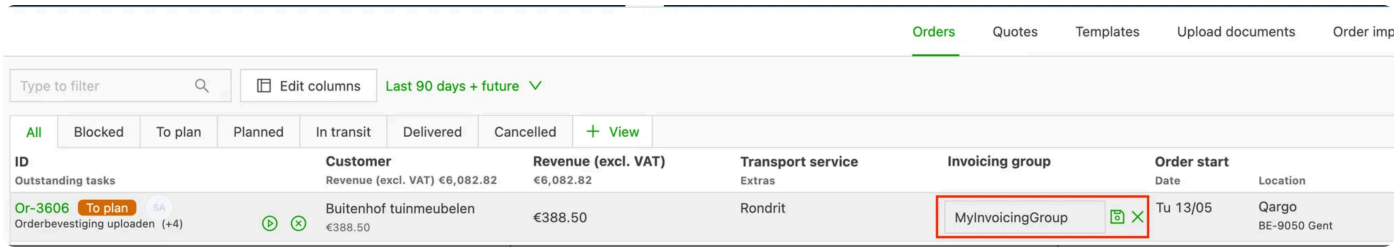
Manually setting the billing group from the order detail page



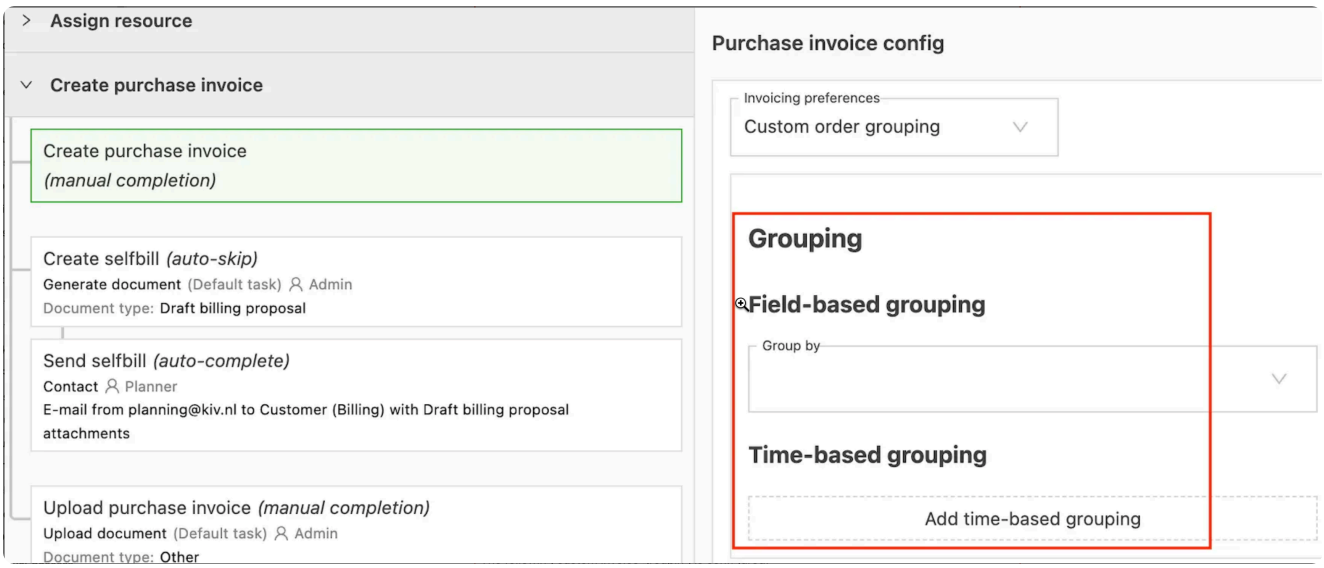
Display of the billing group on the order detail page



Manually setting the billing group from the order list:

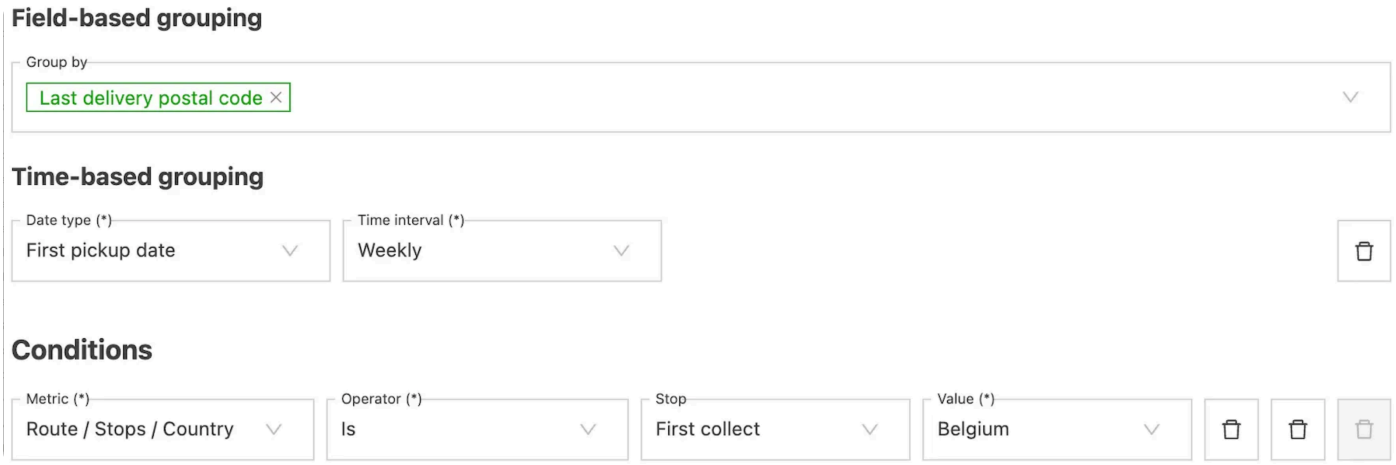


- On contract carriers, the UI for the invoice preference ***Custom order grouping*** has changed to match how it is displayed on customers.
    - These changes are visual only; no functional changes were made for contract carriers.

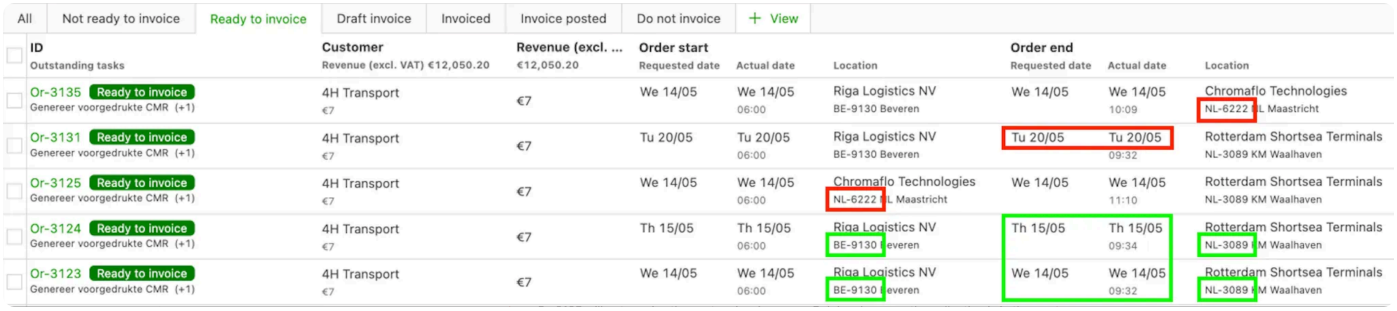


- If the customer on the order changes after the automatic billing group has been assigned, the system does not automatically redetermine the correct billing group.
- To solve this:
  - After changing the customer
    - delete the current billing group
    - Revert the *Ready to invoice* task
    - Re-trigger the *Ready to invoice* task
  - The new automatic billing group is then determined based on the new customer.

An example to clarify:
The following custom invoice grouping is configured:



The following 5 orders are created for the customer with the custom invoice grouping above:



ID	Customer	Revenue (excl. ...	Order start			Order end		
Outstanding tasks	Revenue (excl. VAT) €12,050.20	€12,050.20	Requested date	Actual date	Location	Requested date	Actual date	Location
Or-3135 Ready to invoice Genereer voorgedrukte CMR (+1)	4H Transport €7	€7	We 14/05	We 14/05 06:00	Riga Logistics NV BE-9130 Beveren	We 14/05	We 14/05 10:09	Chromaflo Technologies NL-6222 NL Maastricht
Or-3131 Ready to invoice Genereer voorgedrukte CMR (+1)	4H Transport €7	€7	Tu 20/05	Tu 20/05 06:00	Riga Logistics NV BE-9130 Beveren	Tu 20/05	Tu 20/05 09:32	Rotterdam Shortsea Terminals NL-3089 KM Waalhaven
Or-3125 Ready to invoice Genereer voorgedrukte CMR (+1)	4H Transport €7	€7	We 14/05	We 14/05 06:00	Chromaflo Technologies NL-6222 NL Maastricht	We 14/05	We 14/05 11:10	Rotterdam Shortsea Terminals NL-3089 KM Waalhaven
Or-3124 Ready to invoice Genereer voorgedrukte CMR (+1)	4H Transport €7	€7	Th 15/05	Th 15/05 06:00	Riga Logistics NV BE-9130 Beveren	Th 15/05	Th 15/05 09:34	Rotterdam Shortsea Terminals NL-3089 KM Waalhaven
Or-3123 Ready to invoice Genereer voorgedrukte CMR (+1)	4H Transport €7	€7	We 14/05	We 14/05 06:00	Riga Logistics NV BE-9130 Beveren	We 14/05	We 14/05 09:32	Rotterdam Shortsea Terminals NL-3089 KM Waalhaven

- Or-3123 and Or-3124 are grouped together on the same invoice (billing group Belgium_2025-05-12_3089) because they both have:
  - a first pickup date in the same week
  - a pickup in Belgium
  - the same delivery ZIP code
- Or-3131 is not grouped in the same billing group as the first two because its first pickup date falls in a different week (05/20 → since the chosen time interval is weekly, this order is put in an invoice group for Monday 05/19). The billing group created is Belgium_2025-05-19_3089
- Or-3125 does not receive the custom invoice group Belgium because its pickup is in the Netherlands. No billing group is assigned automatically when the order is set to Ready to invoice.
- Or-3135 is not grouped in the same billing group as the first two because its delivery location has a different delivery ZIP code (NL-6222 instead of NL-3089). The billing group created is Belgium_2025-05-12_6222

Customer	Orders	
✕ 4H Transport	Or-3135	€7.00
	Total	€7.00
✕ 4H Transport	Or-3131	€7.00
	Total	€7.00
✕ 4H Transport	Or-3125	€7.00
	Total	€7.00
✕ 4H Transport	Or-3124	€7.00
	Or-3123	€7.00
	Total	€14.00

