Invoices: create a contract carrier billing proposal from a spreadsheet.

Learn how to create billing proposals from contract carrier spreadsheets in Qargo by pasting data, matching loads and charges, validating results, and converting proposals into carrier invoices.

Updated January 20, 2026



Introduction

Managing carrier invoices from contract carriers efficiently is vital in transportation operations. Qargo offers flexible options for handling these invoices, whether they arrive as spreadsheets containing charges and costs or as more traditional invoice files. This article explains how to process information and generate a billing proposal using spreadsheet data.

A common use case for this feature is when contract carriers submit large volumes of charges in a spreadsheet. Transportation companies then need to quickly reconcile, validate, and convert these charges into official carrier invoices in Qargo.

Key terminology

- **Carrier invoice**: An invoice received from a supplier or contract carrier requesting payment for goods or services provided.
- **Billing proposal**: A preliminary document summarizing charges and loads, which can be reviewed, modified, and converted into a carrier invoice.
- **Spreadsheet template**: A predefined table format provided by Qargo, into which contract carrier charges are pasted for reconciliation.
- **Reference number/load reference**: A unique identifier for each transportation job or load, used to match contract carrier charges with orders in Qargo.

- **Scan and match**: The Qargo feature for matching spreadsheet data to existing records using specified columns (such as reference number and charge amount).
- **Self-bill**: An automated invoice generated and sent to a contract carrier, often used when the company prepares invoices on the supplier's behalf.

Summary overview

For **carrier invoices**, the "Upload spreadsheet" flow works as a **paste-into-the-grid** flow, rather than an actual upload of a .csv/.xlsx file

Steps

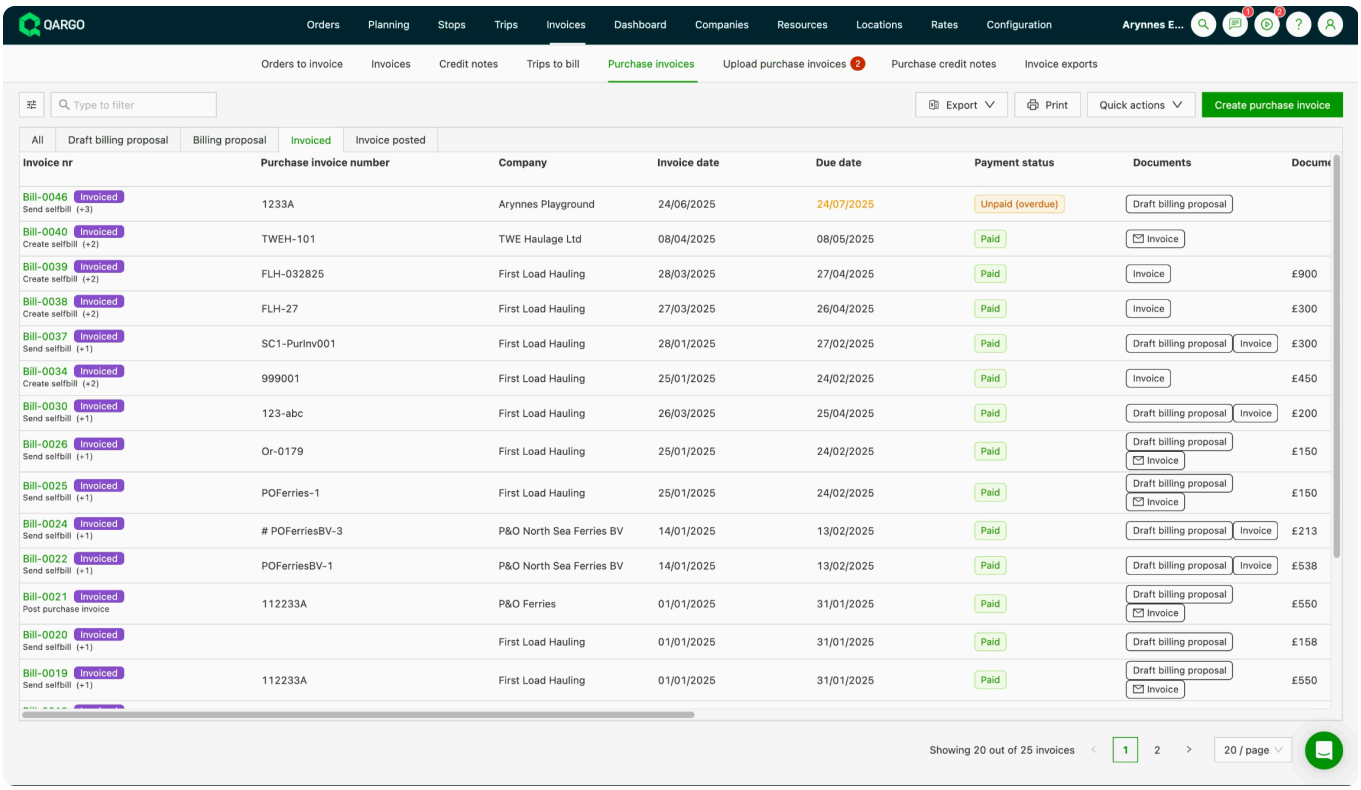
1. Go to **Carrier invoices** and start creating a new draft billing proposal.
2. Choose the option to **upload spreadsheet** / **add data from spreadsheet**.
3. In the supplier's spreadsheet, select the table range (including headers) and **copy** it.
4. Click in the template grid in Qargo and **paste** (Ctrl/Cmd + V).
5. Select the columns Qargo should use for matching, at minimum:
    - the **job/order reference** column, and
    - the **charge/cost amount** column
6. Review the matches and resolve any unmatched lines.
7. Save the billing proposal.

Good to know

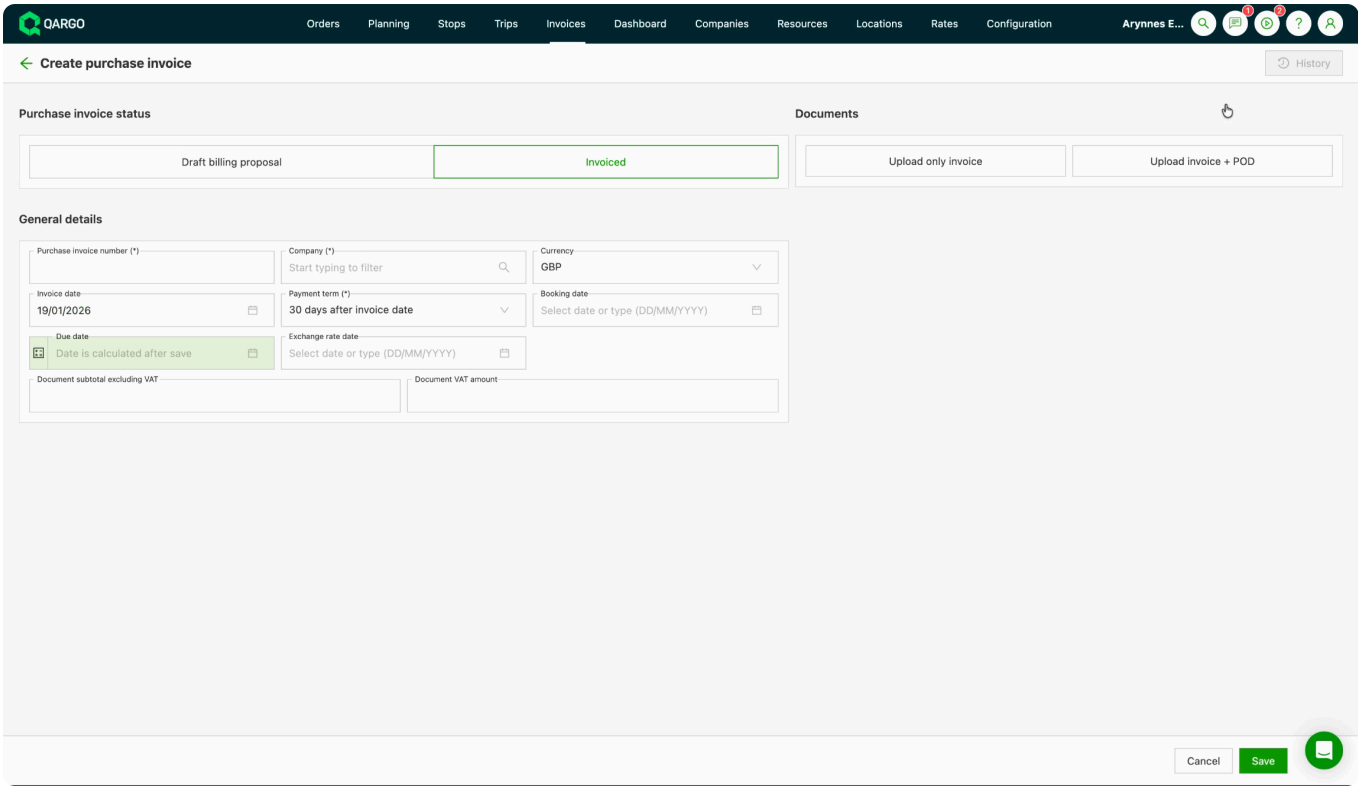
- The **minimum required info** for matching is "job reference + charges/costs".
- Avoid **empty lines** in the pasted data, as they can cause issues when saving.

Workflow steps

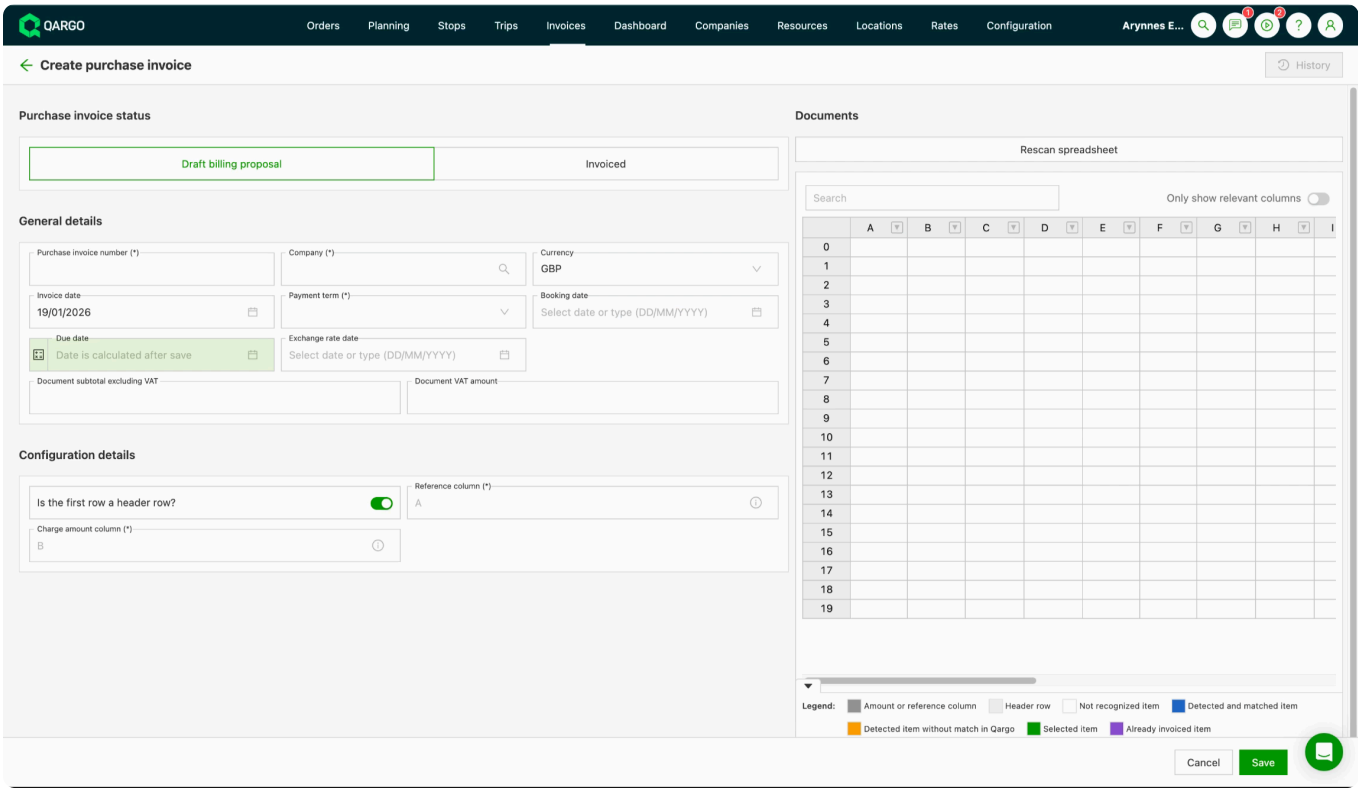
1. **Navigate to carrier invoices** Go to the main menu and select **Invoices > Carrier invoice**.



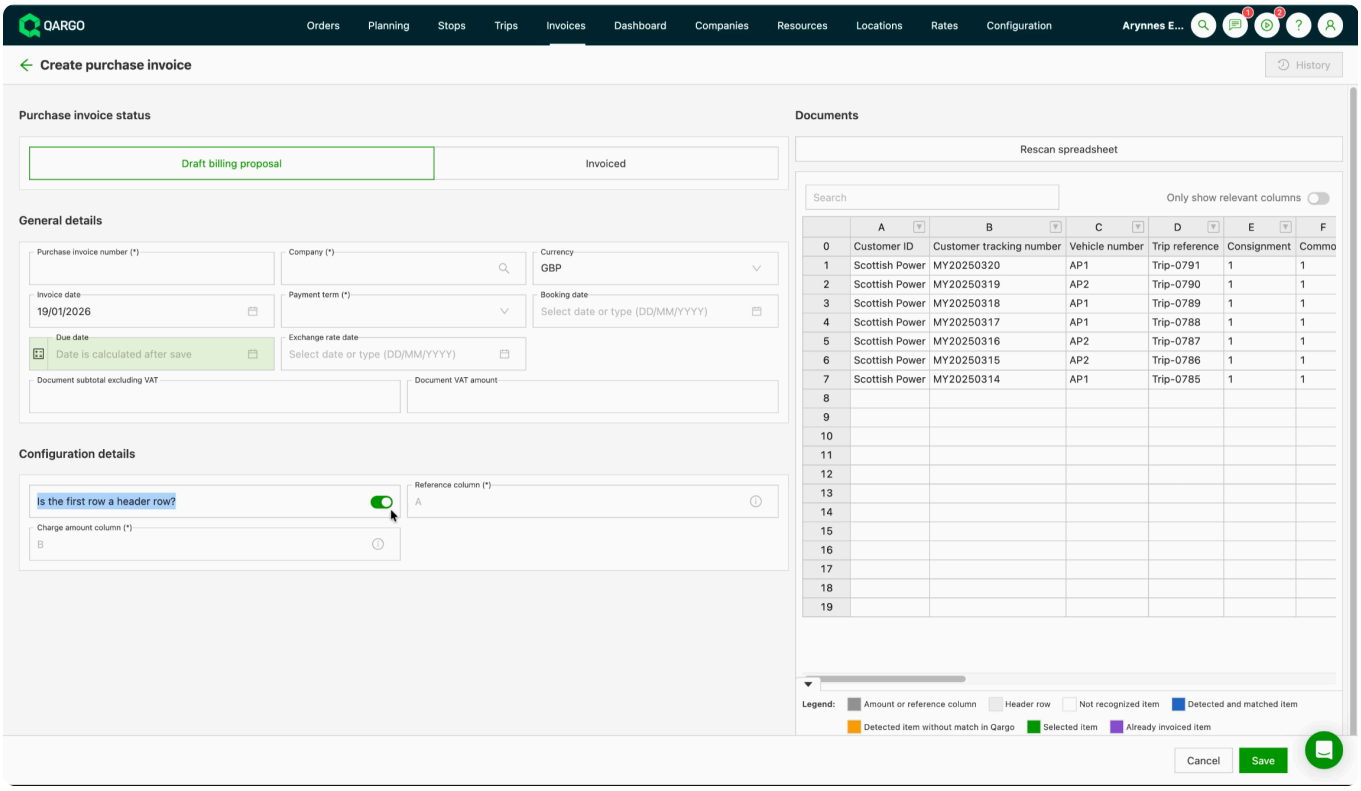
2. **Create a new carrier invoice** Click **Create carrier invoice** and choose the **Draft billing proposal** option.



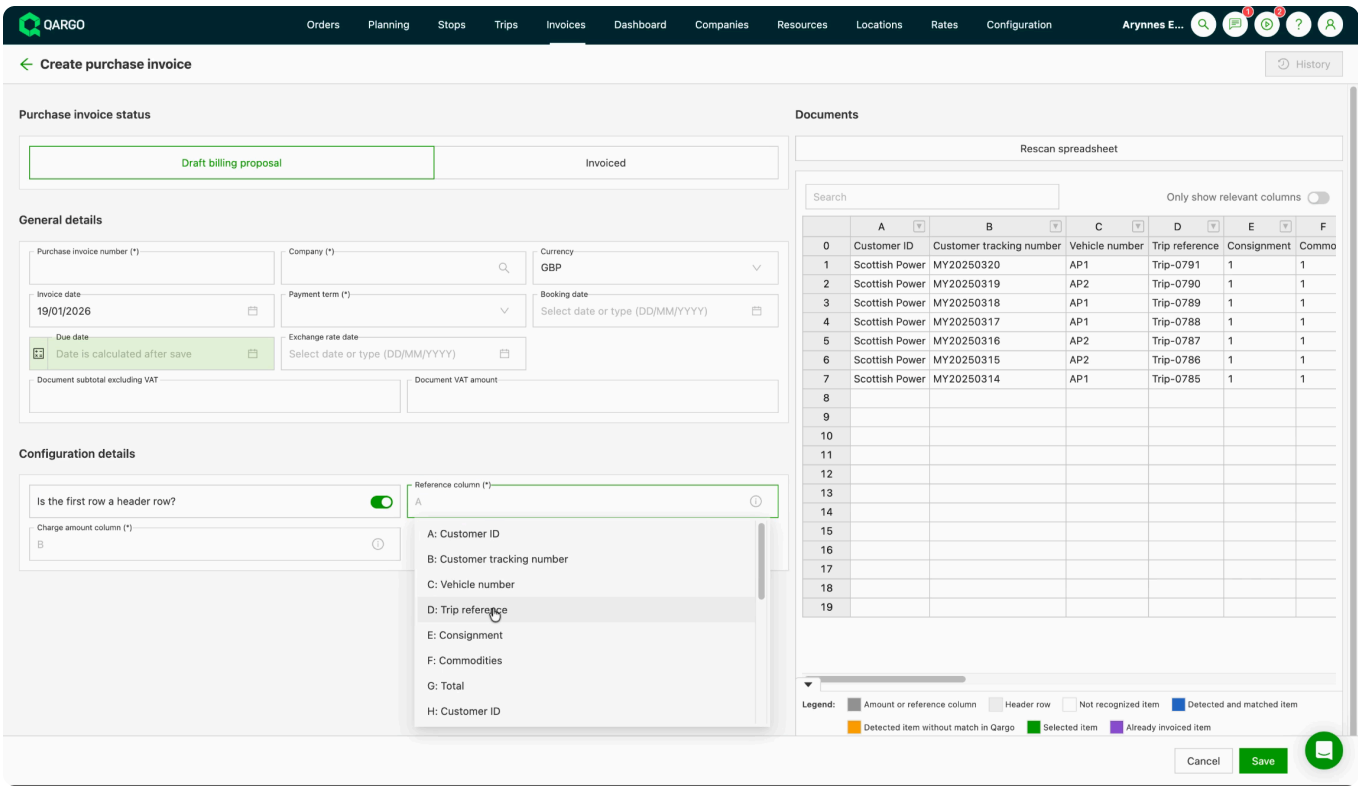
3. **Obtain and prepare the spreadsheet template** When prompted, copy the contract carrier charge data into the provided spreadsheet template. Either entire tables or specific rows can be copied, depending on the data structure.

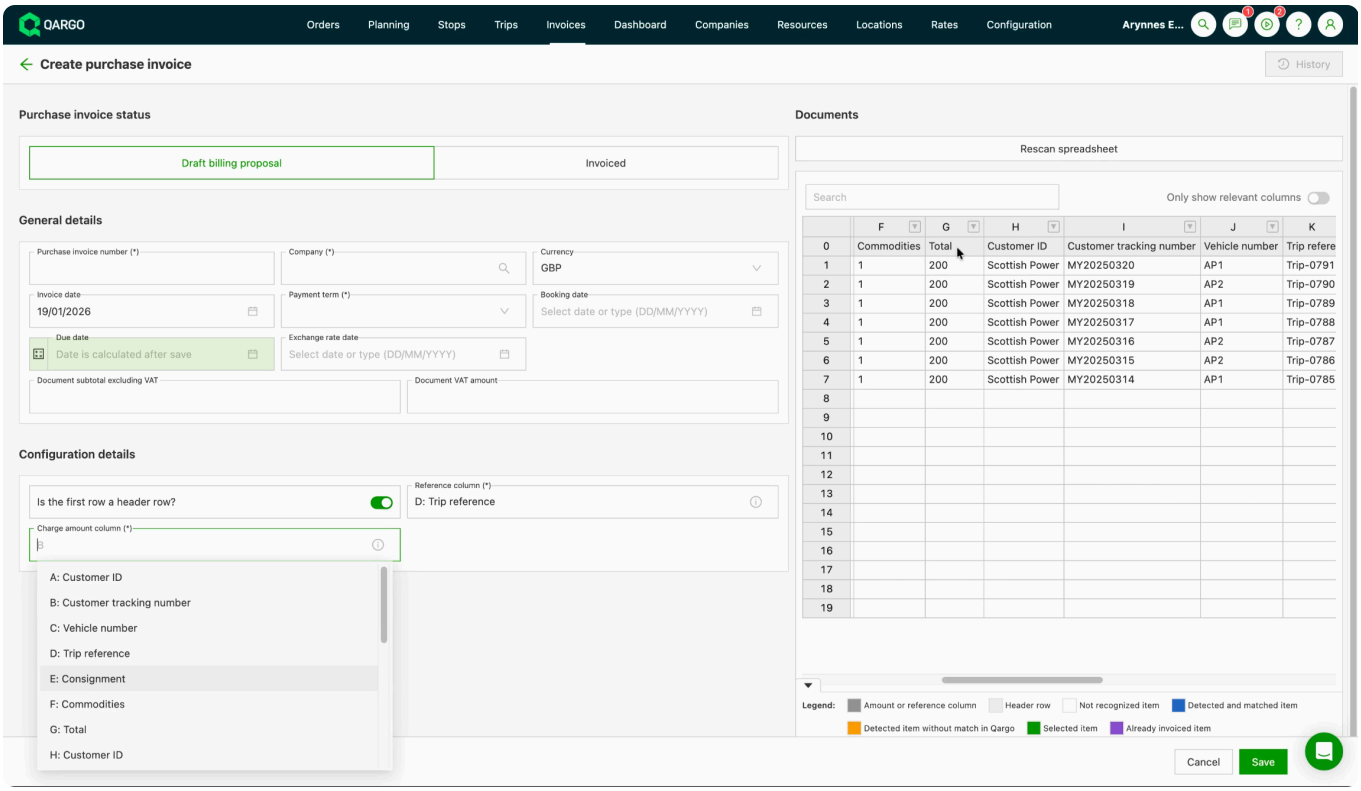


4. **Specify the data structure** Indicate whether the first row is a header by turning on the relevant toggle. This helps the system handle columns correctly during scanning.

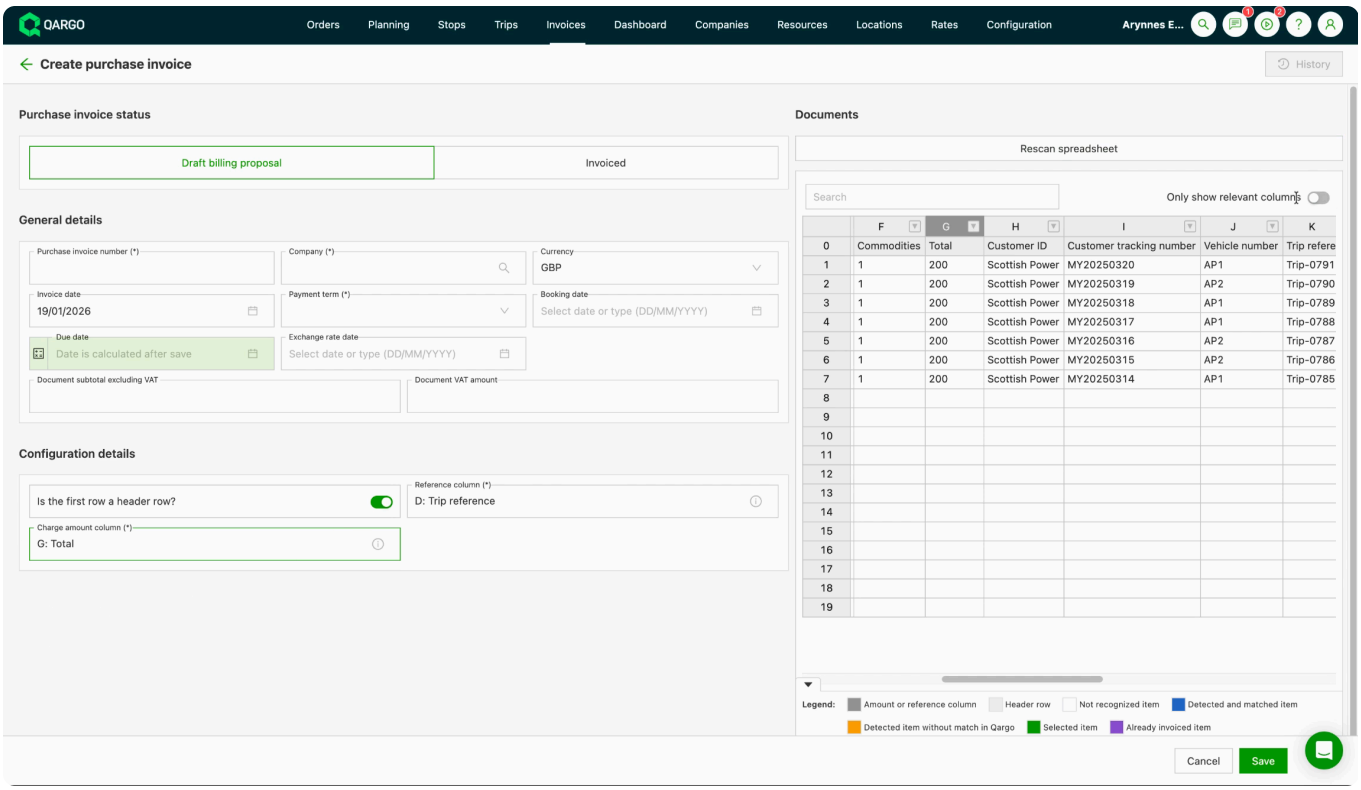


5. **Identify the matching criteria** Select the columns that contain the reference number (for example, **Load reference**) and the charge amount. These are used to match spreadsheet lines to jobs in Qargo.

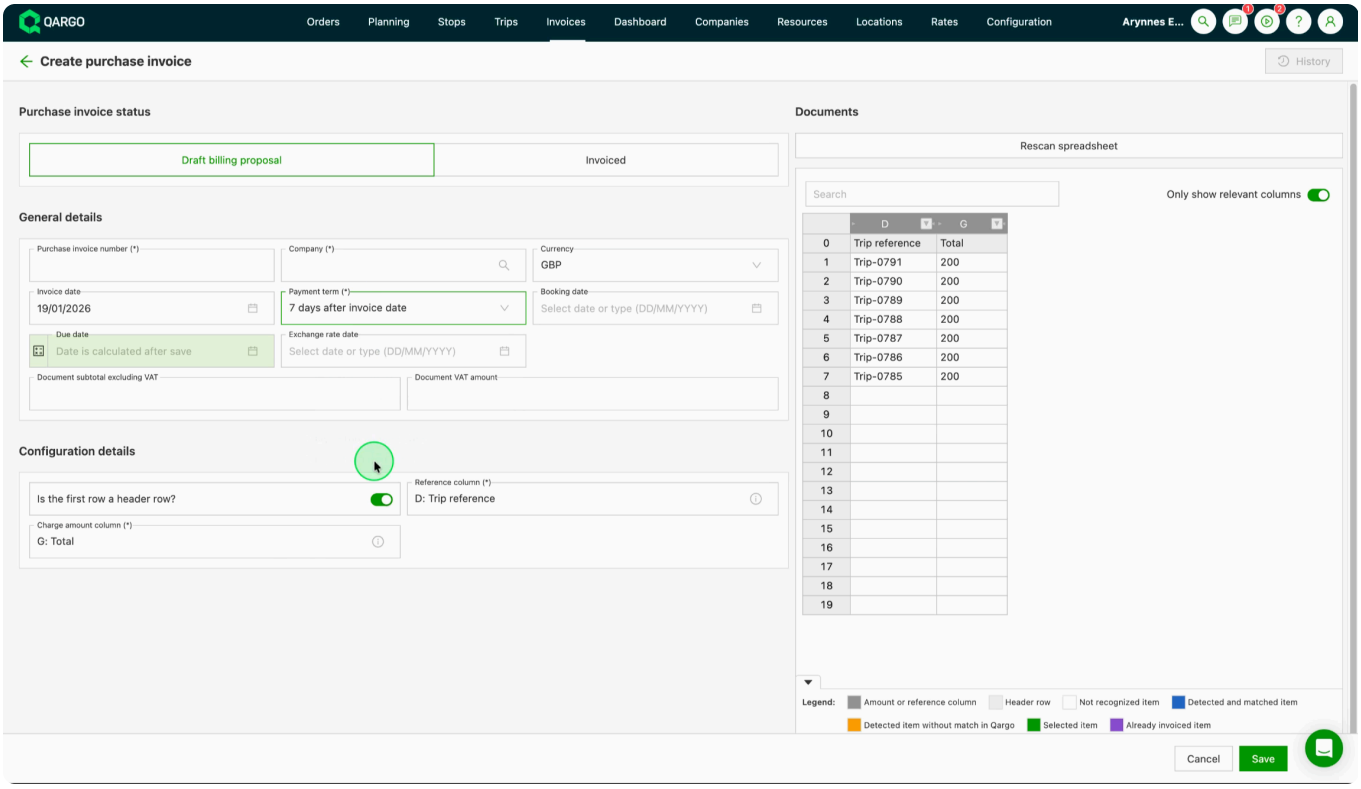


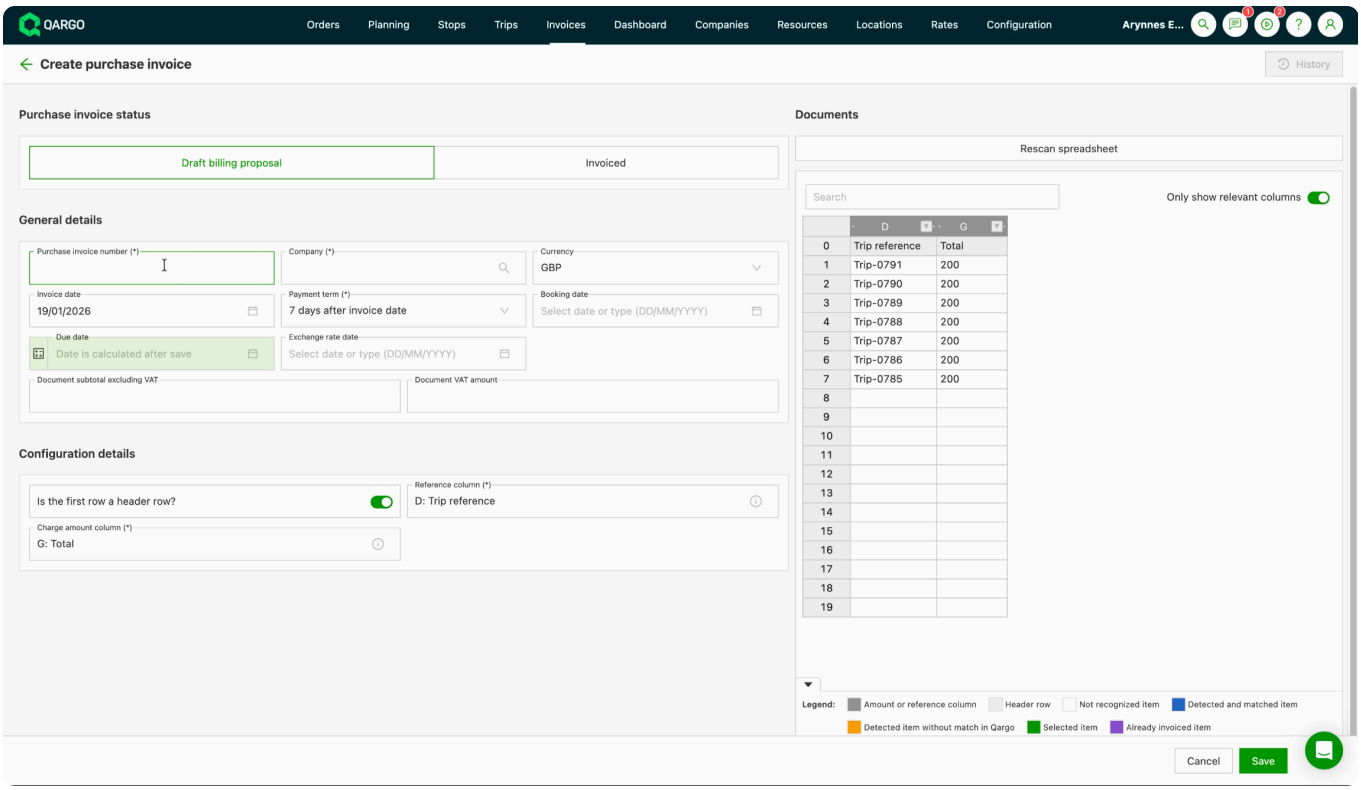


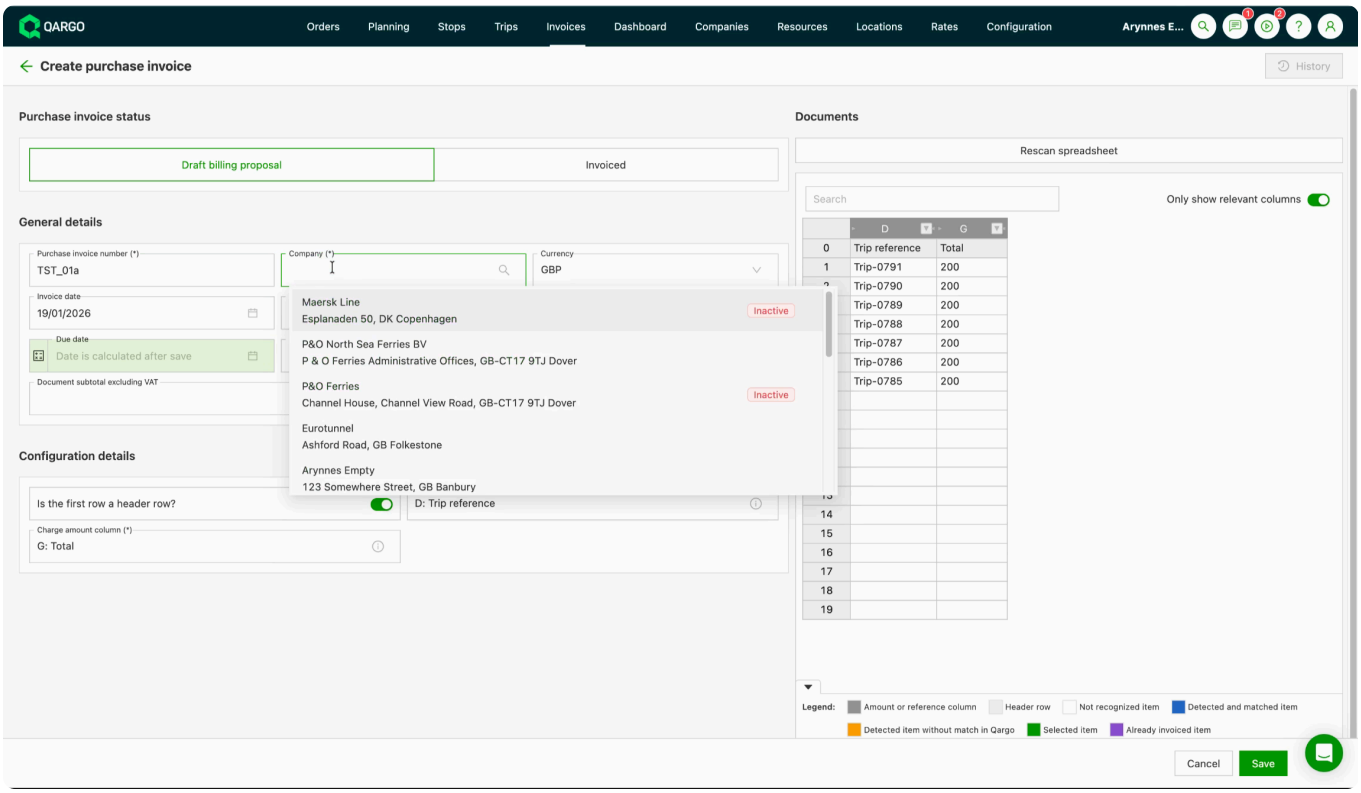
6. **Filter relevant columns** Use the toggle to show only the necessary columns for easier validation.



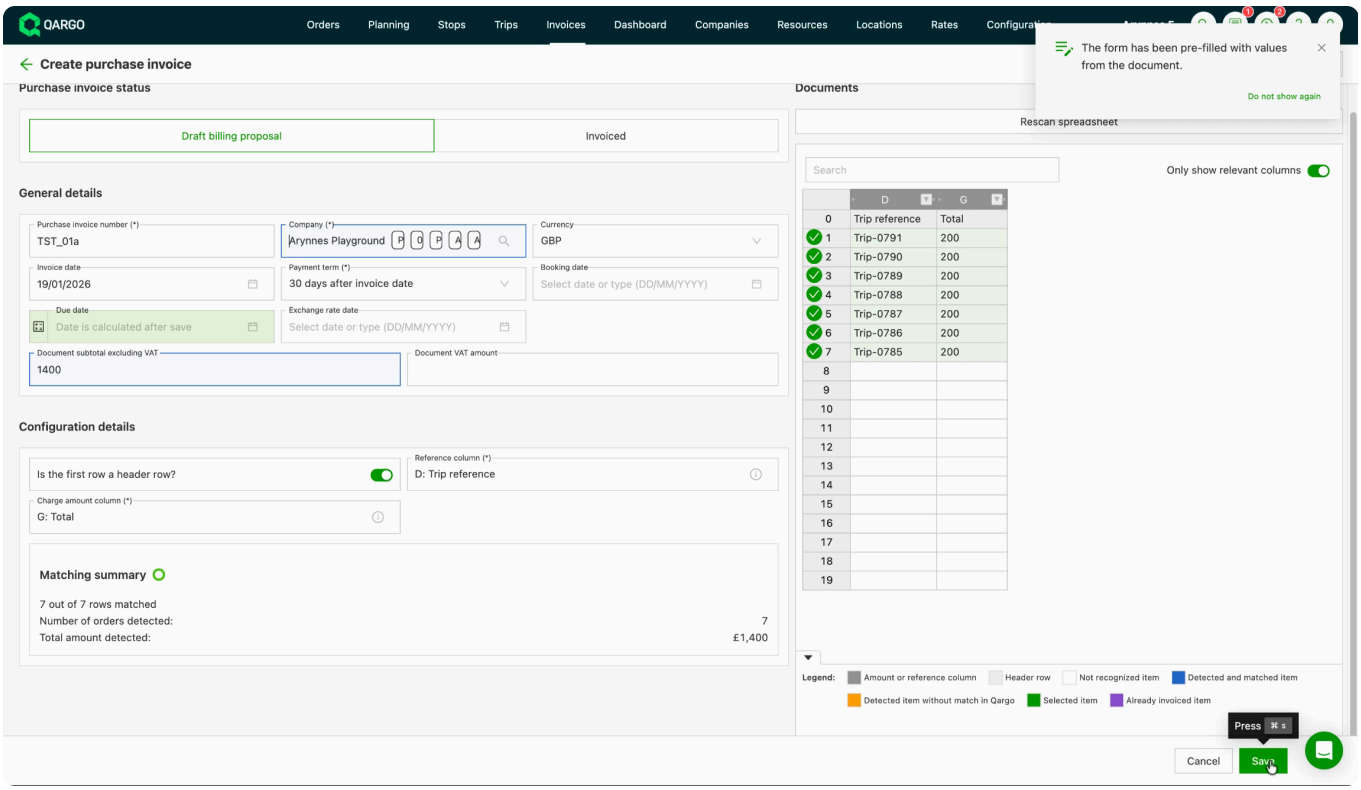
7. **Complete the required details** Fill in the additional fields marked as required, such as payment terms, purchase reference, and company.





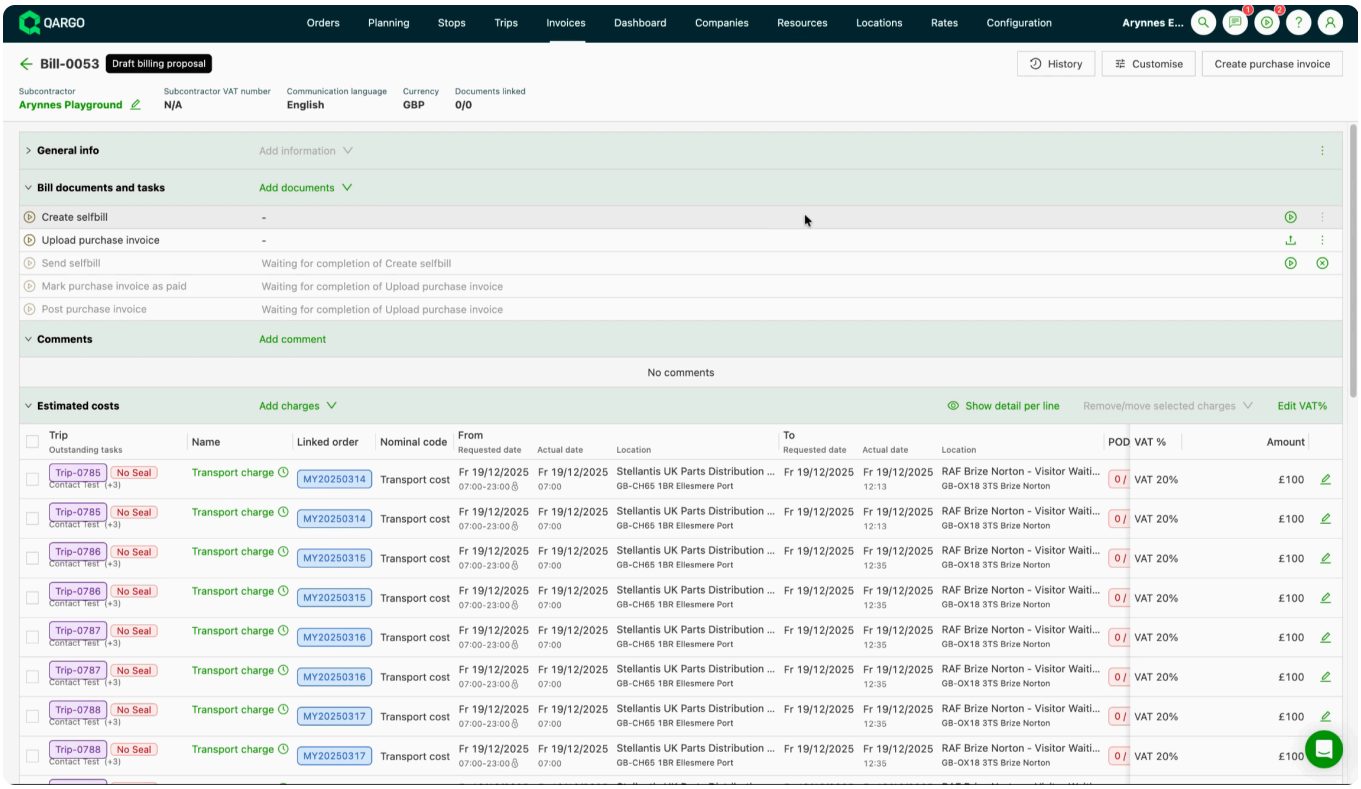


8. **Validate matches and create the billing proposal** Review how Qargo matches the spreadsheet data with its records, shown in a matching summary. Confirm and save to create a draft billing proposal.

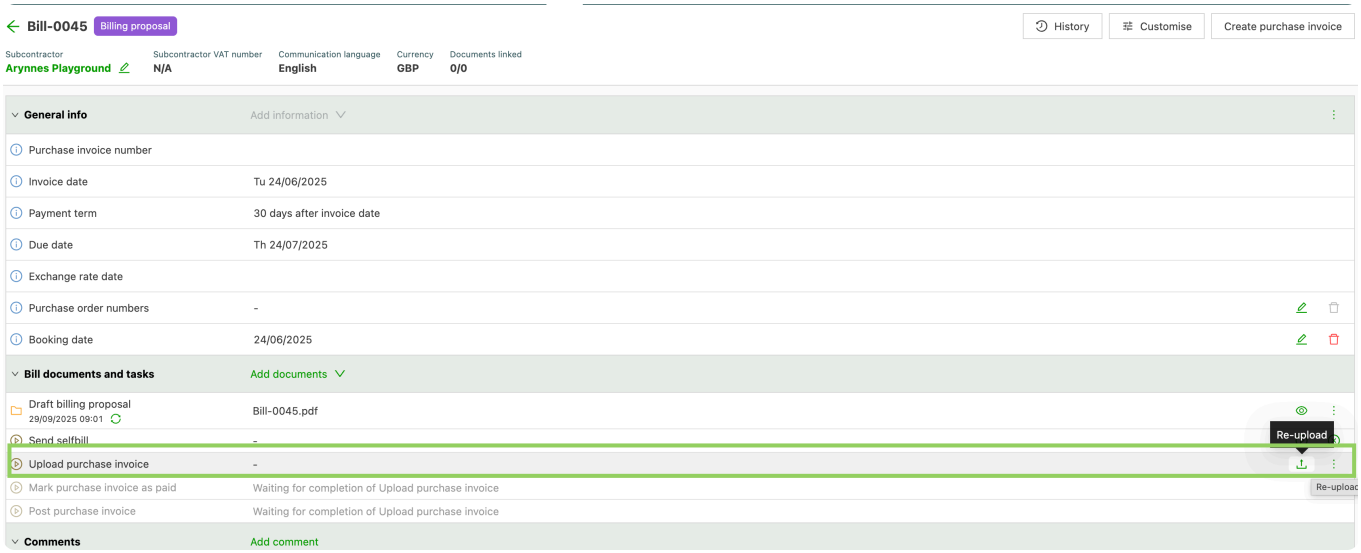


9. **Review and adjust** Check that all loads and charges are correct. Add any missing charges if needed, then finalize the draft.

10. **Take next actions** From the draft proposal, actions such as creating a self-bill, uploading invoice documents, or sending the proposal for approval can be performed.

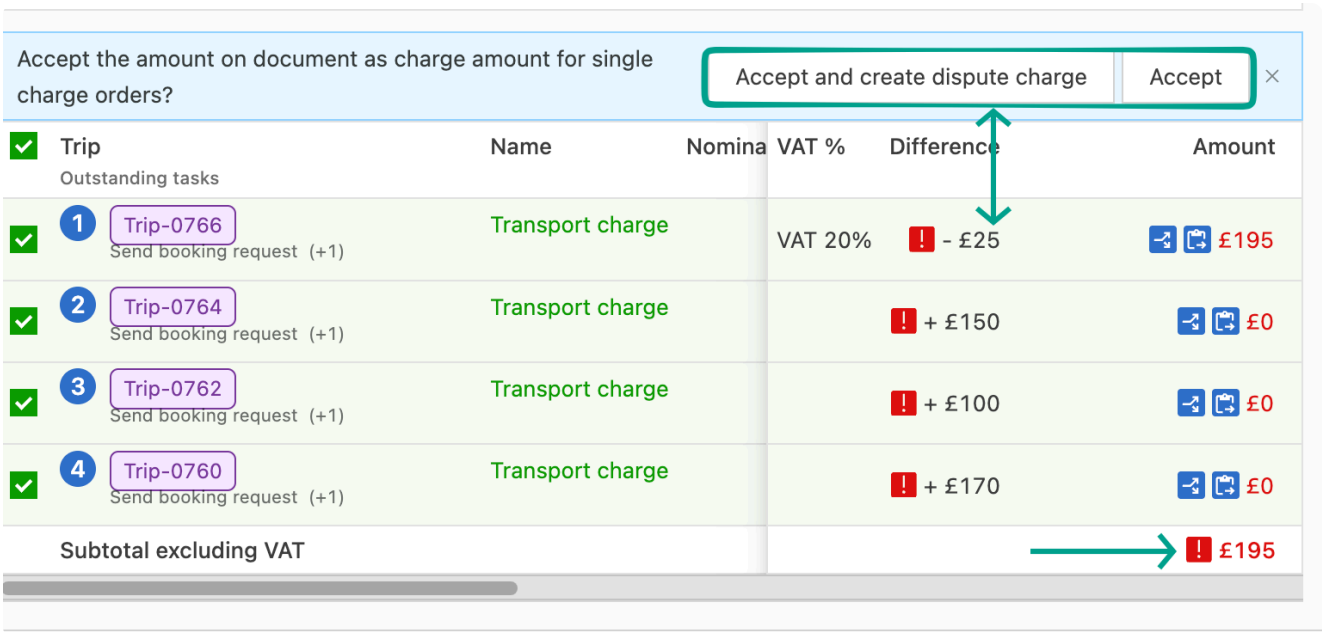


11. **Convert to invoice** When ready, convert the billing proposal into a carrier invoice. Supporting documents can also be uploaded and attached to the invoice.



Handling a charge discrepancy

- A **charge discrepancy** is shown on the individual row.
    - An 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.



- A **subtotal/total discrepancy** is shown for the full amount available.
- The *'Accept'* option automatically copies over the charges submitted by the contract carrier.
    - Use this option when the cost value is 0.
- When a charge does not match, use the *'Create dispute charge'* option to keep the original charge amount.
    - The disputed value is separated out for validation.

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Additional use case examples

- A carrier receives a consolidated end-of-month spreadsheet from a contract carrier covering dozens of individual loads. With the scan and match feature, all loads are checked against Qargo orders. This ensures there are no missing or duplicate charges before the carrier invoice is confirmed.
- A finance team processes a contract carrier's emailed spreadsheet with custom rates and surcharges. The team quickly pastes this data into the Qargo template, uses the matching summary to validate charges, and then attaches the scanned supplier invoice directly for audit purposes.
- When a contract carrier submits an incorrect invoice, operations staff first create a billing proposal to review and correct the amounts before moving to formal billing. This reduces disputes and improves payment timing.

This structured workflow in Qargo streamlines carrier invoice handling, reduces the risk of manual errors, and speeds up payment cycles with contract carriers.