Invoices - Auto-create an invoice when an order is Ready to invoice

An invoice can be created automatically the moment an order reaches Ready to invoice status, so finance teams no longer need to open each order and invoice it manually.

Updated October 1, 2026

🧰 Users must have Admin or SuperAdmin roles to update configuration settings.

- Each customer that should be auto-invoiced must use **Separate invoice per order** as the billing preference.
  - For background on billing preferences, see Invoices - Auto-assign invoice groups to orders and Billing preferences

Use cases

- A carrier that bills one order at a time wants every completed order invoiced immediately, without a daily manual billing round.
- A finance team wants draft invoices generated automatically on completion so they can be reviewed before being finalized.

🎥 Video walkthrough

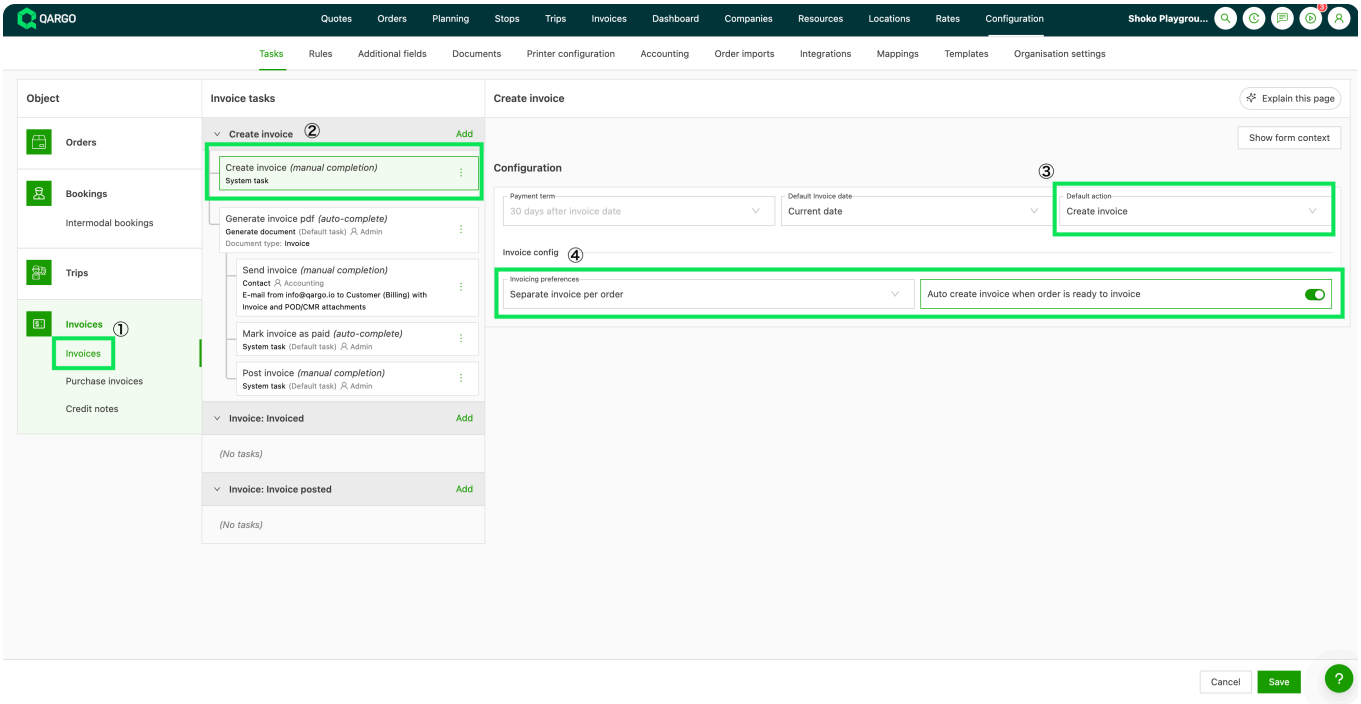
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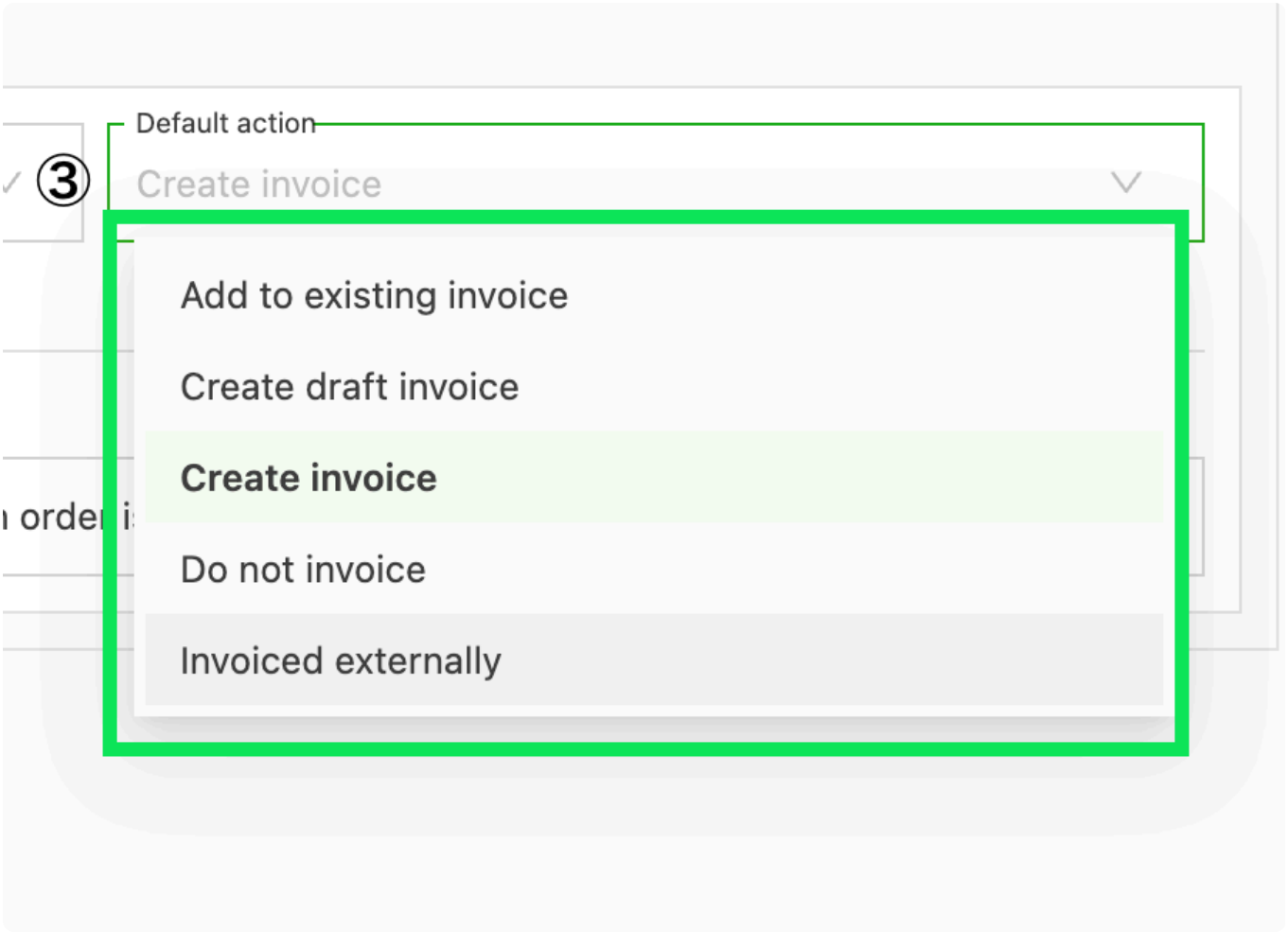
Enabling auto-creation for the tenant

To auto-create an invoice once an order reaches Ready to invoice status, some configuration is needed. If invoices for most customers need to be auto-created, this can be set up at the tenant level.

🧰 The invoice settings for **Default invoice date** and **Default action** moved from **Configuration > Organization settings > Finance & company configuration** to **Configuration > Tasks > Invoices**.

1. Navigate to **Configuration > Tasks**.
2. Click the **Invoices** section.
3. Select the **Create invoice** task.
4. Set **Default action** to either **Create invoice** (for a finalized invoice) or **Create draft invoice** (for a draft to be reviewed).
5. Select **Separate invoice per order** for **Invoice preferences**.
6. Enable the **Auto create invoice** toggle.
   Note: This option is only available when **Invoice preferences** is set to **Separate invoice per order**.
7. **Save** the configuration.


QARGO
Quotes
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Locations
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Shoko Playgrou...
Tasks
Rules
Additional fields
Documents
Printer configuration
Accounting
Order imports
Integrations
Mappings
Templates
Organisation settings
Object
Orders
Bookings
Intermodal bookings
Trips
Invoices
①
Invoices
Purchase invoices
Credit notes
Invoice tasks
Create invoice
②
Add
Create invoice (manual completion)
System task
Generate invoice pdf (auto-complete)
Generate document (Default task) Admin
Document type: Invoice
Send invoice (manual completion)
Contact Accounting
E-mail from info@qargo.io to Customer (Billing) with Invoice and POD/CMR attachments
Mark invoice as paid (auto-complete)
System task (Default task) Admin
Post invoice (manual completion)
System task (Default task) Admin
Invoice: Invoiced
Add
(No tasks)
Invoice: Invoice posted
Add
(No tasks)
Create invoice
Explain this page
Show form context
Configuration
③
Payment term
30 days after invoice date
Default invoice date
Current date
Default action
Create invoice
Invoice config
④
Invoicing preferences
Separate invoice per order
Auto create invoice when order is ready to invoice
Cancel
Save
?


③
Default action
Create invoice
Add to existing invoice
Create draft invoice
Create invoice
Do not invoice
Invoiced externally

‼️ For companies with **no accounting & ERP integration**, the recommended default setting is **Create draft invoice**. Using **Create invoice** with no accounting & ERP integration may affect invoice creation and how invoice generation errors are displayed.

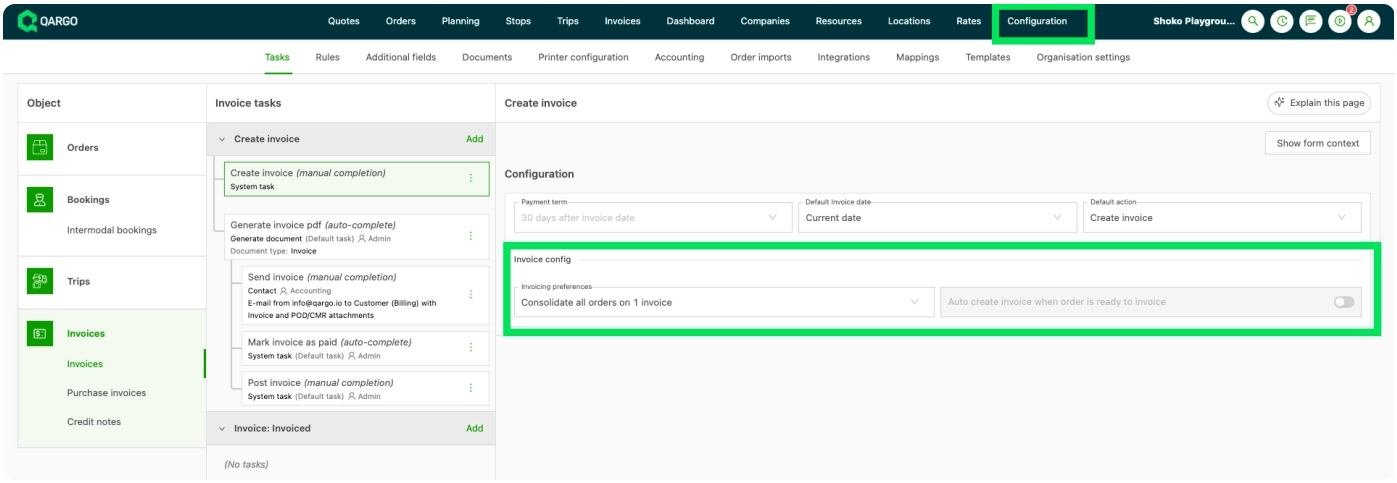
Override the setting per customer

Qargo can also be configured to auto-create invoices per customer. This is especially useful when only a small number of customers need this function, without setting it up at the tenant level.

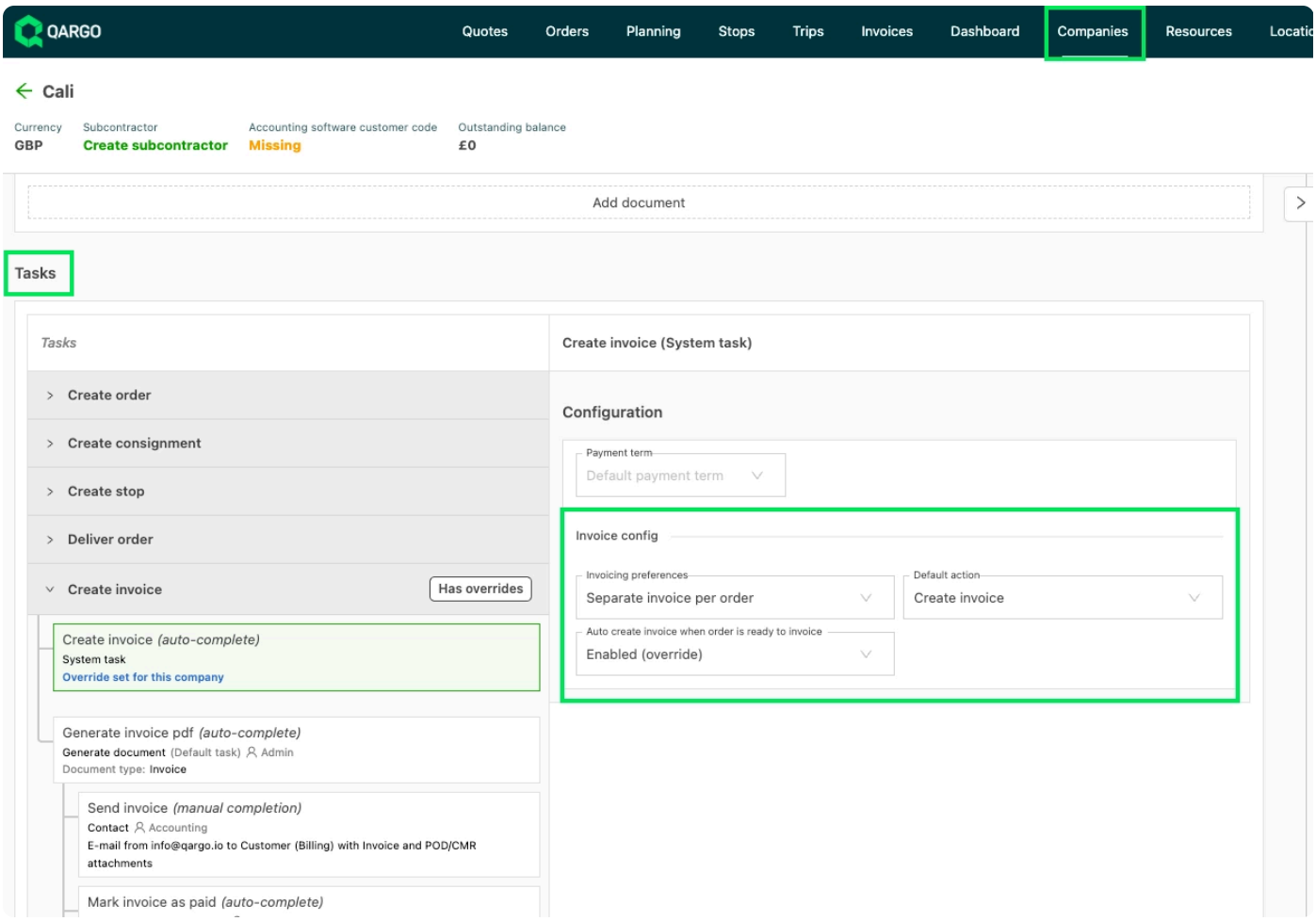
1. Open **Companies > Customers**.
2. Click a relevant customer.
3. Scroll down to the **Tasks** section.
4. Click **Create invoice > Create invoice (auto-complete)**.
5. Set **Invoice preferences** to **Separate invoice per order**.
6. Set the default action to either **Create invoice** or **Create draft invoice**.
7. Enable **Auto create invoice when order is ready to invoice**.
8. Save the customer configuration.

If the **Invoice preferences** setting is left on the default, the customer follows the tenant setting. If it is set explicitly to **Separate invoice per order**, the customer overrides the tenant, regardless of any later changes to the tenant setting. If **Default action** is left empty, the customer follows the tenant setting.

Tenant-level default setting



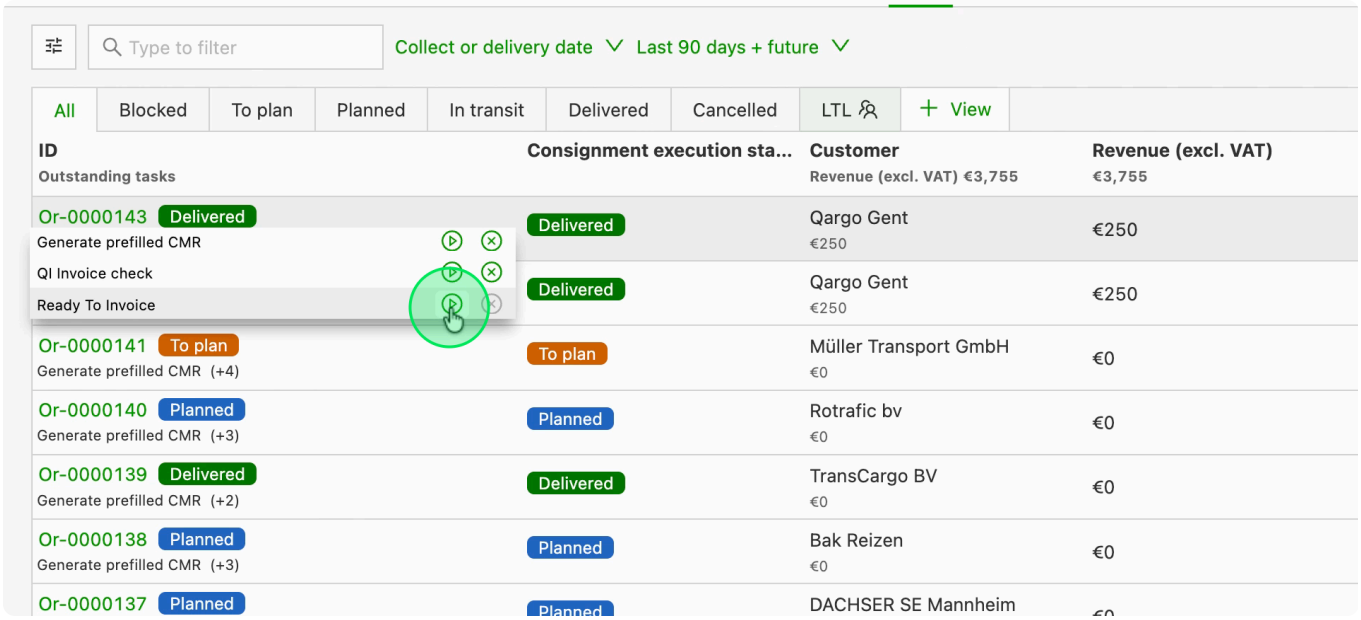
Customer-level setting



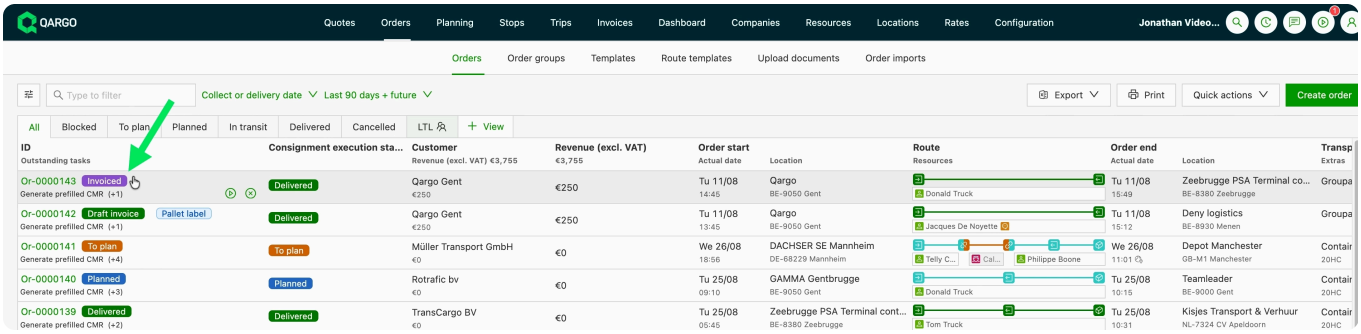
Workflow

Once everything is configured, follow these steps to see automated invoice creation in action.

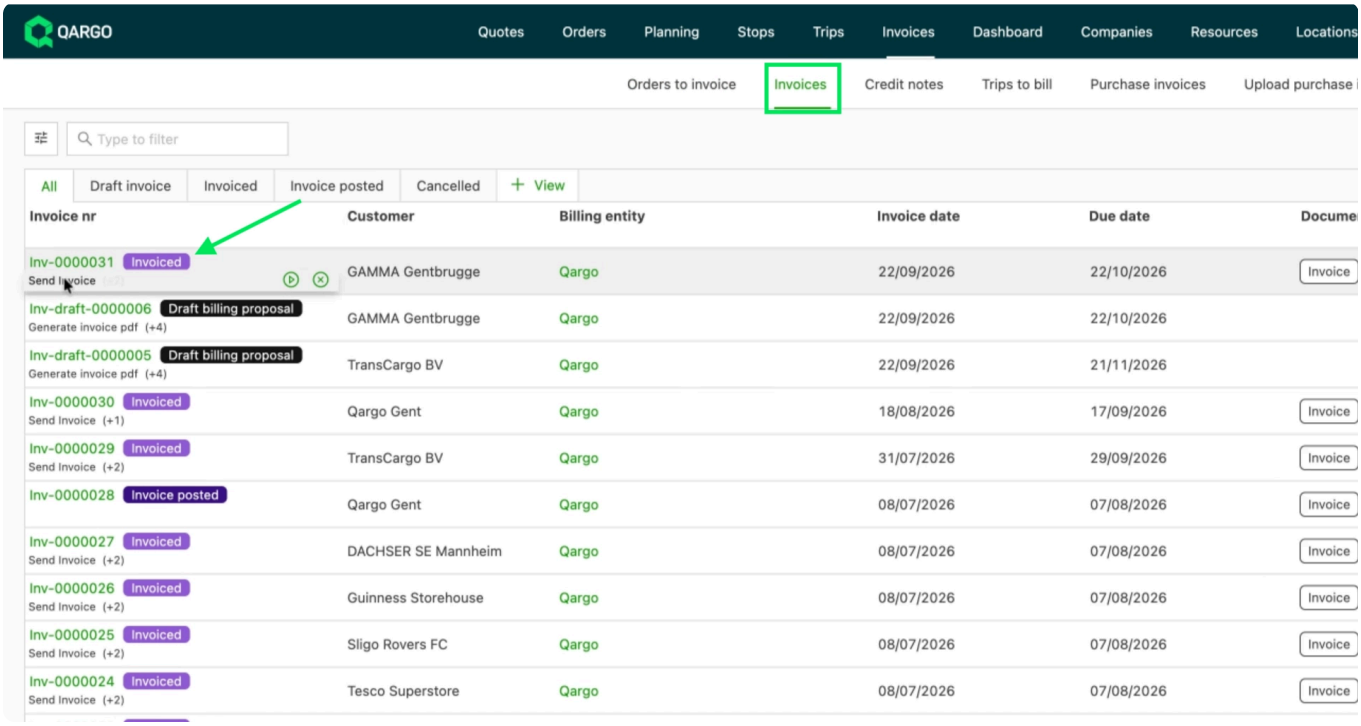
1. Go to **Order**.
2. Move a relevant order to the **Ready to invoice** status. The system detects this change.



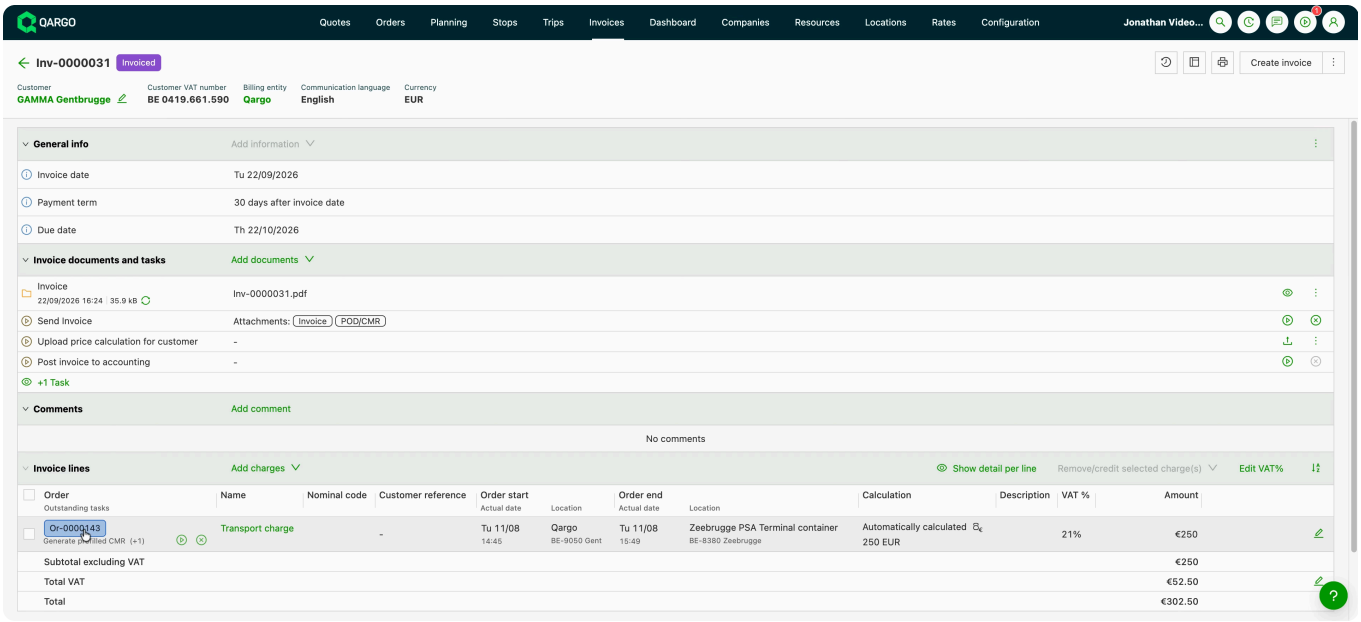
3. If the default invoice preference is set to **Separate invoice per order**, the system automatically creates either a draft invoice or a final invoice and links it to the order.



4. The order automatically moves from the **Orders to invoice** page to the **Invoices** page.



5. Click the relevant (draft) invoice to see the details.



Note

- Grouped billing (per billing cycle, per reference, per purchase order, or a fixed number of orders per invoice) and delayed billing (a number of days later, or only once a POD is attached) are not included.
- A single order can still produce more than one invoice. Charges are grouped by billing group code, customer, billing entity, and currency.

Troubleshooting

Issue	Resolution
Turning on the tenant toggle has no visible effect.	Confirm that each customer that should be auto-invoiced uses **Separate invoice per order**. **Consolidate all** is the default for new and existing customers and is not covered in this version.
No invoice appears after the **Ready to invoice** task completes, and no error is shown.	Check that the billing entity has an active accounting & ERP integration, or switch **Default action** to **Create draft invoice**.