Invoices - Setting the Invoice from date on orders

Set the earliest date an order can be invoiced, per tenant or per customer, so weekly or monthly invoice runs never include orders too early.

Updated October 21, 2026

What is the Invoice from date?

- A rule on the **Create invoice task** that sets the earliest date an invoice containing an order may be created.
- Every order receives its own Invoice from date when it becomes **Ready to invoice.**

Why use it?

- Invoice grouping decides which orders share an invoice, but not when that invoice may be created. Without an **Invoice from rule**, an order can be invoiced the moment it is Ready to invoice.
- A finance team with a fixed routine (for example, every Tuesday for the previous week's orders) no longer depends on manual date filters to avoid billing too early.

How does it work?

- The rule is set once as a tenant default and overridden per customer only where a billing agreement differs.
- On the **Ready to invoice** tab, orders that are not yet due carry a **Not yet due** tag and can be filtered by date.
- Creating an invoice that contains a not-yet-due order shows a warning. The warning does not block.

- Users must have the **Super Admin** role to configure the Invoice from rule.
- The rule cannot be combined with Auto create invoice when order is ready to invoice. Switching one on disables the other for that tenant or customer. See Invoices - Auto-create invoice when an order is Ready to invoice.
- The Invoice from date is not available in custom exports or the External API.

Terminology

Term	Definition
Invoice from	The rule that defines how long after a reference date an order may be invoiced.
Reference date	The date the rule counts from: First pickup date, Last delivery date or Ready to invoice date.
Invoice from date	The resulting date on an individual order. Calculated once, when the order becomes Ready to invoice.
Not yet due	Yellow tag on an order whose Invoice from date has not been reached.
Billing preferences	The grouping setting on the Create invoice task (for example, Custom order grouping or Separate invoice per order).

Use cases

- A carrier invoices every Tuesday for the previous week's orders, one invoice per order. A delay after *Ready to invoice* keeps the current week's orders out of the run.
- A carrier groups orders per month and must not invoice before the month has ended. *Next month after* the *Last delivery date* sets the *Invoice from date* to the first day of the following month.

- Most customers follow one billing routine, but one customer has a billing agreement with a longer delay. The tenant default covers the majority, and a customer override covers the exception.

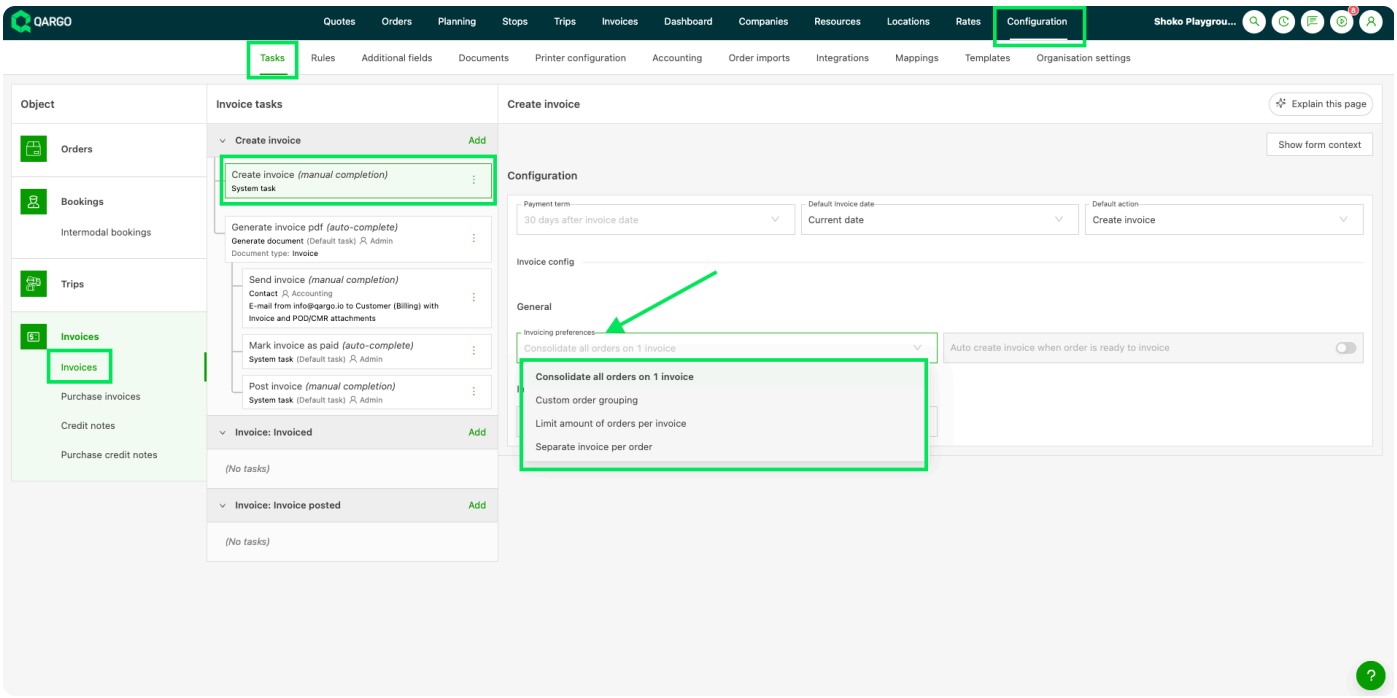
Configure the Invoice from rule

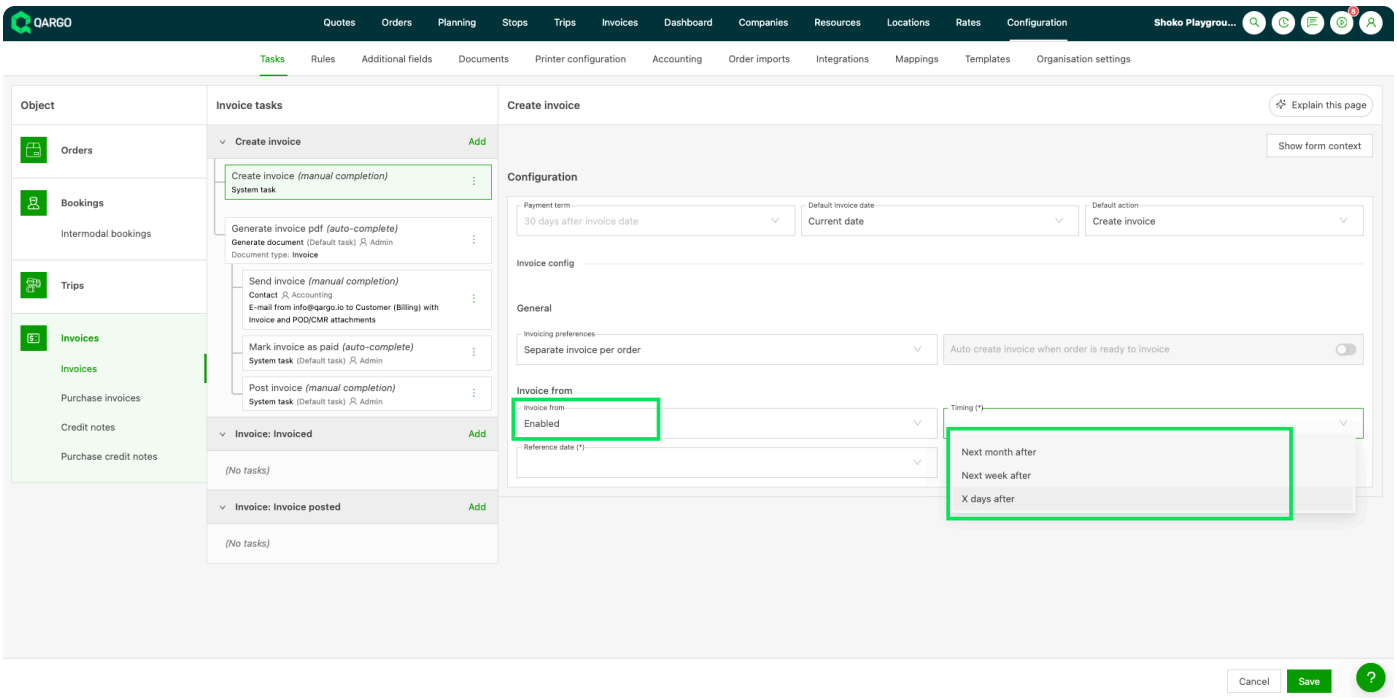
Set the tenant default

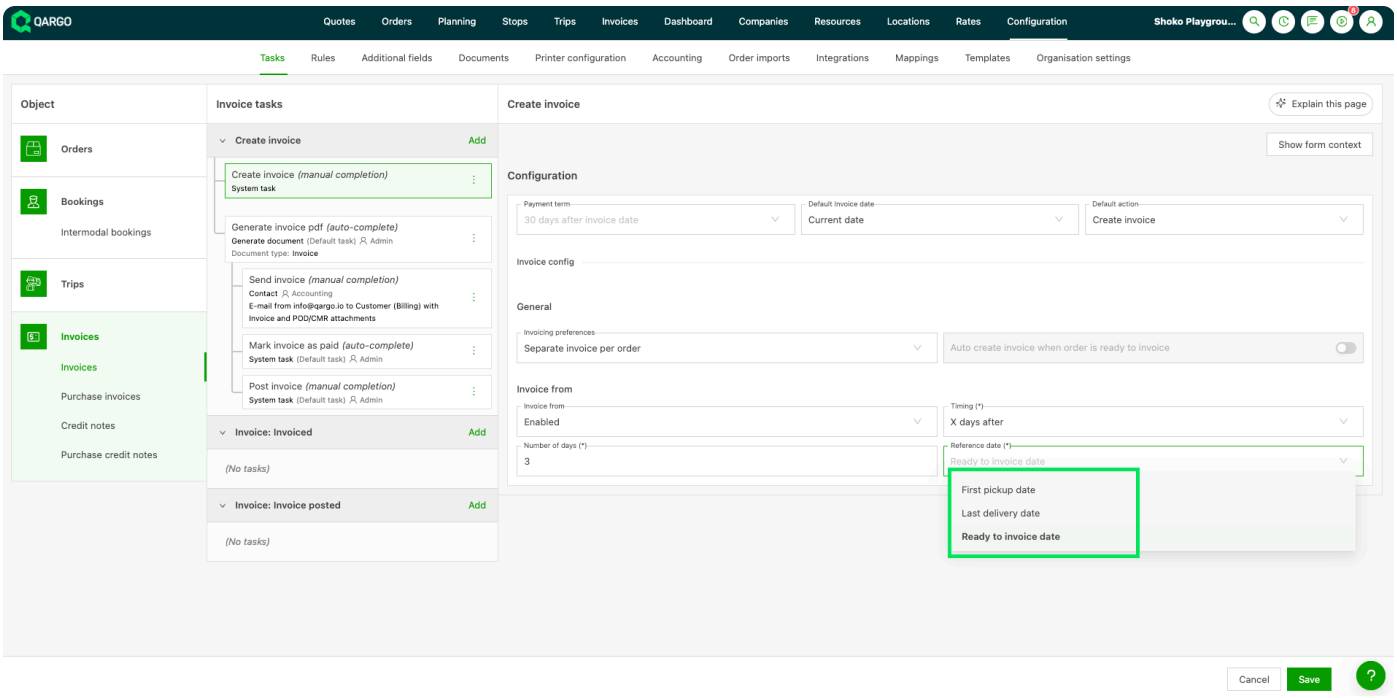
1. Navigate to **Configuration > Tasks**.
2. Click the **Invoices** section on the left side.
3. Select the **Create invoice task**.
4. Choose the **Billing preferences** (grouping) first. The choice decides where the Invoice from rule appears (see Custom order grouping below). Existing grouping stays unchanged.
5. Set the **Invoice from** dropdown to **Enabled**. The default is Disabled, which means no Invoice from date is calculated.
6. Fill in the fields that appear:
    - **Timing**: X days after, Next week after or Next month after.
    - **Number of days**: only shown for X days after.
    - **Reference date**: First pickup date, Last delivery date or Ready to invoice date. Every timing can be combined with every reference date.
7. **Save** the configuration.

Timing	Invoice from date of the order	Example
X days after	Reference date plus the configured Number of days	Ready to invoice on Oct 7, 3 days after: invoice from Oct 10
Next week after	Start of the week following the reference date	Last delivery on Wednesday: invoice from the following Monday
Next month after	Start of the month following the reference date	Last delivery on March 12: invoice from April 1

The Auto create invoice when order is ready *to invoice* toggle is grayed out while Invoice from is Enabled.


QARGO
Quotes
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Shoko Playgrou...
Tasks
Rules
Additional fields
Documents
Printer configuration
Accounting
Order imports
Integrations
Mappings
Templates
Organisation settings
Object
Orders
Bookings
Intermodal bookings
Trips
Invoices
Invoices
Purchase invoices
Credit notes
Purchase credit notes
Invoice tasks
Create invoice
Add
Create invoice (manual completion)
System task
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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
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Invoice: Invoice posted
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Create invoice
Explain this page
Show form context
Configuration
Payment term
30 days after invoice date
Default Invoice date
Current date
Default action
Create invoice
Invoice config
General
Invoicing preferences
Consolidate all orders on 1 invoice
Auto create invoice when order is ready to invoice
Consolidate all orders on 1 invoice
Custom order grouping
Limit amount of orders per invoice
Separate invoice per order


QARGO
Quotes
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Shoko Playgrou...
Tasks
Rules
Additional fields
Documents
Printer configuration
Accounting
Order imports
Integrations
Mappings
Templates
Organisation settings
Object
Orders
Bookings
Intermodal bookings
Trips
Invoices
Invoices
Purchase invoices
Credit notes
Purchase credit notes
Invoice tasks
Create invoice
Add
Create invoice (manual completion)
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Separate invoice per order
Auto create invoice when order is ready to invoice
Invoice from
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Timing (*)
Reference date (*)
Next month after
Next week after
X days after
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Save

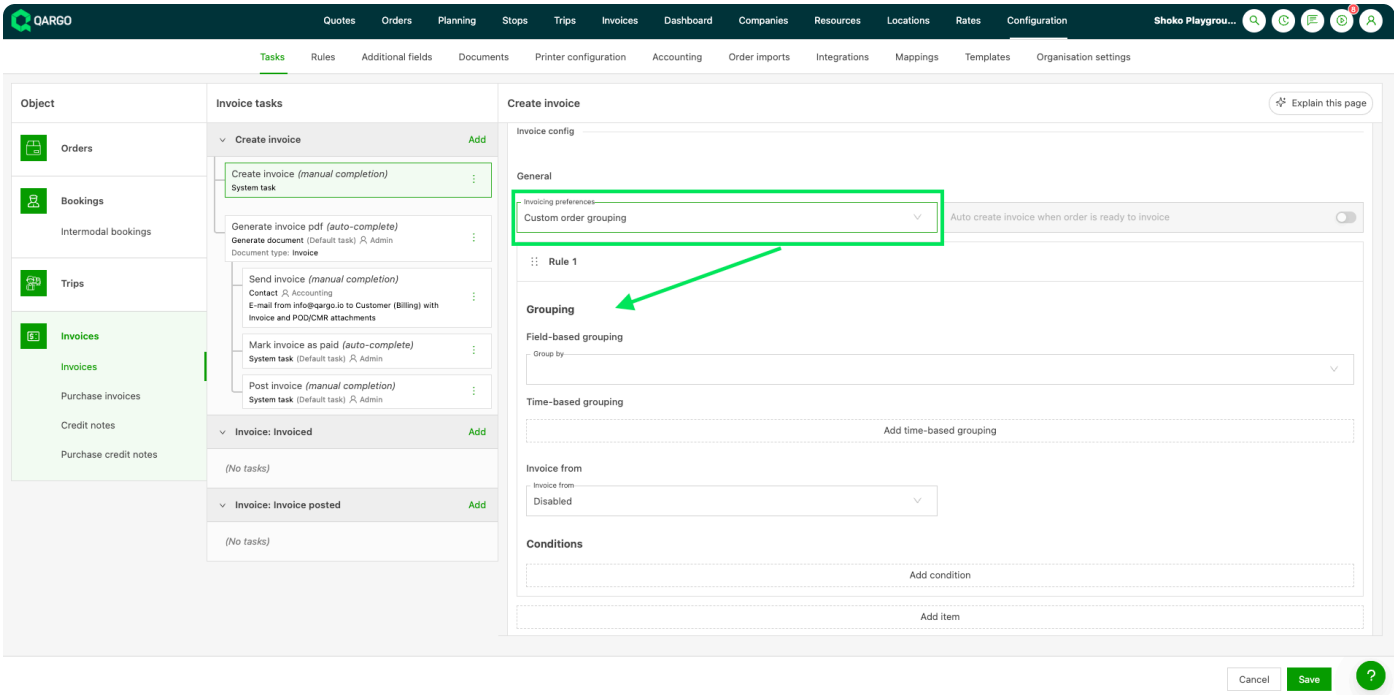


Custom order grouping

With **Billing preferences** set to **Custom order grouping**, the Invoice from block at the bottom of the configuration disappears. Instead, each rule card has its own Invoice from block (below Grouping, above Conditions) with the same dropdown and fields.

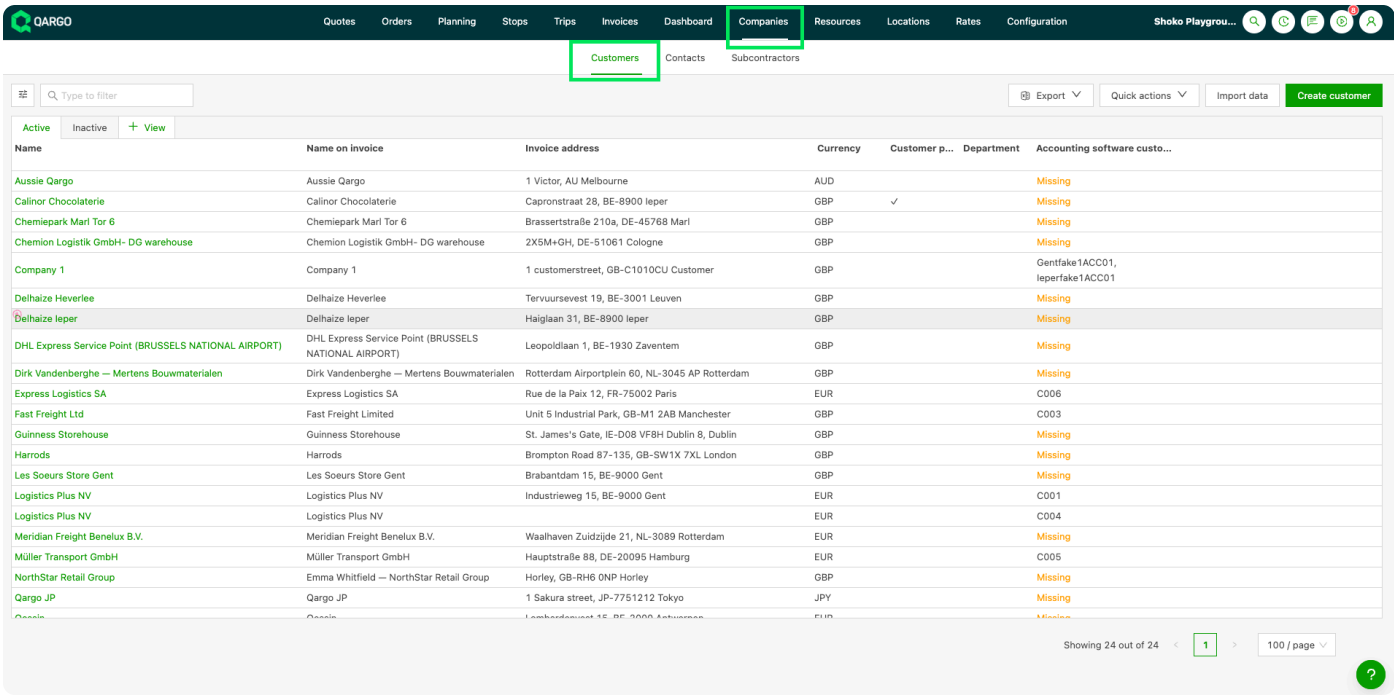
This allows different timing per group. A weekly rule for one segment and a monthly rule for another segment can each have their own Invoice from rule.

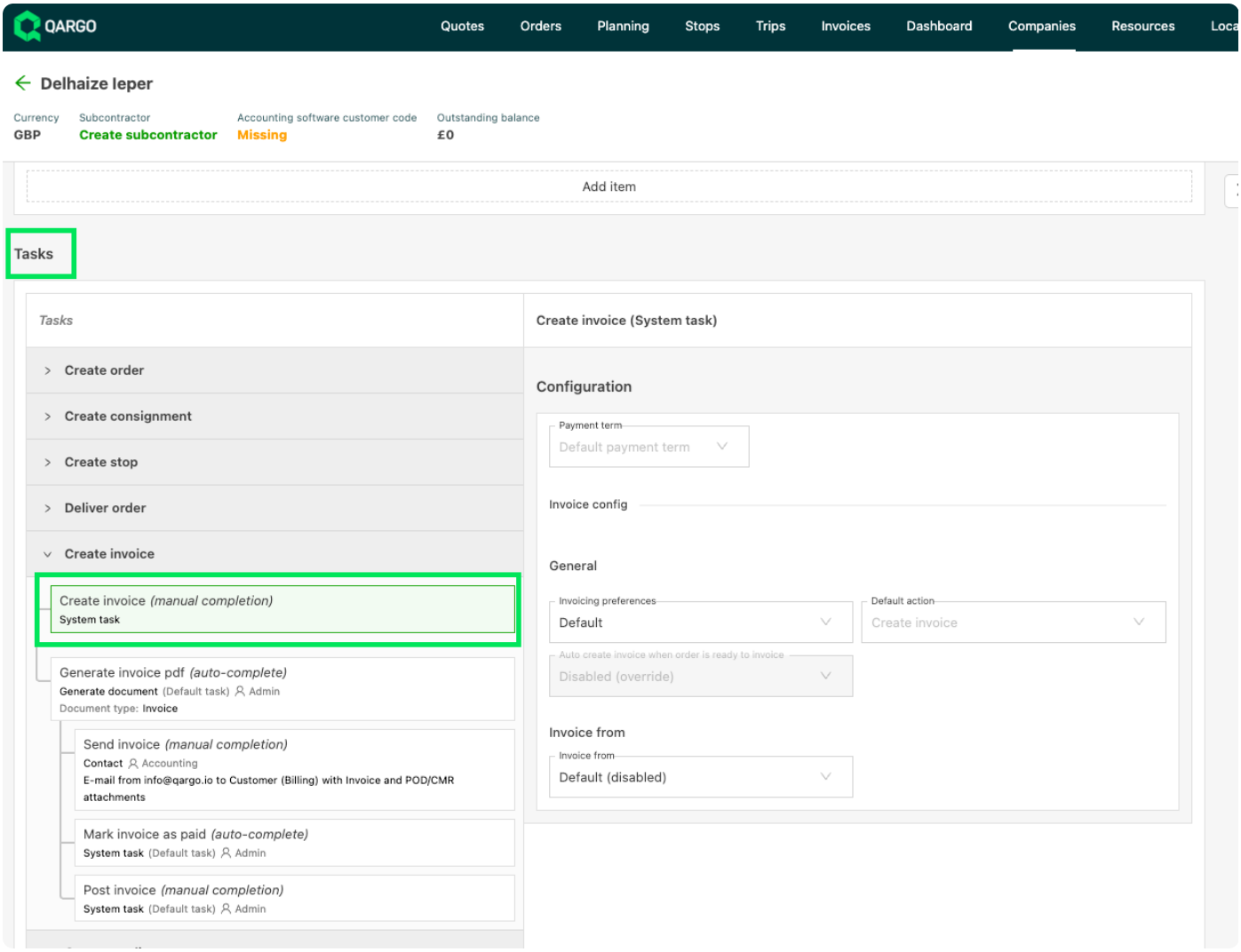
For the options **Consolidate all orders on 1 invoice**, **Limit amount of orders per invoice** and **Separate invoice per order**, one rule applies to the whole configuration.

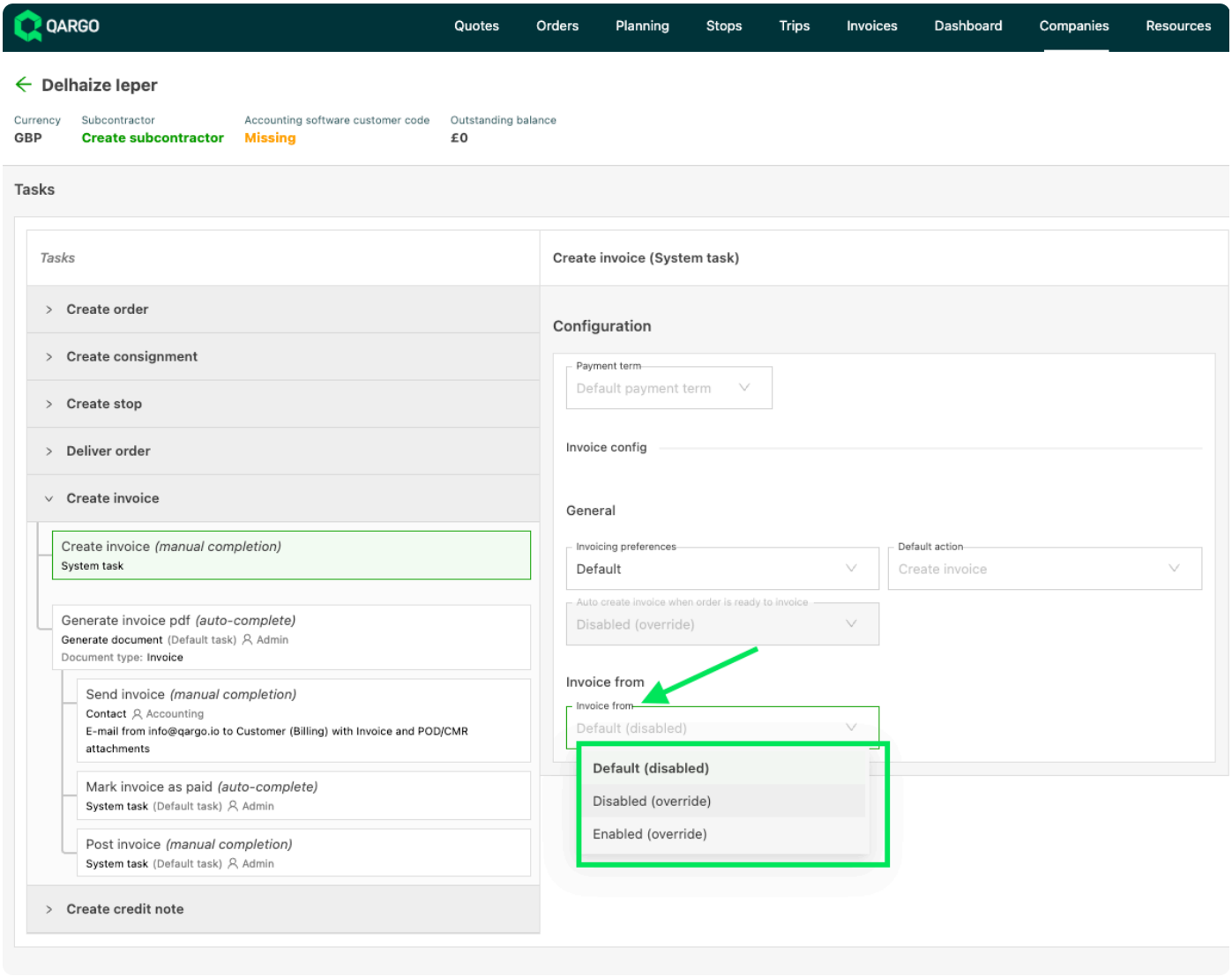


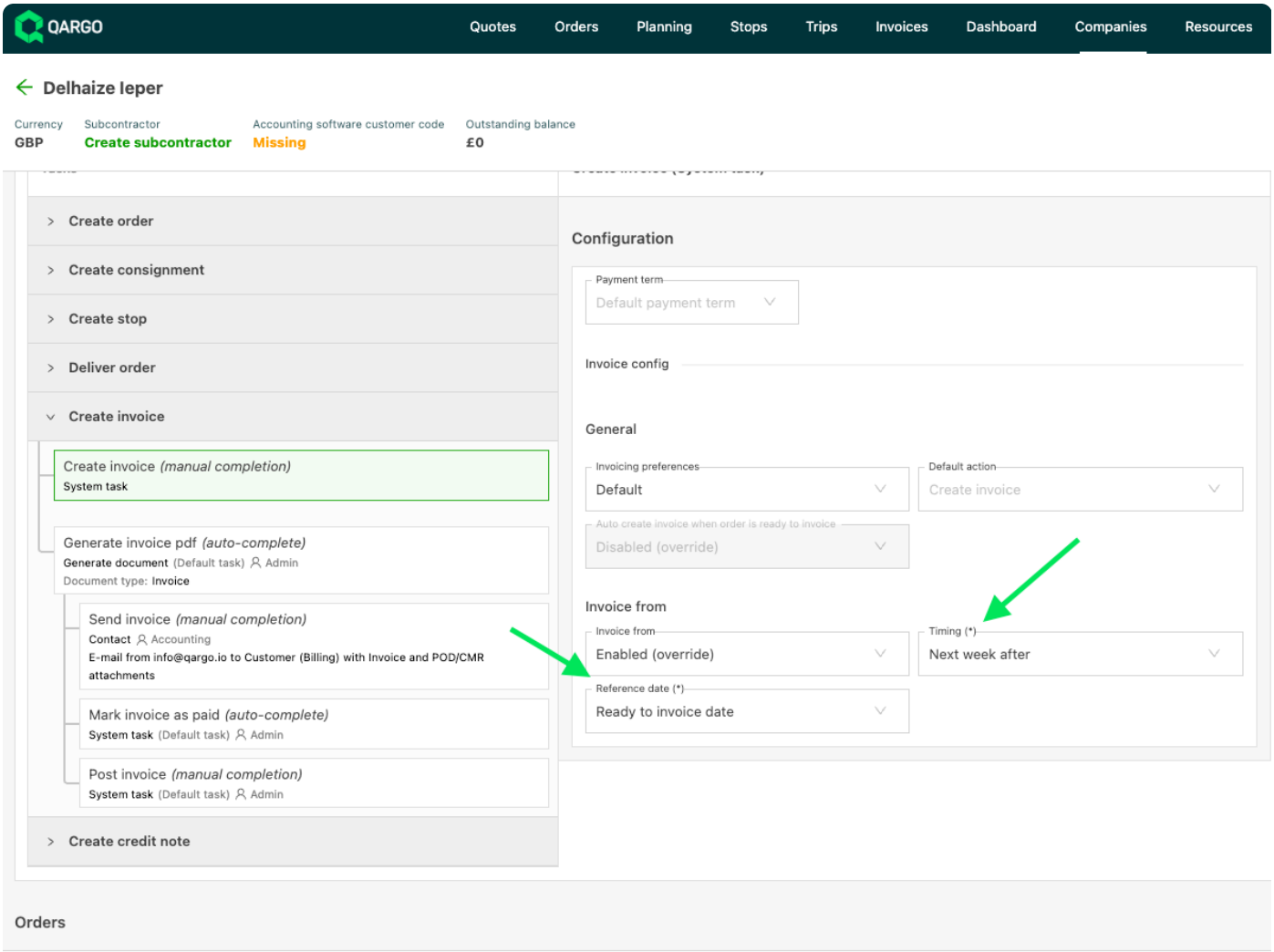
Override per customer

1. Navigate to **Companies > Customers**.
2. Click the relevant customer.
3. Scroll to the **Tasks** section.
4. Click **Create invoice** *(manual completion)*. The same configuration panel as at tenant level opens.
5. Choose an option in the **Invoice from** dropdown:
   - **Default (enabled)**: the customer follows the tenant default. The label reflects the current tenant setting, so it reads Default (enabled) while the tenant rule is enabled.
   - **Enabled (override)**: the customer gets its own rule. Timing, Number of days and Reference date work as at tenant level.
   - **Disabled (override)**: the customer gets **no Invoice from date, even when the tenant default is enabled.**
6. **Save** the customer configuration.




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Quotes
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Delhaize Ieper
Currency
GBP
Subcontractor
Create subcontractor
Accounting software customer code
Missing
Outstanding balance
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Create invoice (System task)
Create order
Create consignment
Create stop
Deliver order
Create invoice
Create invoice (manual completion)
System task
Generate invoice pdf (auto-complete)
Generate document (Default task) Admin
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Configuration
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Default payment term
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General
Invoicing preferences
Default
Default action
Create invoice
Auto create invoice when order is ready to invoice
Disabled (override)
Invoice from
Invoice from
Default (disabled)


QARGO
Quotes
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Delhaize Ieper
Currency
GBP
Subcontractor
Create subcontractor
Accounting software customer code
Missing
Outstanding balance
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Payment term
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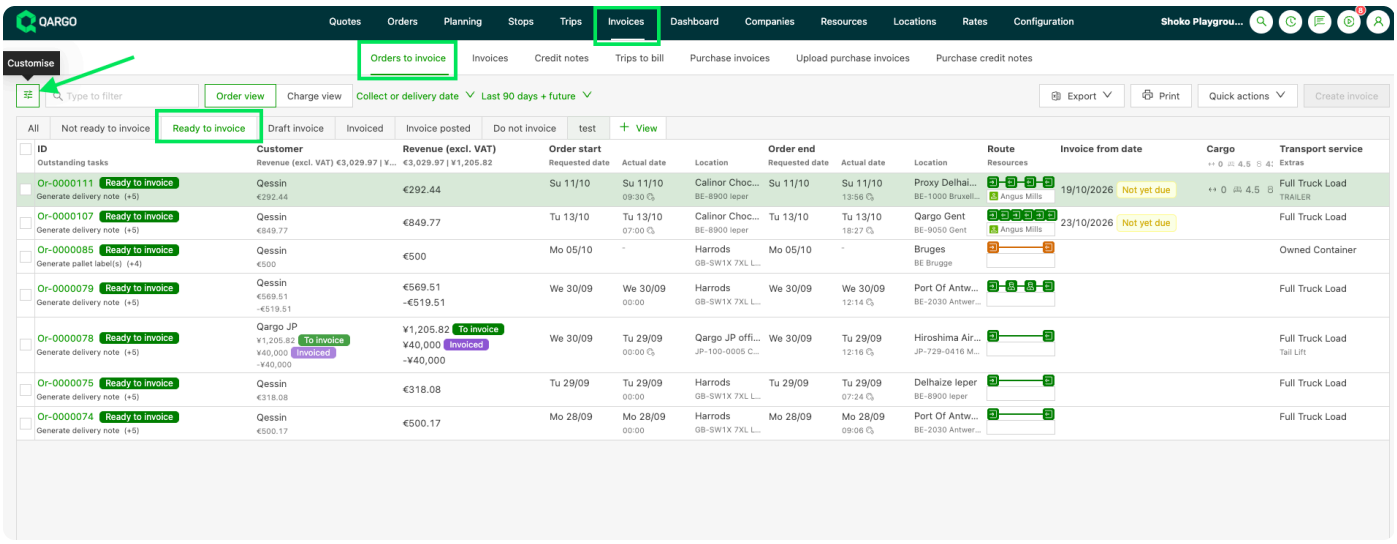


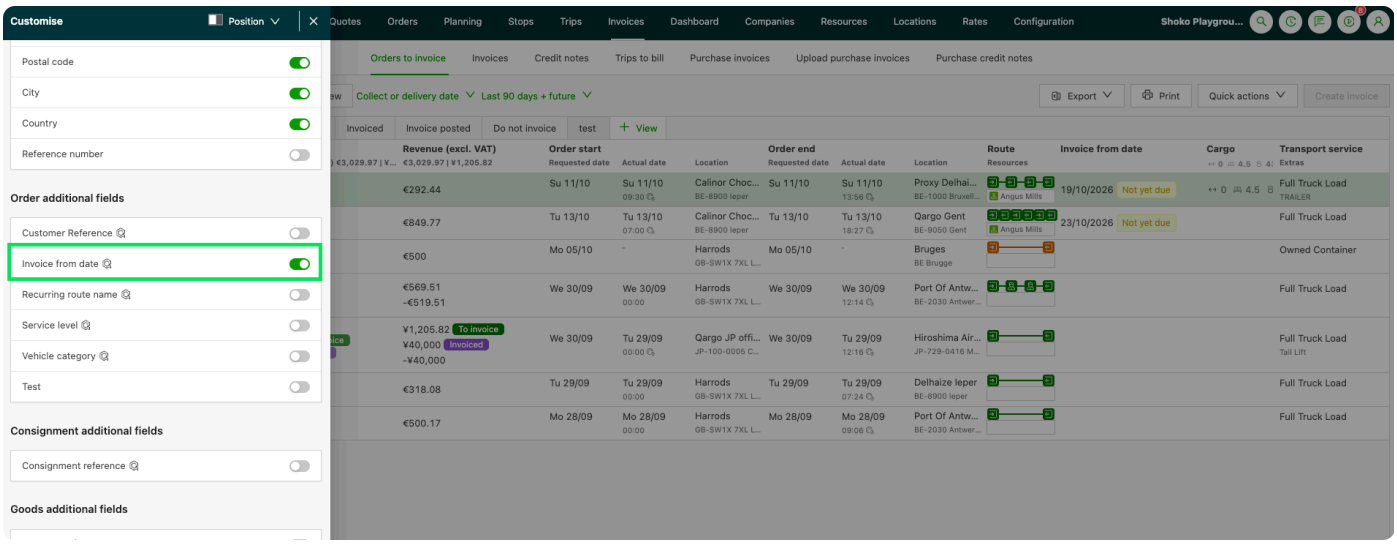
Customers and tenants without any rule behave exactly as before.

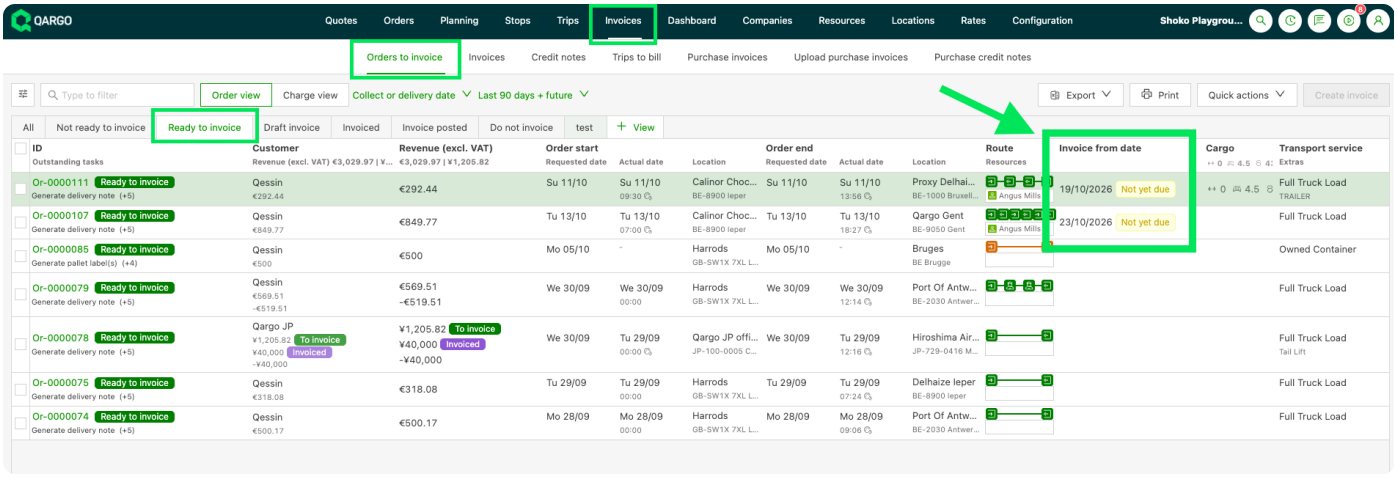
Work with the Invoice from date

See which orders are due

1. Go to **Invoices > Orders to invoice > Ready to invoice**.
2. Switch on the **Invoice from date** column: open **Customize** (icon to the left of the search field), search for **Invoice from date** and switch it on. The column is hidden by default and appears at the end of the list. Drag the column to the desired position if needed.
3. Check the date and the yellow **Not yet due** tag in that column: the order is Ready to invoice, but the Invoice from date has not been reached.
   Filtering with the date type 'Invoice from date' is available (pick a custom range with both a start and an end date, or All dates for the date range).







📚 The Invoice from date is calculated once, at the moment an order becomes Ready to invoice, using the rule in effect at that time. It is not recalculated. So changing a rule only affects orders that become Ready to invoice afterward. Orders already on the Ready to invoice tab keep their date. Orders that became ready before the rule was configured have no date and show no Not yet due tag.

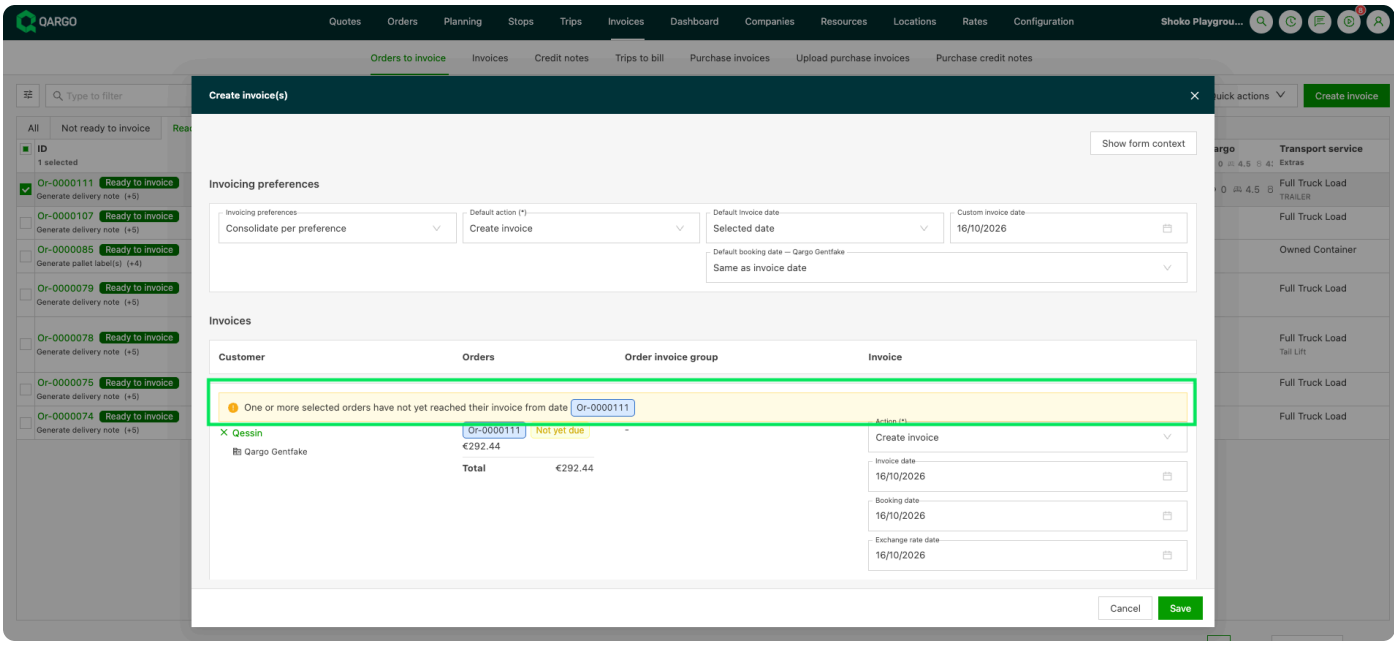
There is no Invoice from date before an order is Ready to invoice, so upcoming billing cannot be previewed.

Create invoices

1. Select the orders and click **Create invoice**.
2. When the selection contains orders that are not yet due, the Create invoice(s) modal shows **a yellow warning**:

   One or more selected orders have not yet reached their invoice from date.

   The affected orders are listed in the warning, and each carries a Not yet due tag in the order list of the modal.
3. Click **Cancel** to go back and adjust the selection, or **Save** to create the invoice anyway.



The warning is for information only. It has no buttons of its own, and invoicing before the Invoice from date remains possible.
When several orders share one invoice, that invoice is due once the last of its orders is due.

Invoices are not created automatically when the date is reached. A user still creates them.

Troubleshooting

Issue	Resolution
No Invoice from date column on the Ready to invoice tab.	The column is hidden by default. Open Customize, search for Invoice from date and switch it on.
An order has no Invoice from date and no Not yet due tag.	The order became Ready to invoice before the rule was configured, or the customer is set to Disabled (override). Such orders can be invoiced at any time without a warning.
Auto create invoice when order is ready to invoice switched off after configuring the rule (or the reverse).	The two settings are mutually exclusive. Switching one on disables the other for that tenant or customer.
The Invoice from date did not change after editing the rule.	The date is fixed when the order becomes Ready to invoice. Only orders that become ready after the change use the new rule.
A customer follows the wrong timing.	Check Companies > Customers > customer > Tasks > Create invoice. Default follows the tenant, while Enabled (override) and Disabled (override) replace it.