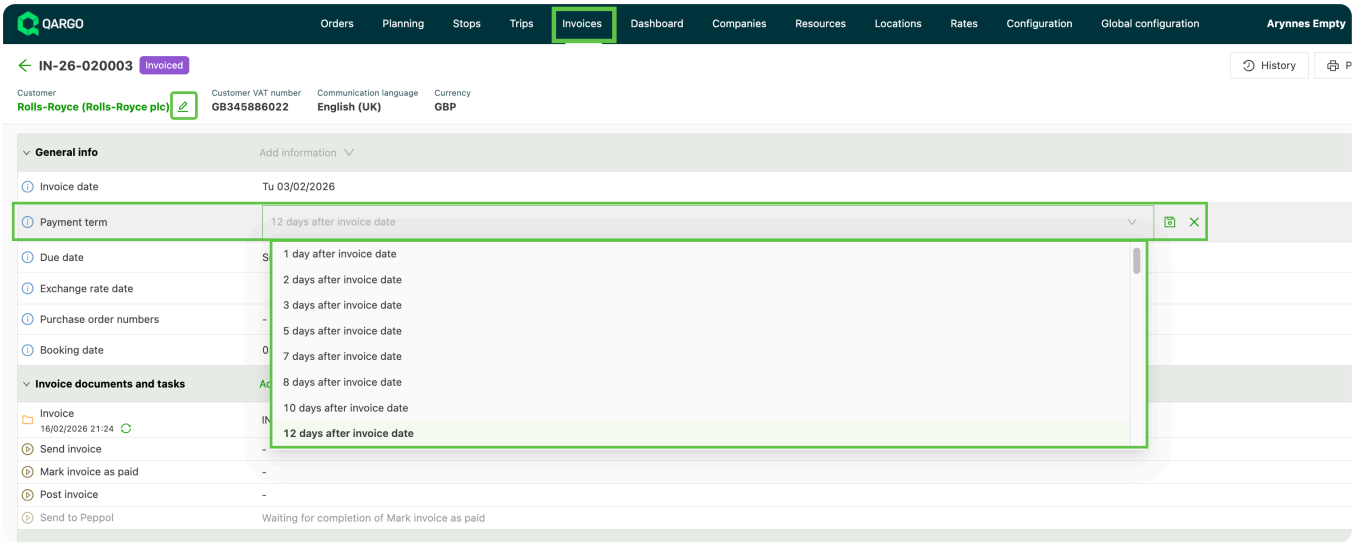
INVOICE - Payment Terms: Automatic Update When Changing Customer

Auto-update invoice payment terms when switching the billing customer, match the new customer's settings while preserving any manual overrides made.

Updated 17 February 2026

Introduction

- **What is this feature?**
  - When changing the customer on an invoice, ***payment term*** automatically updates to match the new customer's configured payment term.
- **Why does this matter?**
  - This update ensures the payment term always reflects the correct customer settings.
- **How does it work?**
  - The update happens automatically in the background. There are no new buttons or screens — simply change the customer on an invoice and the payment term adjusts itself.



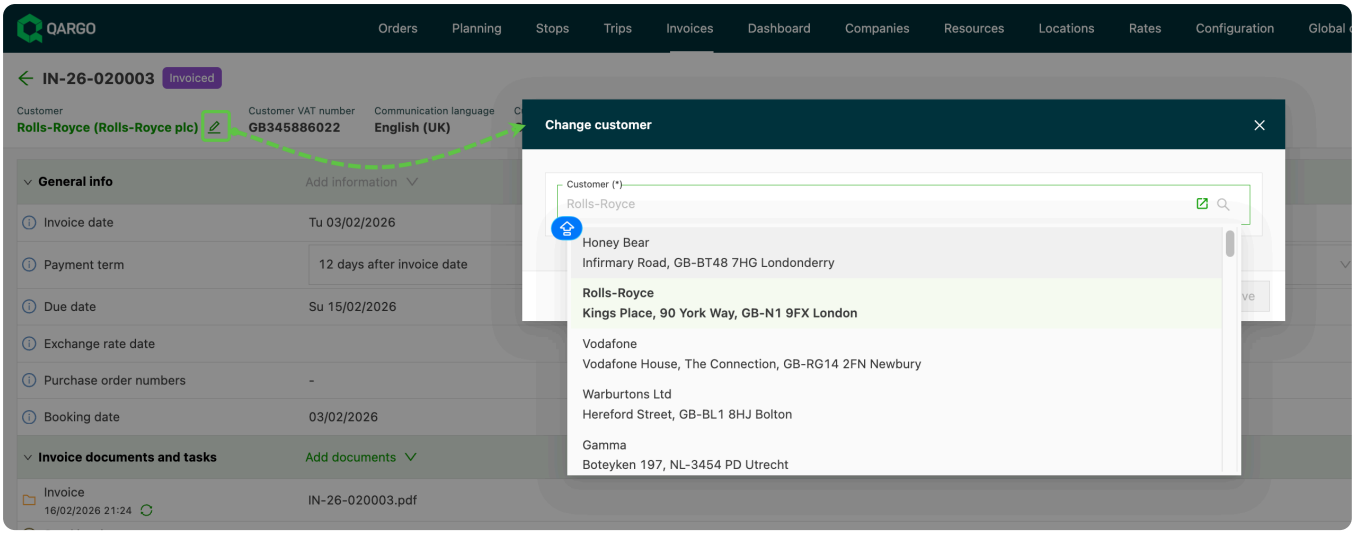
Terminology

Term	Definition
Payment term	The number of days (or specific schedule) a customer has to pay an invoice after it is issued.\
Example: 30 days after invoice date or *End of month + 15 days*.	
Default payment term	The fallback payment term configured at the tenant level, used when a customer has no specific payment term assigned.

How It Works

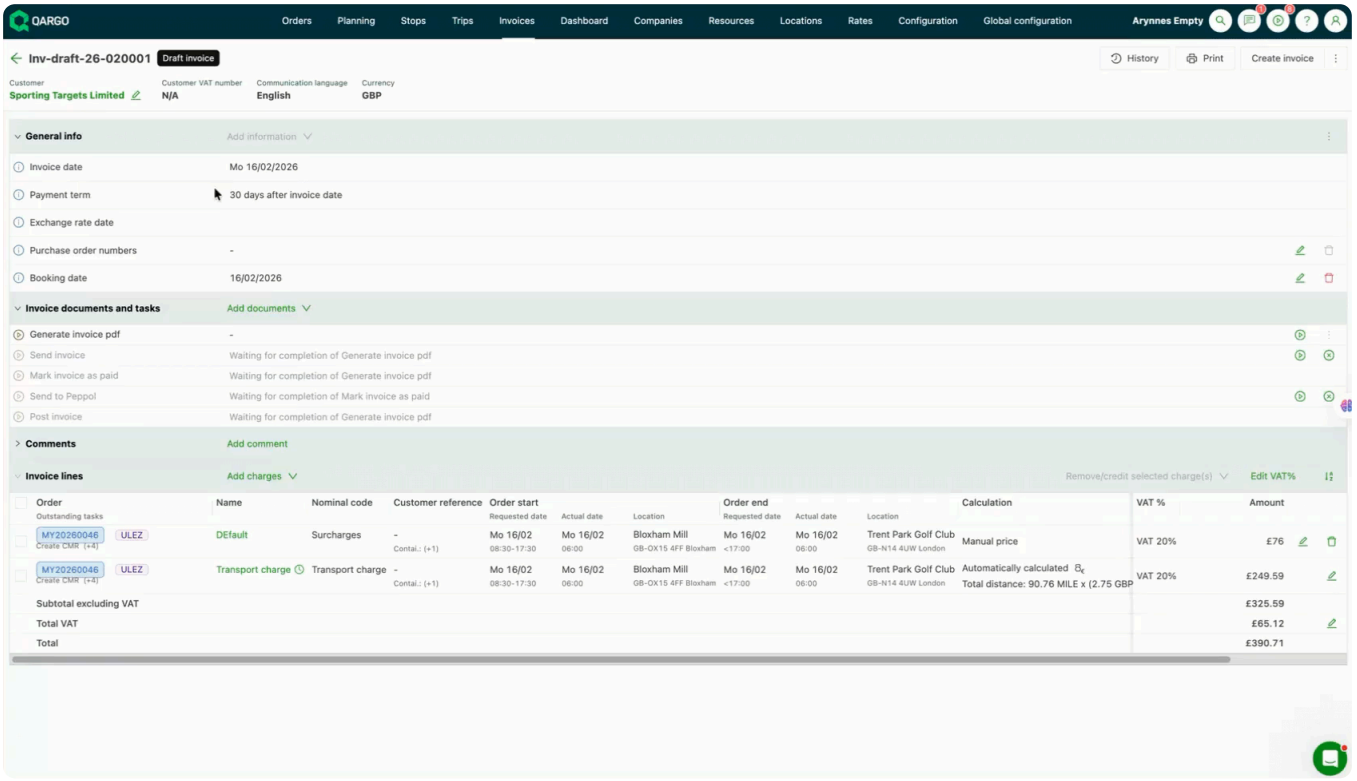
Edit an invoice and change the customer:

1. **NAVIGATE** to the invoice you want to edit.
2. **CLICK** the customer field to change the customer on the invoice.
3. **SELECT** the new customer



Once the new customer is selected, the ***payment term*** on the invoice updates according to these rules:

- If the **new customer has a payment term configured**, that payment term is applied to the invoice.
- If the **new customer does not have a payment term configured**, the *default payment term* (set at the tenant level) is applied.



📚 This update happens entirely in the background. You will not see any additional pop-ups, confirmation dialogs, or new fields. The payment term simply reflects the correct value for the selected customer.

Examples

Example 1: Switching between customers with different payment terms

You create an invoice for **Customer A**, who has a payment term of *60 days after invoice date*. The invoice payment term is set to 60 days. You then change the customer to **Customer B**, who has a payment term of *30 days after invoice date*. The invoice payment term automatically updates to 30 days.

Example 2: New customer has no payment term configured

You change the customer on an invoice to a customer that does not have a specific payment term set. Qargo applies the *default payment term* configured at the tenant level (for example, *30 days after invoice date*).

Troubleshooting

Issue	Solution
Payment term did not update after changing customer	Check whether you previously set the payment term manually on this invoice. Manual overrides are preserved and will not be replaced automatically.
Payment term shows an unexpected value	Verify the payment term configured on the new customer's profile. If none is set, the tenant-level default is applied.
I want to reset to the customer's payment term after a manual override	Clear the payment term field and re-select the customer, or manually set it to match the customer's configured payment term.