COMPANIES - Customer Audit Logs for Company Fields

Track changes to customer status, payment terms, and credit limits through audit logs on customer detail pages, with human-readable descriptions.

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Introduction

- **What is this feature?**
  - Qargo now tracks changes to key customer company fields — customer status, subcontractor status, payment terms, and credit limits — in the user-facing audit logs. Each change is recorded with a descriptive log entry, the user who made the change, and a timestamp.
- **Why was it introduced?**
  - Organisations that vet customers through external systems need visibility into when and by whom customer fields were modified. Previously, audit logs on the customer detail page did not capture changes to these specific fields, making it difficult to trace status approvals, payment term adjustments, or credit limit updates. This feature was introduced to support customer vetting workflows and improve accountability.
- **How does it work?**
  - When a customer company record is updated — whether individually or in bulk — the system automatically detects changes to the tracked fields and creates an audit log entry. These entries appear in the *History* panel on the customer detail page, alongside all other audit log records. Payment term changes display human-readable labels (e.g., "30 days after invoice date") rather than internal codes.

Terminology

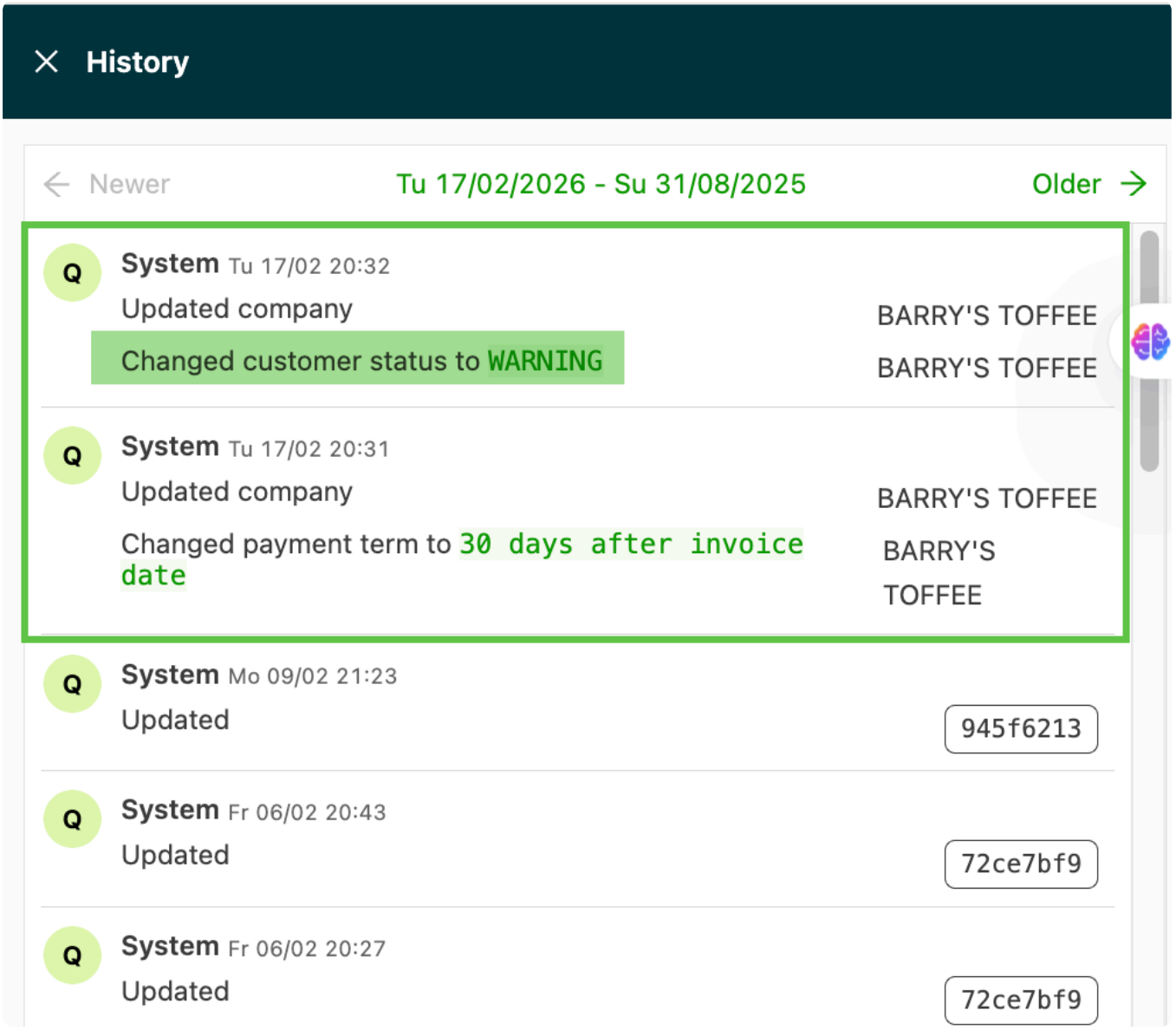
Term	Definition
Audit Log	A chronological record of changes made to an object in Qargo, accessible via the ***History*** panel on detail pages. Each entry shows what changed, who made the change, and when.
Customer Status	The approval status of a customer company (e.g., Pending, Approved, Rejected). Used in vetting workflows to indicate whether a customer has been cleared for business.
Subcontractor Status	The approval status of a company acting as a subcontractor. Tracked separately from customer status.
Payment Term	The agreed-upon payment conditions for a customer, displayed as human-readable labels such as "30 days after invoice date", "End of month", or "Prepaid".
Credit Limit	The maximum outstanding balance permitted for a customer. Changes to this value are now logged for audit purposes.
History Panel	The side panel on detail pages (accessed via the *History* button) that displays all audit log entries for that record.

Tracked Fields

The following company fields are now tracked in the audit logs:

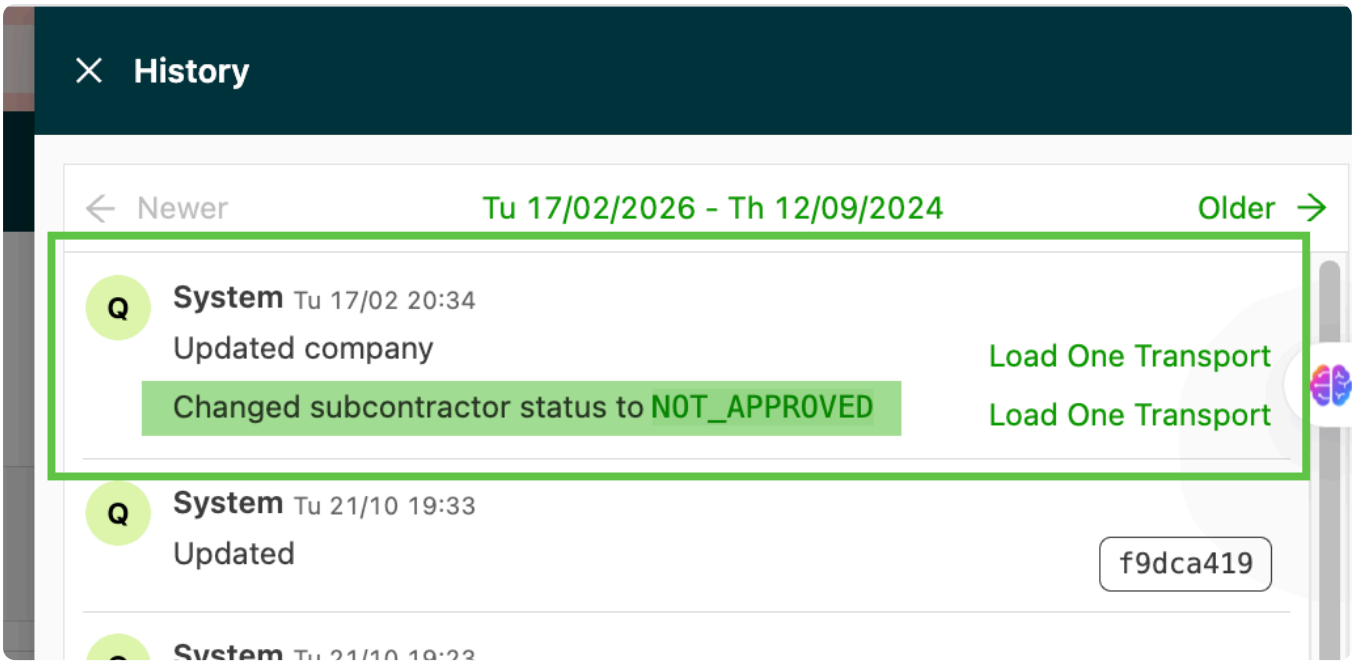
Customer Status

Any change to the customer approval status generates an audit log entry with the description: *"Changed customer status to {status}"*. This is particularly useful for organisations that use the customer status field as part of a vetting or approval workflow.



Subcontractor Status

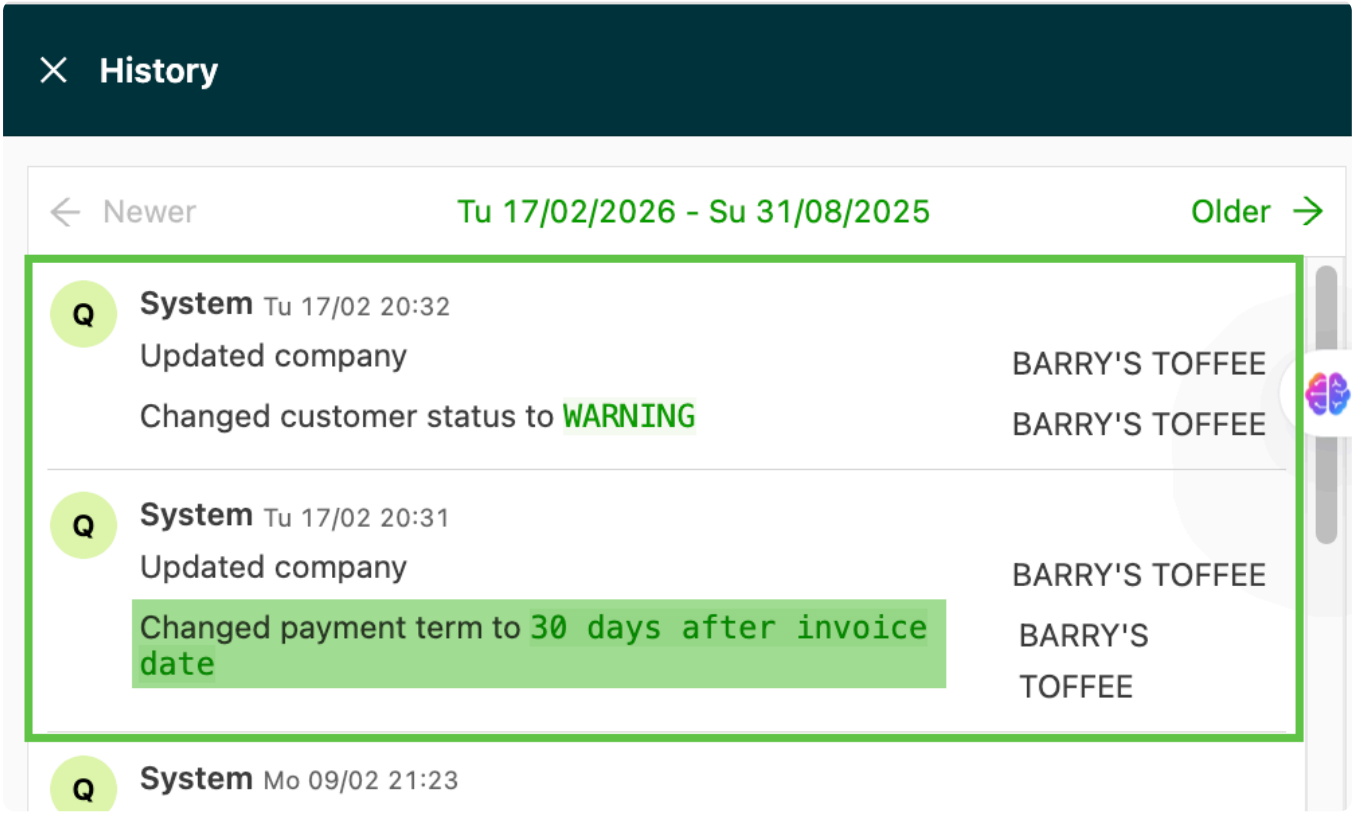
Changes to the subcontractor status field are tracked in the same way, with the description: *"Changed subcontractor status to {status}"*.



Payment Term

When the payment term for a customer is modified, the audit log records the change using a human-readable label. For example, instead of displaying an internal code, the log entry reads: *"Changed payment term to 30 days after invoice date"* or *"Changed payment term to End of month"*.
Common payment term labels include:

- 30 days after invoice date
- End of month
- Prepaid



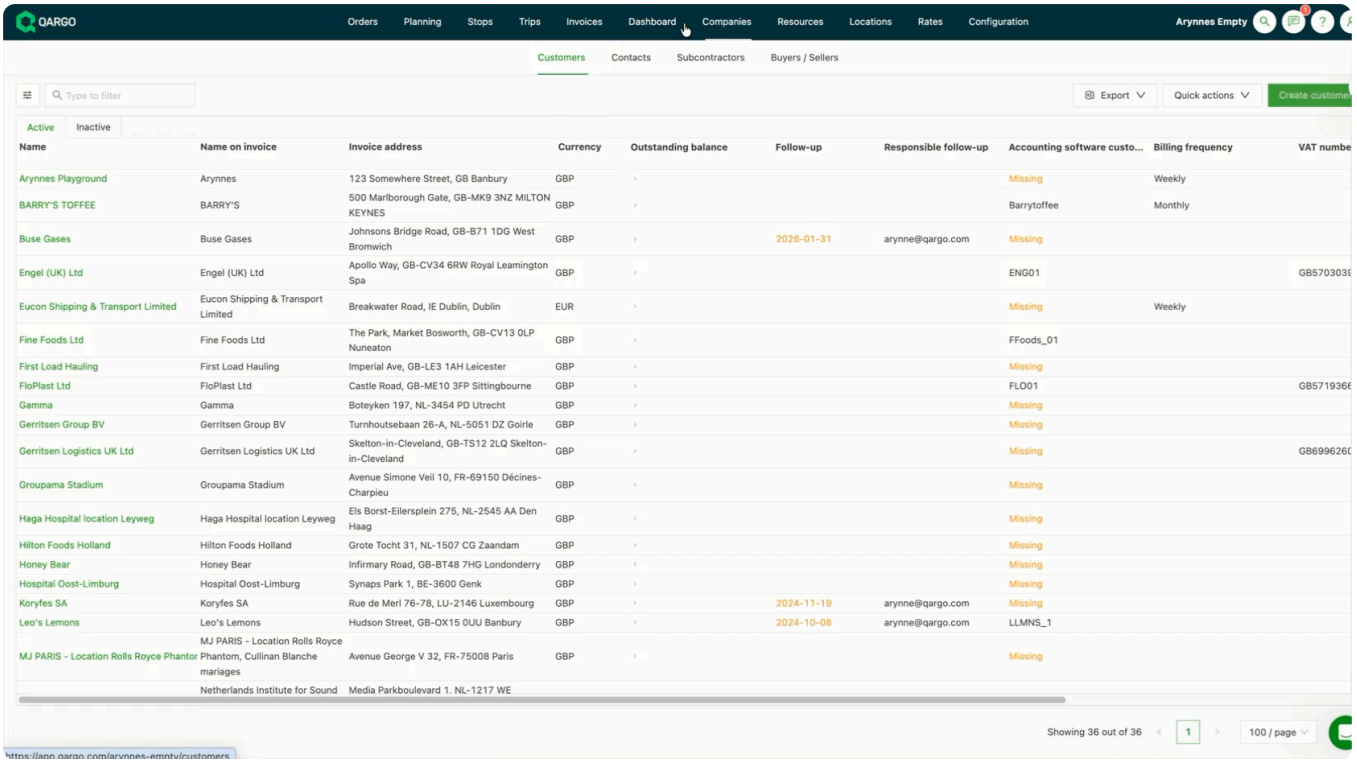
Credit Limit

Changes to the credit limit field produce an audit log entry with the description: *"Changed credit limit to {amount}"*. This allows finance and operations teams to track when credit limits are adjusted and by whom.

Viewing Audit Logs

Accessing the History Panel

1. **NAVIGATE** to the customer detail page for the relevant company.
2. **CLICK** the *History* button to open the audit log panel.
3. **SCROLL** through the entries to find the relevant change. Each entry displays the change description, the user who made the change, and the timestamp.



Reading Audit Log Entries

Each tracked field change appears as an individual entry in the audit log feed. The entry includes:

- A descriptive message (e.g., *"Changed customer status to Approved"*)
- The name of the user who performed the change
- The date and time of the change

If the audit log contains a large number of entries, pagination controls appear at the top of the changes list, along with a date range indicator showing the currently visible period.
[Screenshot: Audit log entries showing customer status and payment term changes]

Limitations

- Only changes made through direct company update actions are tracked. Changes made through other system processes may not appear in the audit logs.
- The audit logs show the new value of the field after the change. The previous value is not explicitly displayed in the log entry.
- Bulk updates to multiple companies are also tracked — each company's changes will appear in its own audit log.

Troubleshooting

Issue	Solution
No audit log entries appear for a customer status change	Confirm that the change was made through the customer detail page or a supported bulk update action. Changes made through other system processes may not be tracked.
Payment term shows an internal code instead of a readable label	Ensure the system is running the latest version. Human-readable labels are applied automatically for all standard payment terms.
Credit limit change is not visible in the audit log	Verify that the credit limit field was actually modified during the update. If the value remained the same, no audit log entry is generated.
Audit logs are slow to load or display an error	Large volumes of audit log entries may cause loading delays. Pagination has been added to handle this — use the navigation buttons at the top of the changes list to browse through entries.
The user shown in the log entry is “System”	Changes performed by Qargo admin users appear under the “System” user label. This is expected behaviour.