FAQ - How to update order, load and invoice numbers

This article looks at how to update the numbers used for quotes and orders, invoices (sales and carrier) and credit memos in the Qargo app.

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Q. How can the numbers generated for [order, load, invoice & credit memo] in a tenant be updated? Can they be customized for the month and year?

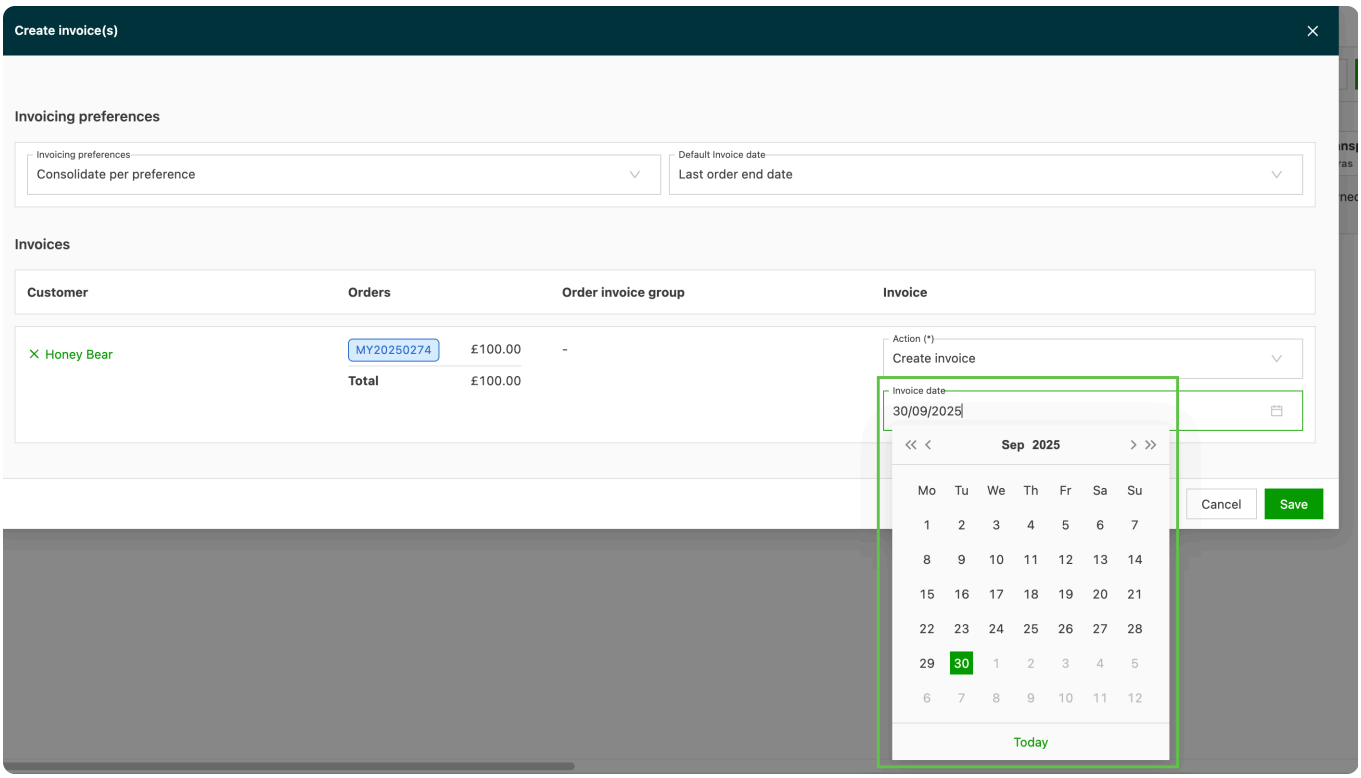
A. The numbers used throughout the Qargo application (orders, invoices, etc.) are set as part of the initial account setup. However, they might need to be modified on a monthly or yearly basis. For instance, the typical naming convention might require the year to be part of the prefix.

Defaults
Each number is made up of a prefix and a number. A prefix (a minimum of 1 character) is required and can be tailored to requirements. The following are created by default:

- Order = Or-
- Quote = Quote-
- Load = Trip-
- Draft invoice = Inv-draft-
- Invoice = Inv-
- Carrier invoice = Bill-
- Credit memo = CN-

For the number component, the length of the number can be modified. The default is 4 digits, so a default order number is Or-0001. These numbers continue to generate sequentially. Each module (order, invoice, etc.) is separate. If 10 orders are generated (Or-0001 to Or-0010) but the invoice for Or-003 is generated first, the invoice is generated with the default Inv-0001.

- Order number sequencing is determined by the *'Order creation date'*.
- Load name/number sequencing is determined by the *'Load creation date'*.
- The invoice and/or credit memo number is determined by the *'Invoice/credit memo date'* entered when creating the invoice.



Example
A load created in 2025 might be named:

```
TRIP-2025-0001
```

Options
Some additional options allow a year, or a year and month, to be included in the generated number. The following can be added to any of the configurations:

- Year: 4 digits, i.e., 2024
- Year: 2 digits, i.e., 24
- YearMonth: 2401
- Year-Month (with additional character): 24-01, 24/01, etc.

When using a date configuration, the numbers will reset each month or year.

Examples:
The order number is configured with *'yearmonth4digits'* and for November 2024 shows as **Or-24110100** (100 order numbers generated). On December 1, the order numbers update to show as **Or-24120001**

The invoice is configured to include *year(4digits)7 numbers* and displays as Inv-20241234567. On January 1 of the following year, the numbers reset to 0 (Inv-20250000001.

While there is a lot of flexibility in creating these numbers, there is no option to fully customize them beyond what is currently available.

Contact the account manager if an update is required.