Invoices: troubleshooting data updates

Troubleshooting and best practice tips for everything related to sales invoices, including credit memos.

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How does Qargo handle customer data updates for invoices and credit memos?

In Qargo, customer data displayed on invoices and credit memos is **determined at the time the document is created**, not at the time of printing or generation. Updates made to customer details after a document is created will not automatically appear on that document, even if it is reprinted or regenerated. Below is a detailed explanation and steps to address related issues.

Key principles of customer data usage in Qargo

1. **Static data at the time of document creation:** - Customer data, such as name and address, is pulled automatically from the customer file at the moment an invoice or credit memo is created. - Any edits to the customer file after creation will not update existing documents. This applies whether a document is reprinted or regenerated later.

Frequently asked issues

Credit memos:

Why does a credit memo show an old customer address?

Credit memos display customer addresses as recorded at the time of their creation. Updating the address in the customer profile after a credit memo is created will have no impact on that specific credit memo, regardless of when it is printed or generated.

Invoices:

Why doesn't an invoice reflect the updated customer name?

For invoices, the customer name is also retrieved at the time of the document's creation. However, Qargo allows users to manually update this data on an existing invoice by retriggering processes:

1. **Ensure the customer file is correct:** Update the customer name in the relevant field of the customer profile.
2. **Retrigger the invoice:** Follow these steps: - Delete the current billing group from the order. - Undo the **"Ready to invoice"** task. - Retrigger the **"Ready to invoice"** task.

This rebuilds the billing group, and the system pulls the updated customer data into the new invoice.

Best practices for user awareness

To ensure data accuracy:

- Always verify customer details in the customer profile before creating invoices and credit memos.
- If data is missing from an invoice, check that the data shows on the order in the correct fields. Invoice templates are mapped to specific fields. Therefore, if the data is not saved in the order, it will not be available on the order.
- If discrepancies are found in existing documents, use the troubleshooting steps outlined for invoices or reissue credit memos if necessary.

Understanding the ‘Charges are outdated’ indicator in Qargo

What is the ‘Charges are outdated’ indicator?

The **‘Charges are outdated’** indicator in Qargo is a system flag displayed on an order when the associated price list (e.g., rates, fuel surcharge, or other rating elements) has been modified after the charges for the order were set. This means that the current charges on the order do not reflect the latest version of the relevant price list. The indicator is not an error or a warning; it is for information only.

When should action be taken?

In most cases, no action is required when the **‘Charges are outdated’** notification appears, especially under the following conditions:

- If the prices for the order were entered manually and do not depend on an active rate card or fuel surcharge.
- If the charges have been verified and are confirmed to be accurate for the specific order.

The indicator’s purpose is to flag potential differences due to updates in the rating system, not to require manual recalculation.

Does ignoring the indicator affect billing?

No, disregarding the **‘Charges are outdated’** indicator will not cause any issues during the billing process. The order can be billed as usual, even if the indicator is displayed. The system ensures that the billing process is unaffected by this informational flag.

Conclusion

The **‘Charges are outdated’** indicator is a helpful tool designed to notify users of changes in the price list that may affect the order. However, its presence does not typically require action and will not interfere with billing. Whether to recalculate charges therefore depends on whether the order relies on an active rating system or the prices were entered manually.