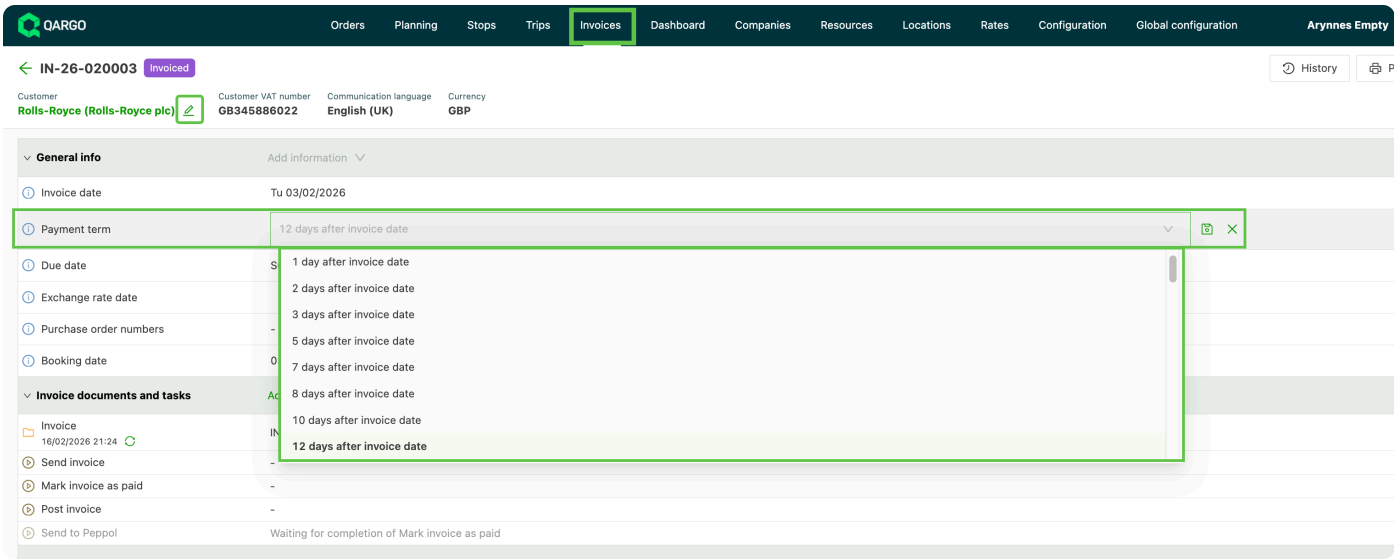
# Invoice – payment terms: automatic update when changing customer

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

Updated February 17, 2026

## Introduction

- **What is this feature?**
  - When the customer on an invoice changes, the ***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; changing the customer on an invoice is enough for the payment term to adjust itself.



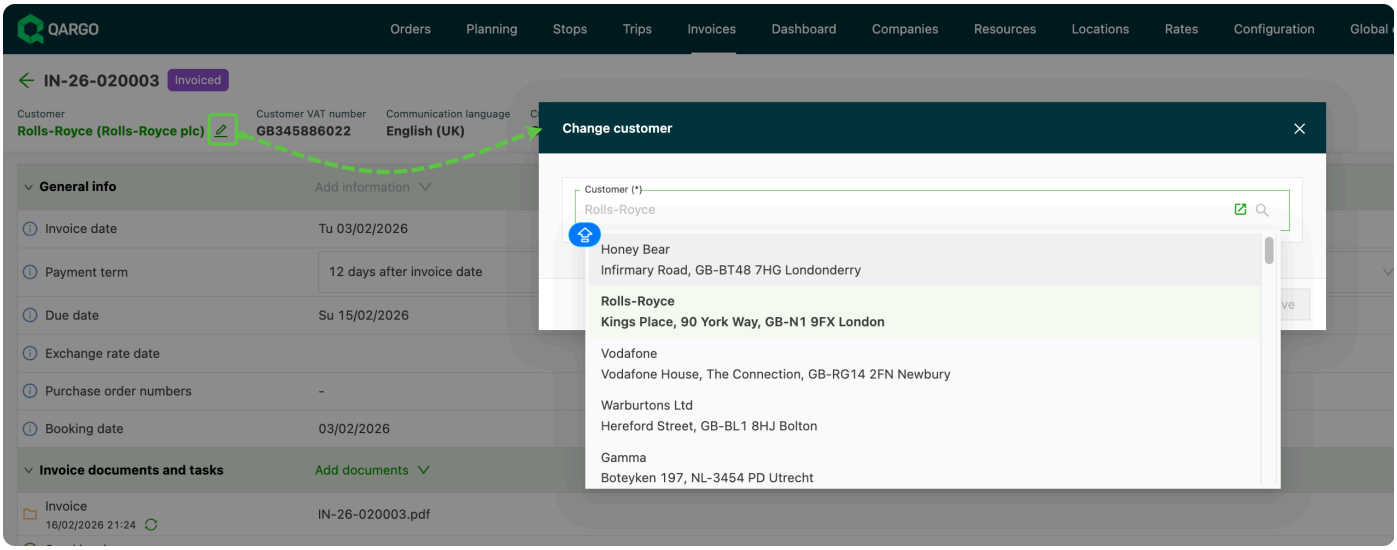

## Terminology

| 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

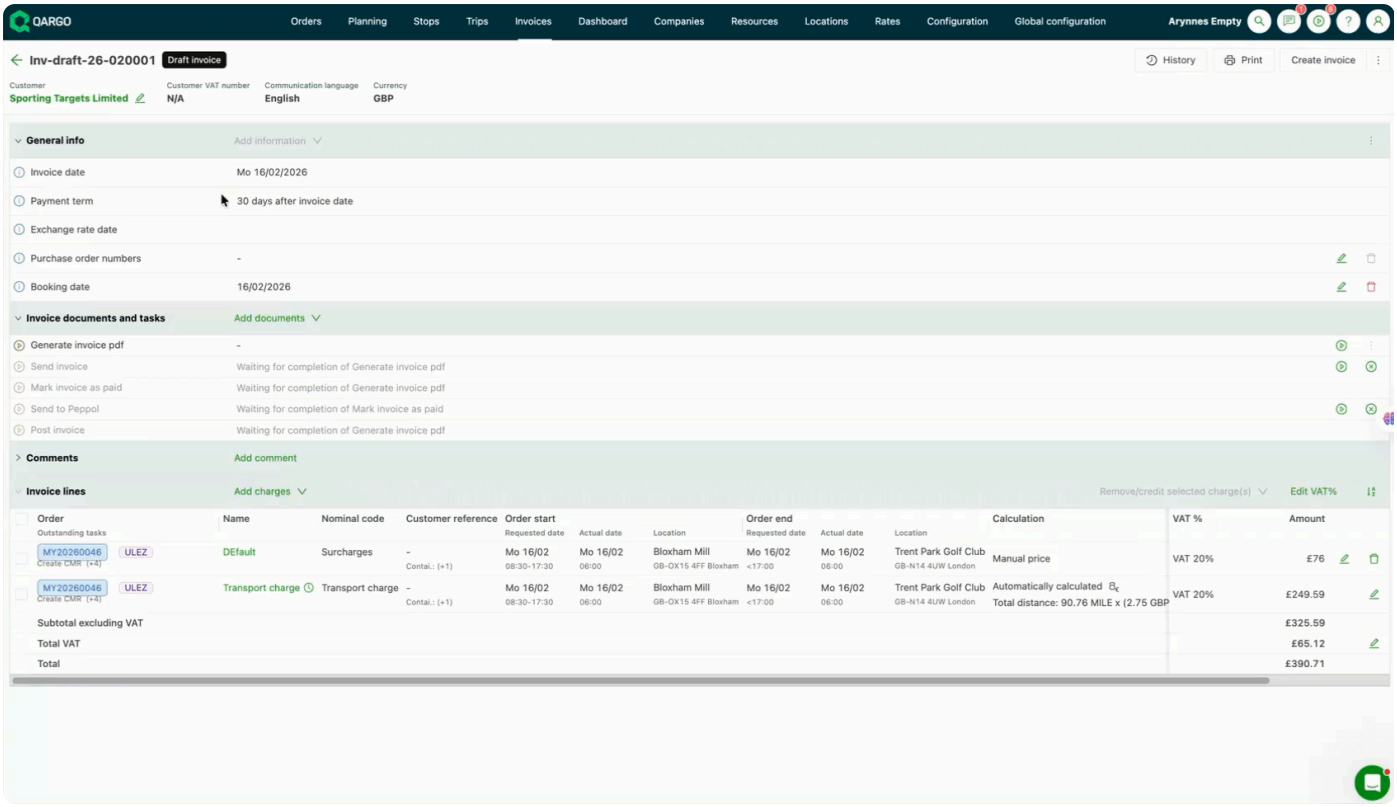
Edit an invoice and change the customer:

1. **Navigate** to the invoice 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. No additional pop-ups, confirmation dialogs, or new fields appear. The payment term simply reflects the correct value for the selected customer.

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## Examples

### Example 1: Switching between customers with different payment terms

An invoice is created for **Customer A**, who has a payment term of *60 days after invoice date*. The invoice payment term is set to 60 days. The customer is then changed 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

The customer on an invoice is changed 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*).

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## Troubleshooting

| Issue | Solution |
|---|---|
| Payment term did not update after changing customer | Check whether the payment term was previously set 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. |
| Resetting 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. |