How to manage and customize terms and conditions in Qargo invoices

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Managing and customizing terms and conditions in Qargo invoices

Qargo provides flexible options for managing and customizing terms and conditions in invoices. This guide walks through the process of including standard terms automatically and of updating non-editable text in invoice templates.

Adding terms and conditions to invoices

To automatically include transport terms and conditions when sending invoices, follow these steps:

1. Open the **Send invoice** task in Qargo.
2. Scroll to the bottom of the task interface.
3. Add the standard terms and conditions as fixed documents. These are included with every invoice sent.

This ensures that terms and conditions are consistently attached to all outgoing invoices, which streamlines the billing process.

Updating non-editable footer text in invoice templates

If the terms and conditions in the invoice footer are not editable, they are likely embedded in the background PDF of the template. To update this text, follow these steps:

1. **Edit the background PDF:** Use any PDF editor to modify the background PDF so that it includes the updated terms and conditions.
2. **Re-upload the updated PDF:** - Navigate to `Configuration > Templates` in Qargo. - Open the relevant template (e.g., Invoice, Credit memo, Pro forma). - Access the PDF configuration settings. - Upload the updated background PDF. The old background is replaced automatically.
3. **Save the template:** Save the updated template to apply the changes.
4. **Repeat for multiple templates:** If different templates are used for various currencies or document versions, repeat the process for each one.

This method keeps terms and conditions accurate and up to date across all invoice templates.

Related topics

- Configuring invoice templates in Qargo
- Automating invoice attachments
- Managing payment terms in Qargo

These steps make it possible to efficiently manage and customize the terms and conditions in Qargo invoices, ensuring compliance and professionalism in the billing process.