De-Caching Invoices

Although invoices are, effectively, just a collection of transactions (see Invoicing Concepts for some background) the underlying data can change. For example, customer specific data (such as the customer's address) could be modified. Shipment details can also change over time. However once you "post" an invoice the created PDF is static. Even if you change the customer's address, when you download a posted invoice it looks exactly as it did when you posted it.

This can be a useful element in transactional accounting as the document is unchanging. However if a customer asks you to re-print their invoice with a different address you would be faced with having to cancel the invoice and produce a new one.

We have now introduced the concept of "de-caching" invoices. When an invoice is de-cached it means we eliminate the PDF and the next time it is downloaded or viewed the PDF must be re-constructed with the latest data.

Invoice De-Cache Command

Invoicing Concepts

Invoicing can be seen as complex and sometimes awkward but understanding the process will certainly help. Operators often expect invoices to be "editable" in as much as one can put anything on them or make arbitrary changes. In fact the invoice is simply a collection of transactions.
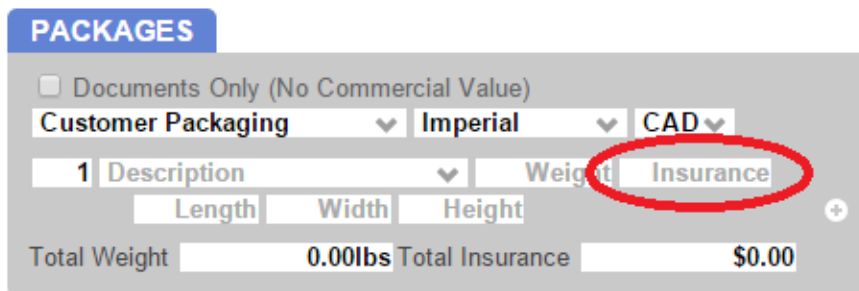
Courier Invoice

440000001 - $40.00
440000002 - $10.00

#	Shipment	Amt	Invoice
#1	440000001	$50.00	330000001
#2	440000002	$30.00	330000001
#3	440000001	$-10.00	330000001
#4	440000002	$-20.00	

Invoice 330000001

440000001 - $40.00
440000002 - $30.00

Invoice Preview

440000002 - $-20.00
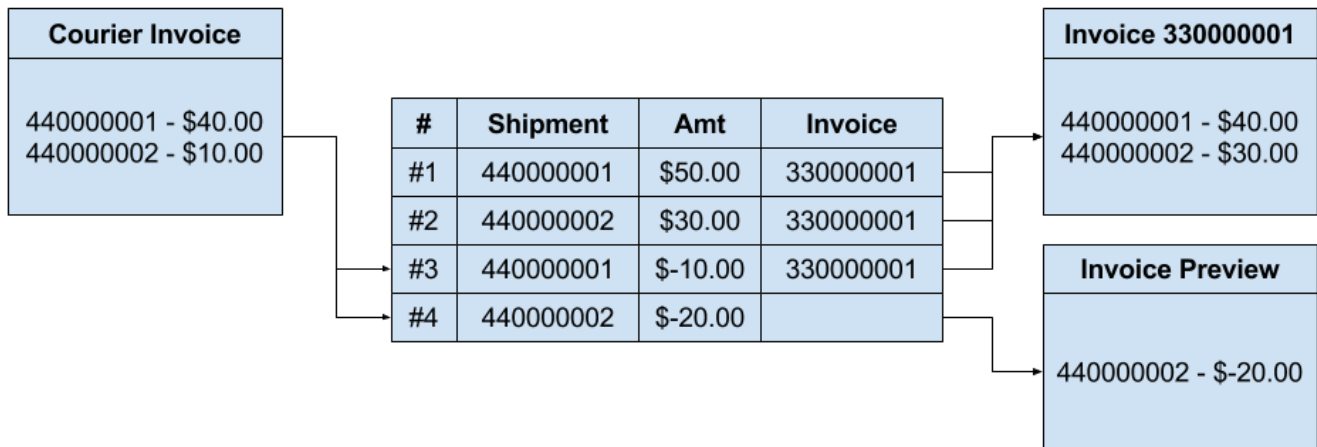
Transaction Invoicing

Transactions are generated during various operations in the system, most often when reconciling carrier invoices. Each shipment typically has many transactions which add up (for each category) to the total chargeable amount. Each transaction can either be un-assigned or assigned to a single invoice. The invoicing system automatically combines transactions for a shipment so that no shipment appears twice on a single invoice. However, a shipment can appear on multiple invoices.

If, for example, you edit the price of a shipment that has already been invoiced then the un-assigned transactions generated by the system (after editing) will represent the difference from the previous total bill. Imagine a shipment that has been invoiced for $50 but you change the price to $40. Internally an un-assigned -$10 transaction has been created. If you preview a new invoice for that customer it will contain this -$10 credit. However, if you cancel the original invoice (unassigning the previous transactions) the new preview will contain simply the updated $40 charge.

Insurance Provisions

Many carriers provide an optional insurance service and customers can take advantage of this service by specifying the value of the items in the package insurance field.

Package Insurance Field

This information is passed to the carrier during quoting and if insurance is available the price will be included in the quote.

Carrier insurance is typically expensive compared to third-party insurance and account holders often receive no discounts. This provides an opportunity to benefit (and profit) from third-party services.

Insurance Provisions

Multiple Insurance Provisions can be created representing multiple third-party insurance providers or differing configurations/pricing schedules for the same provider. The provision defines properties such as the limits, minimum charge, currency and the premium rates.

Insurance Provision Configuration

Each customer can be assigned to a specific Insurance Provision or none (i.e. insurance is provided by the carrier if available). Once assigned to a provision, all requests for insurance will be processed using the configuration defined for the insurance provision.

Each customer can also have an insurance premium value. If empty or zero, the premium calculated in the provision is used. If the number is positive, this is the premium (e.g. "2" is 2% of the insurance value). If negative, this is a percentage discount on the calculated premium. Regardless of this value, if the insurance provision has a minimum fee this will override the customer specific premium.

Insurance Category

When a shipment is being prepared and the insurance requested changes from zero for a customer assigned to a provision, the "Insurance" section will appear.

In this section the customer is asked to select an Insurance Category.

Selecting Insurance Category

This category is used to provide the customer with details about the insurance. It does not affect the premium. However, you may configure some categories as being "Disallowed" and with this method you can prevent the customer from attempting to insure certain categories of goods.

Insurance Category Disallowed

The notice is a good place to indicate restrictions and deductibles.

Insurance Category Customer Notice

Quotes

When the carrier quotes are produced a line item is added based on the insurance provision. Note that this fee is not included in the cost portion.

Insurance Charge in Quote

Resellers

At this time it is not possible to grant a different insurance premium to resellers.