Troubleshooting Errors from Billing or Payment Terms

Last Modified on 07/21/2022 12:17 pm EDT

> This guide explains how to correct errors for billing and/or payment terms. It is intended for advanced users.

aACE validates the billing and payment terms that users enter for companies, orders, invoices, purchase orders, and purchases. This feature prevents problems by encouraging users to select valid options from the provided drop-down list.

Errors from Billing or Payment Terms

Billing and payment terms can also be typed manually or be imported with other record data. These methods may result in terms different from the valid list. Likewise, if your system administrator updates the valid list of terms in Accounting Preferences (https://aace6.knowledgeowl.com/help/billing-payment-terms-preferences), previously correct terms may trigger the data validation.

Records with billing or payment terms that do *not* match the valid list will return an error message. This validation helps users avoid both saving company records with faulty data and opening faulty transaction records.

For example, suppose the valid list includes the billing term "Due *upon* Receipt". If a user tries to enter a billing term of "Due *on* Receipt", the validation will trigger.

If you receive error messages about the billing or payment terms, you can resolve the issue in several ways.

Correcting an Order Record

The billing terms for orders are automatically pulled from the bill-to company specified on the order. If you receive an error message that the Billing Terms are invalid, select a valid option from the drop-down list.

Correcting a Purchase Order or Purchase Record

The payment terms for POs and purchases are automatically pulled from the vendor

company specified on the record. If you receive an error message that the Payment Terms are invalid, select a valid option from the drop-down list.
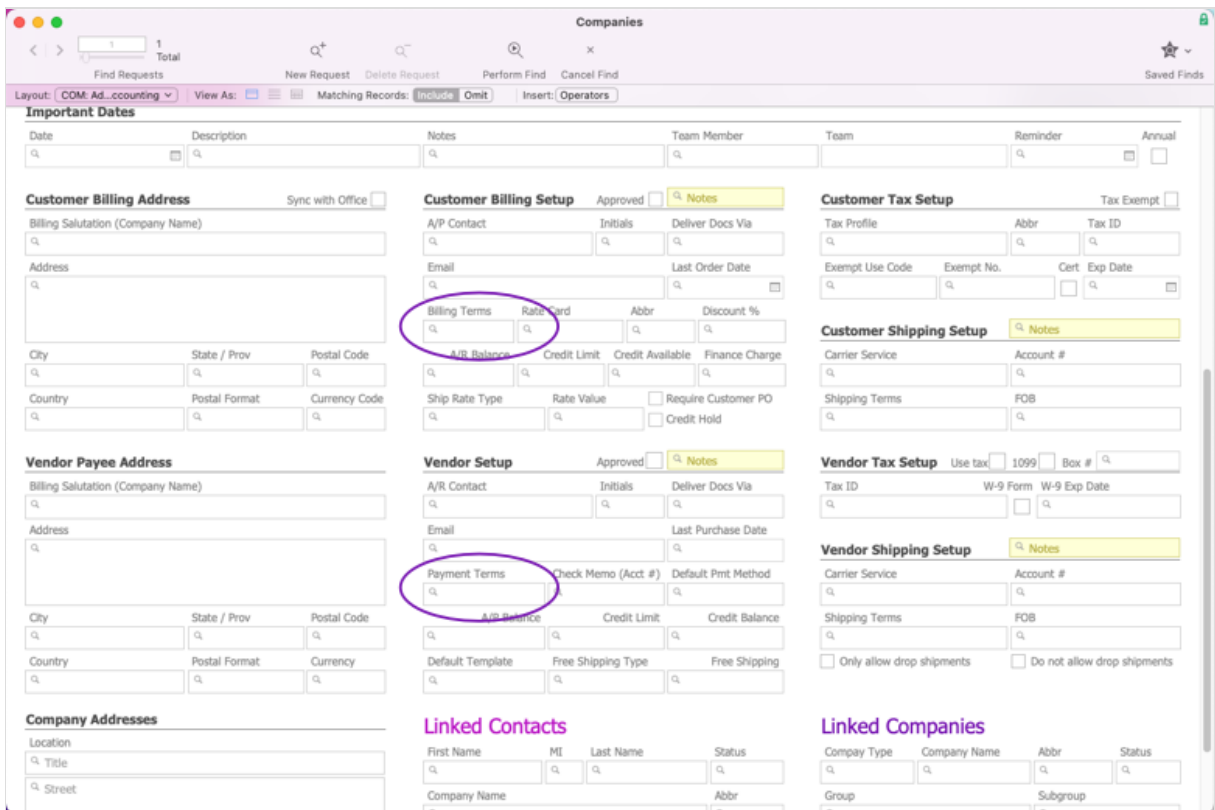
Correcting a Company Record

The billing and payment terms specified in the company record set the default values for new transaction records. You can change a specific company's terms by navigating to the company record's Finance & Accounting tab, then clicking Edit:

- Billing Terms — In the Customer Setup section, select a new option from the drop-down list.
- Payment Terms — In the Vendor Setup section, select a new option from the drop-down list.

Correcting Multiple Company Records

It may be more efficient to update company billing/payment terms in a batch:

1. Navigate from **Main Menu** > **CRM & Sales** > **Companies**.
2. Open the [Advanced Search](https://aace6.knowledgeowl.com/help/understanding-advanced-search-functionality) (https://aace6.knowledgeowl.com/help/understanding-advanced-search-functionality).
3. Scroll down and enter the Billing Terms or Payment Terms that need to be updated.

4. Click the **Perform Find** button (🔍) at the top.

5. At the Companies list view again, review the companies that were found and remove any that should not be updated.
6. Click **Admin Actions** (⚙) > **Update Payment/Billing Terms for List**.
7. At the dialog, enter the new payment/billing terms value and click **Update**.

Correcting the List of Billing and Payment Terms

Your system administrator can [change the list of Billing and Payment Terms](https://aace6.knowledgeowl.com/help/billing-payment-terms-preferences)

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