# Dispute Invoices

Is this feature disabled?

[🔧 Contact To Enable] *This feature needs to be switched on for your site by Commerce Vision. Your site also needs to be on 4.31+.*

Overview

The Dispute Invoices feature allows Users to query outstanding invoices in their Customer account. When a dispute is lodged, the invoice will be flagged as 'being in dispute'. This provides an easy trackable way for your Customer Users to raise an issue against an unpaid invoice .

A lodged dispute is entirely managed by Customer Users. They can update the dispute details, or set it to 'resolved' when appropriate. Lodging a dispute or updating its status will trigger notification emails to be sent to a nominated team member for actioning.

Step-by-step guide

1. Enable and configure Dispute Invoices

1. In the CMS, go to **Settings Feature Management System**.

2. Click **Configure**. (**NOTE -** The **Dispute Invoices** toggle must be enabled for the Configure button to display. If the feature is not enabled, please contact Commerce Vision.)
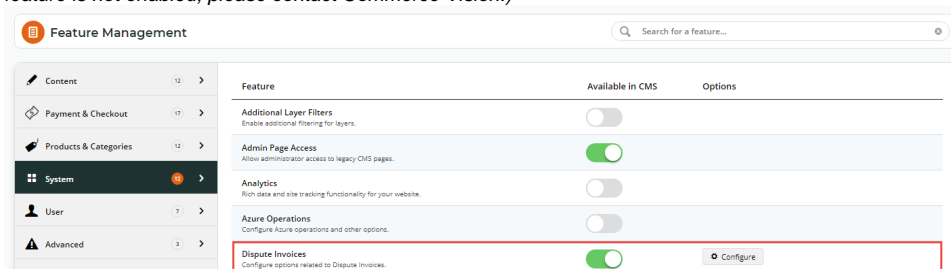
3. In the **Dispute Invoices Feature Settings** screen, either toggle ON the global setting for **Allow Disputed Invoices** or use the Overrides feature to restrict this function to specific Customers, Roles or Users.
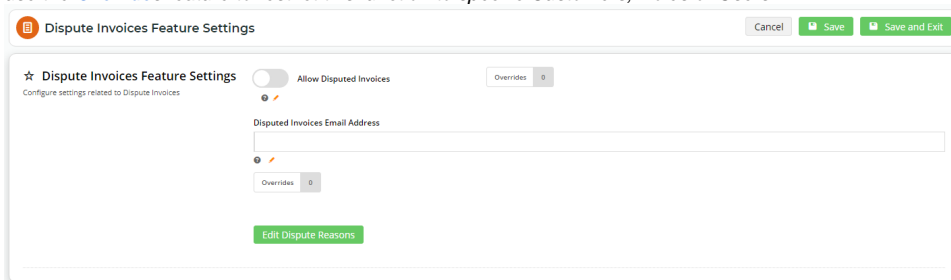
4. In **Disputed Invoices Email Address**, enter the email address of the team member nominated to receive alerts when a User lodges, updates or resolves a dispute. The Overrides feature can be used if you want different email addresses to be set against specific Customers, Users or Roles.

5. Click the **Edit Dispute Reasons** button to add or edit the list of dispute reasons a User can select from.

6. To add a reason, click the **Add New Dispute Invoice Reason** button.

7. If this reason is to be available to Users immediately after it is saved, make sure the **Is Active** toggle is ON. To turn off the reason temporarily, toggle it OFF. **NOTE -** At least one reason must be available for Users to select when they lodge a dispute.

8. Enter a **Code** for the reason. This code is not displayed to the User.

9. Enter a **Description** of the reason. This description is displayed to the User as a selectable reason.

10. Click **Save**.

11. If required, add more reasons by performing Steps 6-10 for each one. **TIP -** Reasons can only be deleted if not used for a current disputed invoice.

The Dispute Invoices feature is now active on your site!

2. Edit Disputed Invoices Email template (optional)

Notification emails are sent to the Disputed Invoices Email Address for the following dispute events:

- new dispute - when the User first lodges the dispute
- updated dispute - when the User edits the dispute details
- resolved dispute - when the User marks the dispute as closed.

New Dispute	Updated Dispute

Email content is contained in the **Disputed Invoice** email template. You can edit some of the default content in the **Disputed Invoice Email Widget**. Note that the following is automatically included in disputed invoice emails:

- Date / time
- User ID
- User Name
- Customer Code
- Invoice Number
- Dispute Reason
- Dispute Text
- Dispute Status

To edit the widget:

1. In CMS, go to **Content Emails**.

2. Search for the template: **Disputed Invoice**.

3. Find the **Disputed Invoice Email Widget** and edit it as required.

   ⓘ **Placeholders in Email Subjects**

   Placeholders added in the email Subject line will populate with the following: {0} - Customer Code; {1} - Invoice Number.

   Example:

   UPDATED Dispute on Customer Code: ABC for Invoice: 10001016

New Dispute Email Subject: *Content for the New Dispute email's Subject.*
Updated Dispute Email Subject: *Content for the Updated Dispute email's Subject*
Resolved Dispute Email Subject: *Content for the Resolved Dispute email's Subject*
New Dispute Email Text: *First line(s) of the New Dispute email*
Updated Dispute Email Text: *First line(s) of the Updated Dispute email*
Resolved Dispute Email Text: *First line(s) of the Resolved Dispute email*

User experience

A User can access the Dispute Invoice feature via **Dashboard Account Enquiry**.

1. *The Customer User logins to your website and selects **Dashboard Account Enquiry**.*

2. *In the **Account Statement Enquiry** screen, for **Enquiry Type**, select '**Outstanding Invoices'**.*

   ⌂ Home › Dashboard › Account Enquiry

   ### 🗎 Account Statement Enquiry

   View and download your account statements.

   Enquiry Type:

   | Outstanding Invoices | ▼ |

   🌐 Display   ⬇ Download

3. *Click **Display**. Any outstanding invoices are displayed.*

4. *Click the **Dispute Invoice** button displayed in the 'Type' column of each invoice.*

Transaction Date	Invoice Date	Type	Invoice #	Details
14-Sep-2015	14-Sep-2015	CR Dispute Invoice	10001016	INTERNET REC62-P

5. *In the **Dispute Invoice** popup, the User selects a **Reason** for the dispute, enters a note about the claim if needed, then clicks **Save**.*

   ### Dispute Invoice   ✕

   Reason: *

   | Price | ▼ |

   Notes: *

   | unit price incorrect |

   ☐ Set To Resolved

   ⊗ Cancel   ✓ Save

6. *The invoice now has a red star tooltip next to the Invoice Number column and an **Edit Dispute** button is displayed.*

Transaction Date	Invoice Date	Type	Invoice #
14-Sep-2015	14-Sep-2015	CR Edit Dispute	Invoice is Disputed 10001016 ★

7. *By clicking **Edit Dispute**, the User can return to the 'Dispute Invoice' popup to edit the dispute or **Set to Resolved** to end it.*

8. When a dispute is resolved, the star tooltip turns green and the **Edit Dispute** button returns to the pre-dispute status: 'Dispute Invoice'. (**NOTE -** *if the User adds an additional dispute, it will be recorded as an update of the original dispute and an updated dispute email is sent*).

Transaction Date	Invoice Date	Type	Invoice #
			Invoice is Resolved
14-Sep-2015	14-Sep-2015	CR Dispute Invoice	10001016 ★

Additional Information

Minimum Version Requirements	4.31
Prerequisites	none
Self Configurable	Yes
Business Function	Accounts
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- Web Category and Product maintenance in PRONTO
- Preferred Delivery Date
- How Order Integration Works
- Standing Orders Settings
- Order Templates