

#8614 new defect

Opened 9 months ago

Last modified 8 months ago

last_recurring_date field isn't updated when modifying recurring frequency

Reported by:	ghilt	Owned by:	developer
Priority:	major	Milestone:	6.3.0
Component:	vtigercrm	Version:	6.3.0
Severity:	Medium	Keywords:	recurring billing
Cc:			

Description

If you change the recurring frequency of an order,), the last_recurring_date field from vtiger_invoice_recurring_info mysql table isn't updated accordingly.

For example, if on the 2015-08-13 you set a monthly recurring, the first invoice will be automatically created on the 2015-09-13, and last_recurring_date will be set to that date. Then, if you update the frequency to daily, last_recurring_date will still be set to 2015-09-13 so you won't have any daily invoice before this date.

Change History (8)

Changed 9 months ago by ghilt comment:1

- **Milestone** changed from *Unassigned* to *6.3.0*

Changed 9 months ago by joebordos comment:2

I understand that you are saying that the recurring MONTHLY invoice was correctly created on 2015-09-13, then AFTER that date, for example on 2015-09-20 you change the frequency to DAILY and you expect to have DAILY invoices BEFORE 2015-09-13. If that is the case I don't think that would be correct, you change the frequency after the invoice was created, you shouldn't get new invoices before that date, you should start getting daily invoices from the day you change the frequency.

In fact what IS wrong and maybe that is what you were trying to say, is that when you change the frequency to a lower one, since the last recurring date is not updated you will start getting invoices from that last date and not from the day you change the frequency. For example:

In the example above, I had a monthly frequency that created an invoice on 2015-09-13. On 2015-09-20 my client asks me to change the frequency. Logically, I should edit the current SalesOrder? and stop that recurrence, close this SO and create a new SO with the new settings, but, instead of doing that I decide to edit the SalesOrder? and change all the details of the new invoices and the frequency to daily. In that case, what will happen is that I will start getting daily invoices from 2015-09-13 and not 2015-09-20, which is what I would expect.

I guess we could detect if the frequency is lower than the current one (bigger ones have no issues) and change the last recurring date in those cases but I think it makes a lot more business sense to close the SalesOrder? and create a new one to reflect the current relation with your client and not lose the historical situation you had before.

HTH

Changed 8 months ago by ghilt

comment:3

No, you misunderstood me, sorry if i wasn't clear enough.

If I change the frequenc to DAILY on the 2015-09-20, i'm expecting invoice to be created each day starting 2015-09-20 or 2015-09-21, but it isn't the case.

With the current way vtiger is working, i'll get dily invoice starting 2015-10-13 since that will be the value of the last_recurring_date field.

Changed 8 months ago by ghilt

comment:4

Closing the SalesOrder? is a possibility, but in that case, updating the frequency of an existing SalesOrder? shouldn't be allowed.

Changed 8 months ago by joebordres

comment:5

This is the way it is programmed. It understands that it has to pickup where it left off and start creating invoices daily.

Changed 8 months ago by ghilt

comment:6

It's a bit misleading since last_recurring_date isn't visible anywhere on the crm. I understand the process but users are lost.

They see they can change the frequency and don't understand why it doesn't create new invoice immediately after.

Changed 8 months ago by ghilt

comment:7

Anyway, i was just stating was i thought was a bug. I don't mind if it stays that way.

Changed 8 months ago by joebordres

comment:8

I will keep your comments in mind and implement some information/process to make this clear in coreBOS

Thanks