

MULTI-SITE

MAY 13, 2026

Filtered invoice exports are dropping VAT/tax IDs

Billing Engineering should treat filtered invoice export schema parity as this week's first operating decision: patch or roll back the filtered export path, then verify VAT/tax ID presence on April filtered exports and count any remaining manual reconciliation rows. This matters because 2 of 4 accepted comments report the same Billing Portal regression after the new billing release, including one customer reconciling 43 rows by hand. Admin Console has two separate one-off signals: SSO finance users may be landing in the wrong role, while audit log search speed is a behavior worth preserving with a simple response-time guardrail.

SUBMISSIONS

4

submissions

SIGNAL RATE

57%

3 filtered

FINDINGS

3

1 red · 1 yellow · 1 green

IDEAS

3

Ranked by impact

EXECUTIVE BRIEF

RED PRIORITY

WHAT IS HAPPENING

Filtered invoice exports are dropping VAT/tax IDs

Two Billing Portal reports describe the same failure mode: filtered invoice exports omit tax/VAT ID fields, while unfiltered exports still contain them. One report ties the defect to April invoice filtering and says it created 43 manual reconciliation rows; the other ties it to the new billing release and narrows the likely path to filtered exports.

WHY IT MATTERS

Finance users may file inaccurate or incomplete reconciliation work, and support/account teams may spend time explaining why filtered exports do not match unfiltered exports. The risk is concentrated and actionable because both reports point to the filtered export path.

DO THIS WEEK

Have Billing Engineering run a schema parity check between filtered and unfiltered invoice exports today, patch or roll back the filtered export path before the next billing batch, then measure whether VAT/tax ID appears on April filtered exports and whether manual reconciliation rows fall to zero.

EVIDENCE

2 of 4 accepted submissions (50%) across Billing Portal; confidence 82%.

MEASURE NEXT

Have Billing Engineering run a schema parity check between filtered and unfiltered invoice exports today, patch or roll back the filtered export path before the next billing batch, then measure whether VAT/tax ID appears on April filtered exports and whether manual reconciliation rows fall to zero.

VOICE OF THE CUSTOMER

“The CSV export drops the tax ID column whenever filtering to April invoices, requiring manual reconciliation of 43 rows.”

On **Filtered invoice exports are dropping VAT/tax IDs** — 2 submissions · 50% of accepted feedback · confidence 82%

R

RED · 1 FINDING

Fix this week. Customers are leaving.**01 Filtered invoice exports are dropping VAT/tax IDs**

Two Billing Portal reports describe the same failure mode: filtered invoice exports omit tax/VAT ID fields, while unfiltered exports still contain them. One report ties the defect to April invoice filtering and says it created 43 manual reconciliation rows; the other ties it to the new billing release and narrows the likely path to filtered exports.

MENTIONS

SHARE

CONFIDENCE

TREND

2**50%****82%****new**

IMPACT

Finance users may file inaccurate or incomplete reconciliation work, and support/account teams may spend time explaining why filtered exports do not match unfiltered exports. The risk is concentrated and actionable because both reports point to the filtered export path.

NEXT ACTION

Have Billing Engineering run a schema parity check between filtered and unfiltered invoice exports today, patch or roll back the filtered export path before the next billing batch, then measure whether VAT/tax ID appears on April filtered exports and whether manual reconciliation rows fall to zero.

“The CSV export drops the tax ID column whenever filtering to April invoices, requiring manual reconciliation of 43 rows.”

“Filtered invoice exports are missing VAT IDs after the new billing release. The unfiltered export has them.”

Y

YELLOW · 1 FINDING

Watch closely. Friction is mounting.

01 SSO-invited finance users may receive a role that blocks invoice downloads

One Admin Console report says finance users invited through SSO land as viewers and cannot download invoices until an owner changes the role. This is not yet a repeated theme, but it blocks a core finance workflow and creates owner intervention.

MENTIONS

1

SHARE

25%

CONFIDENCE

65%

TREND

new

IMPACT

Finance teams can be blocked from invoice downloads after SSO invite, and owners are forced into manual role correction. If the mapping is intentional, the product needs clearer role selection during invite; if not, it is a permission regression.

NEXT ACTION

Have Admin Console Engineering inspect the SSO default role mapping for finance-user invites by Thursday, test one fresh finance invite in staging, and measure whether the invited user can download invoices without owner role changes.

“When I invite a finance user through SSO, they land as viewer and cannot download invoices until an owner changes the role manually.”

G

GREEN · 1 FINDING

Keep doing this. It is working.

01

Audit log search speed is helping users complete admin checks quickly

One Admin Console report says audit log search is much faster this month and allowed the user to find a user change in under a minute. This is a single positive signal, not yet a broad pattern, but it identifies a behavior worth preserving: fast lookup for user-change investigations.

MENTIONS

SHARE

CONFIDENCE

TREND

1**25%****65%****new**

IMPACT

Admins can investigate user changes without long waits, which reduces friction during permission reviews and account audits.

NEXT ACTION

Have the Admin Console team add a weekly saved query check for user-change audit searches by Friday, then track p95 search time and confirm it stays under one minute for the same query class.

“Audit log search is much faster this month and helped me find a user change in under a minute.”



What to try next

Add a filtered-vs-unfiltered invoice export contract test

The repeated Billing Portal reports both point to filtered exports losing VAT/tax ID fields while unfiltered exports retain them. A small contract test can catch schema drift before release.

EXPECTED IMPACT

Prevents another finance export release where filtered files lack required tax identifiers.

EFFORT LOW

Run a one-day SSO finance invite role audit

A single Admin Console report shows finance users invited through SSO landing as viewers, which blocks invoice downloads until an owner intervenes.

EXPECTED IMPACT

Confirms whether this is a mapping defect or expected permission behavior, and gives support a clear answer for affected accounts.

EFFORT MEDIUM

Create an audit-log speed canary for user-change searches

The positive audit log comment names a concrete workflow: finding a user change in under a minute. That can become a lightweight guardrail.

EXPECTED IMPACT

Keeps a valued admin workflow visible after future Admin Console releases.

EFFORT LOW

DISCLAIMER

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Gistback turns private feedback into an evidence-backed operating brief. Use this page as the interpretation guardrail for the findings and ideas above.

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