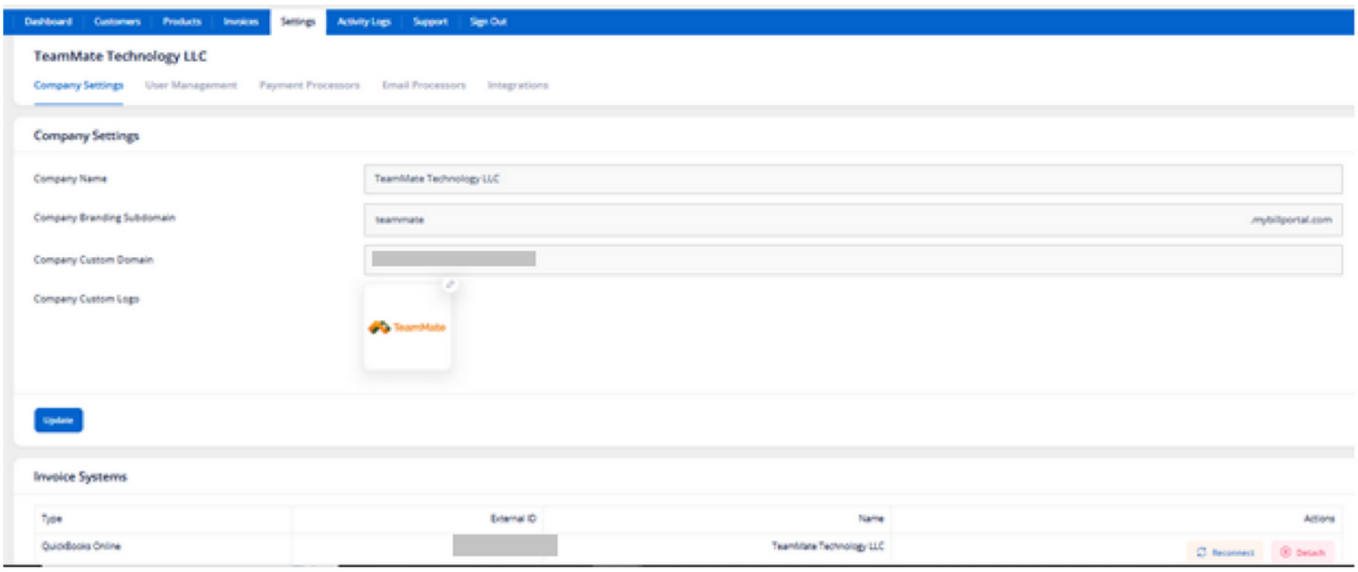
Settings

The Settings module manages organization-wide system configurations.

Company Settings

1. Click Settings.
2. Open Company Settings.
3. Update:

- Company Name
- Branding Subdomain
- Custom Domain
- Company Logo
- Click Update.



Functions

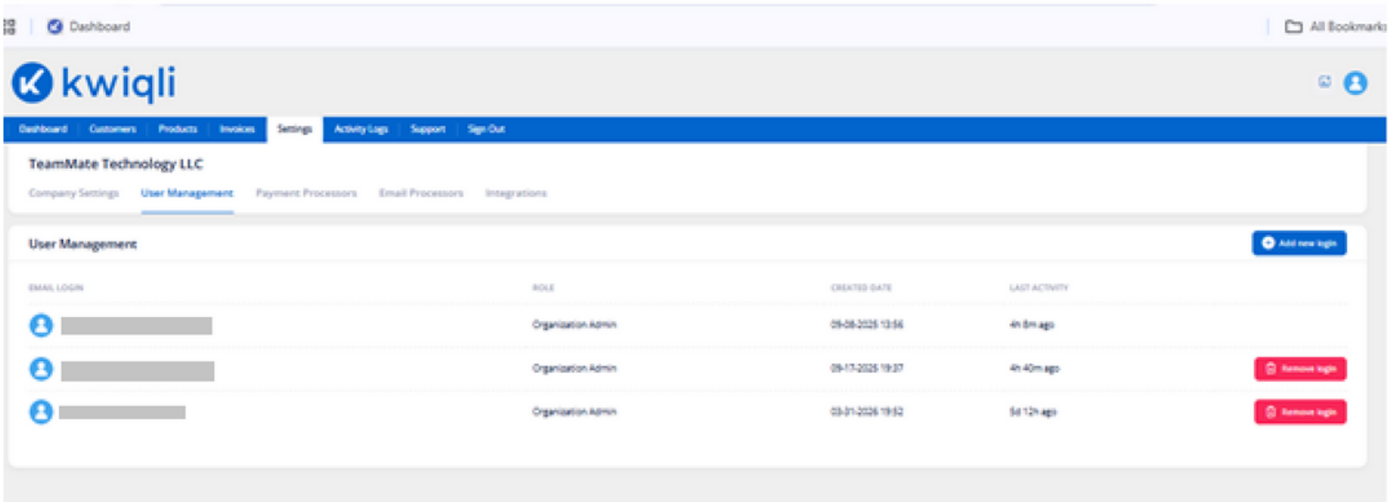
- Configure white-label branding
- Customize customer portal appearance
- Manage QuickBooks integration

User Management

1. Open the User Management tab.
2. To add a user:

- Click Add New Login
- Enter email address
- Assign role
- To remove a user:

- Click Remove Login



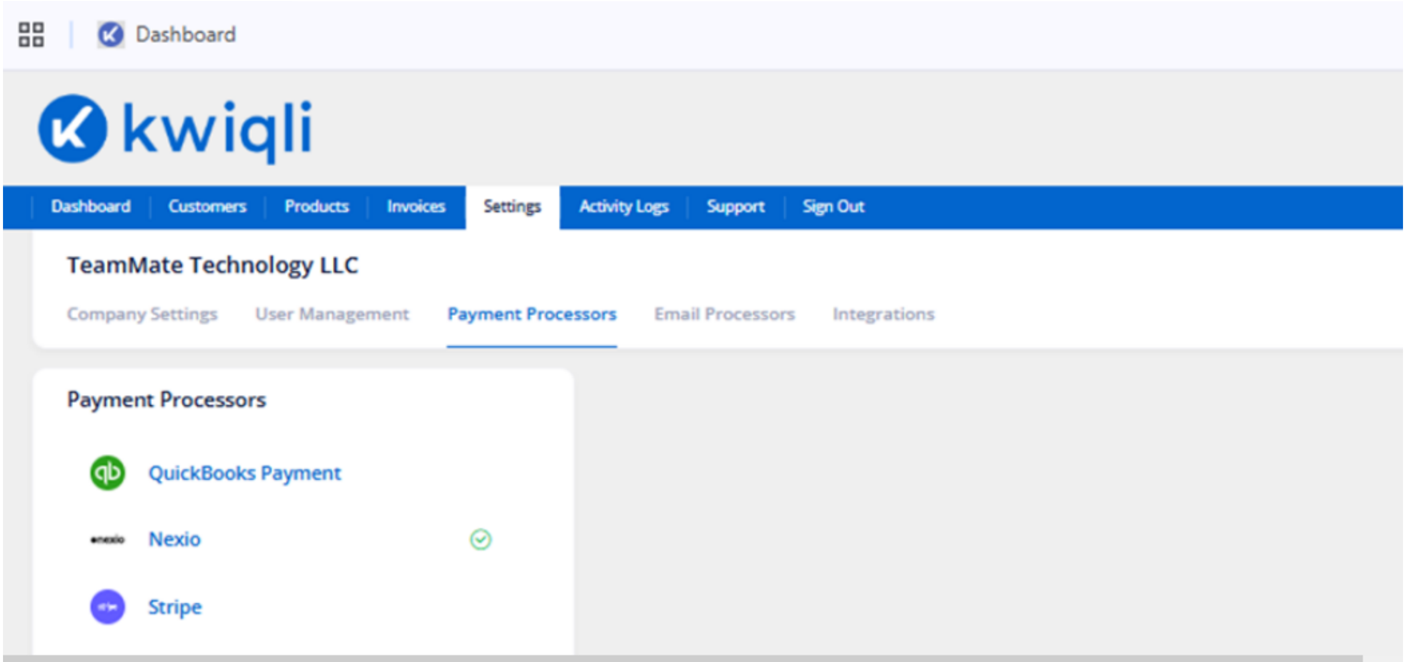
Functions

- Manage administrator access
- Assign user permissions
- Monitor user activity

Payment Processors

1. Open the Payment Processors tab.
2. Review available gateways:

- QuickBooks Payments
- Nexio
- Stripe
- Verify active integrations.



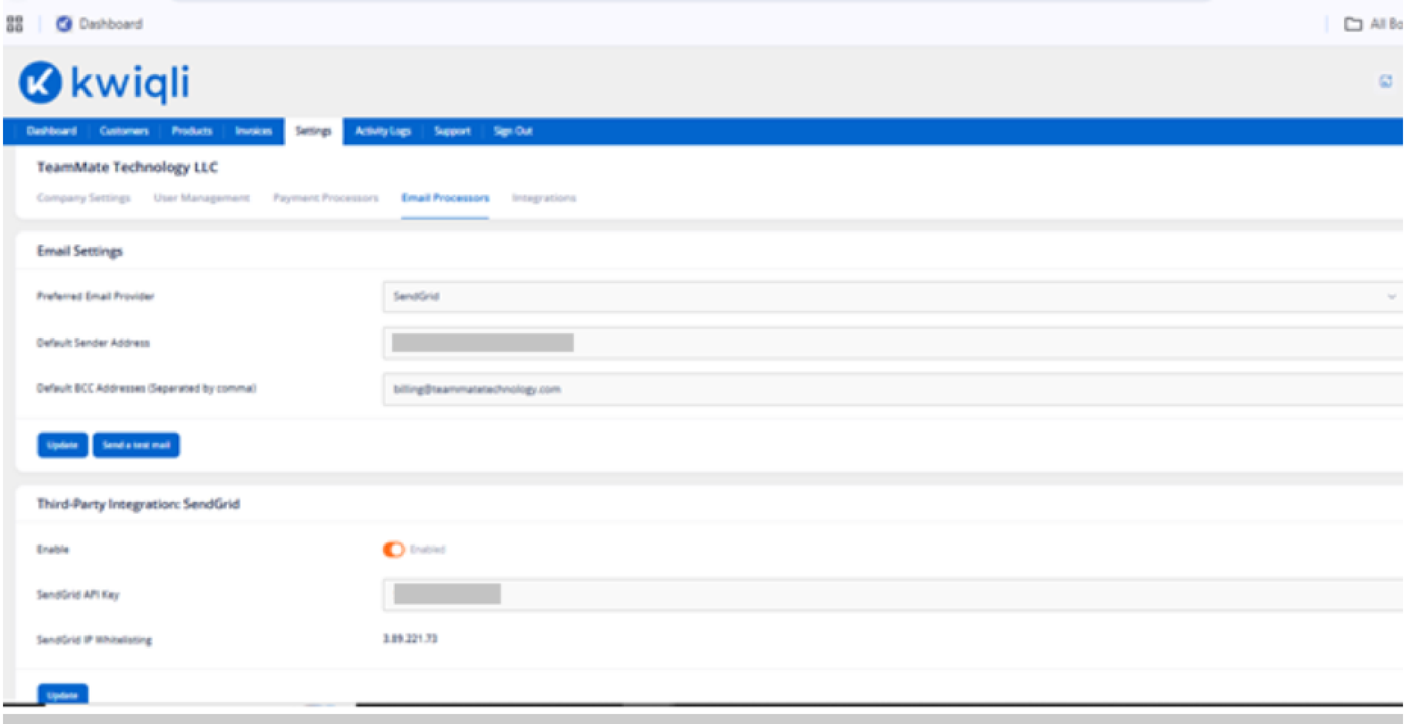
Functions

- Process customer payments
- Enable Auto-Pay
- Configure recurring billing

Email Processors

1. Open the Email Processors tab.
2. Configure:

- Preferred Email Provider
- Default Sender Address
- BCC Addresses
- Configure SendGrid API settings if applicable.
- Click Update.
- Use Send Test Mail to verify email delivery.



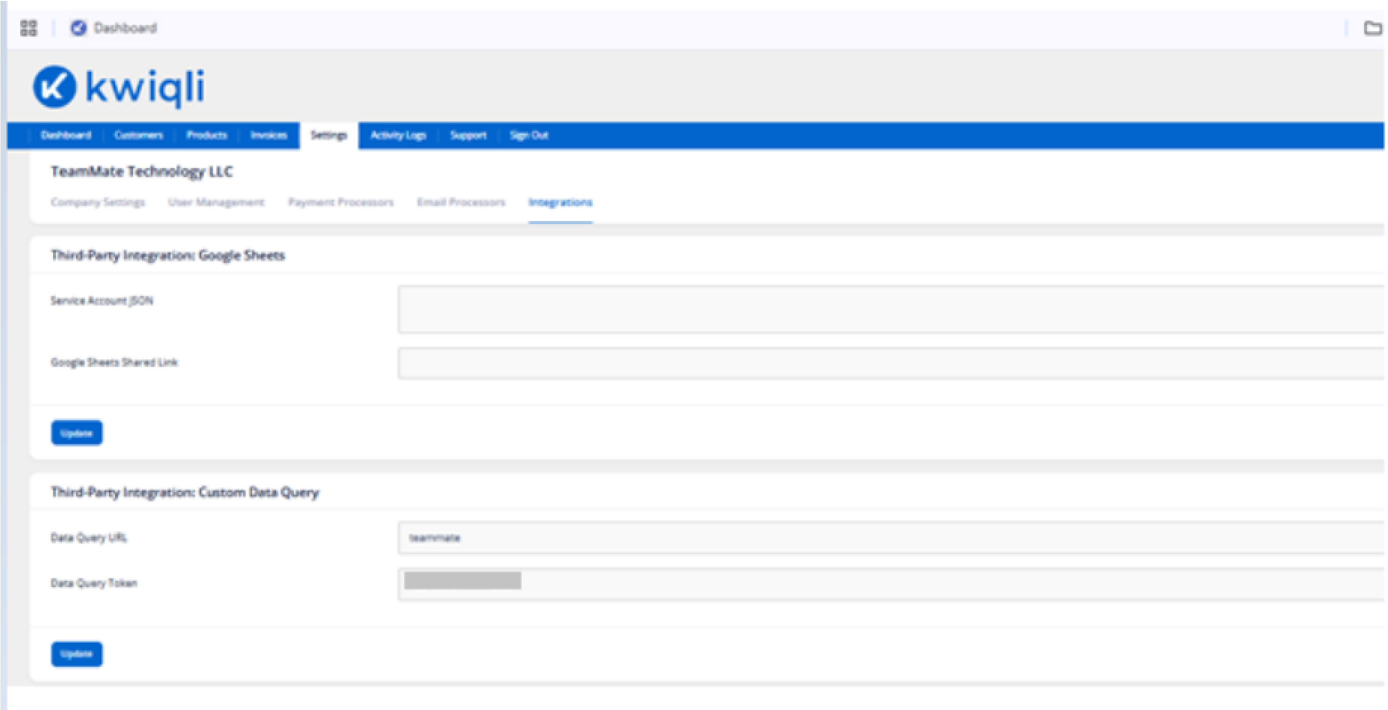
Functions

- Send invoices
- Deliver payment reminders
- Manage customer notifications

Integrations

1. Open the Integrations tab.
2. Configure:

- Google Sheets integration
- Service Account JSON
- Data Query URL
- API Tokens
- Click Update after changes.



Functions

- Import usage data
- Automate invoice quantities
- Connect external billing systems

Revision #2
Created 16 June 2026 11:34:26 by Jemmabelle Tanjusay
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