

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.

The screenshot displays the 'Company Settings' page for 'TeamMate Technology LLC'. The page has a blue header with navigation links: Dashboard, Customers, Products, Invoices, Settings (active), Activity Logs, Support, and Sign Out. Below the header, there's a sub-header with 'TeamMate Technology LLC' and a list of settings categories: Company Settings (active), User Management, Payment Processors, Email Processors, and Integrations.

The 'Company Settings' section includes the following fields:

- Company Name: TeamMate Technology LLC
- Company Branding Subdomain: teammate (with a dropdown arrow and a link to mybillportal.com)
- Company Custom Domain: (empty field)
- Company Custom Logo: (upload button with a TeamMate logo preview)

Below these fields is a blue 'Update' button.

The 'Invoice Systems' section contains a table with the following data:

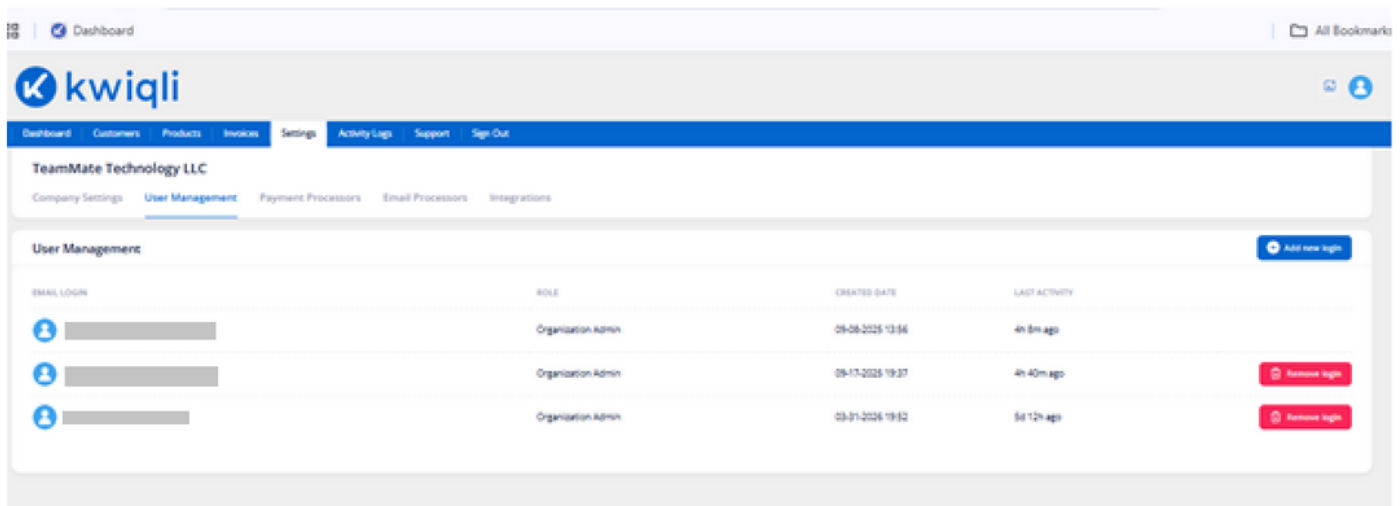
Type	External ID	Name	Actions
QuickBooks Online	(redacted)	TeamMate Technology LLC	Reconnect Details

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



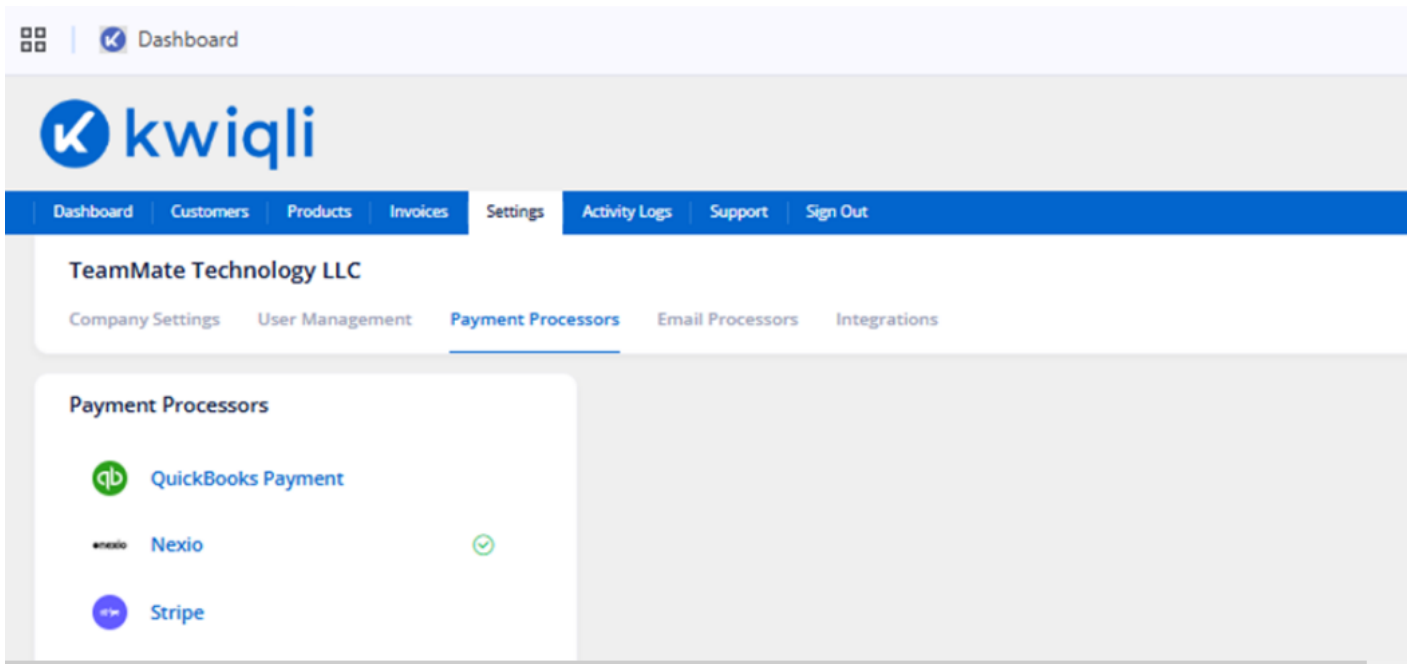
Functions

- 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.

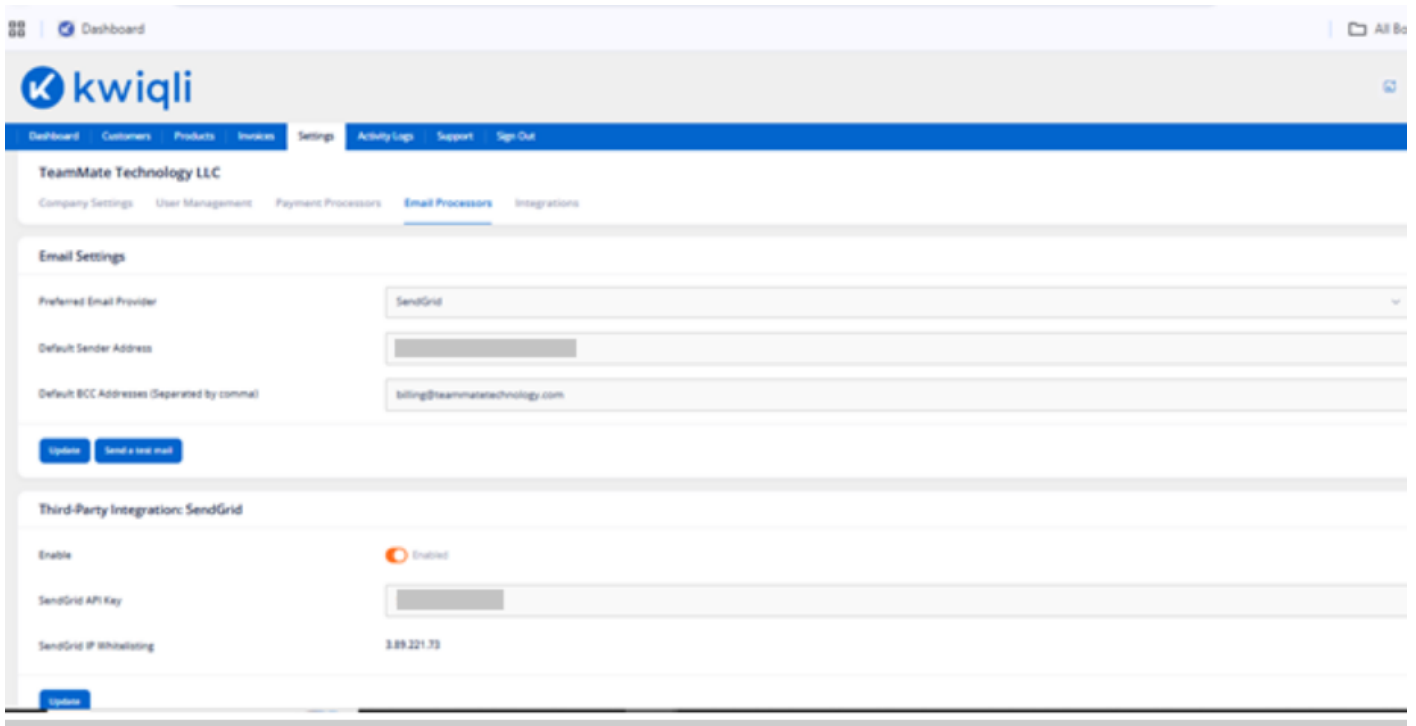


Functions

- 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.

Dashboard

kwiqli

DashboardCustomersProductsInvoicesSettingsActivity LogsSupportSign Out

TeamMate Technology LLC

Company SettingsUser ManagementPayment ProcessorsEmail ProcessorsIntegrations

Third-Party Integration: Google Sheets

Service Account ID

Google Sheets Shared Link

Update

Third-Party Integration: Custom Data Query

Data Query URL

teammate

Data Query Token

Update

Functions

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

Revision #2

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