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How to Edit an Individual Account's Settings

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2 years ago · Updated

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This guide explains how to change settings for a single account. You need to be at least the Sr Manager level to do this.

Let's say that you have a customer that wants to receive a statement every Monday instead of on the 1st of the month. You can change the settings for just this customer in a few easy steps.
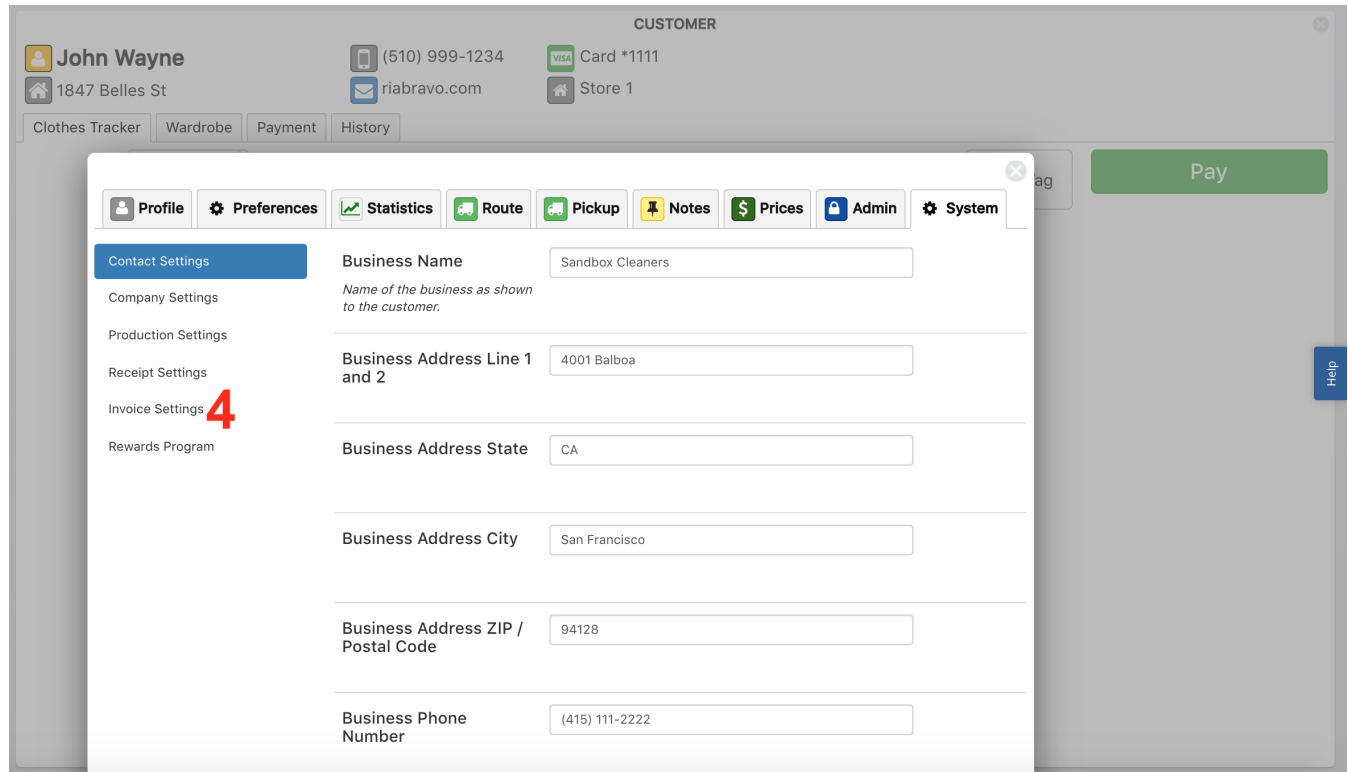
1. Open the account.

2. Click on the customer's name.

Help

3. Click on the System tab.

2___3_-_Select_Settings.png

4. Select the Invoice Settings tab.

5. Change the setting as desired, and click Save.

You can do this for any setting in the System tab. Please be sure that the setting you are changing is correct, otherwise, your changes may have negative consequences. If you have any questions please contact support.

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