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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.

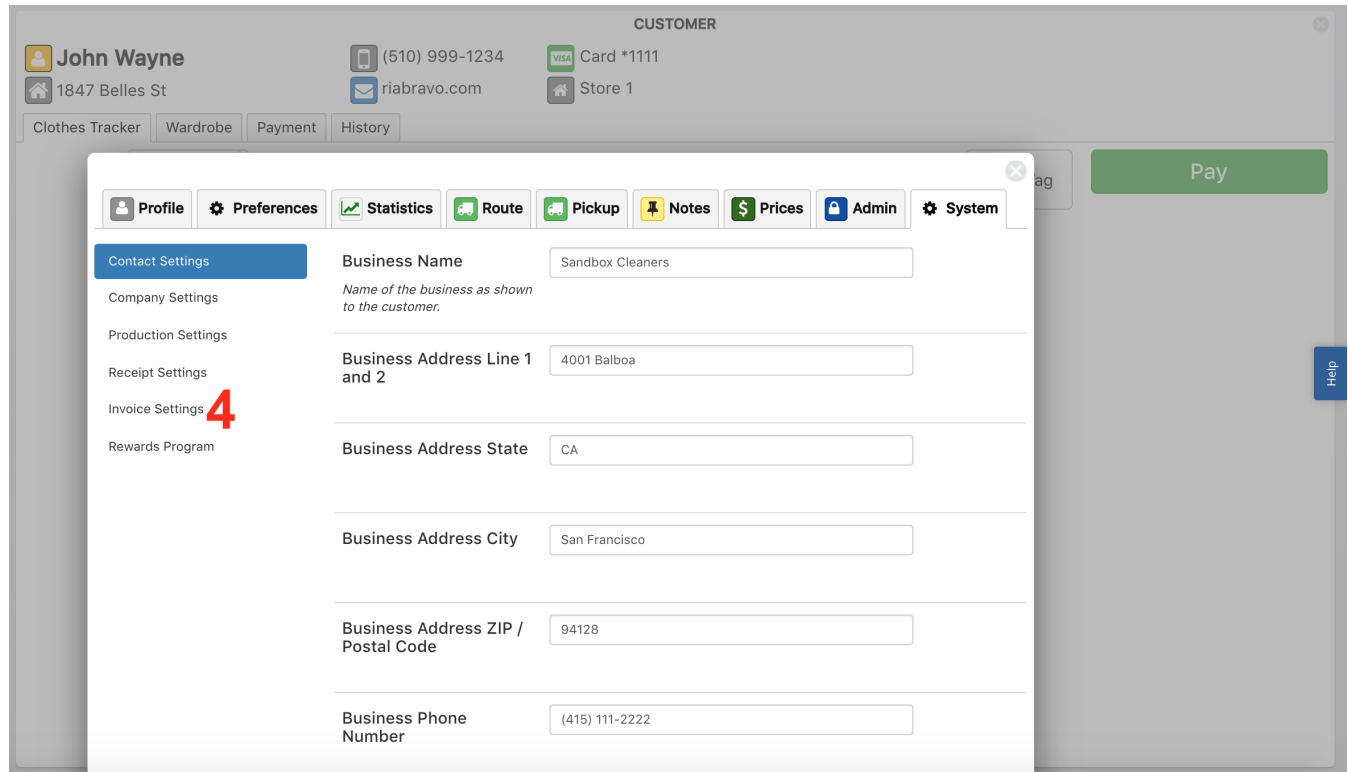
1. Open the account.
2. Click on the customer's name.

Help

3. Click on the System tab.

 2___3_-_Select_Settings.png

4. Select the Invoice Settings tab.



The screenshot displays the SMRT Systems interface for a customer named John Wayne. The top navigation bar includes tabs for Clothes Tracker, Wardrobe, Payment, and History. The main content area shows a 'System' tab selected, with a sub-tab for 'Invoice Settings' highlighted. The 'Invoice Settings' section contains several input fields for business information:

- Business Name:** Sandbox Cleaners
- Business Address Line 1 and 2:** 4001 Balboa
- Business Address State:** CA
- Business Address City:** San Francisco
- Business Address ZIP / Postal Code:** 94128
- Business Phone Number:** (415) 111-2222

A red number '4' is placed next to the 'Invoice Settings' sub-tab, indicating the step to select this setting.

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

CUSTOMER

John Wayne
1847 Belles St
(510) 999-1234
riabravo.com
Card *1111
Store 1

Clothes Tracker Wardrobe Payment History

Profile Preferences Statistics Route Pickup Notes Prices Admin **System**

Contact Settings
Company Settings
Production Settings
Receipt Settings
Invoice Settings
Rewards Program

Statement Generation Days
Used to define what days of the month or week the system should automatically generate statements for customers.

☐ Days of the Month
☒ Days of the Week
☐ No Statements

Monday x **5**

Save Cancel

Invoice Generation Days
Used to define what days of the month or week the system should automatically generate invoices for customers.

☐ Days of the Month
☐ Days of the Week
☒ No Invoices

Statement / Invoice Terms - Printed
This is the text that displays on the bottom of a statement or invoice.

Thank you for being our customer.
Please remit payment upon receipt.

Pay

Help

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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