

Settings

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Accounting Gateways

Setting up Accounting Gateways

1. Go to **Settings**.
2. Select **Accounting Gateways**.
3. Click **Add Accounting Gateway**.
4. Choose the accounting provider.
5. Enter the required connection details.
6. Add any authorization or OAuth information.
7. Confirm the gateway status is active.
8. Click **Save**.
9. Verify the new accounting gateway appears in the list.

This is typically completed during the onboarding process and only needs a one time setup.

Arrival Windows

Arrival Windows

1. Go to **Settings**.
2. Select **Arrival Windows**.
3. Click **Add Arrival Window**.
4. Enter the window name.
5. Set the start time.
6. Set the end time.
7. Mark the window as active if it should be available.
8. Click **Save**.
9. Confirm the arrival window appears in the table.

Branding

- Go to **Settings**.
- Select **Branding**.
- Click **Edit** or open the branding configuration.
- Enter the brand name and display information.
- Upload or update logos as needed.
- Add portal branding details such as colors, favicon, or support information.
- Review the preview area.
- Click **Save**.
- Confirm the branding updates are reflected.

Please note that most of this is completed for you during the onboarding process.

After onboarding you may return here to set a fixed rate for Tank Exchanges or setting Payment Terms for automated Finance Charges.

Invoice Codes

Invoice Codes

1. Go to **Settings**.
2. Select **Invoice Codes**.
3. Click **Add Invoice Code**.
4. Enter the invoice code name.
5. Add the code or short label.
6. Select the related category or type.
7. Set the code to active.
8. Click **Save**.
9. Confirm the invoice code appears in the list.

Most codes should be created during the onboarding process. But you may find the need to add more in the future if you start utilizing additional pieces of the system that had not been discussed during the onboarding process.

Invoice Subtypes

Invoice Subtypes

1. Go to **Settings**.
2. Select **Invoice Subtypes**.
3. Click **Add Invoice Subtype**.
4. Enter the subtype name.
5. Select the related invoice type.
6. Mark it active.
7. Click **Save**.
8. Confirm the subtype appears in the table.

Invoice Subtypes are a great way to quickly list items with set values such as ACTune Up for \$75 or Duct Cleaning for \$8 per ft. This would allow quick items for staff to select and automatically have the pricing connected. This list will get started during onboarding however is likely to be built out during training and as staff sees ways to simplify their day to day billing tasks.

Labels

Labels

1. Go to **Settings**.
2. Select **Labels**.
3. Click **Add Label**.
4. Enter the label name.
5. Select the label type or category.
6. Choose any display options.
7. Mark the label active.
8. Click **Save**.
9. Confirm the label appears in the list.

Key reminder: Install Job is a required label for Installations to appear on the correct sub calendar. Please do not duplicate or rename this Label.

We do import stock labels and many will be added during the onboarding/training time but you may need to add more later.

Payment Gateway

Payment Gateway

1. Go to **Settings**.
2. Select **Payment Gateways**.
3. Click **Add Payment Gateway**.
4. Choose the payment provider.
5. Enter the required gateway credentials.
6. Add merchant or terminal information if required.
7. Set the gateway status to active.
8. Click **Save**.
9. Confirm the gateway appears in the list.

This typically happens during the onboarding experience.