Account Default Settings

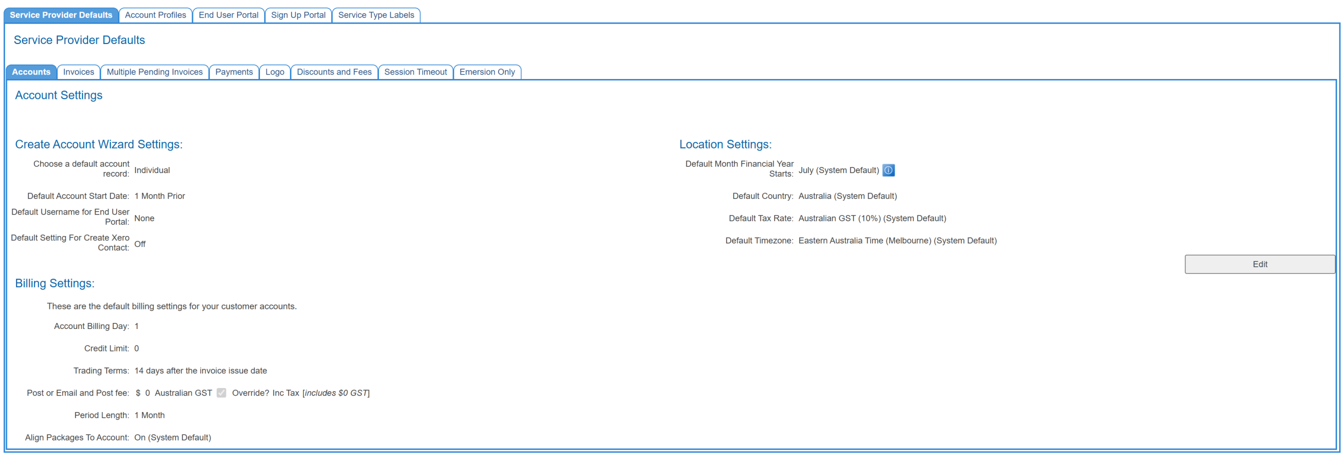
Go to full article

Overview

The settings on this are used by admins to configure the way newly created accounts will behave. When creating a new customer, the options you set here will be used as the default settings. Users can override each setting for an individual customer, if they choose.

This screen can be found at: **Admin > Settings > Service Provider Defaults > Accounts.**

Open the fields for editing by pressing **Edit**. When you are finished press **Save** to submit your changes or **Cancel** to discard them.



Create Account Wizard Settings

These settings control which options are selected by default in the create customer wizard under **Customers > Create New Customer.**

Field Name	Description	Need More Help?
Choose a default account record	Select whether a new account should default to being an organisation account, or an individual account.	Account Fundaments
Default Account Start Date	Select a time offset to act as the default account start date. Usage from before an accounts start date cannot be processed into an invoice.	Default Account Start Date
Default Username for End User Portal	Select an account field to use as a default username. Customers will use this to access the End User Portal.	Granting Access to the End User Portal
Default Setting for Create Xero Contact	Select On/Off to define if a Xero account contact in Xero when an account in Emersion.	

Billing Settings

Field Name	Description	Need More Help?
Account Billing Day	The day each month that the customer Account Invoice Period will begin.	Account Invoice Period

Credit Limit	This is a credit limit for the account. It is used by the system in a number of ways, for example: • Sending notifications (via Events) to either the service provider or customer when the credit limit is exceeded. • The auto top-up feature. • The automated suspension feature. This can be set globally by the service provider, overridden by the account profile or overridden for a given customer.	Common Events Automatic Suspension and Restriction
Trading Terms	This setting controls how many days after an invoice has been generated it will fall due.	Trading Terms Fundamentals Default Trading Terms
Paper Invoice Fee	Set the default cost to be added to invoices that will be sent through paper mail.	Paper Invoice Fee
Period Length	The amount of time that passes between invoice periods. E.g. If you set the **Account Billing Day** to 1 & the **Period Length Months** to 1, the customer will receive an invoice on the 3rd of every month (invoices are generated 2 days after the close of the invoice period).	Period Length and Period Alignment Fundamentals
Align Packages to Account	This flag will align any newly created package subscriptions to the underlying account invoice period for the given customer. This will ensure all access fees and usage fees are aligned to when an invoice is rendered. It is important to note that some package configurations can conflict with this setting, producing undesirable billing results. For instance, a package bundle comprising month-to-month billing for an ADSL service and web hosting. These services will align to the underlying account invoice period nicely, as they are billed monthly. However if the package plan also contains a Domain Registration service (for 1 year, 2 years, or 3 years), it is not desirable for this to be aligned to the customer's account invoice period.	Period Length and Period Alignment Fundamentals

Location Settings

Field Name	Description	Need More Help?
Default Month Financial Year Starts	Set which month the financial year starts for new customers.	Month Financial Year Starts
Default Country	The account country can affect which fields are available for entering addresses, it will also effect the services used to source address data.	Addresses
Default Tax Rate	The tax rating that should be used for a customer.	
Default Time Zone	Set the time zone that will be used communicating times between emersion and the customer.	Time zones

Related Pages

- Account Default Settings
- Accounts and Contacts
- Override Trading Terms for an Account
- Tax Calculations and Impact of Rounding
- Comparison Bill Run
- Billing Start Date
- Account Cloning
- Opening Balances
- Using Groups to Migrate Customers from Xero to Emersion During Onboarding
- Link an Emersion Account to a Netsuite Customer
- Account Synchronisation for Netsuite
- Invoice Period Processing Delay
- Account Statuses and Reasons

- Training Session Guide: Invoice Templates and Global Invoicing Settings
- Configure Late Payment Fee Overdue Invoice