

Detail

[Go to full article](#)

Overview

The *Detail* tab provides an overview of the account, including information such as the account type, tax rate, invoice method, account creation date and groups that the account belongs to. This tab is also where you can create [free-text notes](#) on the account.

There are also a series of sub-tabs on this page which can be used to update account information, which are explained below.

Home

Customers

Services

Billing

Packages and Plans

Products

Inventory

Report

Finance

Events

Commissions

Service Desk

Integration

Admin

Customer List

Create New Customer

Account Groups

Customer: Mrs Neil Brumby (Account ID : 278951, Profile: EmersionTest Default Account Profile, Balance : \$0.00)

Dashboard

Summary

Detail

Contacts

Sites

Personal Information

Package Subscriptions

Service Subscriptions

Account Discount Subscriptions

Pending Ledger Cardlines

Invoices

Billing Status

Account Security

Transactions

Order

Order History

Purchases

Payment Plan

Product Pricing

Payment Extension

Payment Methods

Payments

Cost Centre

End User Portal

Notes

Service Desk

Service Restriction

Referral / Marketing

Bounty Requests

Integration

Account Details

Account Type: End User

Account Status: Active

Account Status Reason:

Start Date: 29 Jun 2012

End Date:

Customer Since: 29 Jun 2012

Account Tax Rate: Australian GST (10%) (Country Default)

Month Financial Year Starts: July (Provider Default)

Invoice Method: Email (Provider Default)

Time Zone: (UTC+10:00) - Eastern Australia Time (Melbourne) (Provider Default)

Post or Email and Post fee: \$ 1.21 Australian GST ☐ Override? Inc Tax [includes \$0.11 GST]

Default Account Invoice Template: Invoice Layout Type 4: For Retail Service Providers (CUSTOM) (#3357) (Profile Default)

Invoice Itemisation: On (Provider Default)

Auto Allocate Payments to Invoices: On (System Default)

Auto-approve Invoices: Off (Provider Default)

Account Groups: For Franchise zz agent, Franchise BB, Franchise Y group, Store - Blackburn, Test group

Account Created By: Emersion Support

Account Creation Date: 29 Jun 2012

Sales Person:

Sales Contact 1: Not Set

Sales Contact 2: Not Set

Credit Manager: Not Set

Upload Source:

Upload Reference:

Export Reference:

CRM Export Ref.:

Omit from Auto-Restrict: No

Edit Account Summary

Profile

Delivery Address

Trading Terms

Early Discount

Late Fee

Late Fee Invoice Ages

Network Account Attributes

Auto Top-up Settings

Xero Sync

Access Fee Bulk Pricing Override

Payment Plans

Prompt Payment Discount

Profile Information

Account Profile: EmersionTest Default Account Profile (Default)

Edit Account Profile

Profile

In Emersion, all accounts belong to an account profile. You can edit which profile the account belongs to by clicking **Edit Account Profile**. For more information about account profiles, click [here](#).

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Profile Information

Account Profile: EmersionTest Default Account Profile (Default)

Edit Account Profile

Delivery Address

The *Delivery Address* sub-tab provides a way to update the delivery address for the account. Fields marked with a red asterisk are mandatory.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
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Edit Delivery Address

☐ Same as Primary Contact

Address Purpose: Not stated/unknown

* Country: Australia

Address Type: Standard Address ☒ Basic ☐ Advanced

Search Address:

Unit Type: Select Unit Type Unit Number:

Level Type: Select House Level Type Level Number:

* Street Number: -

* Street Name:

* Street Type: Select Type - Street Suffix

* Suburb:

* Postcode:

* State: Select State

Trading Terms

This sub-tab lists the [trading terms](#) of the account. These can be edited by clicking **Edit Trading Terms**.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
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Trading Terms

Invoice Due Days: 14 days after the invoice issue date

Days to delay processing of invoice periods:

Credit Limit (\$): 0

Unbilled Credit Alerts (\$):

Period Length: 1 Months

Please note: Invoices are generated 2 days after the end of the account invoice period. If the invoice period length is modified on this screen, any future account invoice periods that are created in advance and unprocessed will be removed.

Current Invoice Period: Wed 1 Sep 2021 - Thu 30 Sep 2021

Align Pkgs To Acct: Yes

Trading Review Last:

Next Review:

Early Discount

[Early payment discounts](#) are applied when a payment is applied against an invoice, and the invoice outstanding amount is reduced to zero. To change the status of the early discount, click **Edit**. The options available are Inherit, Disable or Enable.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
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Early Payment Discount

Please Note: Early Payment Discount fees are applied when a payment is applied against an invoice and the invoice outstanding amount is reduced to zero.

* If you select status "Inherit" your existing data will be discarded

Status: Disable (**Inherit**)

Discount Amount: \$ 0 Australian GST Inc Tax [includes \$0 GST]

Days before due to get discount:

Discount Label:

Late Fee

[Late payment fees](#) are applied when an overdue invoice is fully paid. To change the status of the late payment fee, click **Edit**. The options available are Inherit, Disable or Enable.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
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Late Payment Fee - On Complete Payment of Invoice

This late payment fee will be applied when the invoice is fully paid - The late fee is applied when these business rules are met:

- the outstanding amount of the invoice = \$0.00.
- the outstanding amount on the invoice reached zero on a date after the invoice due date.
- the customer does not have the TIO flag enabled (under "Customer > Details"), or the customer has an open TIO Service Desk ticket unless the Ignore flag is used.

* If you select status "Inherit" your existing data will be discarded

Status: Enable ([Inherit](#))

FeeAmount: 9.0909090909091 %

Days after due to get fee: 0

Fee Label: Late Payment - Invoice Overdue charge

☒ Ignore TIO Cases

[Edit](#)

Late Fee Invoice Ages

This late payment fee is based on the age of an overdue invoice and does not take into account any payments. Click **Edit** to change the following details:

- Status (inherit, disable, enable)
- Fee amount
- Minimum overdue balance required before charge applies
- Number of days after the due date to apply the late fee
- Fee label

To learn more about configuring late fee overrides, click [here](#).

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---------	------------------	---------------	----------------	----------	------------------------------	----------------------------	----------------------	-----------	----------------------------------	---------------	-------------------------

Late Payment Fee - On Overdue Invoice

This late payment fee is based on the age of an overdue invoice. It does not take into account any payments. The late fee is applied when these rules are met:

- the invoice due date is in the past.
- the invoice has no disputed amount.
- the invoice is not subject to a payment plan (v2 only).
- the customer does not have the TIO flag enabled (under "Customer > Details"), or the customer has an open TIO Service Desk ticket unless the Ignore flag is used.

In the case of multiple invoices remaining unpaid, it will apply the late fee for each invoice, but only one fee per invoice can apply. Any other invoices not subject to a payment plan or dispute will (if paid late) attract the late payment fee.

* If you select status "Inherit" your existing data will be discarded

Status: Disable ([Inherit](#))

FeeAmount: \$ 10 Australian GST Inc Tax [includes \$0.9090909 GST]

* Minimum Invoice Overdue balance required before charge applies (inc tax): 2

* Days after due to get fee: 0

Fee Label: Late Payment - Invoice Overdue charge for Invoice XXXXXX due DD MON YYYY

☒ Ignore TIO Cases

[Edit](#)

Network Account Attributes

Description TBC.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
---------	------------------	---------------	----------------	----------	-----------------------	-----------------------------------	----------------------	-----------	----------------------------------	---------------	-------------------------

Attributes Information

Forced New Port: N/A [?](#)

Service Availability Level: 1 [?](#)

[Edit Account Profile](#)

Auto Top-up Settings

This feature is designed for businesses that want to ensure their customers always retain a positive account balance. Click **Edit Auto Top-up Settings** to set the auto top-up trigger limit and the top-up amount. More information about this feature can be found [here](#).

Profile
Delivery Address
Trading Terms
Early Discount
Late Fee
Late Fee Invoice Ages
Network Account Attributes
Auto Top-up Settings
Xero Sync
Access Fee Bulk Pricing Override
Payment Plans
Prompt Payment Discount

Auto Top-up Settings

There is no automated payment method set up for this account.

If the customer has no automated payment method, the events will still be triggered but a payment cannot be taken.

Go to [Payment Methods](#) to set a payment method.

Auto Top-up Trigger Limit (\$):

Top-Up Amount (\$): Top-Up by a fixed amount

Edit Auto Top-up Settings

Xero Sync

Use this feature to create a new Xero contact or link an Emerson account with an existing Xero account. For more information on Xero contact synchronisation, click [here](#).

Profile
Delivery Address
Trading Terms
Early Discount
Late Fee
Late Fee Invoice Ages
Network Account Attributes
Auto Top-up Settings
Xero Sync
Access Fee Bulk Pricing Override
Payment Plans
Prompt Payment Discount

Xero Contact Synchronisation

Use this page to create a new Xero contact or link this Emerson account with an existing Xero contact. Linking this account to a contact in Xero will only trigger a sync of the account data if this is the first time an association is created.

Caution: Changing the associated Xero contact after one has already been set will *not* initiate a new sync of account data. Only future financial activity on the account can be synchronised once an association has been made.

Create Contact in Xero?: ☐ No

* Xero Contact Name:

Edit

Access Fee Bulk Pricing Override

The Access Fee Override section allows you to override the number of active subscriptions taken into consideration when ascertaining the access fee price point, via the *Access Fee Bulk Pricing* feature. Under this sub-tab you can search for an override or create a new bulk access override.

Profile
Delivery Address
Trading Terms
Early Discount
Late Fee
Late Fee Invoice Ages
Network Account Attributes
Auto Top-up Settings
Xero Sync
Access Fee Bulk Pricing Override
Payment Plans
Prompt Payment Discount

Access Fee Bulk Pricing Override

The Access Fee Override section allows you to override the number of active subscriptions taken into consideration when ascertaining the access fee price point, via the 'Access Fee Bulk Pricing' feature. The rule of thumb when calculating the correct price is; Where the number of matching active subscriptions is less, this value will take precedence.

Search
Clear

Create New Bulk Access Override

Model Type: Select

Product Rate Card Name:

ID	Model Type	Product Rate Card ID	Product Rate Card Name	Minimum Tier Count	Saleable From	Saleable To	Last Modified By	Last Modified Date
No Result Found								
1								

Payment Plans

This sub-tab provides a way to edit the *payment plan retry days* and the *payment plan maximum retries*. To learn more about payment plans, click [here](#).

Profile
Delivery Address
Trading Terms
Early Discount
Late Fee
Late Fee Invoice Ages
Network Account Attributes
Auto Top-up Settings
Xero Sync
Access Fee Bulk Pricing Override
Payment Plans
Prompt Payment Discount

Payment Plans

Payment Plan Retry Days: 1

Payment Plan Maximum Retries: 3

Edit

Prompt Payment Discount

Prompt payment discounts are similar to the early payment discount, except that they are based on the cardlines generated per service. This sub-tab provides a way to edit the *prompt payment discount leeway* and the *auto apply prompt payment discount*.

Profile	Delivery Address	Trading Terms	Early Discount	Late Fee	Late Fee Invoice Ages	Network Account Attributes	Auto Top-up Settings	Xero Sync	Access Fee Bulk Pricing Override	Payment Plans	Prompt Payment Discount
Prompt Payment Discount											
Prompt Payment Discount Leeway: 15											
Auto Apply Prompt Payment Discount: No											
											Edit

Related Pages

- [Payment Plans Fundamentals](#)
- [Batch Mediation System](#)
- [BPay Fundamentals](#)
- [Rate Card Fundamentals](#)
- [Account Invoice Period](#)
- [ConnectWise Accounts and Contact Sync Fundamentals](#)
- [Product Fundamentals](#)
- [Service Access Fee Multiplier Fundamentals](#)
- [Ordering Fundamentals](#)
- [Service Plans](#)
- [Invoice Rebilling Fundamentals](#)
- [Commissions Fundamentals](#)
- [Manage Commissions](#)
- [Payment Allocation Fundamentals](#)
- [Package Plans](#)