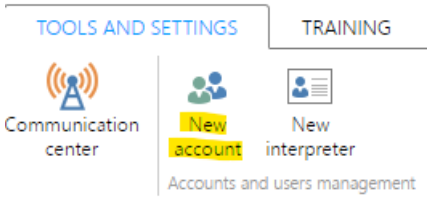
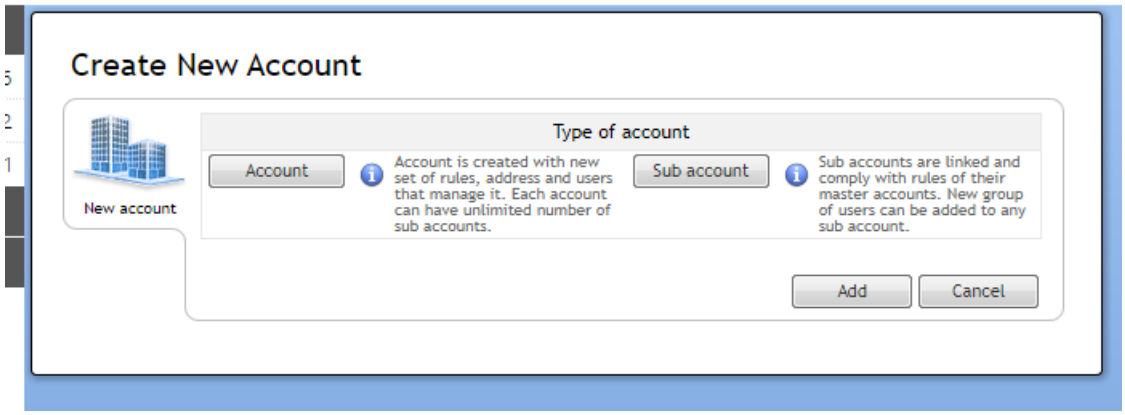
NEW ACCOUNT

Tools and Settings > New Account

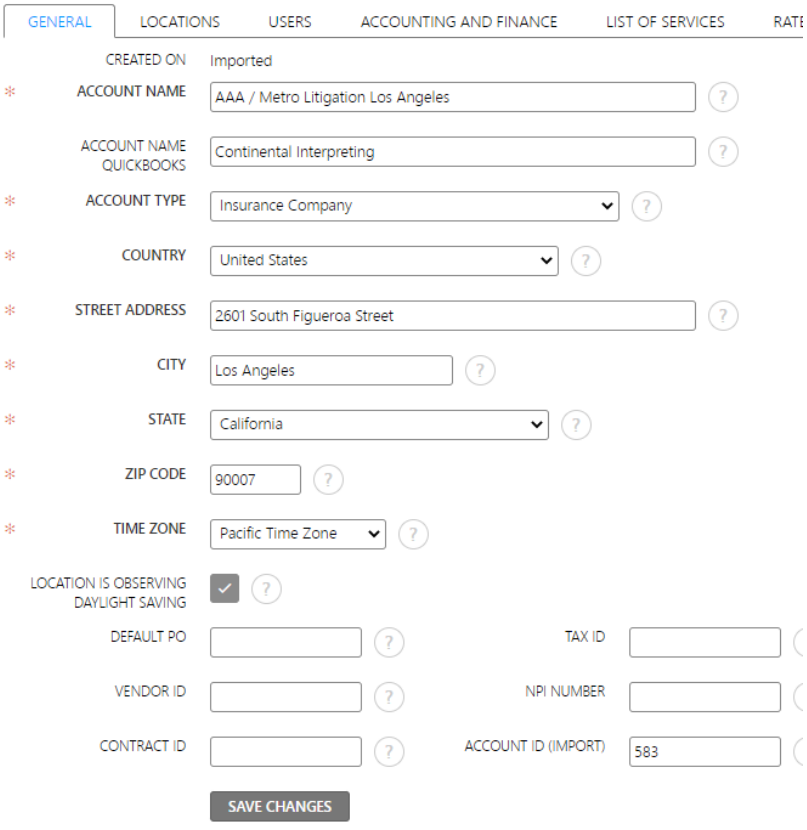


Note subaccount only pertains to the main account's billing practices (rates)

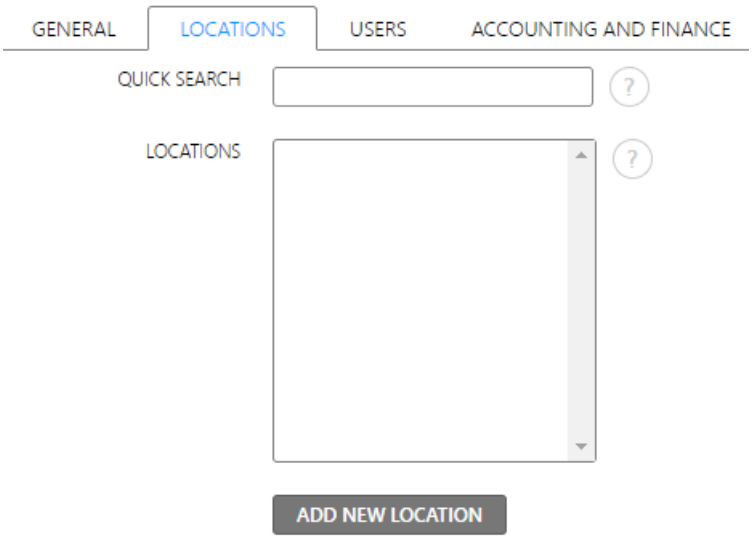


(SI is working on allowing us access to upload MSA)

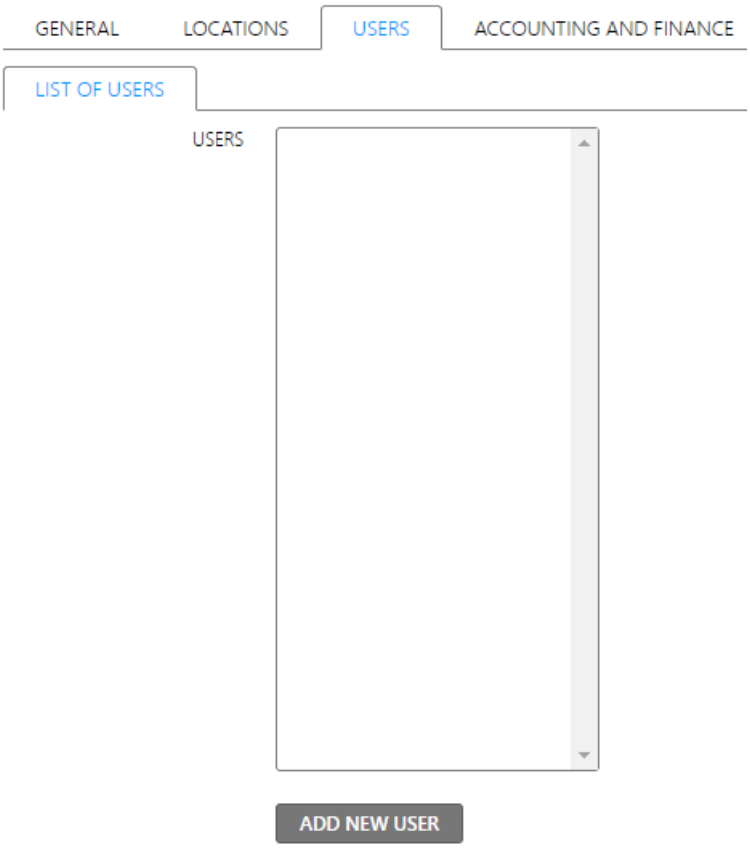
General

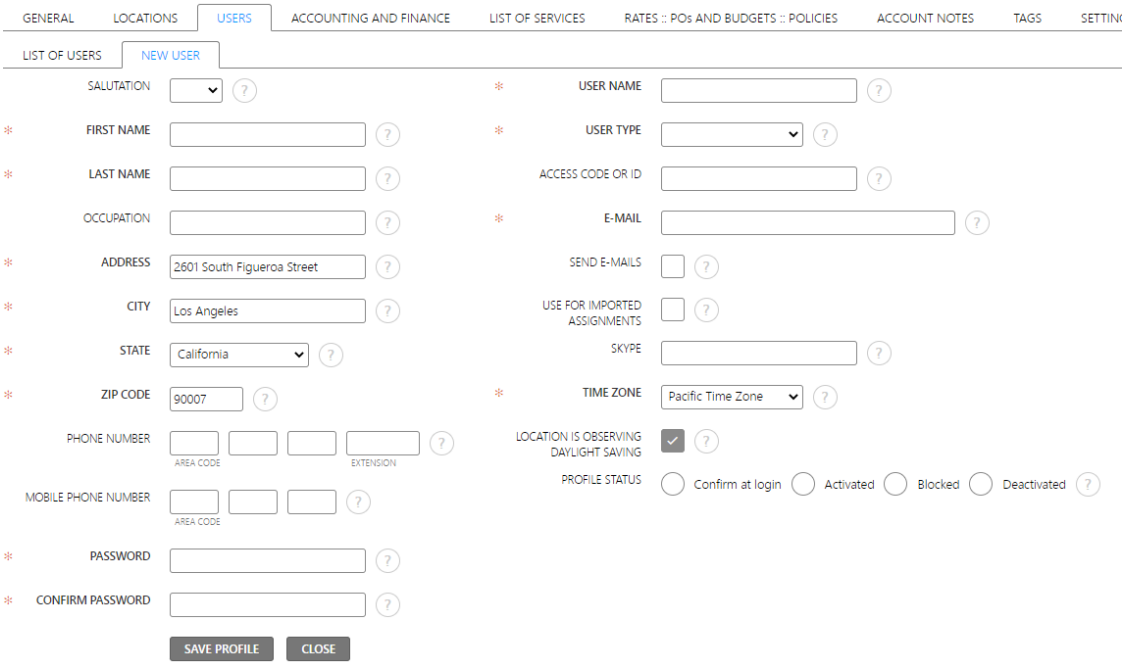


Locations - LEAVE EMPTY

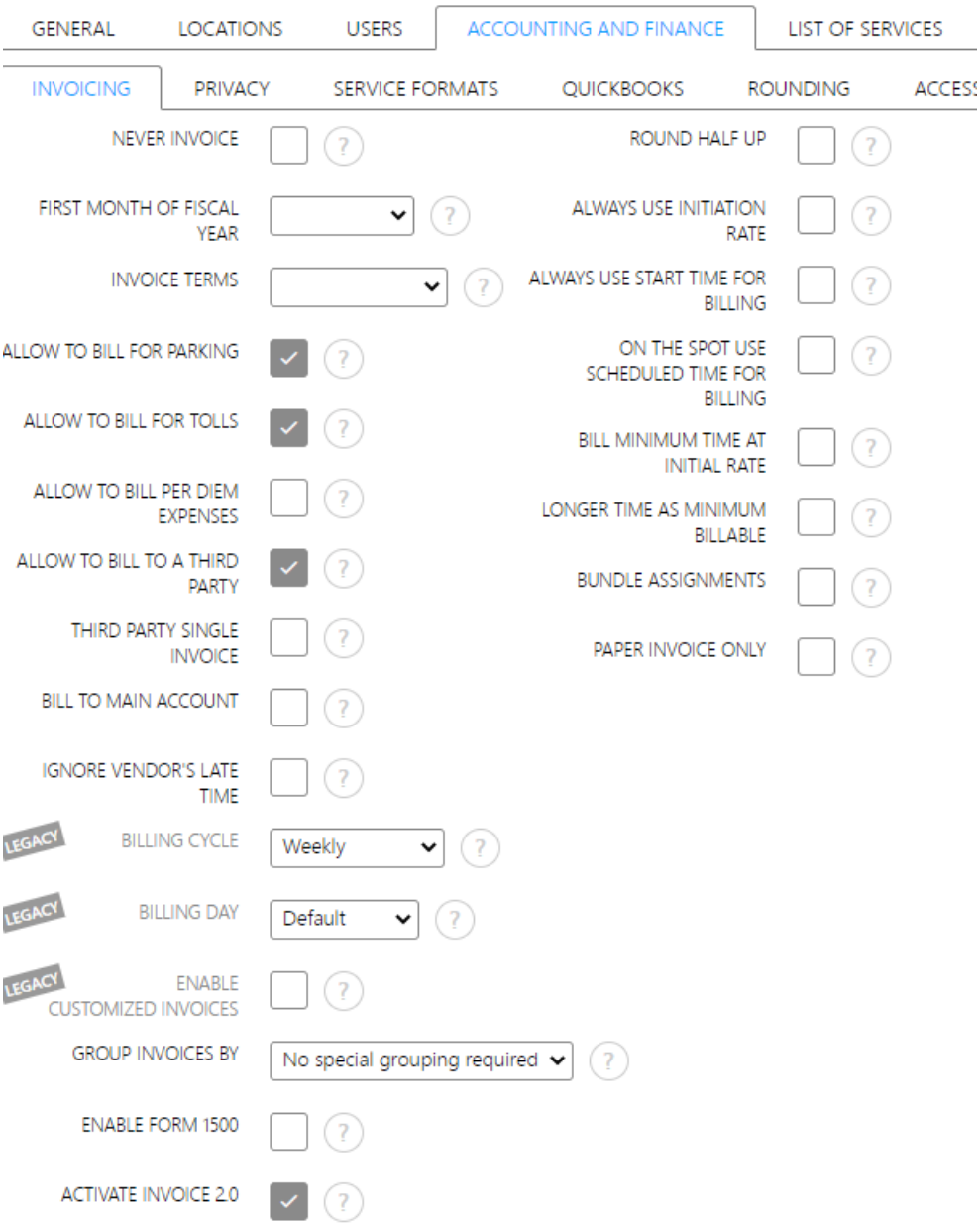


Users (enter the account's employees - secretary, attorney's, accounts payables, if applicable):

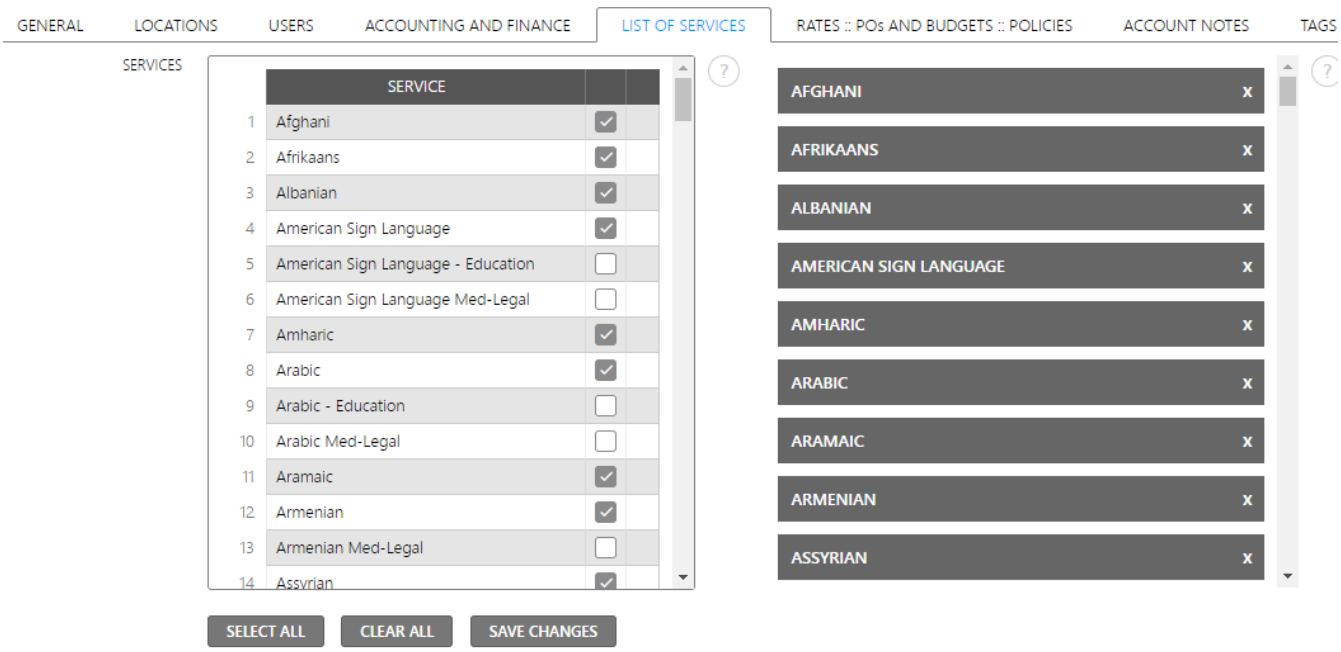




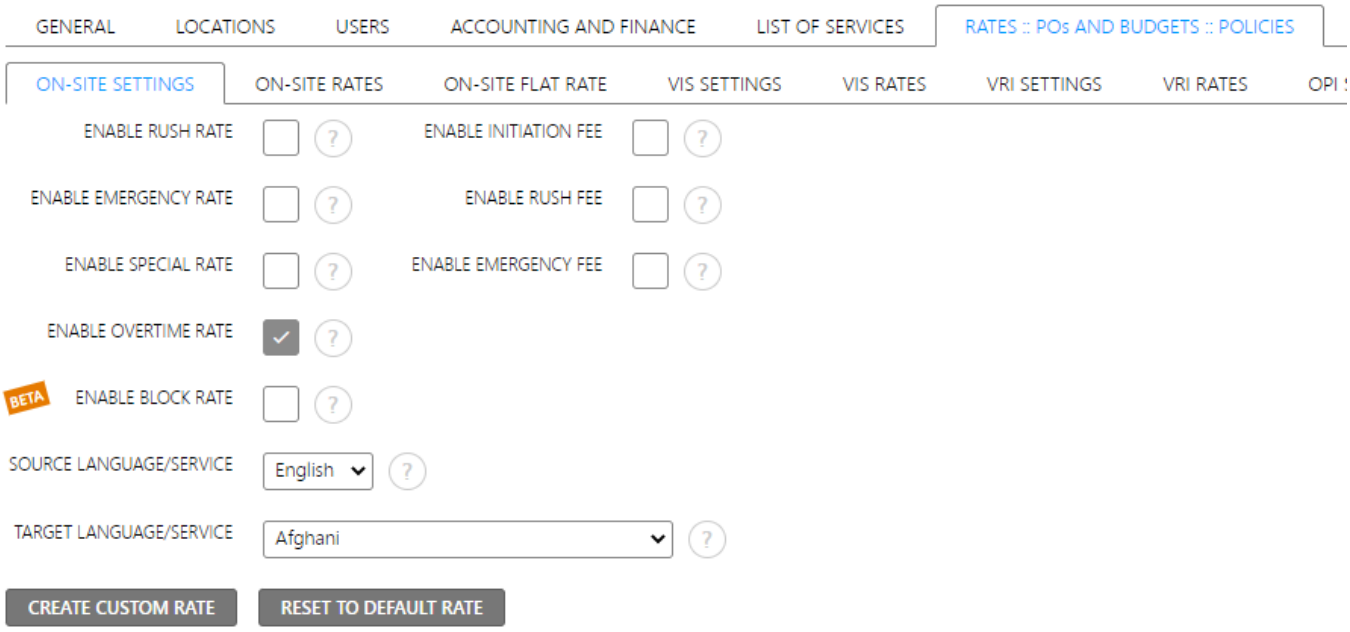
Accounting & Finance

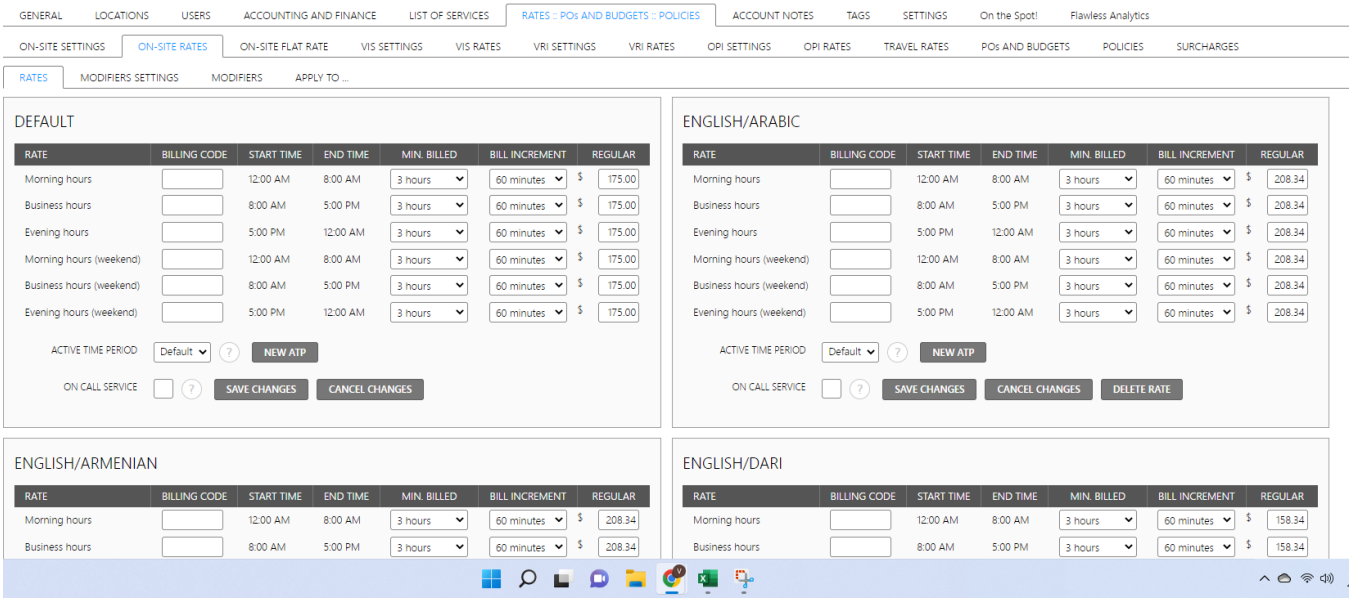


List of Services

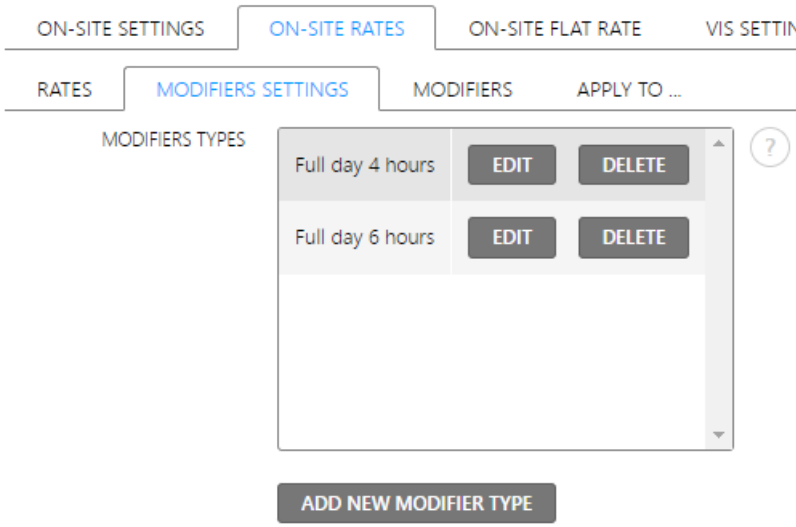


Rates (on-site, remote):

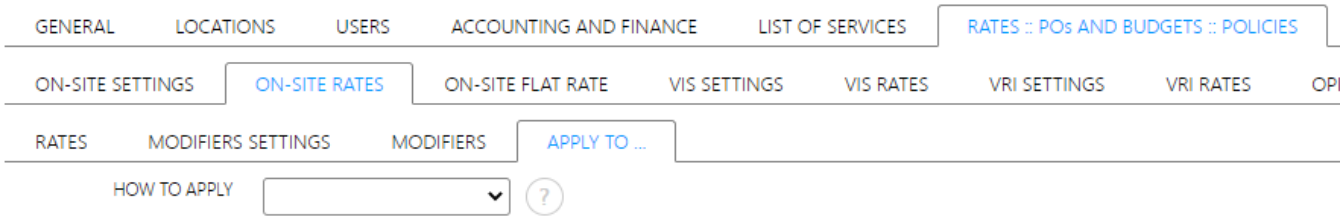




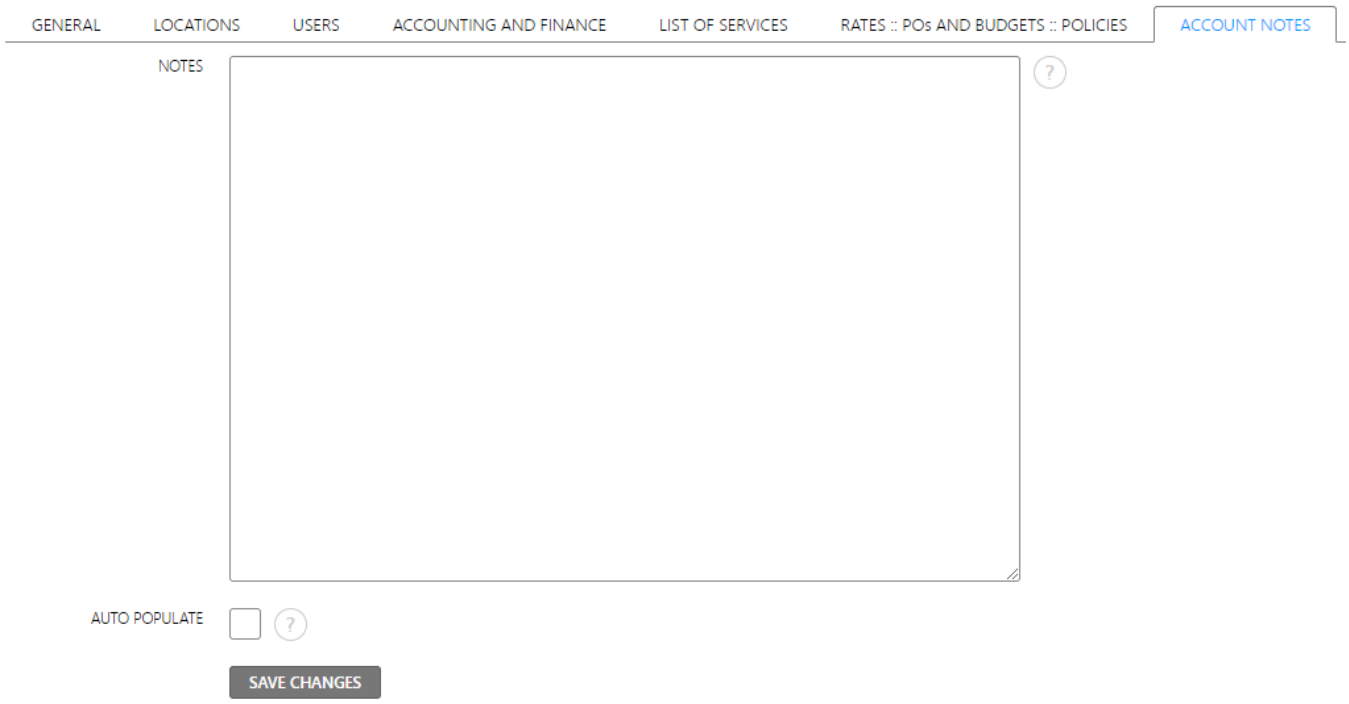
Modifiers



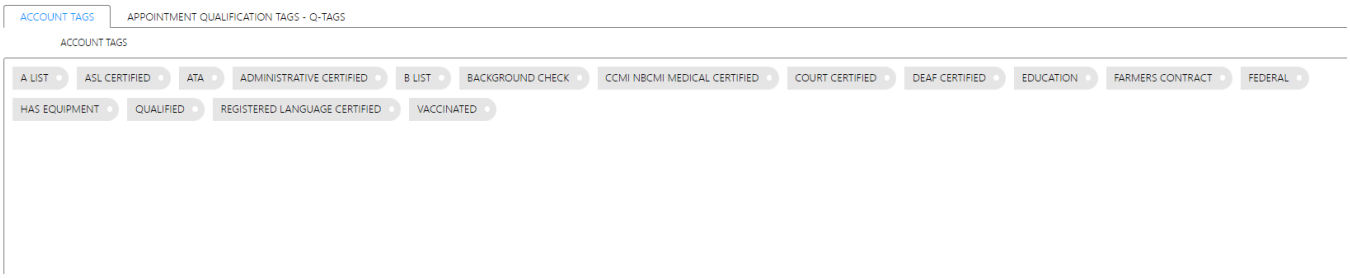
Apply To (apply other account rates to new clients or existing clients)



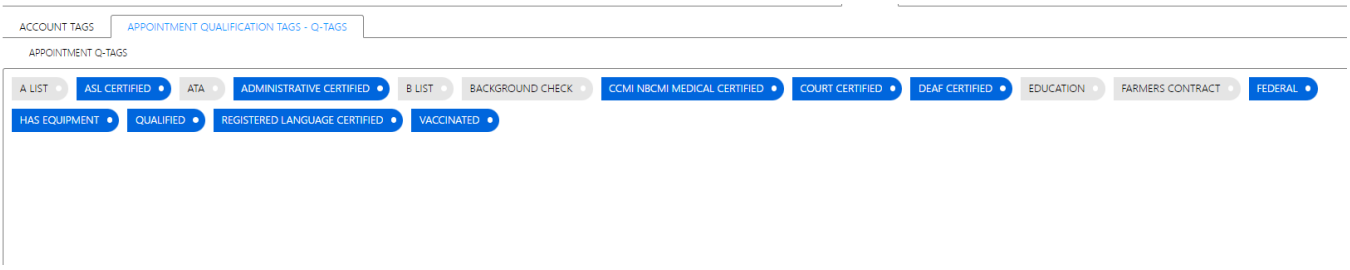
Notes



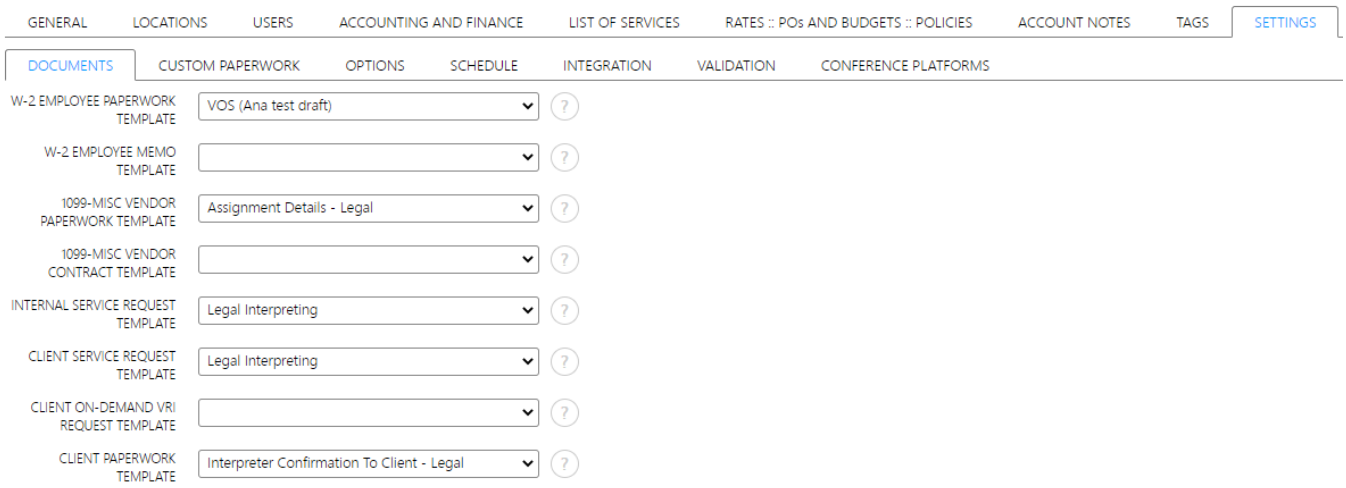
Tags (account tags leave unmarked unless Education and client NEEDS Background Checked Vendors OR if a client needs a Vaccinated Vendor)



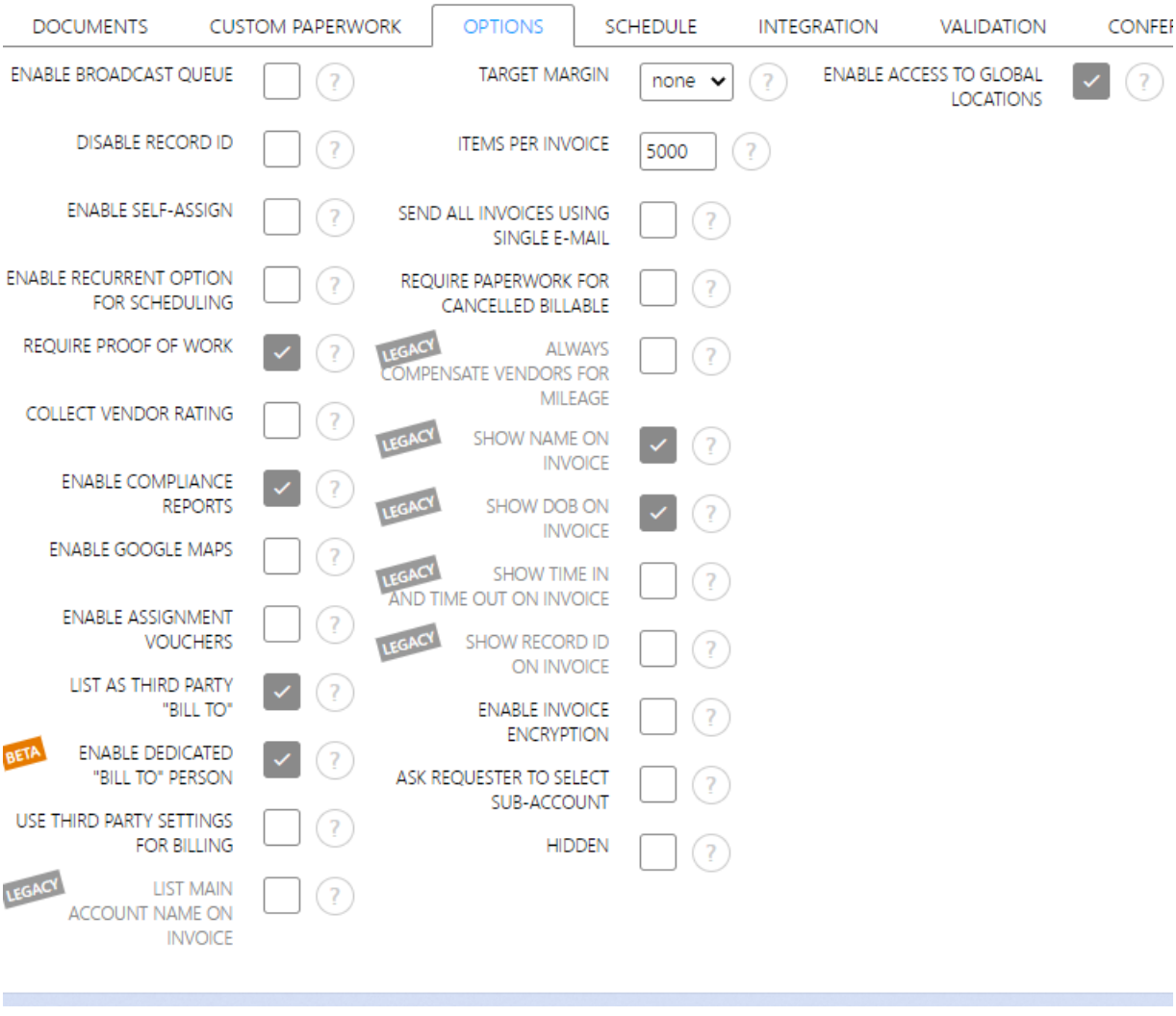
Appointment Qualification Tags (Q-Tags) (these need to be selected)



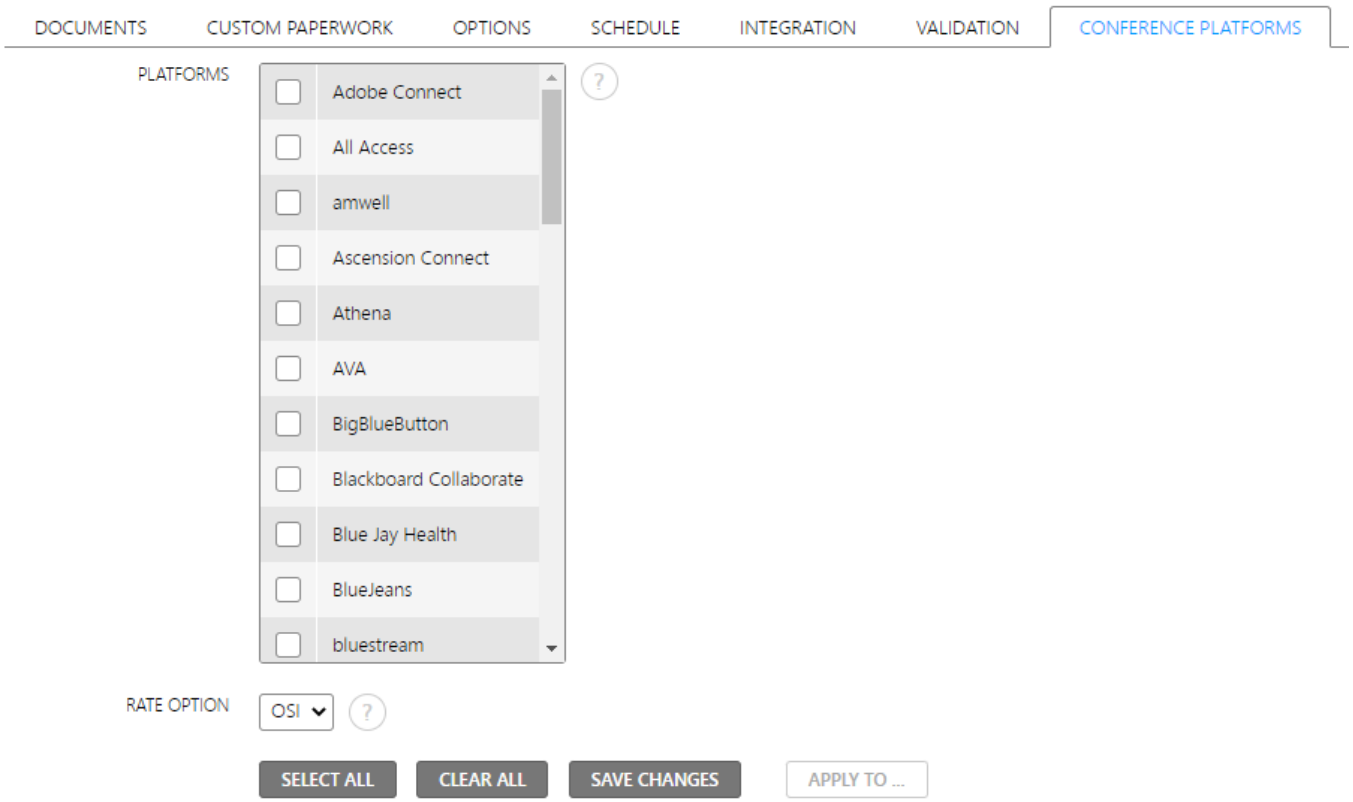
Settings



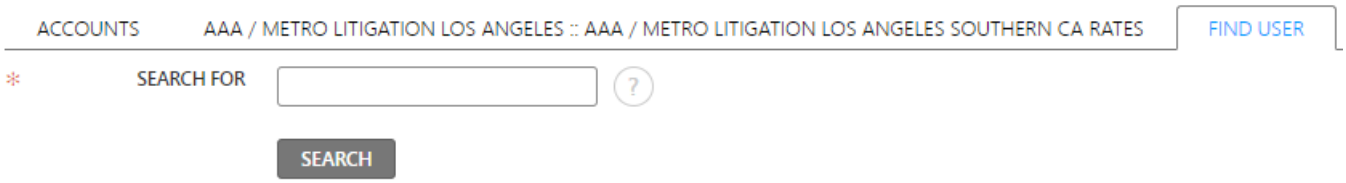
Options



Conference Platforms



Find Users



Revision #3
Created Mon, Feb 7, 2022 5:19 PM by Veronica Amador
Updated Wed, Apr 6, 2022 1:12 AM by Veronica Amador