How to update the finance settings

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Finance Settings allow you to define the currency accepted on the account, the payment account, and the financial notifications.

Accessing the Finance Settings

1. Click **Settings** or the **Gear** icon on the left menu.

2. Click the **E-Commerce & Financial** tab

3. In the General section, click **Finance Settings**. This area allows you to set and update the account's finance settings.

Financial Records & Notifications
In the Financial Records & Notifications tab it allows you to update details about the organization and the invoices.

Invoice Settings

This section sets the business number, invoice comments, and logo.

- **Business Number** - Unique business identifier for your organization.

- **Business Number Description** - The description of the business number.

- **Invoice Comment** - Comment which is added to the invoices.

- **Invoice Logo** - The logo which will appear on the invoices.

Financial Notifications Settings

This section controls which email templates are used for invoices and PDF attachments.

Note
Please edit with care should you wish to update these templates as incorrect edits can lead to broken email templates.

- **Invoice Message Template** - This template is used when sending an invoice for products, donations, and/or membership, which are not free.

- **Attachment Message Template** - This is the invoice attachment template that is

sent with invoice.

- **Order HTML Template** - This template is used when sending an invoice for products, donations, and/or membership which are free.

- **Order PDF Template** - This is the attachment in the email for the above.

Payment Account and Currency

In Payment Account and Currency tab, you have options to view or change the payment account and accepted currencies.

Account Finance Settings

This section controls which default currency is accepted and which payment account is used.

Note

The account currency and payment account cannot be changed if there are orders and invoices already generated.

Supported Currencies

This section controls which currencies are supported. Additional currencies can be used in the Events module only.

Payment Account

This section displays the payment accounts and allows you to add more by clicking the **Add** button. You can also edit or delete the payment accounts by clicking on the corresponding down arrow buttons. All of the information required to add a new payment account can be found from the payment provider.

Related Content

- [How to update officer settings and account positions](#)
- [How to assign officers](#)