Workspace settings

The Owner's tenant-wide control panel: company info, branding, payments, accountant CC, team, billing, premium, integrations, notifications, work-ledger rates, and account deletion.

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What Settings is for

Settings is the Owner's tenant-wide control panel. Everything inside applies to the entire workspace rather than to your account specifically: the company name on every email and signed agreement, the brand logo and colour clients see on the booking page, the Stripe Connect account that collects payments, the accountant who is CC'd on bills, the team roster and the modules each teammate can reach, the Premium subscription, the integrations to Google and Microsoft, and the account-deletion path. The Owner is the only role that can write to most of these cards; other roles can usually view the page but their save buttons are disabled.

Open Settings from the Settings icon in the top bar (the gear, third icon from the right) or from the profile popover. The page is a single long scroll broken into cards with anchor IDs, so you can deep-link a card (for example, /dashboard/settings#payments) from email or chat and the page jumps directly to it. Cards that are not relevant to your tenant (Billing on a comp-Premium tenant, the legacy Premium Package card on a V2-subscribed tenant) hide themselves; you only see the controls that apply to you.

The Booking page card

The Booking page card shows the public URL your clients reach to book with you (rcicapp.ca/book/<your-tenant-slug>) and gives you a copy button alongside it. The slug was set during onboarding; if you need to change it the platform team can do it manually because changing a slug invalidates every external link clients may have bookmarked. The card also surfaces a small set of preview controls that let you visit the booking page exactly as a visitor would see it.

The Embed Widget card

If you have your own website (WordPress, Squarespace, a marketing landing page), the Embed Widget card gives you a ready-to-paste iframe snippet that mounts your full booking flow inside your site. The iframe loads the same booking page that lives at rcicapp.ca/book/<your-slug>, so anything you change on your booking page (services, languages, branding) is reflected inside the embed automatically. There is no separate embed-specific configuration to maintain.

The Branding card

The Branding card holds two settings that apply across every client-facing surface: your logo and your brand colour. The logo upload accepts PNG, JPG, and WebP files and is stored in a dedicated tenant-logos bucket; it appears at the top of your booking page, in the header of every client-facing email, on the cover of signed Service

Agreements, at the top of public bill pages, and on the Transfer Room client portal. The brand colour is a single hex value that tints the call-to-action buttons across the same surfaces.

> **Note**: Branding does not propagate to the marketing site (rcicapp.ca itself) or to your member theme inside the dashboard. The marketing site is platform-wide; the dashboard theme is personal. Branding controls only what your clients see.

The Payments card (Stripe Connect)

The Payments card runs Stripe Connect's Standard onboarding. Clicking Connect Stripe redirects you to Stripe's hosted onboarding form where you provide your business details, banking information, and identity verification; Stripe then redirects you back to the dashboard with a connected account linked to your tenant. The connected account is yours, not Investatech's. Each Stripe payment a client makes routes the funds directly to your account; the platform fee (Basic: 1% on the first $5,000 CAD per month of Stripe-processed payments, 0% above that monthly cap; Premium: 0% always) is collected via Stripe's standard application-fee mechanism.

After onboarding completes, the card shows the connected account's email and a small set of links: a path to manage payouts directly in your Stripe Dashboard, the Express dashboard for any clarifications Stripe needs from you, and your connected-account ID for support. Disconnecting Stripe is intentionally not a self-service action; in-flight refunds and disputes bind to the original account, and a self-serve disconnect would break them silently. If you connected the wrong account during onboarding, the platform team can swap it through a one-time operator action.

> **Note**: If you do not accept Stripe payments at all, leave the account unconnected. Bookings, events, Q&A, written consultations, and bills all support offline payment markers (e-Transfer, cheque, wire, cash, paid outside Stripe) without Stripe involvement. The platform fee only applies to Stripe-processed payments.

The Team card

The Team card is where the Owner manages teammates: sees a roster of current members, invites new members by email, assigns a seat type (Assistant or RCIC, each with its own monthly cost), grants module access per teammate, sets per-member tenant-wide Transfer Room viewer access, sends password resets, and removes seats when teammates offboard. Inviting a new teammate sends them a tokened invitation email; declining is supported with a Reply-To to the Owner so the conversation can continue. Accepted invitations land the teammate at their own My Profile page where they fill in display name, headshot, and signature.

Seat types matter for billing. Assistants are billed at one rate, RCICs at another, both per month, and the per-seat total is added to the workspace subscription on Premium (Basic has its own seat policy). The seat type is not just a label; an Assistant cannot be marked as the RCIC of record on a Service Agreement, cannot countersign agreements, and cannot edit Transfer Room participants. The Owner promotes an Assistant to RCIC by changing the seat type; the teammate then completes their own RCIC self-attestation from My Profile.

Billing & Subscription

The Billing card is the canonical surface for managing your Premium subscription. It shows your current tier (Basic, Premium-monthly, Premium-annual), your billing cadence, your next renewal date, your active coupon if any, the per-seat charges your team currently incurs, and a Manage subscription button that opens the Stripe customer portal where you can update your payment method, see past invoices, change cadence, or cancel. Trial-time tenants see a count-down to their trial end and a Subscribe button that takes them through Stripe Checkout.

The Admin Fees card

If you want to pass a small surcharge to clients who pay via Stripe (to recover Stripe's processing fee), the Admin Fees card lets you configure it. You set a percentage and a flat amount per Stripe transaction; the surcharge is added on top of every Stripe-collected booking, event registration, Q&A registration, single bill, and Active File

Review payment your clients make. The line is labelled clearly to the client at checkout. Tenants who do not want a surcharge leave the values at zero; tenants who absorb the Stripe fee into their service price never enable the card.

Written-Consultation Follow-Up Discount

If your firm offers Written Consultations and would like to incentivise repeat work, this card sets a discount that applies automatically to any follow-up booking a client makes within a configured window after their Written Consultation closes. The discount is percentage-based and the window is in days; both default to off. The discount line surfaces on the public booking page and on the confirmation email so the client knows the offer is in effect.

Work-ledger rates

If your tenant uses the Matter Work Ledger inside Transfer Room (the per-matter internal time and billing log), this Owner-only card sets the hourly rates for each seat type (RCIC, Co-counsel, Assistant) plus the rounding granularity (none, 15 minutes, 30 minutes, 60 minutes). Each work-ledger entry your team logs is multiplied by the worker's seat-type rate at read time, so rate changes apply across every existing entry the next time you open the ledger. The rates are internal-only; clients never see them.

Notifications and accountant CC

The Notifications card holds two tenant-wide CC lists that quietly extend the platform's email fan-out: an SA-signed CC list (up to five email addresses that receive a copy of every Service Agreement the moment it reaches fully-signed) and a Bill-paid CC list (up to five addresses that receive a copy of every payment-received notification). Both lists are common firm-internal needs: a finance address that needs every executed agreement on file, a billing assistant who needs every paid receipt for the accounting system. Both default to empty; both are validated and capped on save.

Separately, Service Agreements ’ Settings ’ Bill on signing carries an Accountant CC field: a single tenant-wide email that gets CC'd on every bill-related email (the bill itself, the bill-paid receipt, the payment-received tenant alert, and the bill reminder). It is one address per firm by design; multi-RCIC firms share one accountant. The two notification surfaces are complementary: the SA-signed and bill-paid lists are about specific lifecycle moments, the accountant CC is about every bill-shaped email regardless of state.

Integrations (Google Drive and OneDrive)

The Integrations card holds your workspace-wide Drive connection. You can connect either Google Drive or Microsoft OneDrive (one or the other; the two are mutually exclusive at the tenant level). Connecting Drive runs the provider's OAuth onboarding and stores the encrypted refresh token under your tenant. Once connected, Transfer Room provisions a full case-folder tree (Contract, Pre-contract consultation, Client Docs, RCIC Docs, Application, Government Communications, Identification) the moment a Service Agreement is fully signed; deliverables, signed PDFs, and received client files route into their correct folder automatically.

> **Note**: If a Drive refresh token goes stale (revoked because of a password change or a Cross-Account Protection event), the card flips to a 'Reconnect required' state. Save-to-Drive across every module degrades gracefully in the meantime: bytes that would have been routed to Drive stay queued and retry automatically once you reconnect. No file is silently lost.

Business Information

The Business Information card holds the tenant-wide fields that flow into every Service Agreement, every email signature, every bill, and every client-facing surface that needs to name your firm. Company name (legal name as registered), business name (the trade name you operate under, when different), business address, contact email, contact phone, default currency, tenant timezone, default client-page language, and your list of supported client-page languages all live here. Changing a value here propagates everywhere on the next render; you should not need to edit it more than once a year unless your firm reorganises.

The supported-language list is interesting because it controls runtime translation. Basic tenants have access to English plus Quebec French; Premium unlocks an additional eight languages for runtime translation on client-facing surfaces (the booking page, the public agreement portal, intake forms, the Transfer Room client portal). Adding a language here makes it appear in the language picker on those surfaces; the visitor's language preference (URL parameter, cookie, browser default) selects the active locale at request time.

Signing and signatures

The Signing and signatures card (under Service Agreements ’ Settings) carries both the workspace-wide signature mode that applies to every Service Agreement the firm signs (Material clauses only, Every clause, or a Custom set you pick) and the per-user signature capture flow. Each RCIC who countersigns agreements captures their signature here once — typed in a script font, drawn with a mouse or trackpad, or uploaded from an image file. The captured signature is encrypted under the tenant's data-encryption key before storage and replays automatically every time you countersign, so the countersign step is a single click rather than a re-draw.

The signature mode determines which clauses require per-clause initials from the client. Material clauses only is the default and the simplest for clients; Every clause is the most defensible if you ever face a dispute about which clauses the client read; Custom lets you pick a precise set if your firm has its own house standard. The mode applies to every Service Agreement the firm signs from the moment you save it; existing in-flight drafts keep their original mode until they reach fully-signed.

Module-specific settings

Most modules carry their own settings page reachable from the module's sidebar rather than from the top-level Settings page. Service Agreements has a Settings hub with Templates, Profile (default fees, refund, complaint handling, accepted payment methods), Signing and signatures, Client translation, Bill on signing, and Customize articles. Transfer Room has its own Owner-only TR Settings page for list-pagination defaults, tenant-wide viewer access, and default contact roster. Active File Review has its own routing and disabled-categories settings. Intake Forms, Co-Counselling Agreements, Fax, and Premium all follow the same pattern.

The top-level Settings page is for tenant-wide concerns that span every module (company info, branding, Stripe Connect, team, Premium billing). Module-specific pages are for configuration scoped to one module's behaviour. Every module chapter in this manual covers its own settings page in detail; check those when you need to tune behaviour for a specific module.

Export account data

The Export account data card (Owner-only) initiates a one-shot job that compiles a downloadable archive of your tenant's data: company information, services, bookings, events, Q&A registrations, written consultations, single bills, Service Agreements (signed copies plus draft data), Transfer Room metadata, Active File Review intake submissions, intake form submissions, Co-Counselling Agreements, and the audit ledgers for each. The archive is delivered to you via a private download link and is intended as a portability artifact. It is not a substitute for ongoing Drive sync or your own document-management practice.

Delete account

The Delete account card (Owner-only) initiates the tenant's wind-down. Clicking Delete pops a confirmation modal explaining what happens: the tenant moves to a soft-deleted state immediately, every member is signed out, the public booking page returns a friendly Not Found, every Stripe subscription and per-seat charge is cancelled, and a 90-day purge is scheduled. During the 90-day window the platform retains your data so a recovery is possible (contact the platform team); after the window expires, every row is permanently deleted from the platform's database and from object storage. If your Transfer Room has active rooms with files in flight, the modal surfaces a footprint warning so you know exactly what is about to be lost.

> **Important**: Account deletion is intentionally a high-friction action. You must type the word DELETE into a confirmation field before the button arms. Reactivation during the 90-day window is possible but requires manual platform-team action; after 90 days, recovery is impossible. Export your data first if you might want it again.