Advanced client configuration
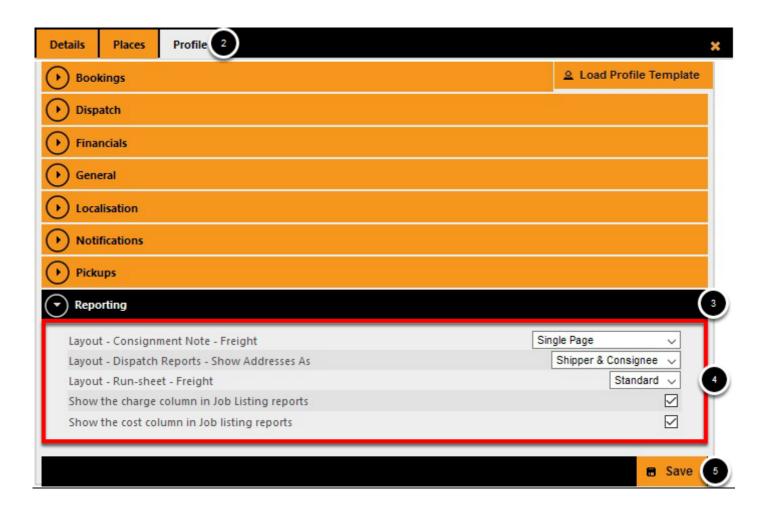
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> 🛈 To modify a client's profile a user must have the **Super User** role and the **Client Company Maintenance** task

The company profiles tab (found in the company menu) contains advanced configuration options for a client.

To modify a client's profile a user must have the **Super User** role and the **Client Company Maintenance** task

Configuring client profiles

1. Select a company from the **Companies Menu**
2. Click the **Profile Tab**
3. Select a profile accordian
4. Update/ Configure accordian options
5. Click the **Save** button to apply your changes

Booking Profile

Configuration options for a client's job bookings; such as defaults, the initial status of their jobs if they book them and what booking features they can access. For more information see the **Company Profile - Bookings** article

Dispatch Profile

Configuration options related to dispatching. For more information see the **Company Profile - Dispatch** article

Financial Profile

Configuration options related to your financial accounts integration and invoices generated for this client. For more information see the **Company Profile - Financial** article

General Profile

Configuration options for the default date ranges on a client's job list workbench and text fields. For more information see the **Company Profile - General** article

Localisation Profile

Configuration options related to what locations a client can see. For more information see the **Company Profile - Localisation** article

Notifications Profile

Configuration options for Proof Reports and who will receive them when a client's jobs have been completed. For more information see the **Company Profile - Notifications** article

Pickups Profile

Configuration options related to pickups. For more information see the **Company Profile - Pickups** article

Reporting Profile

Configuration options for consignment notes and reports generated by a client. For more information see the **Company Profile - Reporting** article

Preview