

Advanced client configuration

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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

The screenshot displays the 'Advanced client configuration' interface. At the top, there are three tabs: 'Details', 'Places', and 'Profile'. The 'Profile' tab is selected and highlighted with a red circle labeled '2'. Below the tabs, there is a list of configuration categories: Bookings, Dispatch, Financials, General, Localisation, Notifications, Pickups, and Reporting. The 'Reporting' category is expanded, showing a list of settings. A red box highlights the 'Reporting' section, which includes the following settings:

- Layout - Consignment Note - Freight: Single Page (dropdown menu)
- Layout - Dispatch Reports - Show Addresses As: Shipper & Consignee (dropdown menu)
- Layout - Run-sheet - Freight: Standard (dropdown menu)
- Show the charge column in Job Listing reports: ☒
- Show the cost column in Job listing reports: ☒

At the bottom right of the interface, there is a 'Save' button, which is highlighted with a red circle labeled '5'. Other numbered callouts include a red circle labeled '3' next to the 'Reporting' section header and a red circle labeled '4' next to the 'Standard' dropdown menu.

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