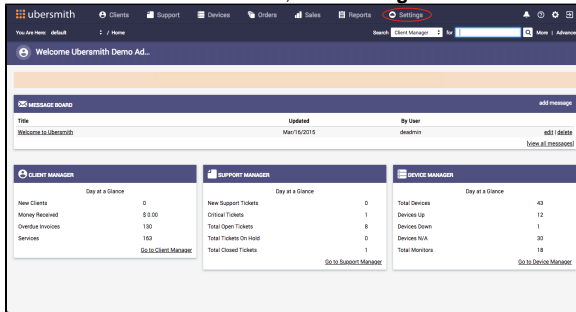


Configuring the Client Manager General Settings

This page specifies how the *Client Manager* operates.

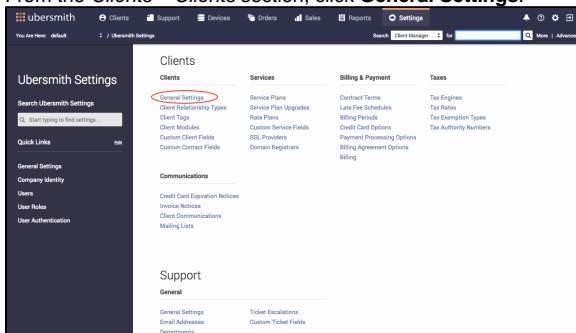
Access the General Settings Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Settings* page appears.

2. From the *Clients – Clients* section, click **General Settings**.

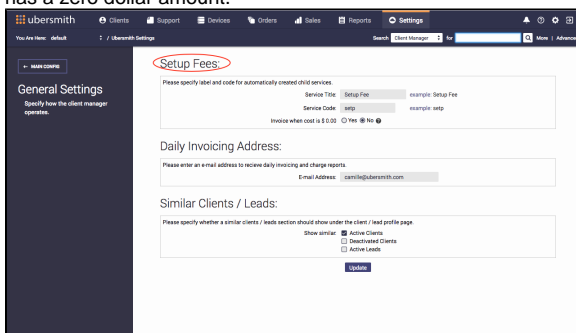


The *General Settings* page appears.

Complete the Setup Fees Section

This section configures what the setup fee child service for parent services will default to.

1. In the **Service Title** field, enter the setup fee label.
2. In the **Service Code** field, enter the setup fee service code.
3. In the **Invoice when cost is \$0.00** field, select **Yes** to include a setup fee in an invoice when it has a zero dollar amount.



Complete the Daily Invoicing Address Section

This section configures which email address will receive daily invoicing and charge reports.

On this page:

On this page:

- [Access the General Settings Page](#)
- [Complete the Setup Fees Section](#)
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- [Complete the Similar Clients /Leads Section](#)
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- In the **Email Address** field, enter the email address to receive the charge queue updates.

The screenshot shows the 'ubersmith' Settings page. The left sidebar has a 'General Settings' section. The main content area has three sections: 'Setup Fees', 'Daily Invoicing Address', and 'Similar Clients / Leads'. The 'Daily Invoicing Address' section is highlighted with a red circle. It contains a text input field with the placeholder 'Please enter an email address to receive daily invoicing and charge reports.' and a button 'Update'.

Complete the Similar Clients/Leads Section

This section configures whether similar clients and leads should display in the Client / Lead profile page.

- In the **Show similar** field, select one or more, or none to determine if either active clients, deactivated clients, or active leads will display.

The screenshot shows the 'ubersmith' Settings page. The left sidebar has a 'General Settings' section. The main content area has three sections: 'Setup Fees', 'Daily Invoicing Address', and 'Similar Clients / Leads'. The 'Similar Clients / Leads' section is highlighted with a red circle. It contains a text input field with the placeholder 'Please specify whether a similar clients / leads section should show under the client / lead profile page.' and a button 'Update'.

Save Your Configuration Settings

- Click **Update**.

The screenshot shows the 'ubersmith' Settings page. The left sidebar has a 'General Settings' section. The main content area has three sections: 'Setup Fees', 'Daily Invoicing Address', and 'Similar Clients / Leads'. The 'Update' button in the 'Similar Clients / Leads' section is highlighted with a red circle.

Related Topics

[Configuring Credit Card Options](#)