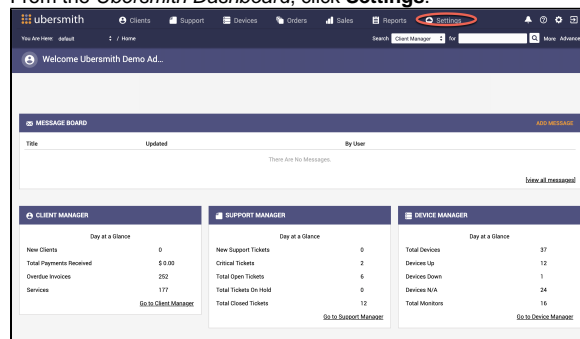


Adding Client Relationship Types

You can create and configure roles for your users that have direct contact with our clients. Salesperson or account manager, are default types already configured in Ubersmith.

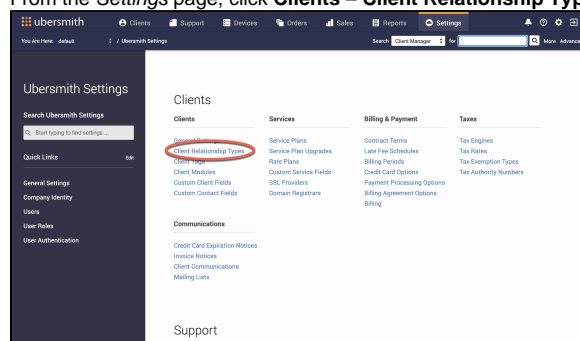
Access the Client Relationship Types Page

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



The Ubersmith *Settings* page appears.

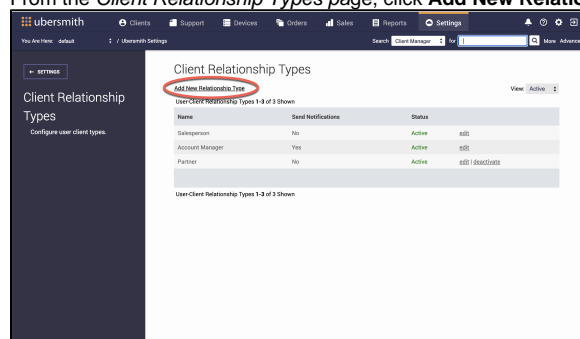
2. From the *Settings* page, click **Clients – Client Relationship Types**.



The *Client Relationships Types* page appears.

Complete the Add New User-Client Relationship Type Page

1. From the *Client Relationship Types* page, click **Add New Relationship Type**.



The *Add New User-Client Relationship Type* page appears.

2. In the **Name** field, enter the title or role of the relationship to the client, such as Project Manager.
3. In the **Active** field, select Yes to enable the role.
4. In the **Send Notifications** field, select **Yes** to include your users assigned this role a copy of their client's notifications.

On this page:

On this page:

- [Access the Client Relationship Types Page](#)
- [Complete the Add New User-Client Relationship Type Page](#)
- [Related Topics](#)

5. Click **Save** or **Save & New**.

ubersmith

Add New User-Client Relationship Type

Details

Name (English(USA))*

Active? ☒ Yes ☐ No

Send Notifications: ☒ Yes ☐ No

Related Topics

[Managing Client Relationship Types](#)

[Adding User Roles](#)

[Managing User Roles](#)