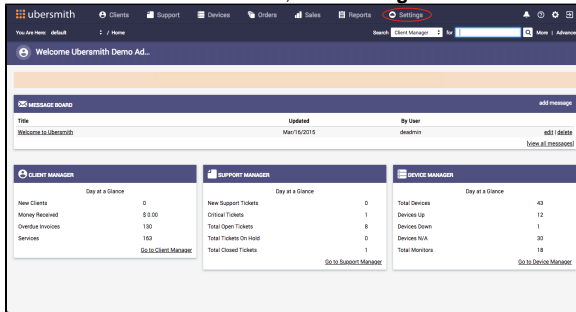


# Configuring the Client Manager General Settings

This page specifies how the *Client Manager* operates.

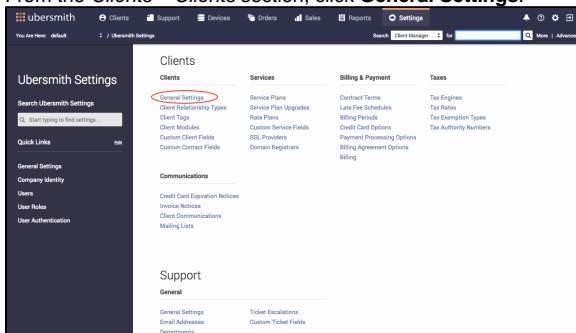
## Access the General Settings Page

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



The *Settings* page appears.

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

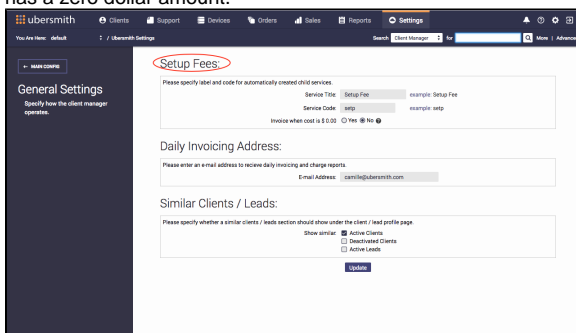


The *General Settings* page appears.

## 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](#)
- [Complete the Daily Invoicing Address Section](#)
- [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 contains 'General Settings' and 'Make Changes'. The main content area has sections for '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 labeled 'Email Address'.

## 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 contains 'General Settings' and 'Make Changes'. The main content area has sections for '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 labeled 'Update'.

## Save Your Configuration Settings

- Click **Update**.

The screenshot shows the 'ubersmith' Settings page. The left sidebar contains 'General Settings' and 'Make Changes'. The main content area has sections for '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](#)