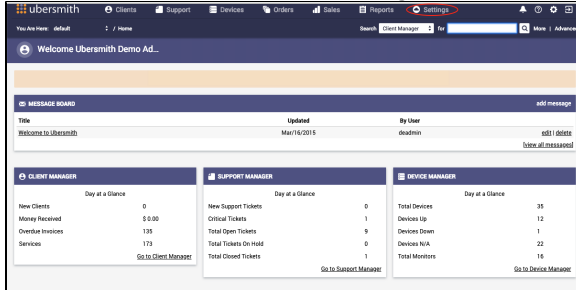


Configuring Client Interface Global Settings

This page determines what self-service functions you want to enable for your clients to perform in your *Client Portal*. If you want to enable any of these functions, ensure the corresponding menu links are also enabled.

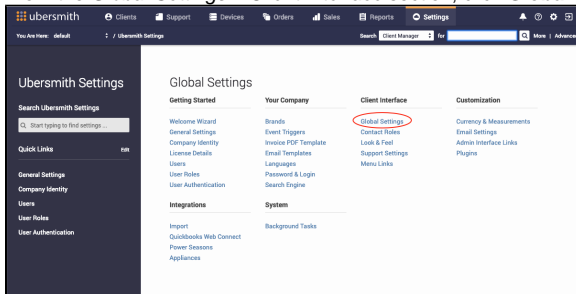
Access the Global Settings Page

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



The *Settings* page appears.

2. From the *Global Settings – Client Interface* section, click **Global Settings**.

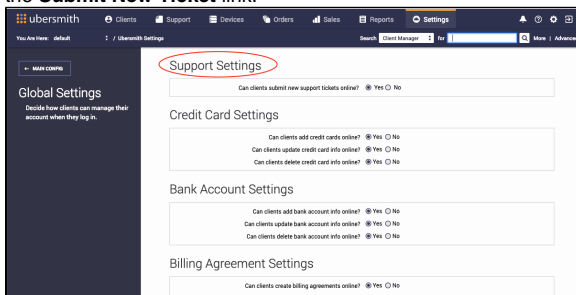


The *Global Settings* page appears.

Complete the Support Settings Section

This section enables [support tickets to be submitted](#) from the *Client Portal*.

- In the **Can clients submit new support tickets online** field, select **Yes** to display and enable the **Submit New Ticket** link.



Complete the Credit Card Settings Section

1. In the **Can clients add credit cards online** field, select **Yes** to enable the **add credit card** link in the *Credit Cards* section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then add their own credit cards for payments.
2. In the **Can clients update credit card info online** field, select **Yes** to enable the **edit link** in the *Credit Cards* section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then update their own credit cards information for payments.

On this page:

On this page:

- [Access the Global Settings Page](#)
- [Complete the Support Settings Section](#)
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- [Complete the Bank Account Settings Section](#)
- [Complete the Billing Agreement Settings Section](#)
- [Complete the Payment Settings Section](#)
- [Complete the Tax Exemptions Settings Section](#)
- [Complete the Contact Information Section](#)
- [Complete the Device Manager Section](#)
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3. In the **Can clients delete credit card info online** field, select **Yes** to enable the **delete** link in the **Credit Cards** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then delete their own credit cards.

The screenshot shows the Ubersmith Settings page. On the left is a sidebar with 'Global Settings' and 'Manage Clients'. The main content area is titled 'Support Settings' and contains three sections: 'Credit Card Settings', 'Bank Account Settings', and 'Billing Agreement Settings'. The 'Credit Card Settings' section is circled in red and contains three toggle switches: 'Can clients add credit cards online?', 'Can clients update credit card info online?', and 'Can clients delete credit card info online?'. All three are currently set to 'No'.

Complete the Bank Account Settings Section

1. In the **Can clients add bank account info online** field, select **Yes** to enable the **add bank account** link in the **Bank Accounts** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then add their own checking or savings account for payments.
2. In the **Can clients update bank account info online** field, select **Yes** to enable the **edit** link in the **Bank Accounts** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can update their own checking or savings account for payments.
3. In the **Can clients delete bank account info online** field, select **Yes** to enable the **delete** link in the **Bank Accounts** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then delete their own checking or savings account.

The screenshot shows the Ubersmith Settings page with the 'Bank Account Settings' section circled in red. It contains three toggle switches: 'Can clients add bank account info online?', 'Can clients update bank account info online?', and 'Can clients delete bank account info online?'. All three are currently set to 'No'.

Complete the Billing Agreement Settings Section

Billing agreements allow your clients to establish recurring payments through PayPal or WorldPay without the need to store their credit card data. In order to enable this feature, you will need to first [add billing agreements](#).

1. In the **Can clients create billing agreements online** field, select **Yes** to enable the **add PayPal billing agreement** and/or **add WorldPay billing agreement** link in the **Billing Agreements** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then add their own billing agreement for payments from PayPal and WorldPay.
2. In the **Can clients delete billing agreements online** field, select **Yes** to enable the **delete** link in the **Billing Agreements** section accessed from the **Payment Methods** link in the *Client Portal*. Your clients can then delete their own PayPal and WorldPay billing agreement.

The screenshot shows the Ubersmith Settings page with the 'Billing Agreement Settings' section circled in red. It contains two toggle switches: 'Can clients create billing agreements online?' and 'Can clients delete billing agreements online?'. Both are currently set to 'No'. Below this are sections for 'Payment Settings', 'Tax Exemption Settings', and 'Contact Information', each with their own set of toggle switches.

Complete the Payment Settings Section

- In the **Accept online payments from clients** field, select **Yes** to accept online payments from your clients. This enables the **Pay Online** link on the **View Invoices** page, accessed from the **View Invoices** link in the **Client Portal**.

Complete the Tax Exemptions Settings Section

1. In the **Allow clients to manage their tax exceptions** field, select **Yes** to add and update tax exemptions through the **Client Portal**.
2. In the **Notify this address when a client adds a tax exemption** field, enter the email address to receive the notification. Once an exemption is submitted, it will [need to be approved](#).

Complete the Contact Information Section

1. In the **Can client modify their information** field, select **Yes** to enable the **edit** link in the **Addresses & Contact Information** section accessed from the **View Profile** link in the **Client Portal**. Your clients can then update their own contact information.
2. In the **Can clients modify their contact list** field, select **Yes** to enable the **edit** link in the **Authorized Contacts** section accessed from the **View Profile** link in the **Client Portal**. Your clients can then update their own authorized contacts.
3. In the **Can clients modify their contact facilities access** field, select **Yes** to enable the **add contact**, **edit**, and **remove** links on the **Facilities** page accessed from the **View Facilities** link in the **Client Portal**. Your clients can then add contacts, update, and remove their own facility authorized contacts.
4. In the **Notify this address when a client updates their contact information** field, enter the email address to receive the notification.
5. In the **How many months before a client's password expires and must be reset** field, enter the number of months.

Complete the Device Manager Section

1. In the **Allow clients to view log entries for their devices** field, select **No Access** to disable the device log, select **Since Assignment** to allow your clients to see all log entries since the device was assigned to them, or select **Full Access** to allow your clients to see the device's full lifetime log entries.
2. In the **Allow clients to add, edit, and delete monitors for devices owned by them** field, select **Yes** to enable the **add monitor**, **edit**, and **delete** links on the **Monitors** page accessed from the **View Devices** link in the **Client Portal**. Your clients can then add, update, and remove

their own monitors.

The screenshot shows the 'ubersmith' Settings page. The left sidebar contains 'Global Settings' and 'MARK CONTACTS'. The main content area has three sections: 'Tax Exemption Settings', 'Contact Information', and 'Device Manager'. The 'Device Manager' section is circled in red. It contains a 'Full Access' toggle and a 'Submit' button at the bottom.

Save Your Configuration Settings

- Click **Submit**.

This screenshot is identical to the previous one, but the 'Submit' button in the 'Device Manager' section is circled in red, indicating the final step to save the configuration.

Related Topics

[Client Portal](#)

[Billing and Payment Client Settings](#)

[Taxes Client Settings](#)

[Devices Settings](#)

[Support Settings](#)

[Adding Clients](#)

[Adding Contacts](#)

[Managing Clients](#)

[Managing Contacts](#)