Profile

To view a client's profile page click [Clients] to browse and sort a list of clients, then click the client's ID under the Client ID column or search for the client using the search field. All actions related to a client can be performed from the client profile.

The client's profile is broken into two primary sections. On the left is the client overview pane, followed by the account actions list. On the right is a list of all widgets set to display in this section. This includes, at minimum, Invoices, Transactions, and Services. You can sort these widgets by clicking the widget heading and dragging it up or down the list of widgets. You may also minimize a widget by clicking the arrow icon in the upper right of the widget heading. The state of all widgets are saved across all client profile pages for the company you are currently logged into.