Company > Client Options

Table of Contents

- 1 General Client Settings
- 2 Client Custom Fields
  - 2.1 Creating a Custom Field
  - 2.2 Editing a Custom Field
  - 2.3 To edit a custom client field click Edit next to the field on the Client Custom Fields page.
  - 2.4 Deleting a Custom Field
- 3 Required Client Fields

General Client Settings

Option	Description
Enforce Unique Contact Email Addresses	Restricts email addresses for contacts. **Option** / **Description** -- None -- : Allow duplicate email addresses Primary Contacts : No two primary contacts (i.e. clients) can have the same email address All Contacts : No two contacts of any type can have the same email address as another contact
Force Email Usernames	Clients must use their email address as their username rather than defining their own. Existing clients can still login with their current username.
Enable Email Verification	Check to send an email verification email when a new login is created or a client changes their email address. A notice will appear on the clients profile until they are verified.
Prevent Payments from Unverified Clients	Do not allow payments from clients with an unverified email address

Client Custom Fields

Custom client fields allow for additional information to be collected and stored for clients. These fields are configured on a per client group basis, allow only certain fields to appear for certain client types.

Custom client fields can be managed under [Setting] > [Company] > [Client Custom Fields].

Creating a Custom Field

To create a custom client field click the **Create Field** button on the Client Custom Fields page.

Editing a Custom Field

To edit a custom client field click **Edit** next to the field on the Client Custom Fields page.

Option	Description
Client Group	The client group this field should belong to.
Name	The display name for this field. This may be a language definition.
Name is language definition	Check this box if the custom field Name is a language definition.
Type	The type of field. **Option** / **Description** Text Box : A text input field. Check Box : A check box field. Drop Down : A drop down menu. If selected a table of options will appear. **Option** / **Description** Value : The value stored for the option. Option Name : The name of the option. Text area : A large text area field.
Default Value Checked (Checkbox only)	Check to have this checkbox be checked by default

Default Text Value (Text area and text box only)	The text that will appear in the text box by default
Visible to Clients	Check to allow clients to see and update this field.
Read Only for Clients	Check to prevent clients from updating this field.
Required	Select **Yes** to ensure that a value is given for this field, for Drop Down types the option must appear in the list of options. Select **No** to accept any value for this field. Select **Custom Regex** to ensure a custom regular expression to valid this field.
Custom Regex	This option will appear if **Required** is set to **Custom Regex**. Enter the custom regular expression to validate for this field here.
Encrypt Values	Check this box to store the value encrypted. This is highly recommended if storing any sensitive or personally identifying information.

Deleting a Custom Field

To delete a custom client field click **Delete** next to the field on the Client Custom Fields page. This will remove the field and all values stored for this field across all clients.

Required Client Fields

Select fields from this page to require when contact fields are being added or updated. Check a box to require that field. Grayed out fields are always required