

Copy Client

Wed, Jan 17, 2024 System

The Copy Client function allows you to create a new Client from an existing Client (referred to as the Reference Client). To copy a Client click the "Copy Client" button in the menu.

Note: Copying a Client does not automatically assign all Resources & Manufacturers from the copied Client to the new Client.

1. Clicking the "Copy Client" button will display the following screen:

Copy Client

Reference Client: Please select...

Name: [Text Box]

Phonetic Name: When blank, the name will be used

Default Timezone: (UTC) Dublin, Edinburgh, Lisbon, London

Default Country: [Dropdown]

Default Culture: [Dropdown]

Logo: [Text Box] Select [Small Square]

Website Logo: [Text Box] Select [Large Empty Box]

Report Logo: [Text Box] Select [Small Empty Box]

Is Active?

Included clone components: Clear All Select All More Info...

- Copy all users
- Copy asbestos
- Copy the building groups (grouping 1)
- Copy the client task type associations
- Copy the active contractor associations
- Copy the active FGas leak detection method associations
- Copy the active FGas type associations
- Copy the active fix type associations
- Copy the active location building formats
- Copy the active location associations
- Copy the operational region codes (grouping 2)

OK Cancel

Here, the following information can be entered:

From the Reference Client drop-down menu, once clicked, a list of the Clients the User has access to can be seen. A Client can be selected from the list that the User wishes to use as the basis for the new Client.

The name of the Client being created and well the Phonetic Name.

The default Timesone, Country and Culture

By pressing the "Select" button, the Logo that is to be used for the new Client can be uploaded.

The Logo should be a maximum size of 22 x 22 pixels and should be of JPG format. This logo appears on the Helpdesk Work Page.

By pressing the "Select" button, the Website Logo that is to be used for the new Client can be

uploaded. The Website Logo should be a maximum size of 276 x 95 pixels and should be of JPG format. This Logo is seen on the Web Portal.

By pressing the "Select" button, the Report Logo that is to be used for the new Client can be uploaded. The Report Logo should be a maximum size of 206 x 94 pixels and should be of JPG format. This Logo is seen when running Client Reports.

When copying a Client, the User has the choice to copy certain components from the Client that is being copied, so that they are present in the new Client. By default, all components are ticked but these can be configured so that only certain components are selected. All components can be removed by clicking the "Clear All" button and all components can be added by clicking the "Select All" button.

2. Once the changes have been made, click "OK" to save them.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=21>