## 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		
Phonetic Name	When blank, the name will be used	
Default Timezone	(UTC) Dublin Edinburgh Lisbon London	
Default Country	· · · · · · · · · · · · · · · · · · ·	
Default Culture		
Default Culture		
Logo	Select	
Website Logo	Select	
Report Logo	Select	
Report Logo	Jelect	
Is Active?		
Included clone components Clear All Select All More Inf		
Copy all users		^
Copy asbestos		
Copy the building groups (	(grouping 1)	
🗷 Copy the client task type a	ssociations	
Copy the active contractor associations		
Copy the active FGas leak of	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 regio	n codes (grouping 2)	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

Here, the following information can 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

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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.

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