

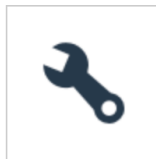
Brand Configuration Settings

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Overview

The **Configuration** section contains all of your brand-level settings. These settings are initially reviewed and configured during onboarding, based on your brand's preferences and operational decisions. While the onboarding team handles the initial setup, you can update these settings at any time as your needs evolve.

To access these settings, go to **Dashboard > Tools > Configuration**.



[Configuration](#)

View and modify your brand's configuration options.

This article highlights the most commonly used settings, organized in the same order as they appear on the Configuration page. Some advanced configuration topics, such as **Data Subscriptions** and **Feedback**, are covered in dedicated articles within the **Brand Admin** section of our knowledge base. While these options appear on the Configuration page, you'll find more detailed guidance in their respective articles.

This article will review:

- [System](#)
- [Settings](#)
- [DataSubscriber](#)
- [Integrations](#)

System

Postal Code Editing - Toggle this setting on to allow brand admins access to update/add postal codes at the organization level

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Territory Restrictions - Determine if you will allow adding contacts in postal codes owned by other organizations. Determine if franchisee will receive a warning when they are trying to add a contact not owned by an organization.

Settings

Organization Permissions

Use this section to control which areas franchisees can view, add, or edit within their accounts. For example, your brand may choose to restrict locations from creating or modifying their own **Parts** and **Services** lists to maintain consistency across all territories.

These permissions are **all-or-nothing**, meaning that if a franchisee does not have permission for **Parts**, they will not be able to perform any related actions—such as updating individual part pricing. In this case, only the **Brand Admin** can make those changes on their behalf or apply pricing updates in bulk from the brand account and deploy them to all franchise organizations.

You will go through this list of organization permissions with your Onboarding Manager:

- Allow organizations to edit Accounting Classes
- Allow organizations to edit contact Accounting Classes
- Allow organizations to edit Channels
- Allow organizations to edit Campaigns
- Allow organizations to edit Contact Categories
- Allow organizations to edit Services
- Allow organizations to edit Parts
- Allow organizations to edit Part Categories
- Allow organizations to edit TaskBoard States
- Allow organizations to edit their own set of decline reasons
- Allow organizations to edit Proposal Text
- Allow organizations to edit Contact Custom Fields
- Allow organizations to edit Appointment Custom Fields
- Allow organizations to edit Proposal Custom Fields
- Allow organization admins to delete invoices
- Allow organizations to edit their Public Name
- Allow organizations to upload their own logo
- Unit Cost is required for parts/add-ons

Territory Restrictions

These settings control how franchise territories are managed across your brand. They define what franchisees can do with contacts and transactions in areas outside their assigned postal codes, as well as how leads are distributed within or beyond a location's service area. Adjusting these options helps maintain clear boundaries between territories while allowing flexibility when needed.

- Allow adding contacts in postal codes owned by other organizations
- Allow creating transactions for contacts in postal codes owned by other organizations
- Choose to warn franchisees when handling contacts in postal codes that are in unowned territories
- Allow editing of the organization's Self Service Radius
- Use the Self Service Radius for Lead Distribution

Territory Restrictions

☐ Allow adding contacts in postal codes owned by other organizations

☒ Allow creating transactions for contacts in postal codes owned by other organizations

Unowned Territories

Warn ▼

Mode for handling contact postal codes not owned by an organization

☒ Allow editing of Self Service Radius

☒ Use Self Service Radius for Lead Distribution

Enable using organizations Self Service Radiuses to distribute leads when postal code is not owned

National Accounts

Go here to learn more about how to set up [National Accounts](#).

Contacts

The Nickname field has proven useful to certain types of businesses to store additional information about a contact. A few common use cases for this field are storing property manager names for commercial locations or recording pet names for training or grooming businesses.

Use this section to give the Nickname field a custom label that fits the needs of your brand.

Contacts

Nickname Label

Adjust the label of the Nickname field on contacts

Proposals

Use this section if you want to override the default label of "Proposal" and "Accepted Proposal" at the brand level.

Proposals

Proposal Header

Accepted Proposal Header

End of Period Reporting

This section is where you will configure brand level royalty reporting. Reference [Royalties and Revenue Categories](#) for details on how to set this up.

Donation Parts

Have a donation campaign you'd like to share with your customers? You can easily set this up by creating **Donation Parts**.

1. Go to **Dashboard > Tools > Configuration**.
2. Click **Add** to create a new donation part.

3. Check the **Active** box to automatically include the donation part on all proposals. When the campaign ends, simply uncheck this box to deactivate it.
4. If you select **Is Option Selected**, the donation option will be checked by default—customers will need to uncheck it if they choose not to donate.

Name*
Malaria No More

Description*
We are dedicated to protecting families from mosquitoes, both locally and globally. When you choose Mosquito Squad, we donate a portion of sales to help fund Malaria No More's life-saving programs in Africa. Unfortunately, every two minutes a child dies from malaria, which is transmitted by mosquitoes. We ask you to join Mosquito Squad in the global fight to end needless and preventable deaths from malaria and donate with us by adding a \$1 non-refundable donation to your total. Help us

More Info URL*
<http://www.malarianomore.org>

Unit Price*
1

Locale*
United States ▼

Option Name*
Contribute \$1 to Malaria No More

☒ Option Selected?

☐ Taxable?

☐ Allow Editing?

☒ Active?

Save Cancel




Donation Parts Report

You can track donation activity using the **Donation Parts** report, found at the brand level. This report shows all donation parts purchased within a specified date range.

At the top of the report, you'll find:

- **Date range fields** to filter results
- A **Refresh** button to regenerate the report
- A **Download** button to export results in CSV format

Each entry includes links to the related **Contact** and **Invoice** records. Donation parts are grouped by type, and each group includes a summary line for quick reference.

Donation Parts Report					From	01/01/2017	Through	10/31/2019	Refresh	
Show All	Organization	Date	Contact	Invoice Number	Part	Quantity	Subtotal			
	Bob's Handyman - Plano					6	\$6.00			
		2/23/2018	Dawn Jones	I2560	Malaria No More	1	\$1.00			
		3/6/2018	Lindsay Adcock	I2562	Malaria No More	1	\$1.00			
		3/6/2018	Tim Ryan	I2561	Malaria No More	1	\$1.00			
		4/13/2018	Paul Zuefeldt	I2566	Malaria No More	1	\$1.00			
		4/20/2018	Jason Sponzilli	I2568	Malaria No More	1	\$1.00			
		8/15/2019	Alix	I2563	Malaria No More	1	\$1.00			
	Bob's Pest Control - Houston					1	\$1.00			
					Malaria No More	7	\$7.00			

DataSubscriber

Learn more about [DataSubscriber Feed API](#).

Integrations

Configure brand-level integration settings for the following platforms:

- Analytics Odyssey
- Consumer Fusion
- Encircle
- Eulerity
- FranConnect
- Google Analytics
- PulseM
- Quote Countertops
- Rallio
- Rikor
- Scorpion Automated Reviews
- Voxie
- WebPunch
- Chatmeter
- Twilio