

# Brand Configuration Settings

12/10/2024 3:06 pm CST

## Overview

This section contains all of your brand level configuration settings. These settings are covered in detail during the initial onboarding of the brand. Our onboarding team sets these according to the brand decisions, but they can be changed at any point.

This article will review most used settings in order per section as you scroll down on the **Configuration** page. There are other articles within the Brand Admin section dedicated to more extensive topics such as **Data Subscriptions** and **Feedback**. Although these settings can be found on the Configuration page, you will learn more about those topics elsewhere.

Configuration | Bob's Handyman Service

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### System

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**Branding Permissions**

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Postal Code Editing  Allow postal code maintenance

### Settings

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**Organization Permissions**

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Accounting Classes  Allow organizations to edit Accounting Classes

Contact Accounting Classes  Allow organizations to edit contact Accounting Classes

Channels  Allow organizations to edit channels

Contact Categories  Allow organizations to edit Contact Categories

Services  Allow organizations to edit services

Parts  Allow organizations to edit parts

## System

- **Postal Code Editing** - toggle 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

Determine which areas franchisees can edit/add or not edit/add. For instance, your brand may want to limit that

locations can create their own parts and services lists. If your brand wants to keep things uniform across nation-wide territories, then you may be more restrictive with your permissions.

These are "all or nothing" permissions. Meaning that if your franchisees do not have **Parts** permission turned on, they cannot do anything associated with that part. For instance, they cannot update their own pricing per part. The Brand Admin would need to do it on their behalf. Or you can bulk update pricing in the brand account and [deploy to all orgs](#).

We recommend the following:

- Turning off **Cash/Accrual Reporting**. This applies to [End of Month/Week reporting](#) and many franchisees mistake this setting for QuickBooks. They change from one to the other, throwing off their royalty reporting.

## National Accounts

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

## Contacts

Nickname has proven useful to certain types of businesses. For example, a dog training businesses may use this as a way of specifying the pet's name.

## Proposals

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

## End of Period Reporting

Section where you set up configuration settings for your brand level royalty reporting. Reference [Royalties and Revenue Categories](#) for details on how to set this up.

## Donation Parts

Please review this article about [Donation Parts](#)

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