# How To: Client management

As an administrator, you access the **client management** via the **menu tree** under:

**MASTER DATA**
**--> Clients**

## Creating a new client

To create a **new client**, click the "**New client**" button in the button bar and fill in the "Name" and "Description" fields.

> NOTIZ
> The name of a client must be **unique** and may only be assigned once!

Then click **"Save & Close"** to return to the list of all clients, or click "Save" to continue editing the form.

- In the **"Options"** tab, general options such as company logo, time zones and other **self-explanatory settings** can be defined.
- Under the **"Prefixes"** tab, abbreviations must be assigned for short names, user names and personnel numbers.
- Through the "**License assignment**" tab, the client receives the valid licenses for the desired Webdesk functions.

The action can be interrupted at any time with the **"Back"** button.

## Editing an existing client

The filterable and sortable data table shows all clients stored in the system.
Clicking the **edit icon**



takes you to the **detail view** of the selected client. In addition to the editable features already mentioned, you can manage the client's permission for certain actions (=functions) or delete them here, and make client-related settings for the individual Webdesk modules.

### "Actions" tab

Under **Actions** you will find a complete **list of all Webdesk functions** that are currently **enabled** for the respective client. Here you can add new **action permissions** as well as **delete** or **edit** existing permissions of the client. More on this under: How To: Authorization control[1].

### "Modules" tab

Here you will find **specific settings** that affect the most important **system parameters** of the respective Webdesk modules with regard to the entire client. These are presented here in a user-friendly way as **"quick settings"**. For the **full configuration scope**, see the admin area of the respective modules.

*Depending on your Webdesk configuration, not all modules may be visible.*

| | |
|---|---|
| **Groupware** | General approval for connecting external groupware, connection configuration test |
| **Human resources** | Extensive settings for events in human resources |
| **Password Quality** | Settings for password quality, change interval, password rules |

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|---|---|
| **Payroll services** | Settings regarding the payroll service |
| **Project time** | Customization of the project time recording module |
| **Time recording** | Settings for time recording, weekly working time and specific time models, e.g. flat-rate overtime |
| **Workflow** | Settings and display options for managing the "Workflow" module |
| **HRd options** | Quick settings for the HR Development module |

# Felder

| Name | Wert |
|---|---|
| Modul | Portal & Organisation (po) |
| Webdesk Actionname | po_editClient |
| Artefakt-Typ | Action |

1. /daisy/personalwolke-admin/5479-dsy.html?language=4