Managing Client Offices

License Agreement
The article presents the features available in the Premium plan of XTRF Language Business Platform. Please keep in mind that your access to the described options might be limited due to your license agreement. If you would like to change your plan of XTRF Language Business Platform and gain access to the additional features, contact your XTRF Sales representative.

Target audience: Project Managers

In the Home Portal of XTRF Platform the offices of a translation company operate as a separate client accounts, but stay linked to each other in a dependency which reflects their organization structure. What is more the contact persons from one office might be granted access to the quotes and projects in other linked offices. In other words, your client's contact person requires only one personal Customer Portal account to access all relevant information and files.

The purpose of the following article is to present you how to:

- Link two client's offices.
- Add a new subordinate office to an existing office.
- Assign contact person to specific office and manage the access rights for this account.

Before Reading a Guide
- The steps without any marking are mandatory to perform because they ensure carrying on a proper function of the Home Portal.
- The steps marked with the (Optional) label give you information about settings useful for you in terms of fulfilling specific requirements for your projects, but if you skip them it will have no negative effect on the function of the Home Portal.

Link Your Client Offices

This section presents you how to link two existing client offices with the parent-child relation. To do so, perform the following steps:

1.	Sign in to the Home Portal of XTRF Platform.

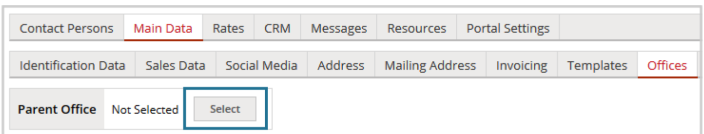
2. Go to the Clients module.

3. In the Clients display locate the client account which is the client's subordinate office and click the

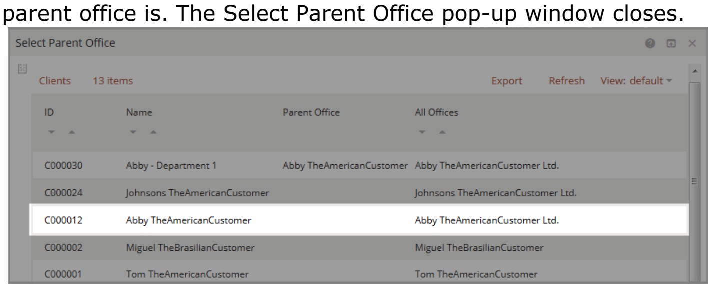
icon.

4. In the client profile display go to the Main Data tab and then select the Offices sub-tab.

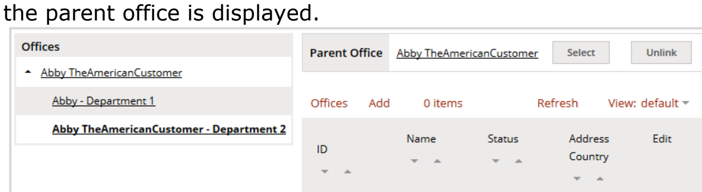
5. In the Parent Office section click the Select button. The Select Parent Office pop-up window appears.



6. On the list of your client accounts locate and select this one where the parent office is. The Select Parent Office pop-up window closes.



7. Click the Save button. The two offices are now linked and the name of the parent office is displayed.



Add a New Subordinate Office

This section presents you how to create a new subordinate office in the client profile. To do so, perform the following steps:

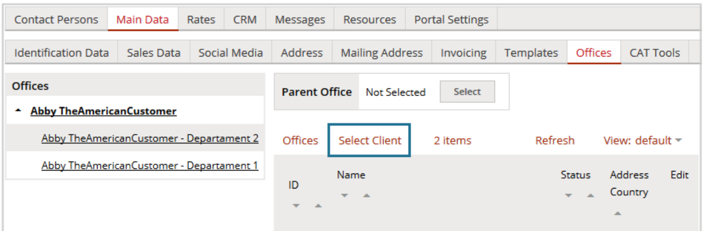
1. Go to the Clients module.

2. In the Clients display locate the client account within the appropriate parent office and click the

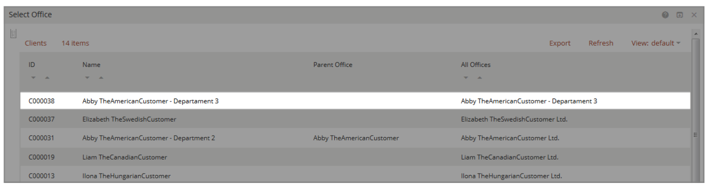
icon.

3. Select the Main Data tab and then the Offices sub-tab.

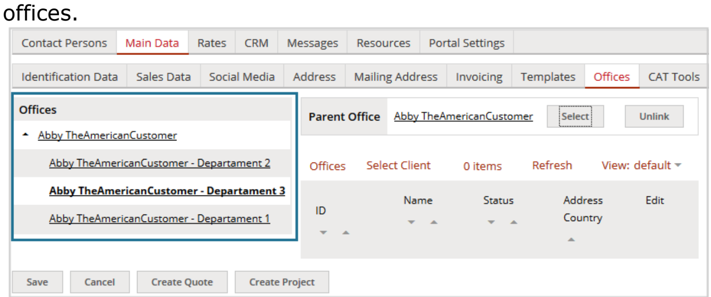
4. In the Offices table click the Select Client button. The Select Office pop-up window appears.



5. On the list of your client accounts locate and select this one where the subordinate office is. The Select Office pop-up window closes.



6. The Parent Office for this new client account is already set. Click the Save button to add the new client office to the list of the subordinate offices.



> Please mind that the new subordinate office is a separate client account in your Home Portal.

Assign Client Contact Person to Multiple Offices

This section presents you how to assign your client's contact person to multiple offices. To do so, perform the following steps:

1. Go to the Clients module.

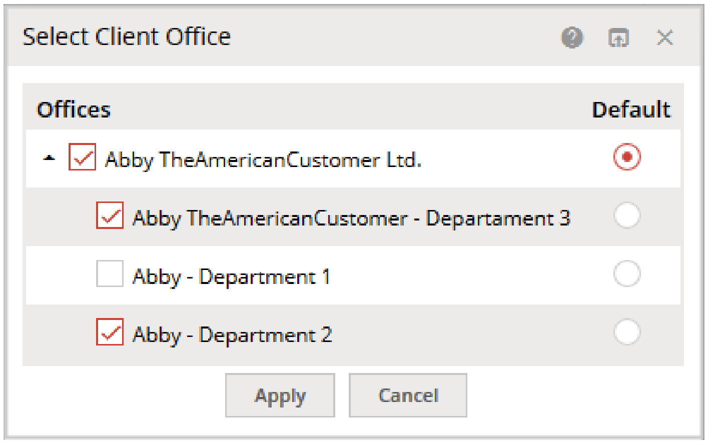
2. In the Contacts display locate the desired contact person and click the  icon.

3. Select the Main Data tab.

4. In the Client section click the Change button to assign this contact person to another or multiple offices. The Select Client Office pop-up window appears.

   a. Select one of the options:
      - Select the checkboxes of the offices to which this contact person is to be assigned to.
      - Use the Default radio button to set the default office for this contact person.

   b. Click the Apply button. The Select Client Office pop-up window closes.

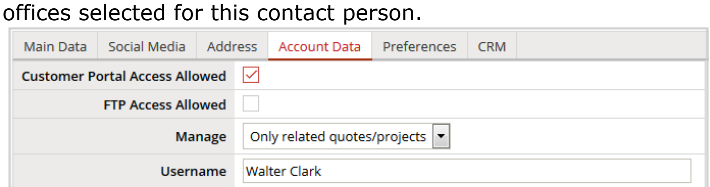


> The name of the default office of the contact person is marked in **bold**.

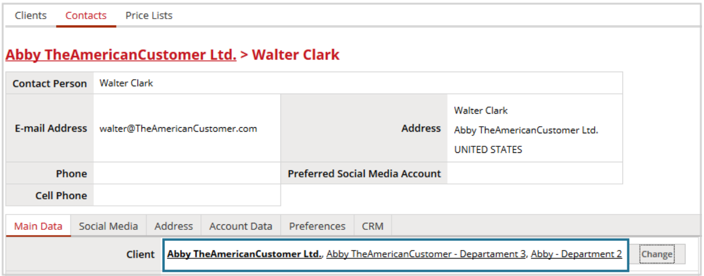
5. Go to the Account Data sub-tab.

6. From the Manage drop-down menu select the access rights for this contact person. Select one of the following options:

   - Only related quotes/projects - grants access only to the quotes and projects from the contact person's default office where this person is selected as the contact person.
   - Default office - grants access to all quotes and projects from the contact person's default office.
   - All selected offices - grants access to all quotes and projects from all offices selected for this contact person.



> The Manage drop-down menu is available only when the Custom er Portal Access Allowed checkbox is selected.

7.	Click the Save button. You have assigned the contact person to the client's offices . 

You can assign the contact person only within the linked offices organization.

Tips and Tricks

More related information you may find in the: Adding a New Client Profile to the Database article.
