Profiles

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A **profile** contains the settings that apply to a specific Bankgiro customer.

If you are going to administer payments for several different Bankgiro customers, you must use several different **profiles** - one for each Bankgiro customer. Even if you are to handle payments for only one Bankgiro customer, it requires a separate **profile**.

When you start Netmaker Bankgiro Link, the last used profile is opened. The first time you use Netmaker Bankgiro Link, you will need to set up a new profile.

Profiles can be saved locally on your computer or on a server (to share profile settings). If a profile is saved on a server, all Netmaker Bankgiro Link users connected to the same network can access that profile.

To create a new profile:

1. Click **File** in the main menu, go to Profiles and select **Administer**. The "Manage Profiles" window opens:



1. Click **Add**:



1. Enter Profile name, Organization number, Customer number Bankgirot and License number Netmaker Bankgiro Link and click **OK**.

2. Click **OK** in the Manage Profiles window.

*** Please note**

If you work for a service agency, you need to fill in your service agency number. This field should otherwise be left blank. If you are unsure, you can leave the field blank.

To select a profile:

1. Click **File** in the main menu, go to **Profiles** and select "**Select**".



1. Select the current profile in the drop-down list and click **OK**.

*** Please note**

If you have chosen to check the box "Always start with this profile", the selected profile will be used at the next start-up.

To change a profile:

1. Click **File** in the main menu, go to **Profiles** and select **Administer**. The Manage Profiles window opens.
2. Select the profile to be changed and click **Change**.
3. Make the necessary changes and click **OK**.
4. Click **OK** in the Manage Profiles window.

Delete a profile:

1. Select **File** in the main menu, go to **Profiles** and select **Administer**. The Manage Profiles window opens:
2. Select the current profile and click **Delete**.
3. Click **OK** in the Manage Profiles window.

Change profile settings:

1. Click **File** in the main menu, go to **Profiles** and select **Administer**. The Manage Profiles window opens:



1. Click the **edit** button.

In the **Change profile window**, there is the option to change the **Organization number, Customer number Bankgirot** and **License number NetMaker BgCom** (see Invoice) and click **OK**:



1. The Settings button opens a new window with the Send tab where you can make the following settings:



- Interval for automatic receipt retrieval is between Off and 60 minutes - default value is every 30 seconds.
- List of folders to be loaded automatically. This means that Netmaker Bankgiro Link automatically

imports all accounting files found in specified folders. Thus, the user does not have to search and import files.

1. The **Fetch** tab allows you to change the following settings:



- Search criteria for the files to be downloaded - **Date** and **File Type.**

  Naming of files:

- Use name created by bankgirot.

The downloaded file is given the name specified by the bank account.

- Use serial numbers in names.

The downloaded file is given a name consisting of a serial number in text format.

- Select name at download time.

The downloaded file will be given the name you specify when downloading.

- Always use the same name.

The downloaded file replaces the previous file and uses the name you entered in the file name field.

Destination folders for different types of downloaded files.

1. The **Archive** tab allows you to change the following settings:



- Sent - when should sent files be archived and where should they be archived.

- Downloaded - when should downloaded files of different types be archived and where should the different types be archived.

1. The **Signatures** tab allows you to change the following settings:



- The number of signatures required to send a file - default value = 1. The setting is made per file type.

*** Please note**

The number of people who must sign and the number of signatures must agree with what has been agreed with your bank.