

Know the client. Reuse the details.

Android Client Profiles guide | Version 2.1

Review draft - October 29, 2026

A Client Profile stores reusable client information, evidence defaults, email details, and client-specific billing rates. Enter the shared information once, apply it where appropriate, then complete the facts for the particular assignment.

Save time on repeat work

When a client sends several assignments, you should not have to retype the same company/contact name, default purpose, tags, and agreed rates each time. A saved profile can supply reusable information to media and support the client/billing context used by case workflows. Review each result before exporting or sending it.

FIELD / CONTROL	WHAT TO DO AND WHY
Free	Save up to 3 Client Profiles in the supplied Android version.
Pro	Save up to 50 Client Profiles in the supplied Android version. Billing and invoice tools require Pro.
One client, several cases	Reuse a client profile across separate case sessions/files, while keeping each case's evidence, facts, and billing entries separate.

What goes where

Client Profiles hold reusable client information and rate defaults. Individual media Details hold item facts such as notes, timestamps, and location. Case sessions/files group the assignment evidence and billing. Global Settings holds your own agency/export identity; it is separate from a client's profile.

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Profile defaults are a starting point

Applying a profile can change existing purpose/tag values. A reusable client profile can also contain a case-number default, which may not fit every matter for that client. Check the actual item and case details after applying it, rather than assuming everything should carry forward.

Android-specific review draft based on the supplied Client Profiles, media, case, and billing source. The verified Pro limit is 50; a proposed increase to 500 is not yet reflected in this source. Confirm current screens before publication.

02 Create a Client Profile

1. Open Client Profiles

From the Evidence Locker toolbar, open Client Profiles. Review Plan Limit and Current Usage. Scroll to New Client Profile, or choose a saved profile to edit it.

2. Enter the client identity

Enter Company name and the client contact's First name and Last name as appropriate. The current form requires at least a company name, client name, or case number before saving. Use a recognizable name so you can choose the correct profile later.

FIELD / CONTROL	WHAT TO DO AND WHY
Case number	An optional reusable case-number value. Leave it blank if one client routinely has several different matters and no single case number belongs on all of them.
Default purpose	A purpose you regularly use for this client. Apply it only when it fits the current media or assignment.
Default tags	Saved tag information that can be used when applying the profile. Keep the format consistent, such as Case #: reference or Client: name, and verify the resulting tag line.
Email address	Save the client's intended email address. Check spelling; the profile validates a nonblank email address before saving.
Email template	Save a reusable message for later supported client-email actions. Review the recipient, subject/message, and attachments each time before sending.

3. Add the optional billing setup

Enter agreed rates, a client discount if applicable, and billing export preferences. These defaults are described on pages 5-6. Saving rates does not record hours worked or create a completed invoice.

4. Tap Save Profile

Use Save Profile for a new entry. It appears under Saved Profiles. When editing an existing entry, use Update Profile to save the changes. This screen has explicit save controls; do not assume typing alone saves the profile.

Clear is different from Delete

Clear resets the profile-entry form so you can start another entry; it does not delete a saved profile. To remove a saved profile, use its delete control and confirm. Save or update the intended entry before clearing your typing.

Example: an agency that sends work every week

Save the agency name, the contact person, email address, useful defaults, and agreed rates once. For each new assignment, apply the profile where appropriate, then enter that assignment's case number and facts separately.

03 Apply the profile to media

1. Import or open the evidence

Open a photo, screenshot, scan/PDF, or supported video in Evidence Locker. Video processing requires Pro. Check the preview so the client information is applied to the correct item.

2. Tap Apply Client Profile

Choose the saved client from the list. Review the Apply Client Profile? confirmation, then tap Apply. Tap Cancel if the wrong client was selected.

3. Review the purpose and tag fields

The profile can populate the saved purpose and the relevant case/client tag information, using the selected tag type and available profile values. The item can retain a link to the chosen client profile for downstream case/client matching. It does not automatically print every profile field on the media.

4. Complete the individual facts

Check the case number for this assignment, add the appropriate factual notes, and verify timestamp and location. The profile does not supply the event's GPS, establish the capture time, or replace your item-level review.

FIELD / CONTROL	WHAT TO DO AND WHY
Apply Client Profile	Reuse saved client defaults rather than typing the common purpose/tag information for every item.
Tag type	Case #, File #, Client, or Custom affects the available profile value used. Inspect the resulting tag line; it is not a list of every field in the profile.
Item heading	A full supported export can show its selected case details. Compact or clean output can omit them. Global agency identity is separate from the client identity.
Preview Exports	Check what the recipient will actually see. A profile link in the app is not a guarantee that all client information appears in the chosen output.

For several photos from the same client

Tap Edit in Evidence Locker, select eligible non-video items, and open Batch Edit. Choose the client and tap Apply Client Profile to Selected. Review the result and apply the correct shared case tag if needed. Free edits up to 5 items; Pro up to 50. Videos are edited one at a time.

A safer repeat workflow

Use the profile for reusable client context, then review the fields for the actual matter. Do not put a prior case number on new evidence just because it was saved in the client's defaults.

04 One client, multiple cases

You can reuse one client profile for several assignments without combining their evidence or billing into one case. The supplied Android screens often call these case containers Case Sessions; this guide also uses case files to describe the workflow.

1. Create a separate case for each matter

Keep the assignments distinct, using the correct case name/reference and summary for each. One repeat client may have multiple service jobs, investigations, inspections, or deliveries.

2. Apply the client to the relevant media

Apply the same client profile to each matter's relevant items from Details. Check the item's case tag afterward. Then use Add to Case Session to place the evidence in the correct case.

3. Keep profile links consistent within a case

Supported case export and billing workflows use client-profile links on the case's items, with older text-based matching as a fallback. Avoid mixing items linked to different client profiles in one case when that case is meant to have one billing client.

4. Check the case's client/billing context

Before adding charges or exporting/emailing the case, verify the client and the offered rates. Conflicting or missing profile links may prevent a clear client match. Correct the relevant item links rather than relying only on similar client names.

Example: one law firm, three service matters

Save one profile for the firm and its contact. Create three separate cases for three matters. Apply the firm profile to the relevant evidence in each, and verify that each has its own correct case number. Track the charges within each case, while reusing the firm's agreed rates.

FIELD / CONTROL	WHAT TO DO AND WHY
Reusable profile	Company/contact identity, client email, general defaults, and agreed rates can be reused.
Separate case records	Each case keeps its own evidence links, narrative, hours, mileage, incidentals, and other billing entries.
Case-number default	A profile has one saved case-number field. It is not a list of all the client's cases. Check or replace that default for each new matter.
Saved exports	Changing a profile does not rewrite PDF/Word files already exported or messages already sent.

Applying a profile is not the same as creating a case. Use the media and case controls deliberately so the right client context and the right evidence stay together.

05 Specialized client billing rates

Different clients can have different agreed rates. Save those values in the appropriate profile so supported billing-entry screens can offer the right defaults for that client, reducing repeated entry and helping keep charges consistent.

1. Open the profile's Billing Service Rates

Expand Investigation Services, Process Server Services, or Travel / Incidentals. Show opens a section and Hide collapses it. Enter only the rates relevant to your agreement, then save/update the profile.

FIELD / CONTROL	WHAT TO DO AND WHY
Investigation Services	Primary professional hourly rate; names and hourly rates for up to two additional professionals; report-writing hourly rate; skip-tracing rate.
Process Server Services	Paper service rate, additional-address rate, and skip-tracing rate.
Travel / Incidentals	Distance rate and incidentals/per diem. Check what the unit represents when entering a charge.
Client-specific pricing	Keep the rates agreed with this client in this profile. Another client can have a different set of saved rates.

2. Open the correct case and add a billing entry

In the case billing section, choose Add Billing Entry. With a recognized client profile, supported service choices can display a saved client rate. Select the appropriate service and check the rate before saving.

3. Enter quantity and review the total

Enter the hours, distance, or other applicable quantity and a clear description. Check the unit and calculated/estimated total. Saved rates do not automatically detect hours worked, track every mile, or add every charge for you.

Example: negotiated hourly rates

A fictional client agrees to one rate for the primary professional, another for an additional professional, and a separate rate for report writing. Store those values once. For each case, enter the actual hours under the correct service and verify the saved rate offered for that entry.

4. Keep billing separate by case

Billing entries accumulate in the case they belong to, even when several cases share a client profile. Review the case summary and invoice output before delivery. Billing and invoice export are Pro tools.

If you change the profile rate later, do not assume old billing entries or exported invoices are recalculated. Review existing entries and create the intended corrected output when needed.

06 Email, discounts, and maintenance

FIELD / CONTROL	WHAT TO DO AND WHY
Client Discount	Enter a Discount label and Discount percentage if an agreed invoice-wide discount applies. The profile screen describes it as applying across the invoice total, including hours, mileage, incidentals, report writing, and billing entries.
Billing Export Options	Choose Include billing summary on PDF exports, Word exports, and final reports for supported outputs. Review the actual preview; billing summaries and standalone invoice options have their own case controls.
Saved client email	Supported case-email actions can use the recognized client's email/template. Review the recipient and text; storing an email address does not automatically send anything.
Update Profile	Open the saved profile, edit its details, and tap Update Profile. Recheck the client context and intended defaults before applying it again.
Delete profile	Use the saved profile's delete icon, then confirm Delete or choose Cancel. Deleting a profile can affect client matching for linked items; preserve needed information and check affected cases.
Local storage	Profiles are stored locally in the app and preserved through normal updates. They are not an automatic cloud address book; protect your records before uninstalling or clearing app data.

A repeat-client routine

Create the profile once. Apply it to the relevant media for each assignment, check that matter's case number, organize the items into the right case, and record billing there using the offered client rates. Preview the finished report/invoice and check the recipient before sharing.

The time savings add up

The profile reduces repeated typing of client details, purpose/tags, email wording, and agreed rates. Separate case records let you reuse the client relationship without merging unrelated assignments. Always leave the final factual and billing review to the person preparing the record.

If the expected client or rate is missing

Check that the intended profile is saved, the relevant media has the correct client link, and the case does not mix conflicting client links. Confirm the service chosen in the billing entry. Review the item/case fields instead of assuming a blank or stale value will populate itself.

Need a walkthrough? Message Final Exhibit on Facebook or email support@finalexhibit.com. Explain which profile, item, or case step needs help, without sending confidential client details.