

Know the client. Reuse the details.

Final Exhibit | iPhone, iPad, and Mac Catalyst

Client Profiles guide | Review draft | October 29, 2026

A Client Profile stores reusable client identity, evidence defaults, email wording, agreed billing rates, and billing export preferences. Keep each assignment's observations, dates, locations, and charges in the appropriate item and Case File.

Save time on repeat assignments

Enter the company/contact name, useful purpose and tag defaults, email address, and agreed rates once. Reuse that information where the workflow supports it, then review the case-specific facts. Your own agency, license, and logo belong in Professional Profile, not the client's profile.

SETTING / CONTROL	WHAT TO DO AND WHY
Free	Up to 3 saved Client Profiles. Both supplied mobile and Mac list/editor code enforce this limit when creating profiles.
Pro	Up to 500 saved Client Profiles. This Apple limit differs from the Android reference. Case billing and full report/invoice exports are Pro workflows.
One client, several cases	Assign the same profile to separate Case Files. Keep evidence, narratives, and charges distinct for each matter.
What a profile does not do	It does not establish capture time, GPS, a service event, hours worked, distance traveled, payment received, or automatic delivery to the client.

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Source-checked review draft

Based on the mobile and desktop source in MetaStamp.zip. The Xcode project configuration and Core Data model were not included. This chapter identifies code-confirmed platform differences and remaining installed-build checks. Android references guide the visual design only.

02 Create a Client Profile

1. Open Client Profiles. On iPhone/iPad, use Client Profiles in Evidence Locker. On Mac, select Client Profiles from Command Center navigation. Review Plan Limit and Current Usage.

2. Choose Create New Client Profile. The editor is titled New Client Profile. Enter the details below. Use a recognizable company name when possible: the saved-list heading falls back to Untitled Client Profile when Company name is blank, even if the contact name or case number is filled.

SETTING / CONTROL	WHAT TO DO AND WHY
Company name	The client or hiring business. This is not your own company branding, unless your company is actually the client for this record.
First name / Last name	The client contact. These can be used for client identity and supported export/email preparation.
Case number	An optional reusable value, not a list of all that client's cases. Leave blank when one client regularly sends unrelated matters with different references.
Default purpose	A recurring purpose appropriate for the client. Applying the profile can replace an existing item purpose when this value is nonblank.
Default tags	Reusable tag text. The single-item mobile, desktop, and batch application paths handle it differently; see page 4. Review the final item tags.
This client is an attorney	iPhone/iPad only in the supplied profile editor. Turn it on to identify the profile for supported attorney pickers in forms.
Bar number (optional)	Shown on mobile when the attorney option is enabled. A bar number is not required merely to appear in supported attorney pickers. The supplied Mac editor has neither attorney control.

3. Add email and agreed rates. Complete the relevant sections on pages 3 and 6. You can save a profile without completing every optional field.

4. Choose Save. For a new profile, enter at least a company name, client name, or case number. A nonblank email address must pass the editor's email-format check. Check that the saved profile appears in the list.

A profile is not a completed case

Creating the profile does not create or populate an assignment, attach evidence, sign a form, or create a billing entry. Save it first, then apply defaults to the relevant items or assign it to the intended Case File.

03 Email, discounts, and export options

Client Email

SETTING / CONTROL	WHAT TO DO AND WHY
Email address	Save the intended recipient address. New-profile and Mac saves check email format. Existing mobile autosave does not; check the address yourself.
Message editor	The multiline box under Client Email saves reusable email wording. The editor says a signature can be appended from app settings. It is not an automatic sending instruction.
Email template saved	The saved-profile list shows this indicator when message text is present. It does not confirm that a message was sent or delivered.

Client Discount

1. Open Edit Client Discount.
2. Enter Discount label and Discount percentage.
3. Choose Done, then finish saving the profile according to your platform.

The screen describes this as an invoice-wide discount covering hours, mileage, incidentals, report writing, and billing entries. The profile save code limits the stored percentage to 0 through 100. A label alone is descriptive; it does not supply a nonzero percentage.

Service-specific discounts need separate review

If only one service is discounted, do not use an invoice-wide discount expecting it to affect only that row. Review the applicable entries and invoice calculation before export.

Billing Export Options

SETTING / CONTROL	WHAT TO DO AND WHY
Include billing summary on PDF exports	Saves a preference for supported PDF output. Check the case-level controls and actual preview before sharing.
Include billing summary on Word exports	Saves a preference for supported Word output. Open the generated document and confirm the billing content.
No third visible toggle	The supplied editors display only these two billing export switches; there is no visible final-reports switch here.

Review a client email before sending

Check the client assigned to the Case File, recipient, subject, wording, case reference, and attachments. Saved templates or client matching can supply defaults, but they are not proof the recipient or case number is correct for this delivery.

04 Apply defaults to evidence

1. Open the intended item in Evidence Locker and check its preview.
2. Choose Apply Client Profile and select the saved profile. Mac may display Reassign Client Profile when it recognizes existing client text.
3. Review the resulting Purpose and Tags before exporting.
4. Complete that item's notes, time, location, and assignment reference separately.

What differs between application paths

SETTING / CONTROL	WHAT TO DO AND WHY
iPhone / iPad item	A nonblank Default purpose is applied. The code reads Default tags, then reconstructs the stored tag line from recognized Client, Case #, and File # values. The contact name is preferred for Client, falling back to Company name. A nonblank profile Case number updates the case tag.
Mac item	A nonblank Default purpose is applied. The Tags string is rebuilt from available Company, Client contact name, Case #, and Default tags, joined with separators. This replaces the previous tag string, even when the new assembled string is empty.
Batch application	The batch path records an applied profile identifier. A nonblank Default purpose is copied. Tags use Default tags if nonblank; otherwise the fallback order is Case #, contact name, then company name. This is not the same as either single-item path.
Blank defaults	Blank values do not behave identically in every path. Existing purpose can remain when the profile purpose is blank. Check for retained or replaced tags and stale case values rather than assuming a full reset.

Check custom tags carefully

The mobile single-item tag writer retains recognized Client, Case #, and File # components. Do not promise that arbitrary custom Default tags will survive that reconstruction. Mac and batch use other rules. Inspect the saved result after applying a profile.

Apply a profile to selected items

For eligible Evidence Locker selections, open Batch Edit, choose a Profile in Client Profile, then choose Apply Client Profile to Selected. Confirm the saved message and inspect representative items. This does not itself assign the case-level client relationship.

The batch sheet allows one selected item in Free; Pro uses the limit passed by the calling workflow. Photo, scan/PDF, and video restrictions will be detailed in the Import Media chapter. Do not substitute Android batch counts or assume every selection is eligible.

Complete the field record

A property condition image, vehicle condition image, address photo, or surveillance time shot still needs its own factual review. Applying client defaults does not alter the original capture event or supply missing embedded metadata.

05 One client, multiple Case Files

Assigning a profile to a Case File is a separate action from applying defaults to a photo. The case-level assignment is the clearest way to establish the client for supported case billing, exports, and client-email preparation.

- 1. Open the correct Case File.** Confirm its name and evidence.
- 2. Choose Assign Client Profile.** If already assigned, the action reads Change Client Profile.
- 3. Select the intended profile.** The selection screen shows Current Client where applicable.
- 4. Check the displayed Client line.** Then review billing rates, invoice details, report output, and email defaults for this matter.

SETTING / CONTROL	WHAT TO DO AND WHY
Connected Case Files	In the saved profile editor, lists Case Files related to that profile, sorted by latest update/creation time. New profiles show Save this client profile before viewing connected Case Files.
Open a connected case	Select its name in Connected Case Files. Both supplied profile editors route these links into CaseSessionDetailView; confirm the presentation on the installed Mac build.
Remove Assigned Client Profile	Shown in the case assignment list when a client is already assigned. Clears that case's client relationship. It does not delete the saved Client Profile.
A case-specific reference	A profile has one Case number default. Name and document each matter correctly; do not replace every linked case's identity by repeatedly changing a shared profile default.

Example: one law firm, three service matters

Save one profile for the firm/contact and agreed rates. Create three separate Case Files, assign that same profile to each, and keep the proper matter references in each case's records and evidence tags. Record the actual papers served, addresses checked, time, and expenses in the case they belong to.

Do not rely on an automatic client guess

The supplied case matcher first uses an explicitly assigned profile. Without one, it can match a case-number hint from item tags and otherwise fall back to the first profile in its fetched list. A guessed client can therefore be wrong. Explicitly assign and verify the client before billing or preparing a client email.

Changes do not rewrite prior deliveries

Editing the reusable profile does not rewrite reports or invoices already exported or messages already sent. Some later workflows read current profile information, while item fields or saved billing entries may retain earlier values. Review the actual record and new output.

06 Save specialized billing rates

In the profile editor, expand Billing Service Rates. Both supplied Apple editors offer Professional Services, Process Server Services, and Travel / Incidentals. Expand only the groups relevant to the agreement, enter the rates, then save.

SETTING / CONTROL	WHAT TO DO AND WHY
Professional Services	Primary professional hourly rate; names and hourly rates for Additional professional 1 and 2; Report writing hourly rate; Skip tracing rate; two custom professional service name/rate pairs.
Process Server Services	Paper service rate; Additional address rate; Skip tracing rate; four custom process service name/rate pairs.
Travel / Incidentals	Distance rate; Incidentals / per diem; two custom travel / incidental name/rate pairs.
Stored service types	Primary/additional professionals and report writing are stored as Hourly. Skip tracing, paper service, additional address, and custom professional/process services are stored as Flat. Distance uses Distance; incidental/custom travel rates use Expense.
Positive rates	Saved service-rate rows are created for amounts greater than zero. Blank, unparseable, zero, or negative values do not create a positive reusable service-rate row. Check a re-opened profile and the case rate list.
Custom service names	Give a clear name when needed. A positive custom rate with a blank name uses the numbered fallback service name, such as Custom Professional Service 1.

Use agreed rates in a case

1. Assign the client to the correct Case File.
2. Open Add Billing Entry and select the appropriate service/rate.
3. Enter the actual positive quantity and description, and check Billable.
4. Review Estimated Total and save the entry, then inspect the invoice.

Supported billing calculations multiply quantity by rate. Confirm what the selected service quantity represents: hours, a paper/service count, an address count, distance units, or expense units. A saved Distance rate is not automatic mileage tracking. A Flat rate does not mean every job must have quantity one.

Keep old work and new rates distinct

A profile rate edit updates the reusable rate setup; it is not a promise that historical billing entries will be repriced. Review existing entry quantities, saved rates, discounts, and the final invoice. Saving a rate alone does not create a charge or record work performed.

07 Save, edit, find, and delete

SETTING / CONTROL	WHAT TO DO AND WHY
New iPhone / iPad profile	Choose Save to create it. New profiles do not autosave. Cancel closes without creating the new profile from the typed fields.
Existing iPhone / iPad profile	Edits schedule an autosave after roughly 0.8 seconds. Save persists changes, and leaving the editor or choosing Cancel also attempts to save pending changes. Cancel is not an undo/discard action.
Mac profile	The editor uses an explicit Save for new and existing profiles. The back control closes the editor. No autosave handler is present in the supplied desktop editor; save before leaving if you want to keep changes.
Mobile validation difference	New-profile Save checks identity and email format. Existing-profile autosave does not apply that same validation. Check those fields yourself and review any save error.
Find a saved profile	Both management lists are sorted by latest updatedAt, then Company name. Applying/assigning or editing can affect order. The supplied profile management lists and item pickers contain no dedicated search field.
Read the row	Company is the main title; available contact/case details follow. Purpose/tags, email, Email template saved, and Billing defaults saved can appear. These indicators are not a completed invoice or delivery receipt.
Delete on iPhone / iPad	From the normal Client Profiles management list, use Edit or the supported row deletion gesture. The supplied delete handler has no additional custom confirmation.
Delete on Mac	The normal management list has a Delete button beside each profile. The source deletes immediately without an additional custom confirmation. Do not describe a second confirmation as a guaranteed safeguard.

Deleting and unassigning are different

Remove Assigned Client Profile clears the case's connection. Delete removes the reusable profile itself. The Core Data model and relationship delete rules were not supplied, so effects on connected cases, rate records, and cross-device deletion must be verified before publication.

Review saved data after an error

Read any Notice or Client Profile Limit message. Reopen the profile and verify the intended values, especially after mobile autosave or closing an editor. A screen dismissal alone is not proof that every requested change saved successfully.

08 Practical workflows and review

Property inspections, repairs, locks, and vehicle condition

Reuse the client identity and agreed rates. Apply a suitable Default purpose to the relevant property photos, door/lock condition images, or vehicle condition images before towing or repossession. Enter each image's own observations and the correct assignment reference. Before/after sets must remain distinguishable.

Papers to serve, addresses to check, or deliveries to make

Reuse Paper service, Additional address, or a clearly named custom rate when it fits the agreement. Keep the actual work and positive quantities in the relevant Case File. A list of client rates does not plan a route, document service, or establish delivery; those workflows have their own records.

Surveillance, incidents, and proof of work

Use the profile for repeat-client context. Keep time shots, incident observations, supporting records, and billing in the correct matter. A saved client template can help prepare an update, but review the recipient and confidential details before sending.

Move from iPhone to Mac

Use the same iCloud account on supported devices and allow eligible record synchronization to finish. Verify the profile, connected Case File, and actual evidence files on the receiving device. Do not promise immediate transfer of every setting or file. Family Sharing does not combine different iCloud accounts' evidence or client libraries.

A repeat-client routine

Create and save the profile. Assign it explicitly to the Case File. Apply relevant defaults to media, then check the purpose and case tags. Record the work and quantities using the agreed rates. Preview the report/invoice, verify the recipient, and share the intended output.

Remaining checks before publication

Confirm matching release/build identification and target configuration. Verify profile and relationship sync using the missing Core Data model and actual devices; check deletion effects, mobile tag reconstruction, and the Mac connected-case screen. Confirm attorney fields in the installed Mac build before claiming they exist there. Test one new profile, one existing-profile edit, profile assignment, each custom-rate group, and a representative invoice/email preparation flow.

Source review: ClientProfilesView.swift; DesktopClientProfilesView.swift; EditClientProfileView.swift; DesktopEditClientProfileView.swift; ItemDetailView.swift and Part2; DesktopItemDetailView.swift; BatchEditSheets.swift; CaseSessionDetailView.swift; DesktopCaseSessionDetailView.swift and Billing; applicable California form attorney filters. MetaStamp.zip supplies the Apple facts. The Android Client Profiles guide supplies the design reference.

Need help or a personal walkthrough?

Email support@finalexhibit.com or message **Final Exhibit on Facebook**. Describe the profile, item, case, or billing step you need help with. Suggestions for additional forms and practical field workflows are welcome.