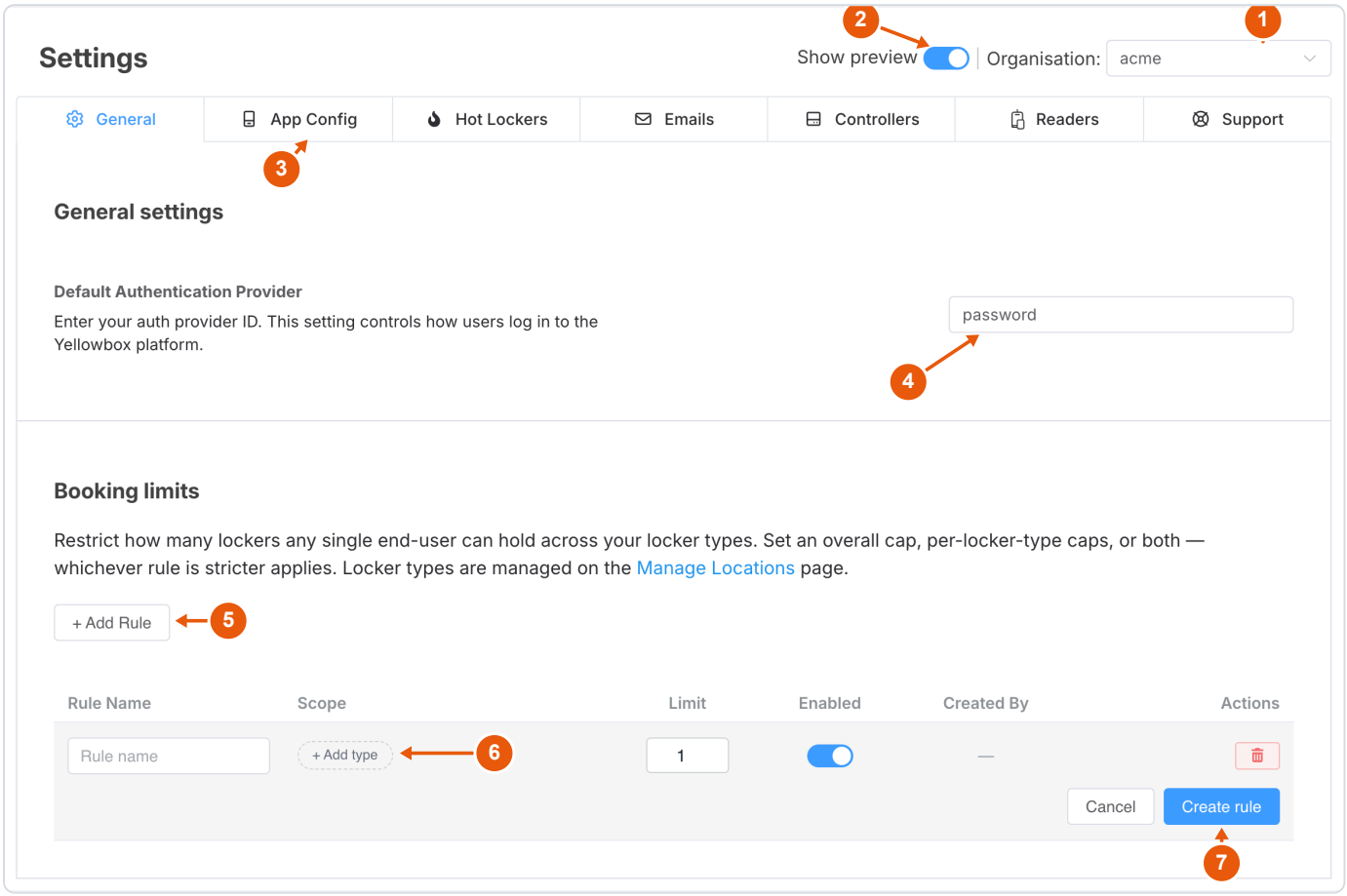
Configuration: Quick Guide

Yellowbox Partner Dashboard, sidebar > **Configuration**. Organisation-wide settings for your lockers, apps, kiosks, card readers and emails.

Who sees what: each tab has its own permission on the **Manager Access** page, so you may not see every tab. A few settings are greyed out with the message "*This setting can only be changed by a Yellowbox staff member or an organization admin*": ask your organisation admin or Yellowbox Support to change those.

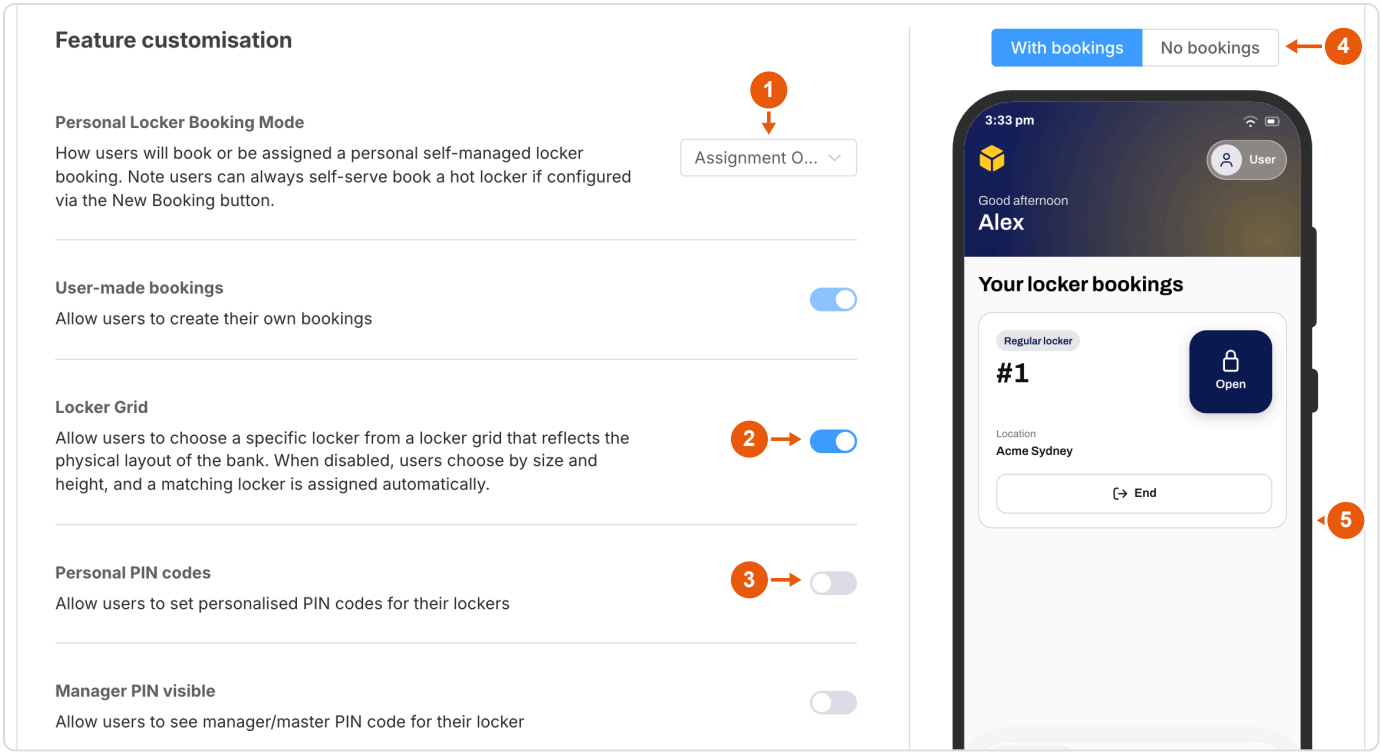
The Settings page and General tab



1. **Organisation**: choose which organisation's settings you are looking at, if you manage more than one.
2. **Show preview**: show or hide the live preview of the app or kiosk beside the settings.
3. One tab for each area: General, App Config, Hot Lockers, Emails, Controllers, Readers and Support.
4. **Default Authentication Provider**: how your users sign in (for example *password*, or your company's single sign-on). Only an organisation admin or Yellowbox can change it.
5. **Booking limits**: **+ Add Rule** caps how many lockers one person can hold at once, across all locker types or only some. If two rules apply, the stricter one wins.
6. Give the rule a name, pick the locker types it covers with **+ Add type** (at least one), set the **Limit** (1 or more) and leave it **Enabled**. The bin deletes it.
7. **Create rule** saves it; **Cancel** throws it away. Locker types themselves are set up on **Manage Locations**.

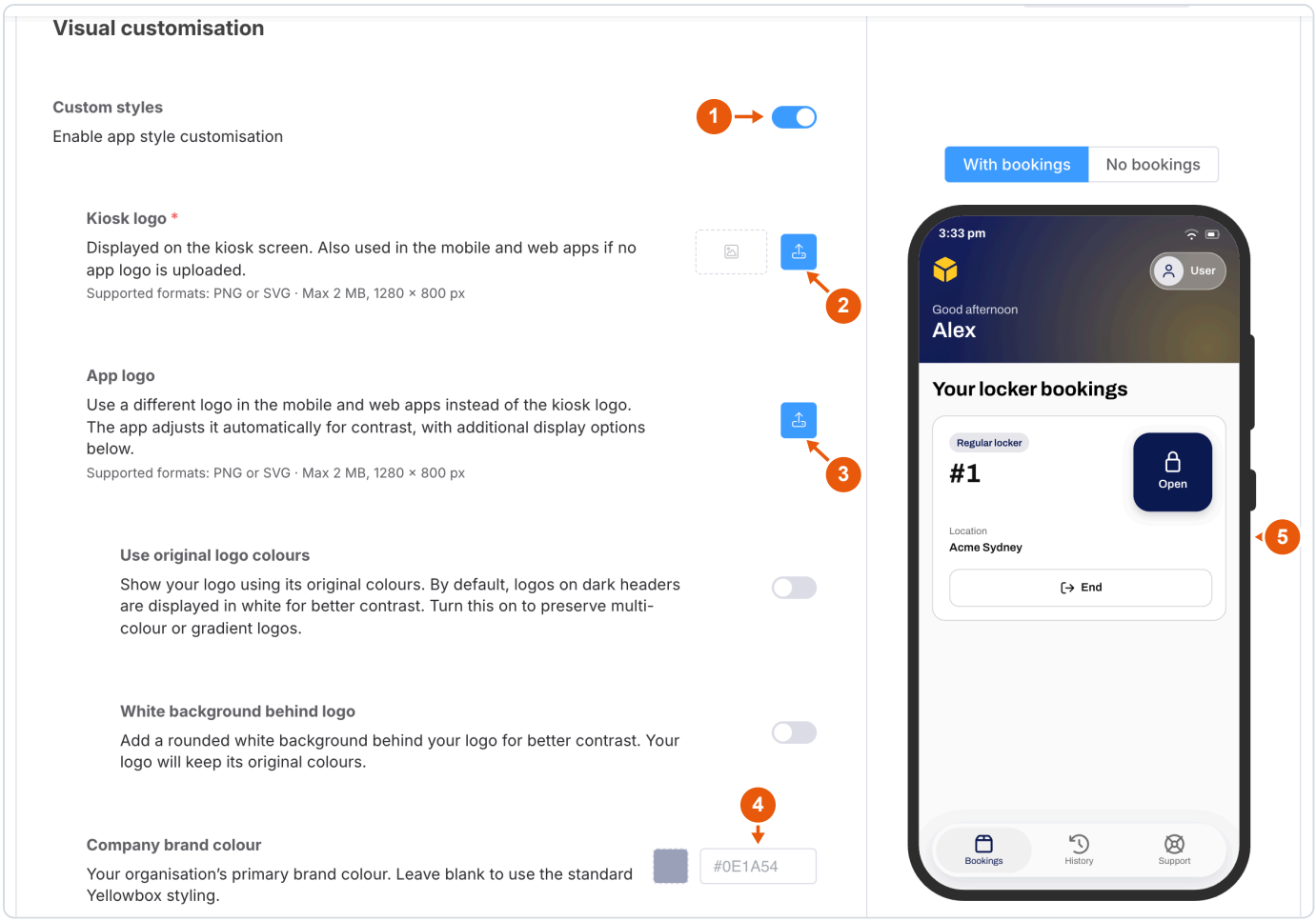
App Config: features

Controls what your people can do in the Yellowbox mobile and web apps.



1. **Personal Locker Booking Mode**: whether people book their own personal locker or a manager assigns it (for example *Assignment Only*). People can still book a hot locker themselves if one is set up.
2. **Locker Grid**: on, people pick an exact locker from a map of the bank; off, they pick a size and height and are given one.
3. **Personal PIN codes** and **Manager PIN visible**: let people set their own keypad PIN, or see the manager PIN for their locker. Further down: **Team lockers** and **Request Team Locker Access**.
4. Switch the preview between a person **with bookings** and one with **no bookings**.
5. The preview updates as you change settings, before you save.

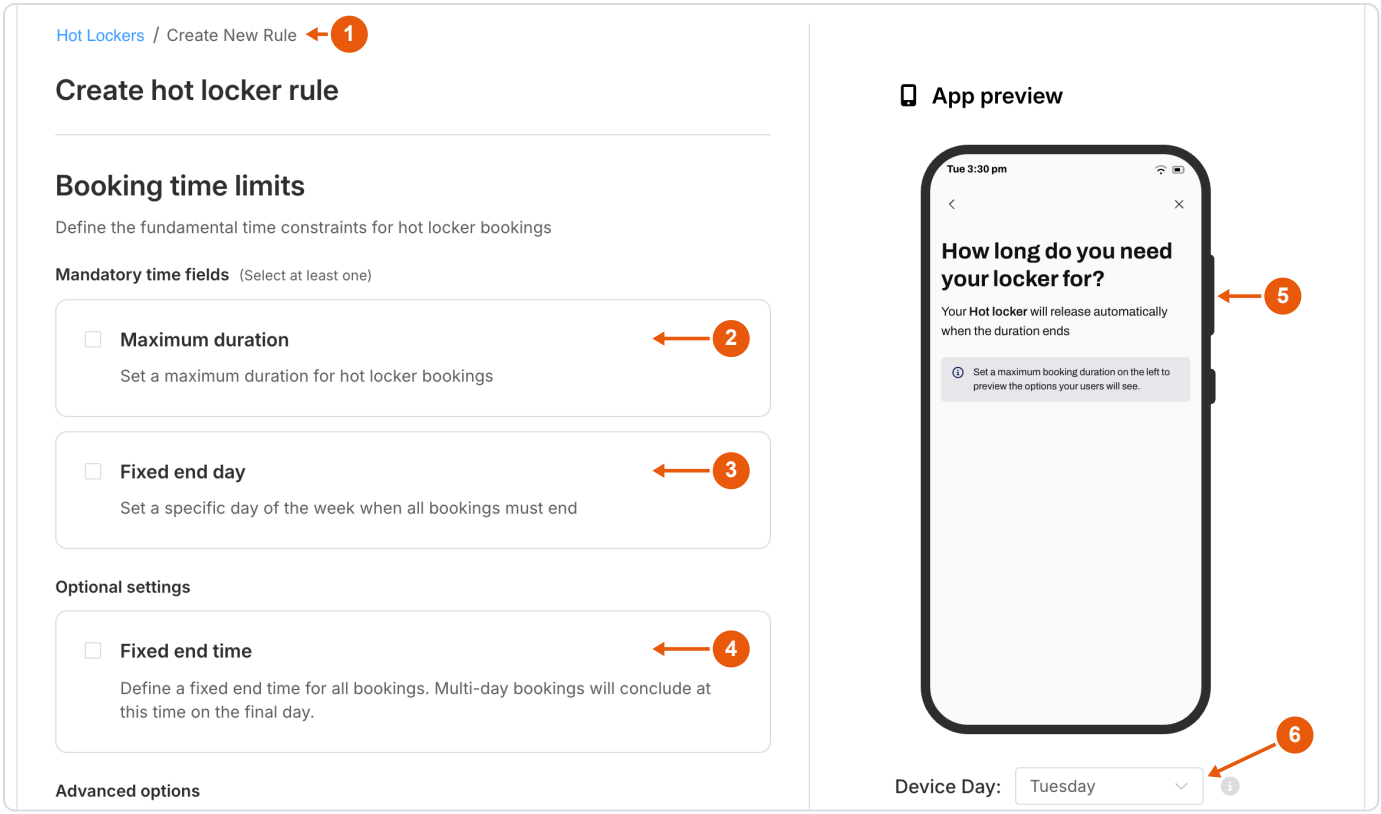
App Config: your branding



1. **Custom styles**: turn on to use your own logo and colours.
2. **Kiosk logo** (required once custom styles are on): shown on the kiosk screen, and in the apps if there is no app logo. PNG or SVG, up to 2 MB, 1280 × 800 px.
3. **App logo**: a different logo for the apps. Options below it keep its original colours or add a white background behind it.
4. **Company brand colour**, then **Accent colour**, **Heading text** (up to 40 characters) and **Greeting text** (up to 160 characters) further down. Leave blank for the standard Yellowbox look.
5. Check the preview before you save.

Hot Lockers

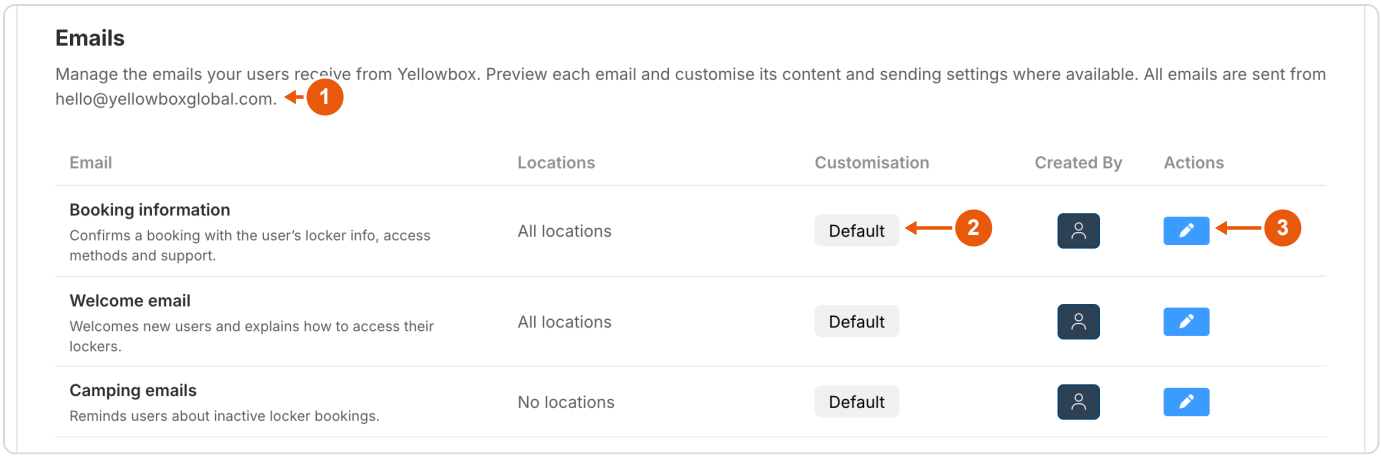
A hot locker is booked for a short time and then released automatically. The tab lists your **Hot Locker Rules**; **+ Add New Hot Locker Rule** opens the form below.



1. Back to the list of rules (leaves without saving).
2. **Maximum duration**: the longest a booking can last.
3. **Fixed end day**: every booking ends on a set day of the week. Pick at least one of these two.
4. **Fixed end time** (optional): all bookings end at this time on their last day. Further down: extra duration choices, how far ahead people can book, a time-limit message on the kiosk, and one-time access to empty the locker after it expires.
5. **App preview**: what people will see when they book.
6. Change the preview's day and time to test the rule. **Create rule** at the bottom saves it.

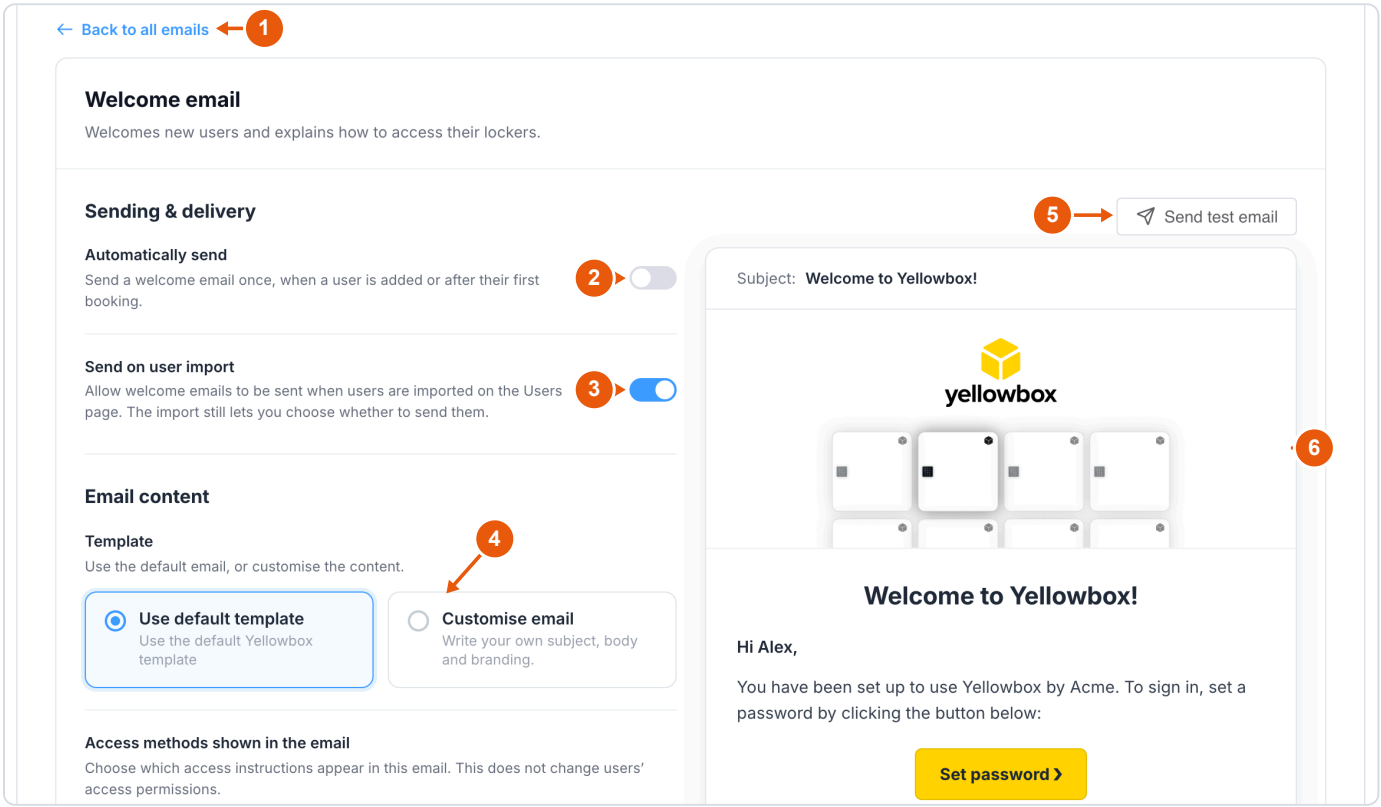
To put a rule to use, go to **Manage Locations**, create a custom locker type with Hot Locker mode and this rule, and give that type to the lockers.

Emails



1. Every email comes from **hello@yellowboxglobal.com**.
2. **Default** means the standard Yellowbox wording; **Customised** means your organisation has changed it.
3. The pencil opens the email to preview and change it (next picture).

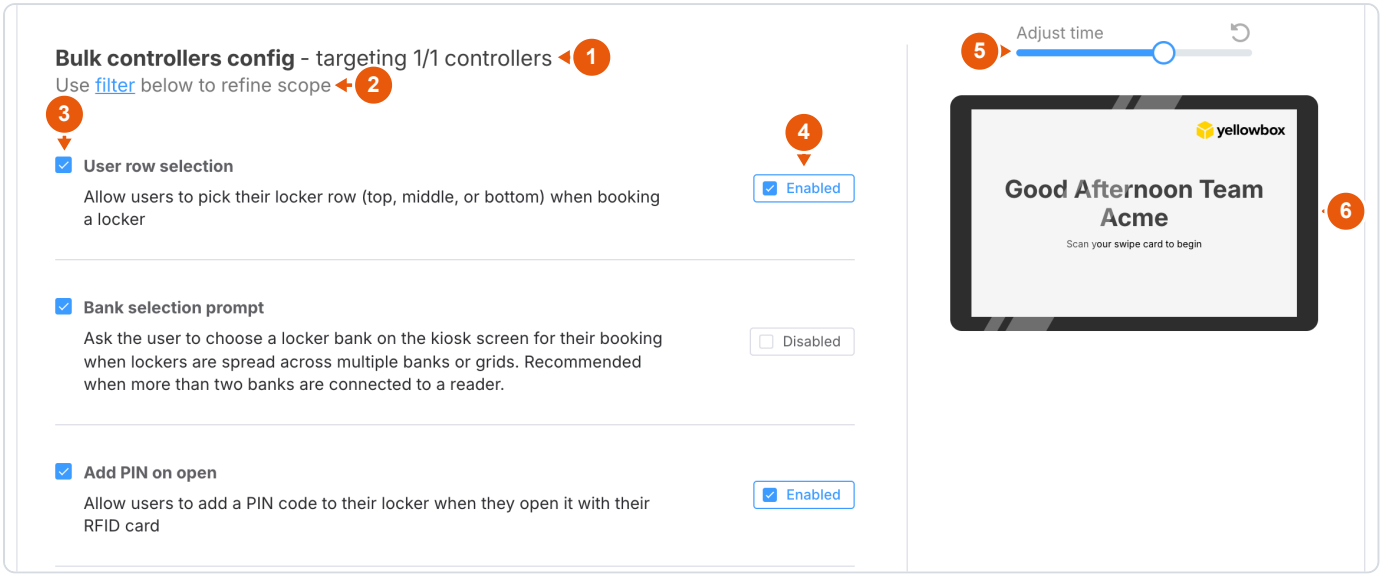
The emails are **Booking information** (confirms a booking), **Welcome email** (for new users), **Camping emails** (reminders about lockers that have not been used), and, where you have them, **parcel delivery** and **hot locker expiry** emails (the last one can be viewed but not changed).



1. Back to the list of emails.
2. **Automatically send**: send the welcome email once, when someone is added or after their first booking.
3. **Send on user import**: offer to send it when you import users on the **Users** page.
4. Use the default email, or **Customise email** to write your own subject, text and branding. Below: which access methods to explain, support text, and password set-up instructions.
5. **Send test email** to see it in your own inbox.
6. The preview shows the email as people will get it. **Save changes** is at the bottom.

Controllers (kiosk settings)

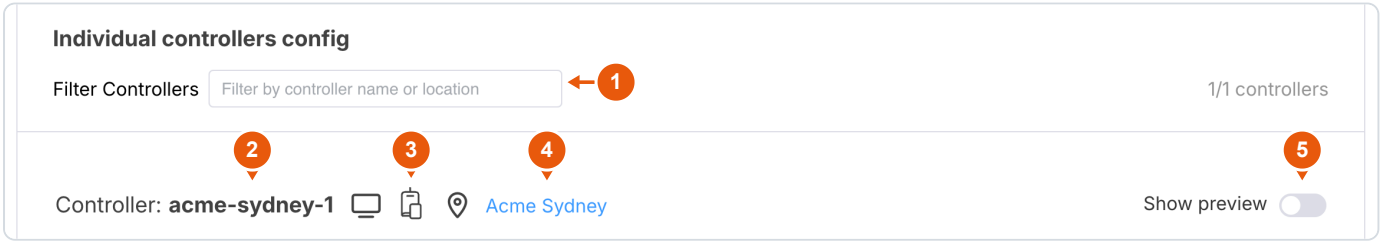
Settings for the kiosk screen at each locker bank. The top half changes many controllers at once; the bottom half changes one at a time.



1. **Bulk config**: how many controllers a change here will reach.
2. Use the **filter** further down to narrow that to some controllers.
3. Only ticked settings are changed in bulk. Untick a setting to leave it as it is on each controller.
4. The current value. **Mixed values** means the controllers are not all the same.
5. **Adjust time**: see the morning, afternoon or evening message in the preview.
6. Preview of the kiosk screen.

Settings include: row selection, bank selection, adding a PIN on open, the Keep / Vacate prompt, custom logo, the mobile access QR code, card-tap sign-in for the app, visitor bookings, locker availability, the morning, afternoon and evening messages, instruction text, FAQ content, rotating the display, and **offline notifications** (email chosen people when a bank goes offline and again when it recovers).

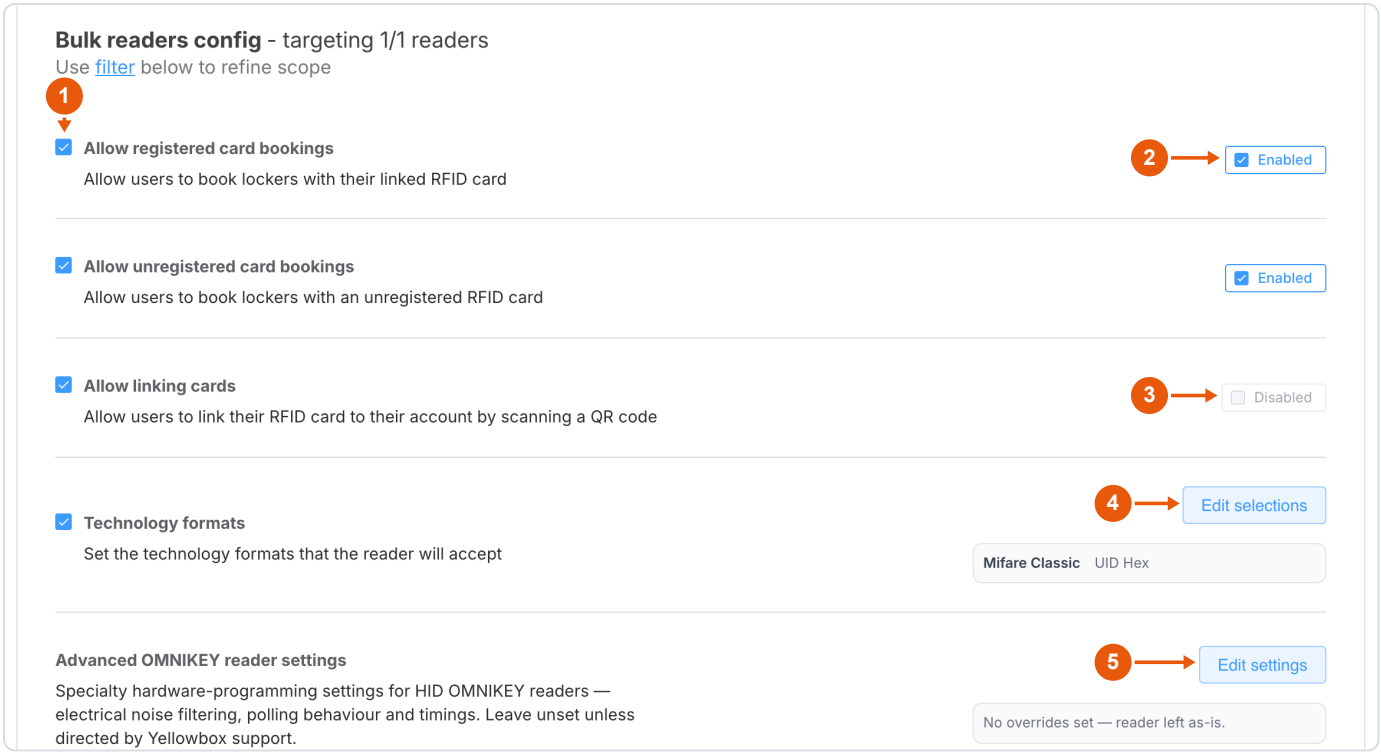
One controller at a time



1. Filter by controller name or location. This also sets which controllers the bulk section changes.
2. The controller's name. A screen icon means it has a kiosk screen.
3. Click a reader icon to jump to that card reader's settings.
4. The location it belongs to.
5. Show a preview for this controller only. Its settings are listed below, with a switch to change each one for this controller only.

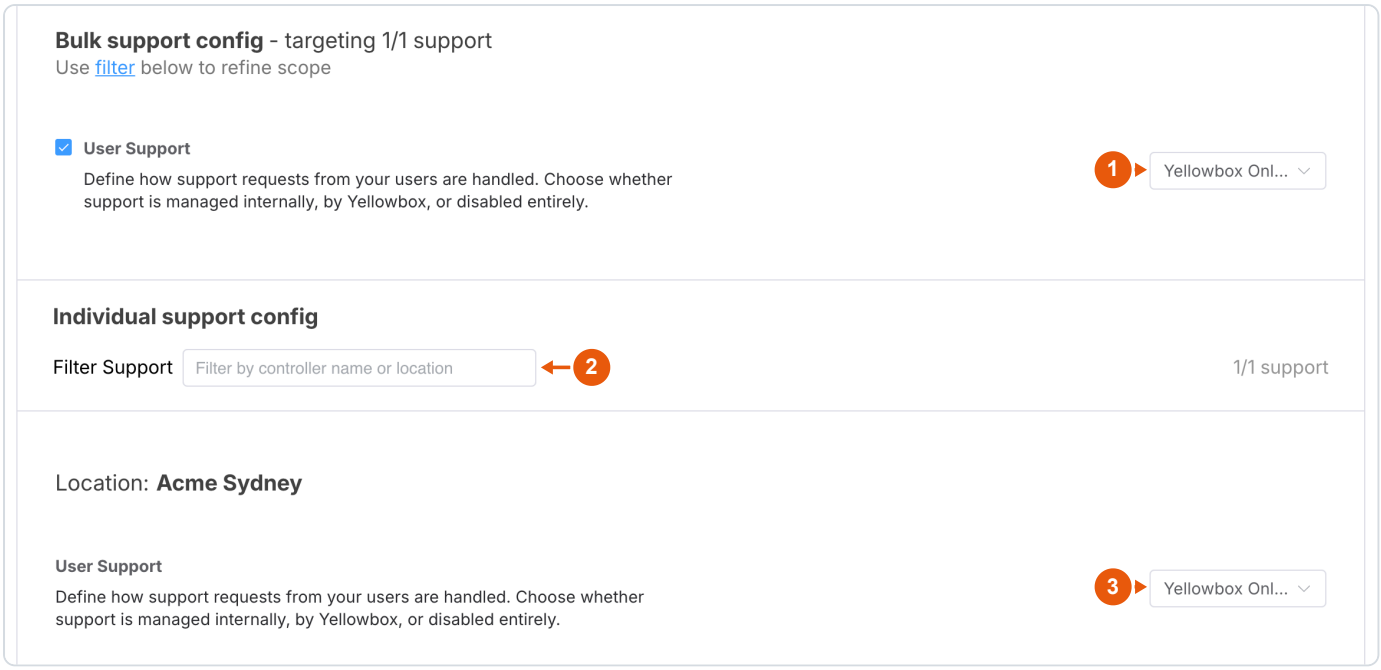
Readers (card readers)

Works the same way as Controllers: bulk settings at the top, one reader at a time below.



1. Tick the settings to change in bulk.
2. **Allow registered / unregistered card bookings**: let people book with a card linked to their account, or with any card.
3. **Allow linking cards**: people link a card to their account by scanning a QR code. It is greyed out while unregistered card bookings are on, because the two cannot be used together.
4. **Technology formats**: the card types the reader accepts. Check with Yellowbox before changing these.
5. **Advanced OMNIKEY reader settings**: hardware tuning. Leave these alone unless Yellowbox Support asks you to change them.

Support (help for your users)



1. Set **User Support** for every filtered location at once.
2. Filter by location.
3. Or set it for one location.

Option	What your users get
Yellowbox Only Support	Their support chats go straight to Yellowbox. Managers cannot see or answer them in the dashboard.
Manual Email Support	The support button sends them to your own email address(es), entered in **Support Email Contacts**. Your team handles support.
No Support	No support option in the app; support is handled outside Yellowbox.

Saving your changes

- Nothing changes until you save. When you have unsaved changes, a yellow **You have unsaved changes** tag appears, with a round **Save** button (disk icon) and a **Reset** button (cross) at the bottom of the page.
- On the Controllers, Readers and Support tabs, saving the bulk section updates **every filtered controller, reader or location**. You are asked to confirm first, with the number that will change. Filter first if you only mean to change some.
- **Organisation > All Organisations** (on the Controllers, Readers and Support tabs) shows everything you manage in one list. **Merged Config** shows the combined settings of your organisations and is view only.

Tips

- **A tab is missing?** Ask your organisation admin to check your permissions on the **Manager Access** page.
- **A setting is greyed out?** Hover over it to see why: it may need an organisation admin or Yellowbox, it may clash with another setting, or it may be outdated and replaced elsewhere.
- **Need help?** Use the **Support** page or contact Yellowbox at contact@yellowbox.app.

Screenshots use sample data.