

Create a client

Add a client with just their name, then complete their profile in Edit client with contact details, address, site, representative and plan contacts.

WHO IT IS FOR Owner, Admin, Manager, Coordinator	TIME NEEDED About 8 minutes	LAST REVIEWED 6 October 2026
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Who this is for

Permissions: You need the Can create clients permission. Owners, Admins, Managers and Coordinators have it by default. If you cannot see the Add client button, ask an Owner or Admin to check your role. If your access is limited to certain sites, Add client also asks for a Site and the new client must be at one of your sites. A Coordinator cannot see the site list, so in Edit client the Linked site / house list is empty. Ask a Manager, Admin or Owner to link the site, or use community rostering (step 8).

Before you begin

- You are signed in to BondiByte on a computer. See Sign in to BondiByte.
- You have the client's first name and last name. Their email address is optional. Everything else is added later.
- If the client will live at, or be supported through, one of your houses or locations, that site already exists and your role can see the site list (a Coordinator cannot; see step 7). See Create a site.



Steps

1 Go to Clients > Add client

- 1 In the left menu, under **Operations**, choose **Clients**. The **Client Records** list opens.
- 2 At the top right of the list, choose **Add client**. The **Add client** window opens. It says **Create the client record now. You can complete their profile later.**

The list shows each client's name, status, NDIS number, contact details, date of birth and whether they are active.

NAME	STATUS	NDIS NUMBER	CONTACT	DATE OF BIRTH	ACTIVE	ACTIONS
Noah Bennett Noah	Active	400000000	noah.bennett@example.com 0400 000 000	02/11/1988	Active	Deactivate
Ruby Chen Ruby	Active	400000000	ruby.chen@example.com 0400 000 000	06/09/1990	Active	Deactivate
Chloe Davis Chloe	Active	400000000	chloe.davis@example.com 0400 000 000	10/12/1998	Active	Deactivate
Mason Ibrahim Mason	Active	400000000	mason.ibrahim@example.com 0400 000 000	03/04/1974	Active	Deactivate
Ethan Kaur Ethan	Active	400000000	ethan.kaur@example.com 0400 000 000	14/01/2001	Active	Deactivate
Daniel Mensah Dan	Active	NDIS-DEMO-100001	daniel.mensah@example.com 1234567891	15/08/1992	Active	Deactivate
Lucas Miller Luke	Active	400000000	lucas.miller@example.com 0400 000 000	21/05/1985	Active	Deactivate
Grace OConnor Grace	Active	400000000	grace.oconnor@example.com 0400 000 000	29/07/1979	Active	Deactivate
Henry Roberts Henry	Active	400000000	henry.roberts@example.com 0400 000 000	16/02/1982	Active	Deactivate
Avery Sample -	Active	-	avery.sample@example.com -	-	Active	Deactivate
Isla Taylor Isla	Active	400000000	isla.taylor@example.com 0400 000 000	24/06/1996	Active	Deactivate
Amelia Watson			amelia.watson@example.com			

Choose Clients in the left menu (1), then Add client (2).



2 Enter the essentials

Fields marked * are required.

- 1 In **First name**, type the client's first name.
- 2 In **Last name**, type their last name.
- 3 In **Email**, type the client's email address if you have it. It is optional.

First name: Required.

Last name: Required. First and last name are shown in Client Records and wherever the client is chosen.

Email: Optional. It must look like an email address.

Site: Shown only if your own access is limited to certain sites. Choose one of your sites. If you have just one site, it is filled in for you and the window says **The new client is added to your site.**

Tip: The NDIS number, address, site, representative and the rest are added later with **Edit client** (steps 4 to 11).

Add client Close

Create the client record now. You can complete their profile later.

Fields marked * are required.

First name * 1 Alexis

Last name * 2 Sample

Email (optional) 3 alexis.sample@example.com

Create client Cancel

Type the first name (1) and last name (2), and the email address if you have it (3).



3 Choose **Create client** and check the new client

- 1 Choose **Create client**. Choose **Cancel** instead to close the window without saving.
- 2 A message confirms **Client record created**. The window closes and the new client appears in **Client Records** as **Active**.

Clients						1	✓ Client record created.	✕
Ruby Chen Ruby	Active	400000000	ruby.chen@example.com 0400 000 000	06/03/1990	Active		Deactivate	
Chloe Davis Chloe	Active	400000000	chloe.davis@example.com 0400 000 000	10/12/1998	Active		Deactivate	
Onbverify Delta -	Active	-	-	-	Active		Deactivate	
Mason Ibrahim Mason	Active	400000000	mason.ibrahim@example.com 0400 000 000	03/04/1974	Active		Deactivate	
Ethan Kaur Ethan	Active	400000000	ethan.kaur@example.com 0400 000 000	14/01/2001	Active		Deactivate	
Tessa Marlow Tess	Active	400000000	tessa.marlow@example.com 0400 000 007	22/11/1990	Active		Deactivate	
Daniel Mensah Dan	Active	NDIS-DEMO-100001	daniel.mensah@example.com 1234567891	15/08/1992	Active		Deactivate	
Lucas Miller Luke	Active	400000000	lucas.miller@example.com 0400 000 000	21/05/1985	Active		Deactivate	
Grace OConnor Grace	Active	400000000	grace.oconnor@example.com 0400 000 000	29/07/1979	Active		Deactivate	
Henry Roberts Henry	Active	400000000	henry.roberts@example.com 0400 000 000	16/02/1982	Active		Deactivate	
Alexis Sample -	Active	-	alexis.sample@example.com -	-	Active		Deactivate	2
Avery Sample -	Active	-	avery.sample@example.com -	-	Active		Deactivate	

The confirmation message (1) and the new client in the list (2).



4 Complete the profile with **Edit client**

Add the rest of the client's details when you have them. The **Edit client** window has six sections: **Basic Details**, **Contact Details**, **Address Details**, **Guardian / Representative**, **Emergency Contact** and **Plan / Support Contacts**. Scroll down the window to reach each one. Only **First name** and **Last name** are required.

On the client's row in **Client Records**, choose the pencil icon. The **Edit client** window opens on **Basic Details**.

- 1 In **Preferred name**, type the name the client goes by, if it is different.
- 2 In **Date of birth**, choose or type the date.
- 3 In **Gender**, choose from the list if you want to record it.
- 4 In **NDIS number**, type the client's NDIS number if you have it.
- 5 In **Internal client reference**, type your own file or reference number, if you use one.
- 6 Check **Status**. A new client is **Active**.
- 7 In **Profile photo**, choose a photo from your device if you have one. A **Preview** shows it before you save.

Preferred name: Optional. Shown under the name in the **Client Records** list.

Date of birth: Optional. Shown in the **Date of birth** column.

Gender: Optional. Choose **Female**, **Male**, **Non-binary**, **Prefer not to say** or **Other**.

NDIS number: Optional. Nine or ten digits. Spaces and hyphens are allowed and are removed when you save. Two clients in your organisation cannot have the same NDIS number. Shown in the **NDIS number** column.

Internal client reference: Optional. Your own reference for the client.

Status: **Active**, **Inactive**, **On Hold** or **Exited**. **Active** and **On Hold** clients count as active. **Inactive** and **Exited** clients are hidden from the list until you tick **Include inactive**, and are not linked to a site when you save.

Profile photo: Optional. A JPG, PNG or WebP image from your device. It is saved with the client's profile when you choose **Update client**.

The screenshot shows the 'Basic Details' section of the 'Edit client' form. It includes the following fields and callouts:

- 1** Preferred name: Lexi
- 2** Date of birth: 15/01/1990
- 3** Gender: Select
- 4** NDIS number: 999 999 999
- 5** Internal client reference: SAMPLE-002
- 6** Status: Active
- 7** Profile photo: Choose File (No file chosen)

A 'Preview' section on the right shows 'No photo'.

Type the preferred name (1), date of birth (2), gender (3), NDIS number (4) and internal reference (5), check the status (6) and choose a photo (7).



5 Add contact details

The **Contact Details** section is next.

- 1 Check **Email**. It shows the email you typed in **Add client**, if any.
- 2 In **Phone**, type a landline number if they have one.
- 3 In **Mobile**, type their mobile number.
- 4 In **Preferred contact method**, choose how the client likes to be contacted.
- 5 In **Preferred contact time**, type when to contact them, for example Weekdays only.
- 6 Tick **Can contact directly** if your team may contact the client themselves, rather than only through someone else.
- 7 In **Communication notes**, add anything staff should know when they contact the client.

Email: Optional. It must look like an email address.

Phone: Optional. Shown under the email address in the **Contact** column.

Mobile: Optional.

Preferred contact method: Optional. Choose **Phone**, **Mobile**, **Email**, **Guardian / Representative** or **Support Coordinator**.

Preferred contact time: Optional. Free text, such as Morning or After 5pm.

Can contact directly: Tick box, not ticked to start with. It shows on the client's record as **Can be contacted directly**.

Communication notes: Optional. Free text.

The screenshot shows a 'Contact Details' form with the following fields and callouts:

- 1** Email: alexis.sample@example.com
- 2** Phone: (empty)
- 3** Mobile: 0400 000 006
- 4** Preferred contact method: Email (dropdown menu)
- 5** Preferred contact time: Weekdays only
- 6** Can contact directly: (checkbox, currently unchecked)
- 7** Communication notes: (empty text area)

Check the email (1), type the phone (2) and mobile (3), choose the contact method (4) and time (5), tick Can contact directly if it applies (6) and add notes (7).



6 Enter the client's address

The first part of the **Address Details** section holds the client's home address and where their support is delivered.

- 1 In **Residential address line 1**, start typing an Australian address and choose a suggestion from the list that appears. The address fields below fill in for you. You can also type the address yourself.
- 2 In **Residential address line 2**, type a unit or level if there is one.
- 3 In **Suburb**, check or type the suburb.
- 4 In **State**, choose the state or territory.
- 5 In **Postcode**, check or type the postcode.
- 6 In **Country**, choose **Australia** or **Other**. It starts as **Not set**.
- 7 In **Service delivery address**, search for or type the address where support is delivered, if it is different from the home address. Choosing a suggestion fills in the full address.

Residential address line 1: Optional. Start typing and choose a suggestion to fill the suburb, state and postcode too.

Residential address line 2: Optional. A unit, level or building name.

Suburb: Optional.

State: Optional. Choose **ACT, NSW, NT, QLD, SA, TAS, VIC** or **WA**.

Postcode: Optional.

Country: **Not set** to start with. Choose **Australia** or **Other**.

Service delivery address: Optional. Where staff deliver support, if not at the home address. Saved as one line of text.

Address Details					
Residential address line 1 Start typing an Australian address		1	Residential address line 2	2	
Suburb Brisbane	3	State QLD	4	Postcode 4000	5
Country Australia	6	Service delivery address Start typing an Australian address		7	
Linked site / house Select site	☐ Enable standalone/community porting		Living arrangement Select		

Search for or type the home address (1), then the second line (2), suburb (3), state (4), postcode (5) and country (6), and the service delivery address (7).



7 Link the client to a site

Next, in the same **Address Details** section, choose where the client is supported. There are two choices and you can only use one of them. This step covers a client who lives at, or is supported through, one of your sites. Step 8 covers a client with no site. If you use neither, the client is not attached to a site and is scheduled on the **Rostering** screen.

- 1 In **Linked site / house**, choose the site. The list shows your active sites by name and site code. **Select site** means no site.
- 2 In **Living arrangement**, choose how the client lives, if you want to record it.

Once you choose a site, **Enable standalone/community rostering** is greyed out. Pointing at it explains that clients assigned to a site are rostered through that site.

Linked site / house: Optional. Choose one of your active sites. A line under the list says community rostering sites are not selectable here. When you save an **Active** client with a site chosen, BondiByte also adds the client to that site's **Clients** tab as a **Primary residence**, starting today.

Living arrangement: Optional. Choose **Lives alone, With family, With partner, Supported Independent Living, Group home, Temporary accommodation or Other**.

Note: A Coordinator cannot see the site list, so **Linked site / house** shows only **Select site**. Save the client without a site, then ask a Manager, Admin or Owner to link the site, or use community rostering (step 8).

Suburb: Brisbane, State: QLD, Postcode: 4000

Country: Australia, Service delivery address: Start typing an Australian address

Linked site / house: 1
Riverside Sample House (RIVERSIDE-SAMPLE-HI)
Standalone/community roster sites are managed from the client's standalone rostering setting and are not selectable here.

Enable standalone/community rostering
Use this when the client receives support outside a site or house and needs their own roster.

Living arrangement: 2
Supported Independent Living

Guardian / Representative

Choose the site in **Linked site / house** (1) and the living arrangement (2). The community rostering tick box is now greyed out.



8 Or choose community rostering for a client with no site

Do this step instead of step 7, only for a client who is supported outside a house or site and needs their own roster.

- 1 Tick **Enable standalone/community rostering**.
- 2 Check **Linked site / house**. It clears and is greyed out, and a line under it says **A community access site will be created using this client's name**.

To go back, untick the box. The site list becomes available again.

Enable standalone/community rostering:

Tick box, not ticked to start with. When you save an **Active** client with this ticked, BondiByte creates a **Community Access** site named after the client, and the client is rostered through it. You cannot link a site and tick this at the same time.

Note: A community client has no real site. They are scheduled in **SIL/Smart Rostering**: choose the client's name in the **Select Site/Client** list. A client with no site and no community rostering shows on the **Rostering** screen instead.

The screenshot shows a form for creating a client. At the top, there are fields for Suburb (Brisbane), State (QLD), and Postcode (4000). Below these are Country (Australia) and Service delivery address (Start typing an Australian address). The 'Linked site / house' dropdown is highlighted with a blue box and a circled '2'. It shows 'Select site' and a message: 'A community access site will be created using this client's name.' To the right of this dropdown is a checkbox labeled 'Enable standalone/community rostering' with a blue box and a circled '1'. The checkbox is checked, and below it is a note: 'Use this when the client receives support outside a site or house and needs their own roster.' To the right of the checkbox is the 'Living arrangement' dropdown, which is set to 'Supported Independent Living'.

Tick *Enable standalone/community rostering* (1). The site list (2) clears and a line explains that a community access site will be created.



9 Add a guardian or representative

The **Guardian / Representative** section records a person who acts for the client. Skip it if the client acts for themselves.

- 1 Tick **Has guardian / representative**.
- 2 In **Representative type**, choose the person's role.
- 3 In **Representative full name**, type their name.
- 4 In the next row, type **Relationship to client** (how they are related to the client), **Representative phone** and **Representative email**.
- 5 In **Representative address**, type their address. The address box works like the other address boxes.
- 6 In the first row of tick boxes, tick each thing the representative is allowed to do: **Can sign service agreement**, **Can make service decisions** and **Can receive client information**.
- 7 In the last row, tick **Can receive invoices** if the representative receives invoices, **Consent to contact representative** if the client has agreed that your team may contact them, and **Primary representative** if this is the main contact.

Add anything else in **Representative notes**, at the bottom of the section.

Has guardian / representative: Tick box, not ticked to start with.

Representative type: Optional. Choose **Guardian**, **Plan Nominee**, **Correspondence Nominee**, **Parent**, **Family Member**, **Carer**, **Power of Attorney**, **Support Coordinator**, **Advocate** or **Other**.

Representative full name, relationship, phone, email and address: Optional. Free text, except that the email must look like an email address. The address box works like the other address boxes and is saved as one line of text.

Can sign service agreement, Can make service decisions, Can receive client information and Can receive invoices: Tick boxes, not ticked to start with. They record what the representative is allowed to do.

Consent to contact representative and Primary representative: Tick boxes, not ticked to start with.

Representative notes: Optional. Free text.

The screenshot shows the 'Guardian / Representative' form with the following fields and values:

- Has guardian / representative:** ☒ (Callout 1)
- Representative type:** Parent (Callout 2)
- Representative full name:** Pat Sample (Callout 3)
- Relationship to client:** Parent (Callout 4)
- Representative phone:** 0400 000 003 (Callout 4)
- Representative email:** pat.sample@example.com (Callout 4)
- Representative address:** Start typing an Australian address (Callout 5)
- Can sign service agreement:** ☒ (Callout 6)
- Can make service decisions:** ☐ (Callout 6)
- Can receive client information:** ☐ (Callout 6)
- Can receive invoices:** ☐ (Callout 7)
- Consent to contact representative:** ☒ (Callout 7)
- Primary representative:** ☒ (Callout 7)

Tick **Has guardian / representative** (1), choose the type (2), type the name (3), the relationship, phone and email (4) and the address (5), then tick what they may do (6) and the consent and primary options (7).



10 Add an emergency contact

- 1 In **Emergency contact name**, type the person to call in an emergency.
- 2 In **Emergency contact relationship**, say how they are related, for example Friend.
- 3 In **Emergency contact phone**, type their phone number.
- 4 In **Emergency contact email**, type their email address, if you have it.
- 5 Tick **Can contact after hours** if they can be called outside business hours.
- 6 In **Emergency contact notes**, add anything others should know when they call.

Emergency contact name: Optional.

Emergency contact relationship: Optional.
Free text.

Emergency contact phone: Optional.

Emergency contact email: Optional. It must look like an email address.

Can contact after hours: Tick box, not ticked to start with.

Emergency contact notes: Optional. Free text.

The screenshot shows a form titled "Emergency Contact" with the following fields and steps:

- Step 1: "Emergency contact name" field with the value "Jo Sample".
- Step 2: "Emergency contact relationship" field with the value "Friend".
- Step 3: "Emergency contact phone" field with the value "0400 000 004".
- Step 4: "Emergency contact email" field, currently empty.
- Step 5: "Can contact after hours" checkbox, which is checked.
- Step 6: "Emergency contact notes" text area, currently empty.

Type the emergency contact's name (1), relationship (2), phone (3) and email (4), tick Can contact after hours (5) and add notes (6).



11 Add plan and support contacts, then save

The last section, **Plan / Support Contacts**, records who manages the client's NDIS plan and who supports them.

- 1 In **Plan management type**, choose how the plan is managed.
- 2 Fill in the plan manager's details, starting with **Plan manager name**: also **Plan manager organisation**, **Plan manager email** and **Plan manager phone**.
- 3 Fill in the support coordinator's details, starting with **Support coordinator name**: also **Support coordinator organisation**, **Support coordinator email** and **Support coordinator phone**.
- 4 Fill in **Local Area Coordinator name** and **Local Area Coordinator email**, if the client has a Local Area Coordinator.
- 5 In **NDIS plan document**, type a link or reference for the client's plan document.
- 6 Choose **Update client**. The buttons at the bottom of the window stay in view as you scroll. A message confirms **Client record updated**. Choose **Cancel** instead to close the window without saving.

Plan management type: Optional. Choose **Self Managed**, **NDIA Managed** or **Plan Managed**. It is used on the Invoicing screen when you prepare an invoice for the client.

Plan manager name, organisation, email and phone: Optional. Recorded on the client's record. The **Invoicing** screen shows these details as the billing contact until billing details are saved. To send an invoice, also enter a billing email on the client's **Billing Details** tab.

Support coordinator name, organisation, email and phone: Optional. Recorded on the client's record.

Local Area Coordinator name and email: Optional. Recorded on the client's record.

NDIS plan document: Optional. Free text, such as a link or a reference. It is not an upload.

The screenshot shows the 'Plan / Support Contacts' form. It contains several input fields and a dropdown menu. Numbered callouts are placed over the form as follows:

- 1: Over the 'Plan management type' dropdown menu, which currently shows 'Plan Managed'.
- 2: Over the 'Plan manager name' text input field, which contains 'Sam Sample'.
- 3: Over the 'Support coordinator name' text input field, which contains 'Alex Sample'.
- 4: Over the 'Local Area Coordinator name' text input field, which is empty.
- 5: Over the 'NDIS plan document' text input field, which contains 'Document link or reference'.
- 6: Over the 'Update client' button at the bottom right of the form.

Other visible fields include 'Plan manager organisation' (Example Plan Management), 'Plan manager email' (plans@example.com), 'Plan manager phone' (empty), 'Support coordinator organisation' (Example Support Coordination), 'Support coordinator email' (empty), 'Support coordinator phone' (empty), and 'Local Area Coordinator email' (empty). At the bottom right, there is also a 'Cancel' button.

Choose the plan management type (1), fill in the plan manager (2), support coordinator (3), Local Area Coordinator (4) and plan document (5) details, then choose Update client (6).



12 Find, update or deactivate a client from the list

Use the controls on the **Client Records** list to look after the clients you have created.

- 1 Type in **Search clients...** to narrow the list.
- 2 Use the **Status** filter to show one status only. It starts on **All statuses**.
- 3 Tick **Include inactive** to show **Inactive** and **Exited** clients as well. They are hidden until you tick it.
- 4 In the **Status** column, choose a different status from the drop-down on a row. The change is saved straight away and a message confirms **Client status updated**.
- 5 Choose the pencil icon in the **Actions** column to open the **Edit client** window, as in step 4.
- 6 Choose **Deactivate** to make the client inactive. It happens straight away, without asking you to confirm, and a message confirms **Client record deactivated**. The button then becomes **Reactivate** (visible when **Include inactive** is ticked); choose it to return the client to **Active**.

Warning: Making a client inactive, by **Deactivate** or by choosing **Inactive** or **Exited**, also makes their active Service Agreements inactive automatically. Reactivating the client does not switch those agreements back on, so check them on the client's **Service Agreements** tab.

Permissions: The pencil icon needs the Can edit clients permission. The **Status** drop-down and the **Deactivate** and **Reactivate** buttons need the Can deactivate/reactivate clients permission.

The screenshot shows the 'Client Records' interface. At the top, there is a search bar with 'Morgan' entered (labeled 1), a status filter dropdown set to 'All statuses' (labeled 2), and a checkbox for 'Include inactive' (labeled 3). To the right are buttons for 'Import spreadsheet', 'Extract from document', and '+ Add client'. Below this is a table with columns: NAME, STATUS, NDIS NUMBER, CONTACT, DATE OF BIRTH, ACTIVE, and ACTIONS. The first row shows 'Morgan Sample Mo' with status 'Active' (labeled 4), NDIS number '999999999', contact 'morgan.sample@example.com', date of birth '15/01/1990', and an 'Active' status indicator. In the ACTIONS column, there is a pencil icon (labeled 5) and a 'Deactivate' button (labeled 6). At the bottom left, there is a 'Rows' dropdown set to '50'. At the bottom right, there are 'Back', '1-1 of 1 clients', and 'Next' buttons.

Search (1), filter by status (2), show inactive clients (3), change the status (4), edit (5) or deactivate (6) a client.



What happens next

The client appears in **Client Records**. Choose their name to open their record. Its tabs are **Overview**, **Billing Details**, **Service Agreements**, **Documentation**, **Reports**, **Charts**, **Sites**, **History**, **Imported history** and **Intelligence**. You see only the tabs your role allows.

The **Overview** is kept short. Until the profile is complete, it shows a **Complete the profile** card that names what is still missing, with a **Complete profile** button. Under **At a glance**, each line, such as **Service agreement** or **Site and rostering**, links to the tab where you manage it.

If you linked a site and the client is **Active**, they are already on that site's **Clients** tab. If you chose community rostering, a **Community Access** site named after the client now exists in the **Sites** list, and you schedule them in **SIL/Smart Rostering** by choosing their name in **Select Site/Client**.

A new client has no Service Agreement yet. Add one from the client's **Service Agreements** tab when you are ready.

Important notes

Important: Only **First name** and **Last name** are required. Add the rest when you have it, using the pencil icon on the list, or **Edit client** or **Complete profile** on the client's record.

Tip: To bring in many clients at once, use **Import spreadsheet** or **Extract from document** above the list instead of adding them one by one. They appear only if your role allows imports.

Good practice

- Search **Client Records**, with **Include inactive** ticked, before you add a client. A client who left and has come back may already have a record, and **Reactivate** returns them to **Active** without creating a second one.
- Enter the **NDIS number** whenever you have it. BondiByte stops two clients with the same NDIS number, which helps you catch a duplicate, but it can only do that when the number is filled in.
- Decide how the client will be rostered when you complete the profile. A client is either linked to a site or set up for community rostering, never both, and a client with a site must have that site assignment removed before community rostering can be turned on.
- Keep the client **Active** if you want them linked to the site straight away. A client saved as **Inactive** or **Exited** keeps the chosen site on the form but is not added to the site's **Clients** tab.
- Fill in the **Guardian / Representative** section at intake, and tick only what the person is actually authorised to do. The ticks show on the client's record, and your team will rely on them.
- Record the **Emergency contact** and the **Plan / Support Contacts** while you have the client's paperwork in front of you, so staff and your finance team can find them in one place.
- Keep **Status** up to date. Use **On Hold** for a pause, and **Inactive** or **Exited** only when support has ended, because both make the client's active Service Agreements inactive.



Troubleshooting

I cannot see **Add client**.

Why it happens: Your role does not include the Can create clients permission.

What to do: Ask an Owner or Admin to check your role, or to add the client for you.

A message under **Site** says **Choose one of your sites for this record**.

Why it happens: Your access is limited to certain sites, and a client must be created at one of them.

What to do: Choose a site in **Site**, then choose **Create client** again.

A message says **Please check the information you entered and try again. when I choose Update client**.

Why it happens: A value is not accepted. The most common cause is an **NDIS number** that is not nine or ten digits.

What to do: Check **NDIS number** (digits only, with or without spaces or hyphens) and any email address you typed, then choose **Update client** again.

A message says a client record with this NDIS number already exists.

Why it happens: Another client in your organisation already has that NDIS number.

What to do: Search **Client Records**, with **Include inactive** ticked, for the existing record. If it is the same person, use **Reactivate** or **Edit client** on the existing record. If you typed the number wrongly, correct it.

The site I need is not in the **Linked site / house list** in **Edit client**.

Why it happens: The list shows active sites only, and sites made for community rostering are never in it.

What to do: Check the site in **Sites** with **Include inactive** ticked. Reactivate it, or create it first. See [Create a site](#).

Linked site / house or Enable standalone/community rostering is greyed out.

Why it happens: The two choices exclude each other. A site is chosen, so community rostering is off, or community rostering is ticked, so the site list is off.

What to do: To use the other choice, clear the one you have. Choose **Select site** in the list to clear a site, or untick the community rostering box.

A message about a profile photo appears after I choose **Update client**.

Why it happens: The photo is saved after the client's details, so the details may already be saved even though the window stays open.

What to do: Close the window, search **Client Records** for the client and add the photo again with the pencil icon. Use a JPG, PNG or WebP image.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
Last reviewed 6 October 2026.*