

Set up your organisation

Enter your organisation's profile, address, invoice payment details and logo, set the time zone and date format, and check your setup progress.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 15 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need permission to manage organisation settings. Owners and Admins have it. If the Organisation tile is missing from the Configuration page, or Settings is missing from the left menu, ask an Owner or Admin to make these changes.

Before you begin

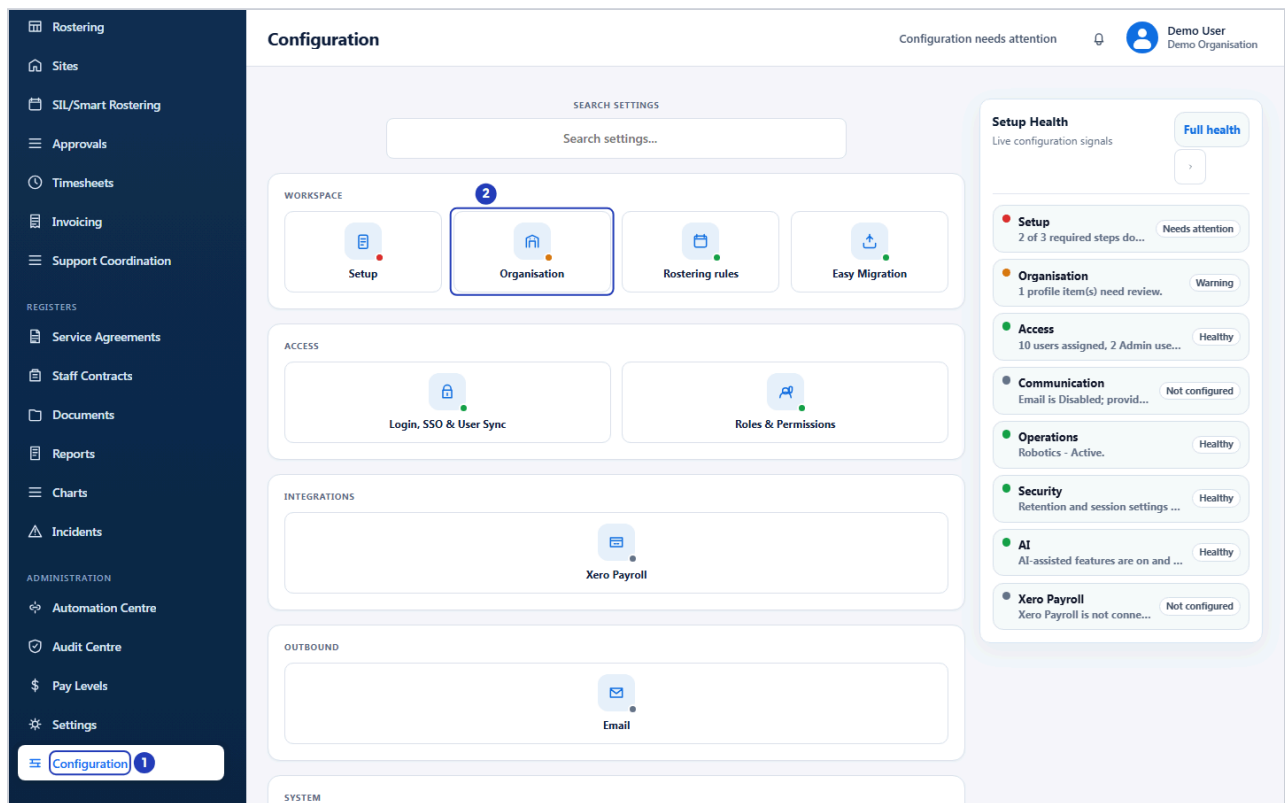
- You are signed in to BondiByte as an Owner or Admin. See Sign in to BondiByte.
- You have your organisation's legal name, ABN, a support email address and your logo file ready. A logo can be a PNG, JPEG, WebP or SVG file of 2 MB or smaller.
- If you want invoices to show bank details, you also have your account name, BSB and account number.



Steps

1 Go to Configuration > Organisation

- 1 In the left menu, under **Administration**, choose **Configuration**. The Configuration page opens with a tile for each group of settings.
- 2 In the **Workspace** group, choose **Organisation**. The **Organisation Settings** page opens with four cards: **Organisation profile**, **Invoice payment details**, **Contact & business address** and **Brand assets**.



Choose Configuration in the left menu (1), then Organisation in the Workspace group (2).



2 Upload your logo and choose your brand colours

Do this step before you type anything else on the page. Uploading a logo saves it straight away and refreshes the page, so anything you typed and did not save is lost.

The **Brand assets** card is the last of the four cards. Scroll down to it.

- 1 Use the **Choose file** button next to **Upload brand logo (PNG / JPEG / SVG / WebP)** to pick your logo file. The logo uploads straight away.
- 2 Choose your **Primary brand colour**. It is used for accents and primary actions.
- 3 Choose your **Secondary brand colour**. It is used for headers and supporting surfaces.
- 4 Check your logo under **Logo preview**. Until you upload a logo, **Logo preview** shows the BondiByte mark.

The logo is already saved. The two colours are saved with your other details when you choose **Save section** in step 6.

Warning: If you have already typed or changed anything on this page, choose **Save section** before you upload a logo, or those changes are lost. The same applies if you upload a different logo later.

Brand assets

1 Upload brand logo (PNG / JPEG / SVG / WebP)
No logo uploaded [Choose file](#)
Uploading a new logo replaces the current logo used in app headers.

2 Primary brand colour
Used for accents and primary actions.

3 Secondary brand colour
Used for headers and supporting surfaces.

4 Logo preview

Choose your logo file (1), your primary (2) and secondary (3) brand colours, and check the logo preview (4).



3 Enter your organisation profile

The **Organisation profile** card is at the top of the page. These details appear on invoices, portals and headers.

- 1 In **Legal name**, type your organisation's registered name. BondiByte uses this name across the platform.
- 2 In **Trading name**, type the name you trade under, if it is different from your legal name. Leave it empty if it is not.
- 3 In **ABN**, type your Australian Business Number. It appears on invoices.
- 4 In **NDIS registration number**, type your NDIS provider registration number. BondiByte uses it in the bulk-claim CSV export.

Legal name: Required for setup. The primary name for your organisation. The **Settings** page calls this same name **Organisation display name**.

Trading name: Optional. Used on documents and portals when it is different from the legal name.

ABN: Required for setup. Your Australian Business Number. It appears on invoices.

ACN: Optional. Your Australian Company Number, used on documents where a company number is needed.

NDIS registration number: Optional. Your NDIS provider registration number, used in the bulk-claim CSV export.

Default currency: A three-letter code. It starts as AUD and is used for budgets and pricing.

Website: Optional. Your organisation's website address.

Tip: To bring in organisation details from a spreadsheet instead of typing them, choose **Import organisation details** at the top of the **Organisation profile** card.

The screenshot shows the 'Organisation profile' form. At the top left is an information icon and the title 'Organisation profile'. Below it is a button labeled 'Import organisation details'. The form contains several input fields: 'Legal name' (with callout 1) containing 'Sample Support Services Pty Ltd'; 'Trading name' (with callout 2) containing 'Sample Support', with a note 'Optional. Used for documents and portals when different from the legal name.'; 'ABN' (with callout 3) containing '11 222 333 444', with a note 'Australian Business Number. Appears on invoices.'; 'ACN' containing 'e.g. 123 456 789', with a note 'Australian Company Number. Used on documents where a company number is required.'; 'NDIS registration number' (with callout 4) containing 'e.g. 1234567891', with a note 'Your NDIS provider registration number. Used in the bulk-claim CSV export.'; 'Default currency' containing 'AUD', with a note 'Three-letter ISO code used for budgets and pricing outputs.'; and 'Website' containing 'https://www.example.com'.

Type your legal name (1), trading name (2), ABN (3) and NDIS registration number (4).



4 Add your invoice payment details

The **Invoice payment details** card holds the bank details and payment terms that can be printed on future client invoices. You can fill it in now or come back before you send your first invoice.

- 1 In **Account name**, type the name on your bank account.
- 2 In **BSB**, type the six-digit BSB, for example 123-456.
- 3 In **Account number**, type your account number. It must be 4 to 12 digits.
- 4 In **Payment terms**, type how many days after the invoice date payment is due. Type 0 for due on receipt.

Account name: The name shown beside the bank account in the payment instructions.

BSB: Six digits, for example 123-456. You can type it with or without the hyphen.

Account number: Four to twelve digits. Leading zeros are kept.

Payment terms: A whole number of days from 0 to 120. It starts as 14.

Staff leave approval threshold (days): Staff unavailability longer than this many days needs manager approval before it takes effect. This setting sits in this card but is not about invoices.

Remittance email: Optional. The email address for payment advice. It is linked to the billing reply-to address in the **Email** settings.

Invoice payment instructions: Optional wording shown with the bank details on future invoice PDFs and emails.

Type the account name (1), BSB (2) and account number (3), and set the payment terms in days (4).



5 Add your contact and business address

- 1 In **Primary support email**, type the email address people should use to reach your organisation. It is shown on portals and used as the contact address on outgoing automation messages.
- 2 In **Organisation phone**, type your public contact number.
- 3 In **Address line 1**, type your street address. Use **Address line 2** for a unit, floor or campus name.
- 4 In **Country**, type Australia. Also fill in **City**, **State / region** and **Postcode**.

Important: Setup counts your organisation as complete only when **Legal name**, **ABN**, **Country** and **Primary support email** are filled in.

The screenshot shows a form titled "Contact & business address" with the following fields and callouts:

- 1** Primary support email: support@example.com. Below the field, it says "Shown on portals and used as the contact address on outgoing automation messages."
- 2** Organisation phone: +61 4 xx xxx xxx
- 3** Address line 1: 1 Example Street
- Address line 2: Unit, floor, campus name (optional)
- City: Brisbane
- State / region: Queensland
- Postcode: 4000
- 4** Country: Australia

Type the support email (1), phone number (2) and street address (3), then the country (4).



6 Choose Save section

- 1 Look at the bar at the bottom of the page. It shows how many changes are pending, for example **10 changes pending**.
- 2 Choose **Save section**. A message confirms **Organisation saved**, and the bar changes to **All changes saved**.

To throw away changes you have not saved, choose **Discard** instead.

Note: If you change **Default currency**, BondiByte asks you to confirm first, because future invoice defaults will use the new currency. Existing invoices keep their original currency.

The screenshot displays the 'Organisation setup' form. It includes fields for ABN (11 222 333 444), ACN (e.g. 123 456 789), NDIS registration number (e.g. 1234567891), and Default currency (AUD). Below these is a Website field with the URL https://www.example.com. A section titled 'Invoice payment details' contains fields for Account name (Organisation Pty Ltd), BSB (123-456), and Account number (123456789). At the bottom of the form, a blue bar indicates '10 changes pending' with a circled '1'. To the right of this bar is the text 'Review Organisation updates before saving.' and two buttons: 'Discard' and 'Save section'. The 'Save section' button is highlighted with a circled '2'.

Check how many changes are pending (1), then choose Save section (2). Discard throws the changes away.



7 Check the time zone and date format in Settings

These settings are the default time zone and date and time format for your whole organisation. In the left menu, under **Administration**, choose **Settings**. The **Workspace Settings** page opens.

- 1 Under **Date and time**, choose your **Time zone**.
- 2 Choose a **Date format**.
- 3 Choose a **Time format**.
- 4 Choose **Save settings**. A message confirms **Settings saved**.

Organisation display name: The same name as **Legal name** on the Organisation page. Changing one changes the other.

Theme mode: Choose **Light**, **System default** or **Dark**.

Primary colour: The same colour as **Primary brand colour** on the Organisation page.

Owner phone number (optional): Your own phone number, saved on your login.

Time zone: Choose from Australia/Brisbane, Australia/Sydney, Australia/Melbourne, Australia/Adelaide or Australia/Perth.

Date format: Choose dd/MM/yyyy or yyyy-MM-dd.

Time format: Choose **24 hour** or **12 hour**.

The screenshot shows the 'Workspace Settings' page. On the left, the 'Theme' section is visible with fields for 'Organisation display name' (set to 'Demo Organisation'), 'Theme mode' (set to 'Light'), 'Primary colour' (a color picker), and 'Owner phone number (optional)' (set to 'e.g. +61 4XX XXX XXX'). On the right, the 'Date and time' section is highlighted. It contains three dropdown menus: 'Time zone' (set to 'Australia/Brisbane'), 'Date format' (set to 'dd/MM/yyyy'), and 'Time format' (set to '12 hour'). A blue 'Save settings' button is located at the bottom right of the 'Date and time' section. Numbered callouts 1, 2, 3, and 4 are placed next to the 'Time zone', 'Date format', 'Time format', and 'Save settings' button respectively.

Choose your time zone (1), date format (2) and time format (3), then choose Save settings (4).



8 Check your setup progress

Go to **Configuration** and choose **Setup**, the first tile in the **Workspace** group. The guided setup page opens.

- 1 The counter at the top right shows how many of the three required steps are done.
- 2 **Next recommended action** tells you what to do next.
- 3 Choose a step in the list to see what BondiByte checked and what still needs attention. Each step is marked **Done**, **Current**, **Locked** or **Skipped**.

After you make a change, choose **Refresh setup** to read your settings again.

Tip: The three required steps are **Tell us about your organisation**, **Upload your brand** and **Set up roles and users**. The first is done when **Legal name**, **ABN**, **Country** and **Primary support email** are filled in. The second is done when a logo has been uploaded.

The counter shows the required steps done (1), the next recommended action tells you what to do (2), and the list shows each step (3).

What happens next

The details you entered are used on invoices, portals and headers, as the card descriptions explain. Your logo and colours are used in app headers and organisation portals.

The third required setup step is **Set up roles and users**. It needs at least one active Admin and at least one person assigned to a role. See Roles and permissions basics.

Next, add your sites, staff and clients. See Create a staff member and Create a site.

To share your organisation's sign-in link and company code with your team, find them in **Configuration** > **Login, SSO & User Sync**.



Important notes

Important: Nothing in the Organisation page is saved until you choose **Save section**, and nothing on the Settings page is saved until you choose **Save settings**. The logo is the one exception, because it uploads as soon as you choose the file.

Tip: Fill in only what you have. Your name, ABN, country, support email and logo are the details the setup checklist asks for. You can add the rest later from the same cards.

Good practice

- Upload your logo and choose your brand colours before you type anything else on the **Organisation** page, or choose **Save section** first. Uploading a logo refreshes the page, and anything typed but not saved is lost.
- Check your **Legal name** and **ABN** against your registration before you choose **Save section**. Both appear on invoices, and setup counts the organisation as complete only when they are filled in.
- Check the **BSB** and **Account number** twice. They are printed with the payment instructions on your future client invoices, so a typing mistake reaches your clients.
- Choose your **Time zone**, **Date format** and **Time format** in **Settings** before you start rostering, so dates and shift times show the way your team expects.
- After you save, open **Configuration > Setup** and choose **Refresh setup**. The counter should now show your organisation and brand steps as done.

Troubleshooting

Save section is greyed out.

Why it happens: The bar shows **Make a change to enable Save**. until something on the page has changed.

What to do: Change a field first. The bar then shows how many changes are pending and **Save section** becomes available.

A message says BSB must be six digits, for example 123-456.

Why it happens: The **BSB** has fewer or more than six digits, or contains letters.

What to do: Type the six digits of your BSB, with or without the hyphen, then choose **Save section** again.

A message says Account number must be 4 to 12 digits.

Why it happens: The **Account number** is too short or too long, or contains letters.

What to do: Type only the digits of your account number, then choose **Save section** again.

A message says Brand logos must be 2MB or smaller.

Why it happens: The logo file is larger than 2 MB.

What to do: Export a smaller version of the logo, or compress it, then choose the file again.

A message says Brand logos must be image files.

Why it happens: The file you chose is not a PNG, JPEG, WebP or SVG image.

What to do: Choose a logo saved as a PNG, JPEG, WebP or SVG file.



I cannot see the Organisation tile or Settings.

Why it happens: Your role does not include permission to open or manage organisation settings.

What to do: Ask an Owner or Admin to make the changes, or to check your role.

Need more help?

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

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