Client Search – Default Settings Help & Information Sheet

Client Search "Local computer" defaults can be set up in Chreos by going to Maintenance | Setup | Local computer | General. There is an option in "Client Find" settings to select the search field you would like to use. The default setting is "Company Default – Client Code". See (Fig 1.).

C Local Computer Settings			Т
 □ Clients □ Invoicing Receipting □ Creditors □ Display options □ General Ledger □ Point Of Sale (POS) □ Security □ Stock 	Client settings Client settings Show oldest dates first in activities tab Use computer date as default invoice date Order / Packing slip / Invoice Deliver by date is 1 day (s) after current date "Client Find" settings Default search field Company Default - Client Code Automatically drop down Company Default - Automatically drop down NOTE: Screens already open may need to be closed before changes take place		sadCo CSmbp Ttikou

To change the Default search field click [Edit] and select from the drop down menu – Client code, Sort code or Client Name.

Click [Save]. Screens already open may need to be closed before changes take place.

This will only change the setting on the local machine, not all of the machines used.

Fig 1. Local Computer Settings

Client Search "Company" defaults can be set up in Chreos by going to Maintenance | Setup | System | Clients |General 2. There is an option in "Client Find" settings to select the search field you would like to use. The default setting is "Client Code". See (*Fig 2.*).

🛢 Setup		
 General Modules General 1 General 2 Prompt Payment Discounting Display Define extra data fields Credit Control Creditors General Ledger Job Management Point Of Sale (POS) Guote Management Stock 	Orders - Packing slip - Invoicing Show unit column (hides item ref) Invoice Head office on pack slip to invoice Invoice drop-down defaults to last used Packing slip completion uses slip pricing. Packing slip completion uses slip pricing. Packing slip notes default to Prompt' Orders - Pricing defaults to 'Quote' Orders - Pricing defaults to 'Quote' Orders - Check item availability Orders - Notes default to Prompt' When displaying notes (during conversion) default to copy notes to dest transaction Order default Supply and Charge Order completion Max lines per invoice / packing slip 0 (Set to 0 for no limit) Only process orders over 10 Only process orders over 11 Only process orders over 12 Only state to display packing 328 slips and invoices	Client receipting Show batch totals on 'Batch' tab Receipts - Can not complete un-balanced Discounts Client Find' settings Column widths Column widths Code 100 Sortcode 100 Name 200 Search field Client code Client Name Default Client status' display based on Image Automatic status' display based on Image Automatic s
< >		

To change the Default search field click [Edit] and select from the drop down menu – Client code, Sort code or Client Name.

Click [Save]. (Screens already open may need to be closed before changes take place).

This will change the company default settings for "Client Find" but will not override the settings on each local computer setup.

Fig 2. System Setup Screen

Alternative search method available in various screens.....

An alternative "Client Search" method is available by clicking on the column heading of the small search box that appears when keying information into the Client search area. See (*Fig 3.*).

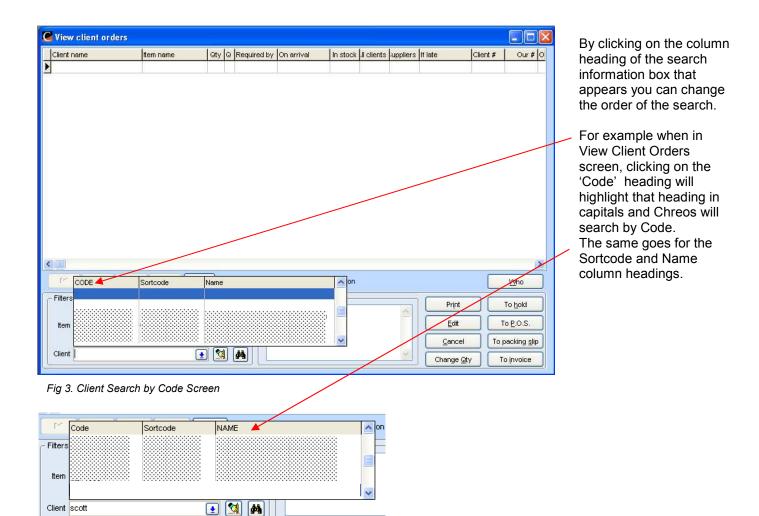


Fig 3a. Client Search by Name Screen