

## 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.).

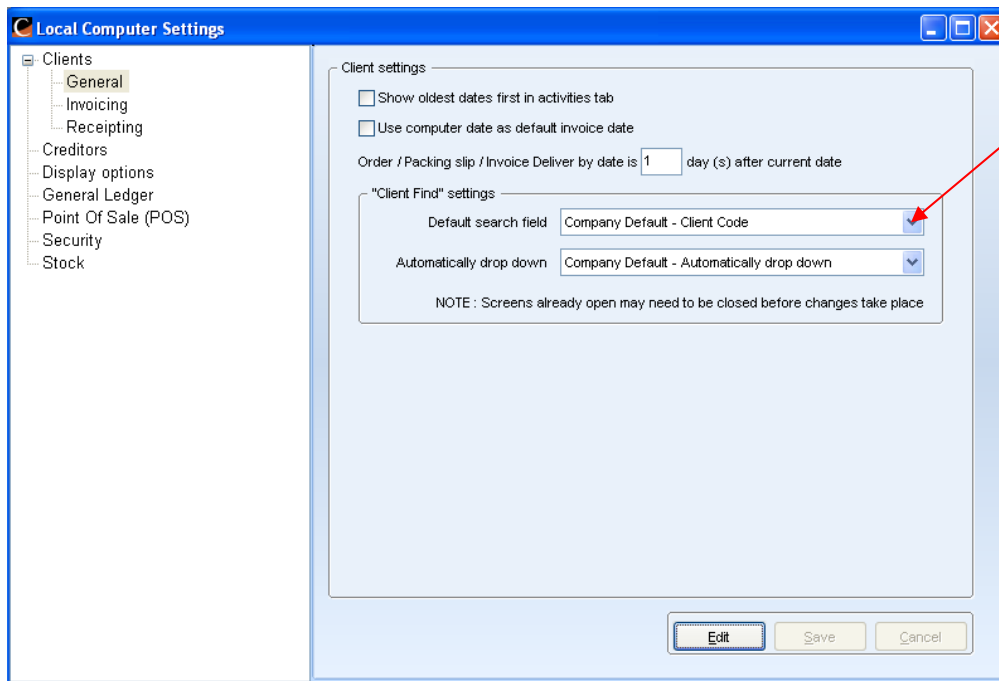


Fig 1. Local Computer Settings

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.**

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.).

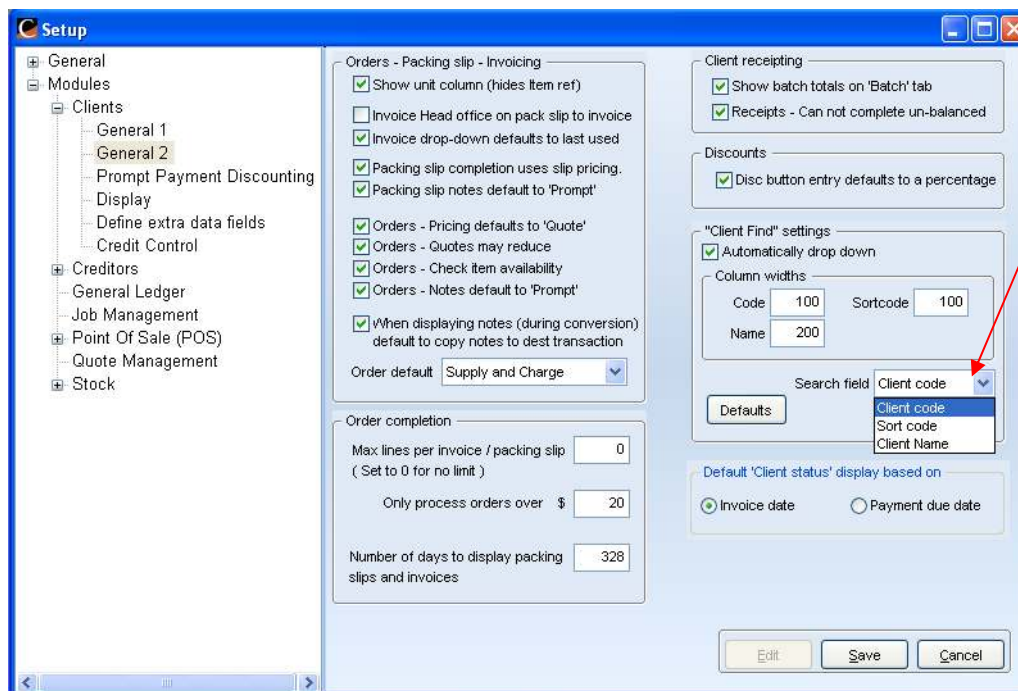


Fig 2. System Setup Screen

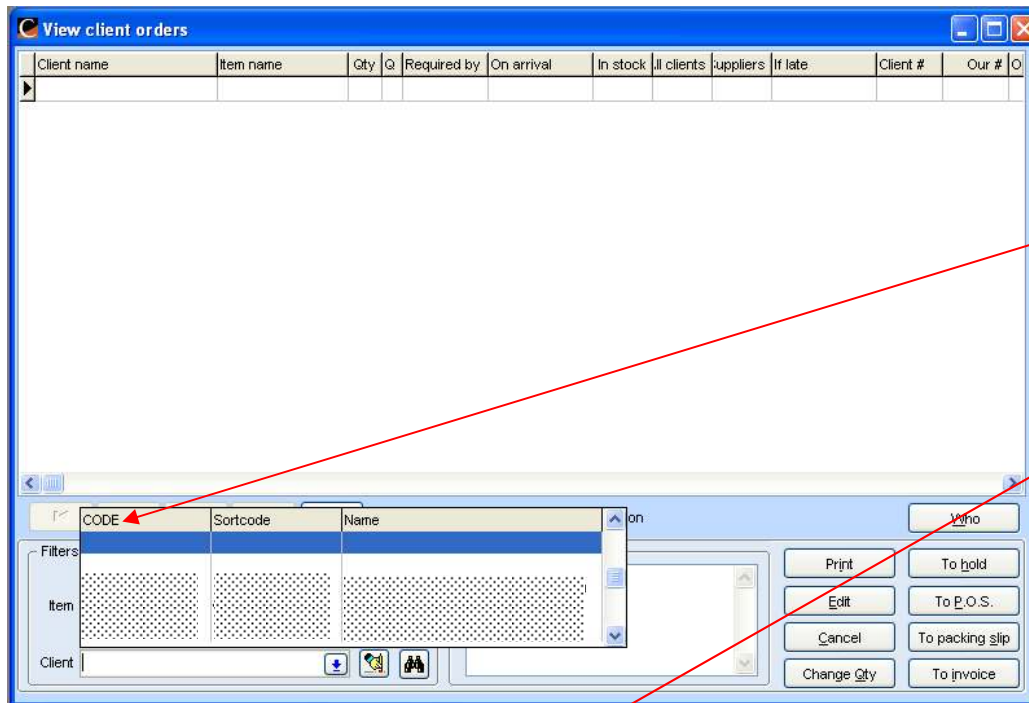
To change the Default search field click [Edit] and select from the drop down menu – Client code, Sort code or Client Name.

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.**

## 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.).



By clicking on the column heading of the search information box that appears you can change the order of the search.

For example when in View Client Orders screen, clicking on the 'Code' heading will highlight that heading in capitals and Chreos will search by Code. The same goes for the Sortcode and Name column headings.

Fig 3. Client Search by Code Screen

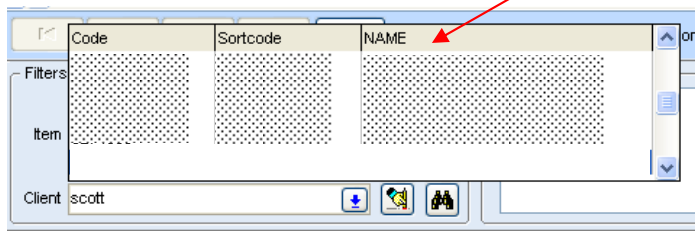


Fig 3a. Client Search by Name Screen