CREDITOR SEARCH

Application	ChreosClient – Chreos 3
Module	Generic
Access	Various screens where a creditor is needed
Minimum service pack	SP27
This document	Creditor Search
	Ref 1.4
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Overview

Specific creditors are located by using a variety of searches. Where the 'Creditor code' is known it is entered directly if this combo is displayed. If the name is known the creditor is found using the 'Sort code' or the 'Supplier' combos. If neither are known the 'Creditor search' screen allows the creditor to be searched for using a range of classifications and other search parameters.

To Search for a Creditor:

There are three ways to search for a creditor.

Name (or Supplier)

- Begin to type the 'Name' into the 'Name' or 'Supplier' combo. The name that is the nearest match will be visible. Note: 'Names' are not necessarily unique so several creditors may have the same one. If this is not the required creditor, the <Up> and <Down> keys move to the previous or next creditor. If there is also a 'Creditor code' combo the 'Creditor code' will be displayed here and other details about the creditor may also be visible.

- Opening the drop-down of the combo and scrolling through the list to select the creditor will also change some of the data on the screen but not that in the 'Creditor code' combo (if there is one) until the selection is actually made.

Creditor Code

- Begin to type the 'Creditor code' into the 'Creditor code' combo and the code that is the nearest match will be visible. If this is not the required creditor, the <Up> and <Down> keys move to the previous or next creditor. The 'Name' will be displayed in the 'Name' combo, the name will also appear above or below the combos, and other details about the creditor may also be visible.

- Opening the drop-down of the combo and scrolling through the list to select the creditor will also change some of the data on the screen but not that in the 'Name' combo until the selection is actually made.
- Note, not all screens will have a 'Creditor code' combo.

Find Button

Click on the [Creditor find] button or press the <F4> function key and a search engine will appear with three tab page options that each allow you to search and/or display the results in different ways.

Search Engine Tab Pages

Text Search

- There are two entry fields displayed:
  - **Starting With** – Enter all, or the first part of the 'Name'. This is not case sensitive and when you use this field you can not also use the 'Containing' field.
  - **Containing** – Enter any part of the 'Name'. This is not case sensitive and when you use this field you can not also use the 'Starting With' field. While this is not a multi-word search it will find a string that is offered where a string is a contiguous group of letters, spaces and other characters. For example, 'e lt' as a search brings up 'Kendell Software Ltd' and 'Tilley AE Ltd'. If you want to search for two words that do not form a single string, search for one and then search for the other as a second search on the subset.

Define Filters

- User-defined entry fields are displayed in three areas:
  - **Three Check Boxes –** Tick the check boxes where the value for the creditor is true. If you do not tick a check box the value will be false.
  - **Two Character Boxes –** Enter the value into these character boxes that is applicable to the creditor. These are optional.
  - **Two Combo Boxes –** Select the value from these drop-down combos that is applicable to the creditor. To empty any of these fields click the button with the red circle to the right of the field.

Note, these fields are the same as the user-defined fields discussed in "Setup (9.1)" that appear in "Creditors | Creditor management". Any that have not been defined in "Maintenance | Setup" will not appear on this page.

Display Settings

- There will be two list boxes displayed:
  - **Available –** This displays the names of the fields that are available to be displayed in the search results table but that are not currently selected to be displayed.

- **Displayed** – This displays the names of the fields that have been selected to be displayed in the search results table.
- Ticking the "Display all fields" underneath the results table overrides all selections on this page. To then reverse this and only view the display fields from the 'Displayed' list box from the 'Display settings' tab page, un-tick the checkbox.

To Search with the Search Engine

- Set the parameters on one or more of the tab pages and click the [Find Now] button or press the <Enter> key.

- As you complete each search, the search results grid will appear and will display the matches that have been made. The parameters of the search will be displayed above the table. However, if there are no matches the table will be empty.

- To do a further search on the results of the previous search and further narrow down the results, enter the new parameters and click the [Find Now] button or press the <Enter> key.

- To return to the previous search click the [Back] button. Reset the parameters and search again.

- To clear all previous searches and start a completely new one click the [New Search] button.

- When the creditor that you are searching for is found, you can select them by clicking the [OK] button or by highlighting them on the table and pressing the <Enter> key. This creditor will now be the selected creditor in the *ChreosClient* screen that you are currently working in.