

DEBTOR PROFILE MAINTENANCE Chreos

Application	ChreosClient – Chreos 3
Module	Clients
Access	“Clients Profile maintenance”
Minimum service pack	SP36
This document	Client Profile Maintenance Ref 3.23 Published May 2004

Overview

“Client profile maintenance” allows client profiles to be defined. E-mailing to clients of a specified profile can also be done in this screen.

What is a Profile?

A profile can be assigned to clients on the ‘Profile’ page of “Client management (3.1)”, it is categorising clients for different purposes.

Details Displayed

- **Profile.** All of the available profiles are displayed in this grid.
- **Profile.** This field is used to add and edit profiles.

To Add a Profile

- Click the [Add] button.
- Enter the new profile into ‘Profile’.
- Click the [Save] button.

To Edit a Profile

- Select the required profile.
- Click the [Edit] button. Edit the profile as required.
- Click the [Save] button.
- All clients that assigned the edited profile will now display the new version.

To Email Clients of a Selected Profile

- Select the required profile.
- Click the [Send e-mail to all members of this profile] button.
- The “Send e-mail” screen will appear. The following details will be displayed:
 - **User name** – The name of the user currently logged into Chreos.
 - **E-mail** – The company’s e-mail address.
 - **BCC** – The e-mail address of each client in that profile that will receive the email. They must have an e-mail address setup in “Client Management” to appear on this list.
 - **Subject** – Enter the subject of the e-mail.
 - **Attachments** – Attach any files to the e-mail if required. To do this click the [Attachment] button. The “Open” screen will appear. Browse to find the required file and click the “Open” button. To remove an attachment select it and click the [Delete] button.
 - **Description** – Enter the body of the email. To spell check this click the [Spell Check] button. Note: The spell check is only available if Microsoft Word is installed on the machine being used.
- Click the [Send] button. A progress bar will appear and the e-mail will be sent. This will interact with your virus protection software. Note: If your internet is dial up it may need to be activated before the e-mail is sent.
- Note: If there are no clients within the selected profile that have e-mail addresses an information message will display and the “Send e-mail] screen will not open.

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