QUICK REFERENCE GUIDE

CLIENT SEARCH

The client search facility can be accessed from the Client menu. It may also show on the organisation defined quick links within the Home menu.

The Client Search uses the V9 Grid functionality, meaning that any text field within the displayed columns can be searched upon. Columns can be added to the Grid view using the **Columns** button on the right-hand side of the grid.

There are 3 available views within the Client Search screen – Simple, Extended and Reference Lookup:

- The **Simple** view uses only the columns that have been selected to search upon. The **Retain Search** checkbox allows the user to retain search criteria for the next search.
- The **Extended** view provides multiple search fields at the top of the screen and will remember selected search criteria.
- The **Reference Lookup** provides a way of searching for a client associated with reference on a transaction such as a receipt or fee.

The search results can be exported to either a **Batch** or **Data** using the drop-down option attached to the **Columns** button. Exporting the clients to a batch will allow them to be used in the Bulk Client Admin page for creating client jobs. The Data option allows the selected clients along with all data within the displayed columns to be exported to Excel in csv format.

The extended view allows fields of Short Code, Name, Code, Group, Status, Partner, Manager, Office and Organisation to be searched upon. The criteria selected in this view will be retained for future searches using the extended view.

The Reference lookup allows for the client attached to a fee note or credit note reference to be searched for.

FAVOURITES

Each staff member can create a list of 'Favourite' clients which are clients they regularly use. The favourite clients are listed under the Recent Items **>** menu option. Clients are added to the Favourites by clicking onto the star symbol.

ACTIONS BUTTON

The options that are available from the Actions drop down are:

- *Dashboard:* This will direct you to the client dashboard.
- *Details:* This will open the Client Details page.
- *WIP Trans:* This will open the WIP Trans page for the client.
- *DRS Trans:* This will open the DRS Trans page for the client.
- *New Fee:* This will open the Draft Fee Wizard for the client.
- *New Credit Note:* This will allow you to draft a new credit note for the client.
- *Client Jobs:* This will navigate through to the client's Jobs page.