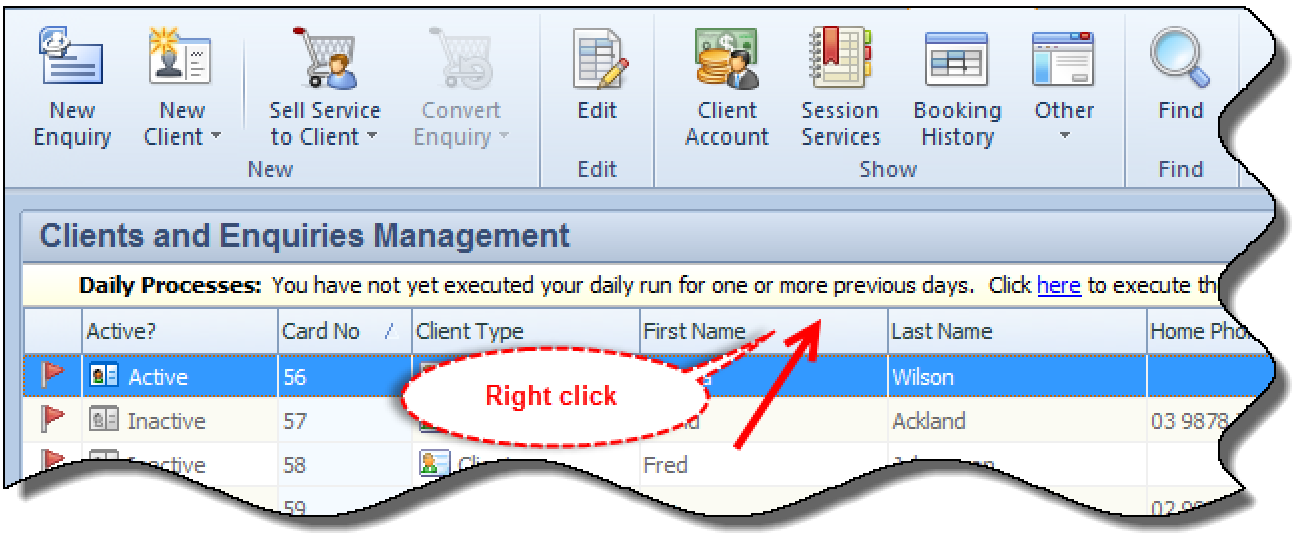
Field Chooser

In the **'Clients and Enquiries'** screen, there is a feature called **'Field Chooser'**. This is a reporting/display function which allows the user to customise what they see on the **'Clients and Enquiries'** screen. It can also be used to filter clients for **SMS** and mail merges. For example, if you only want to display clients who have their **'Preferred Reminder Method'** to be via SMS. You can then use this view to send an **SMS** to only those clients by doing an **SMS** merge. Or if you want to be able to quickly see what the current balance of your clients accounts are, you can do it here.

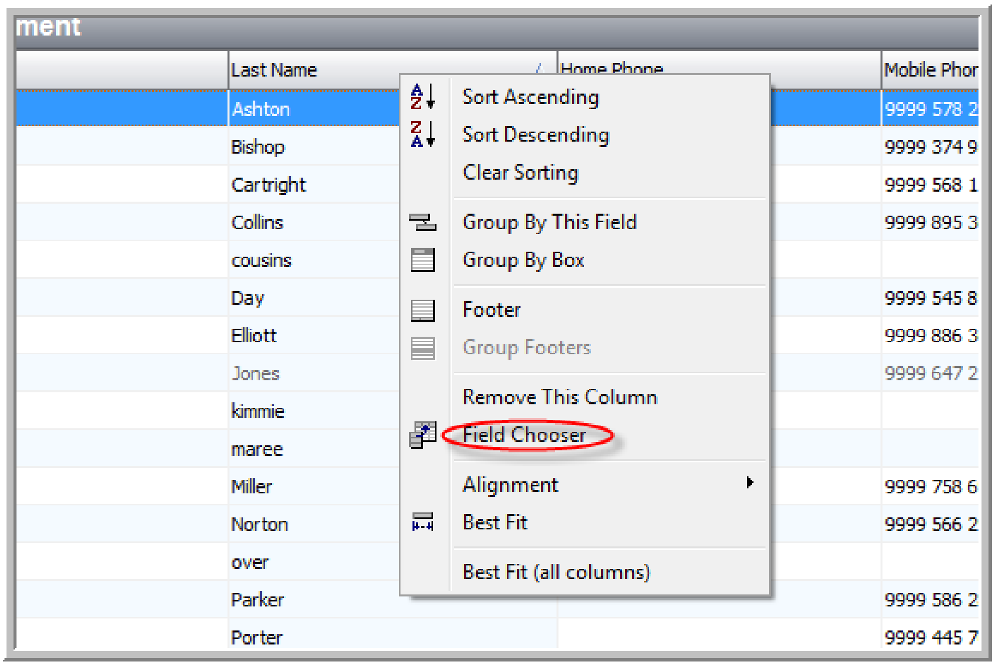
<u>**Access Method**</u>

Using the **'Field Chooser'.**

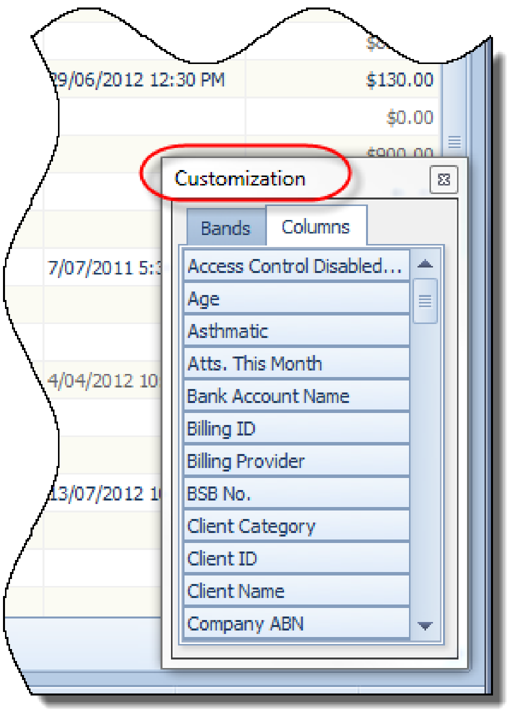
Firstly, right click anywhere on the headings.



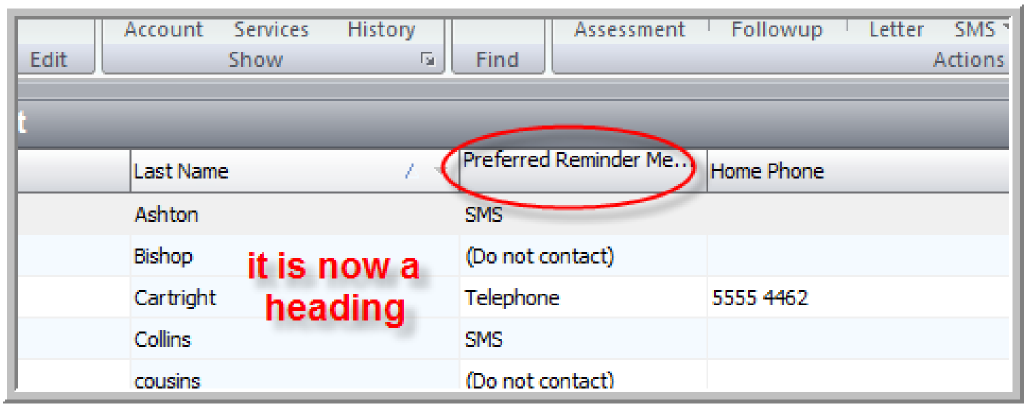
This will result in a drop down list. Select '**Field Chooser'.**



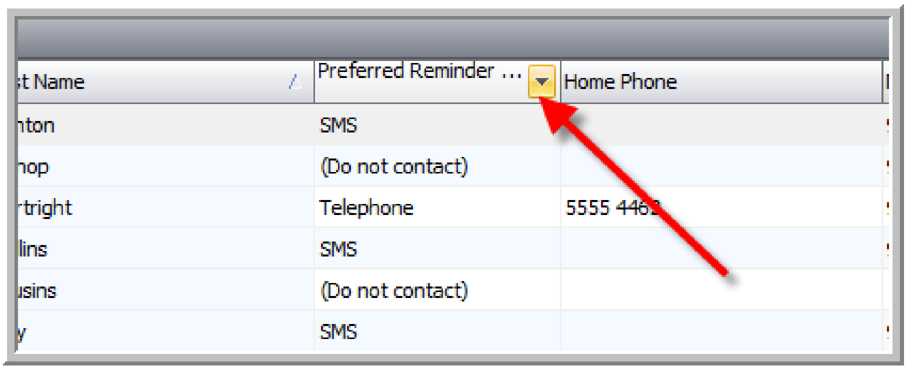
Another box will appear on the bottom right, called **'Customisation'**, which contains field names.



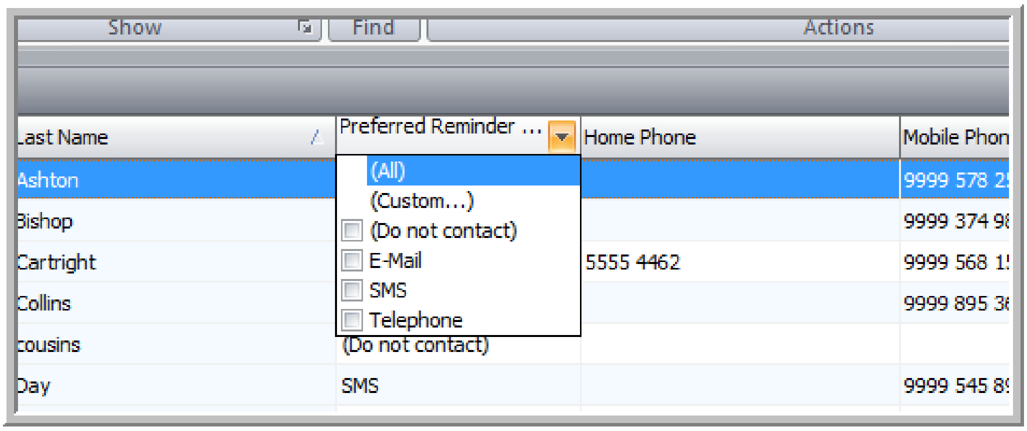
Scroll down this list until you find the field called **'Preferred reminder Method'**. Click on it and drag it up to the headings and drop it where you want the column to appear.



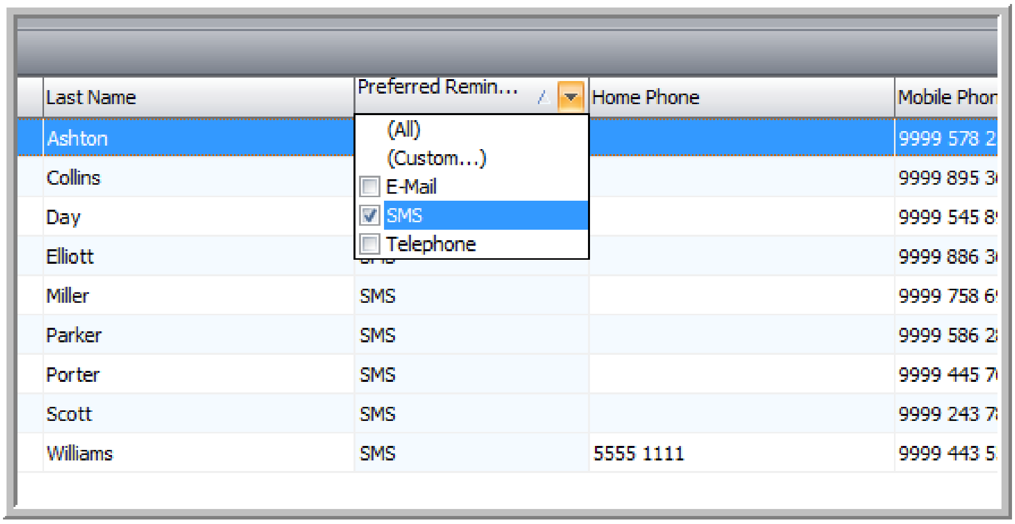
If you hover your cursor over the new heading, a small arrow will appear.



Click on this arrow and it will list all of the contact methods you have recorded in the system.

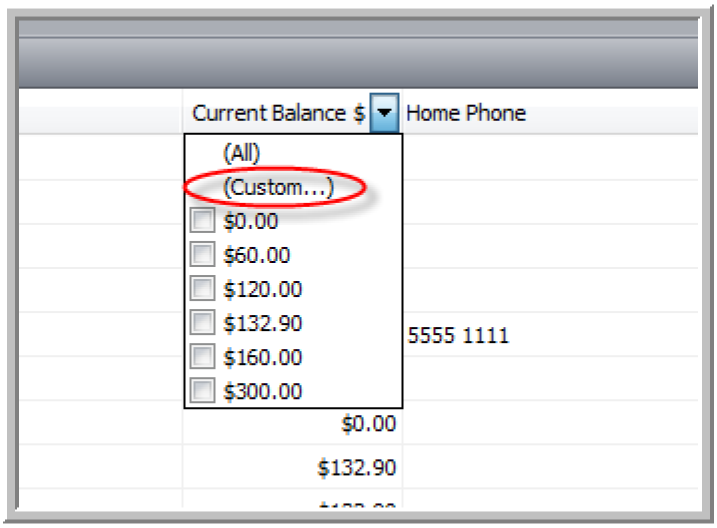


You can click on the method that you want display. For example....**SMS**.



This will display only those clients who want to be reminded via **SMS** in your view. If you click on **'email'** only those clients who want to be contacted via **email** will be displayed in your view. You can then do an SMS or mail merge with only those clients.

If you want to see the account balance of all of your clients at a glance, simply go to the field chooser again, drag **'Current Balance $'** up to the headings and there you have their current balance. If you then want only balances over a certain amount, click on the heading arrow to get the drop down box and select **'Custom'**.



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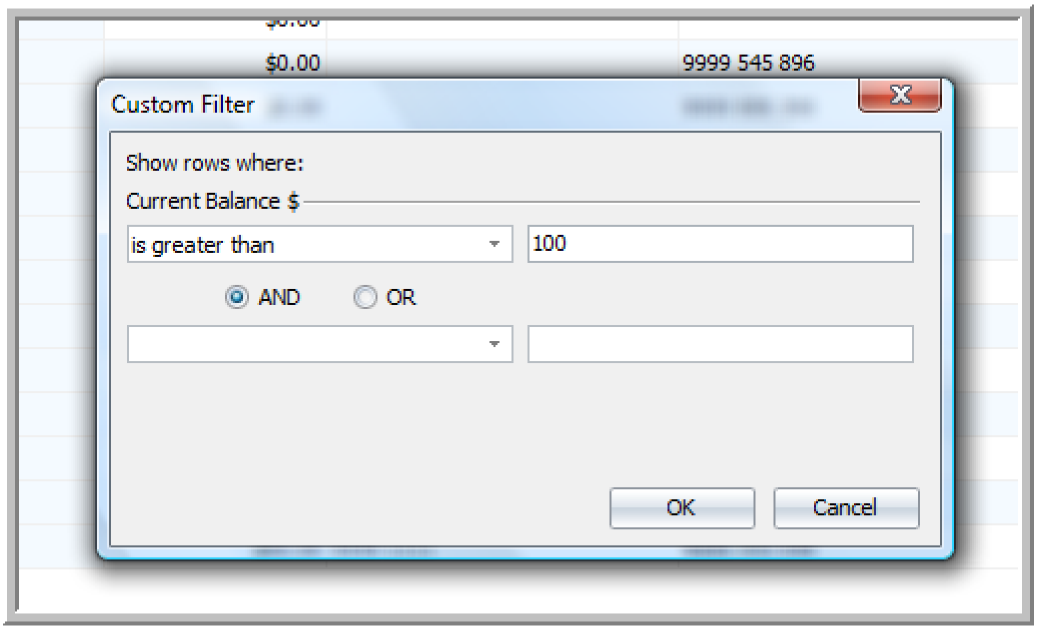
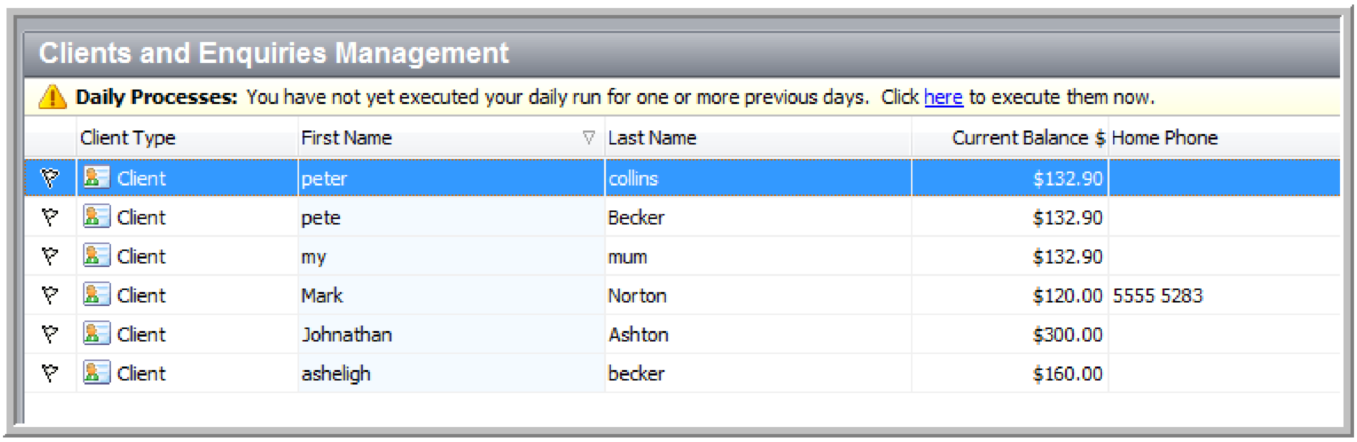
This will open a screen where you can specify extra filtering criteria. I used **'Greater than'** and **'100'**. I now get only those clients whose balances are over $100.

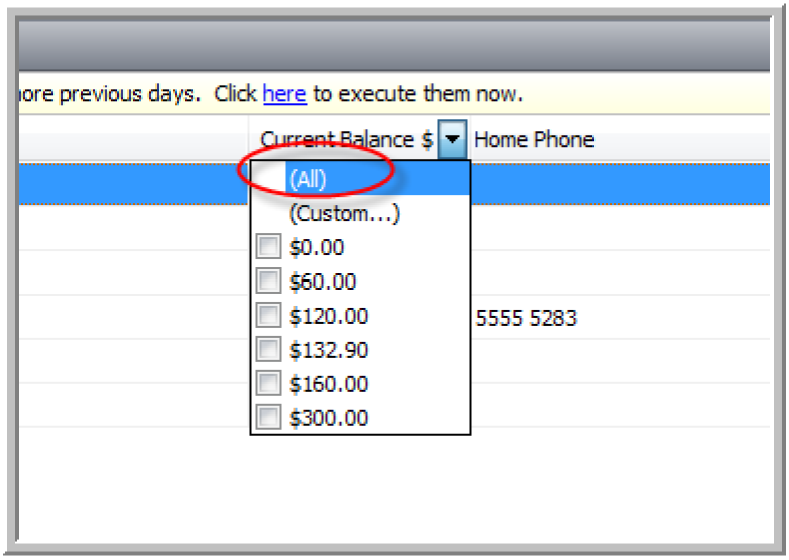



Clients and Enquiries Management

Daily Processes: You have not yet executed your daily run for one or more previous days. Click here to execute them now.

Client Type	First Name	Last Name	Current Balance $	Home Phone
Client	peter	collins	$132.90	
Client	pete	Becker	$132.90	
Client	my	mum	$132.90	
Client	Mark	Norton	$120.00	5555 5283
Client	Johnathan	Ashton	$300.00	
Client	asheligh	becker	$160.00	

Make sure that you change the filter criteria back to display 'All' (this will display everything again) and then you can right click on the newly added heading and select **'Remove This Column'**. The column will no longer show.



If for some reason, you have made a lot of changes and can't remember what they were, simply exit and re-enter ClientConnect and all fields will be back to normal.

You can use the **"Field Chooser"** for any number of things to be displayed and it is handy for 'one off' type displays. It is worth spending some time having a look at this area as you may find it useful. You can always print from here too.

If you create a view that you plan to re-use, you can also select 'Save' the view and filters, rather than having to re-create it each time.

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