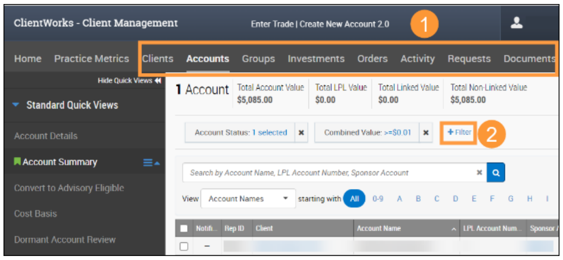
ClientWorks

Book Segmentation

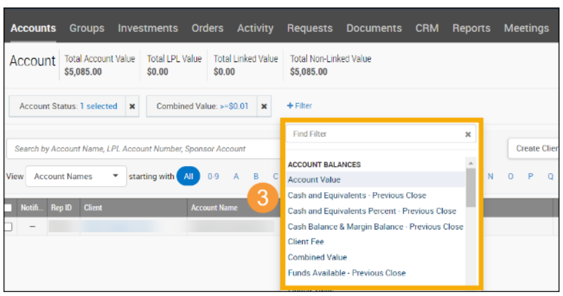
Using Quick Views & Filtering

For assistance with Quicks Views, please contact your **Service360 Team at (866) 321-3640, option 2, say “Team 92”.**

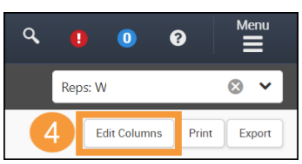
Customizing with Filters & Columns



1. Each **Tab** within **Client Management** is customizable with its own filters and columns.
2. Select **+Filter** to customize the list.



3. Select a Filter; enter any specific criteria and **Apply**.
   - *Follow the same process to add additional filters.*
   - *You can also **Drag & Drop** a Column Header onto **+Filter** to select it then specify criteria and **Apply**.*

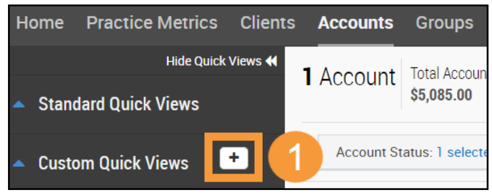


4. Select **Edit Columns** to add or remove columns in your list.

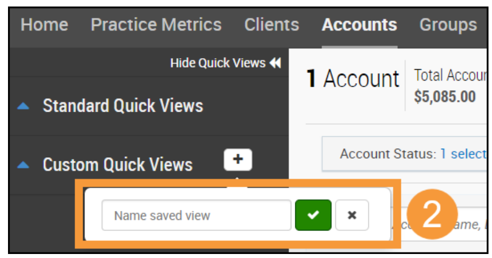
5. Drag & Drop to reorder the columns displayed and **Apply**.

Working with Quick Views

❖ **To save a customized Quick View:**



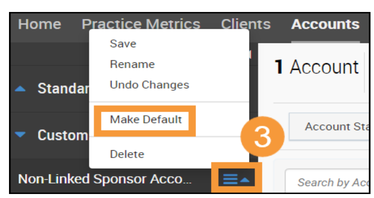
1. Click the **plus sign (+)** to name your custom list.



2. Name your Quick View and click the **green check mark** to save.

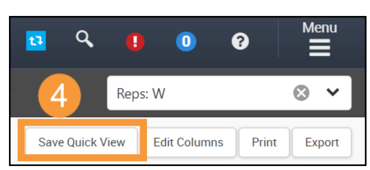
Your saved view will appear under Custom Quick Views for future use. Simply Drag & Drop to reorder your Quick Views list.

❖ **To make your preferred Quick View your landing page for that tab in Client Management:**



3. Click on the **context menu** on the right of the Quick View name and select **Make Default.**

❖ **If you make future changes to a Quick View, be sure to SAVE:**



4. Select the **Save Quick View** button on the top right of the page below the Global Rep ID filter.