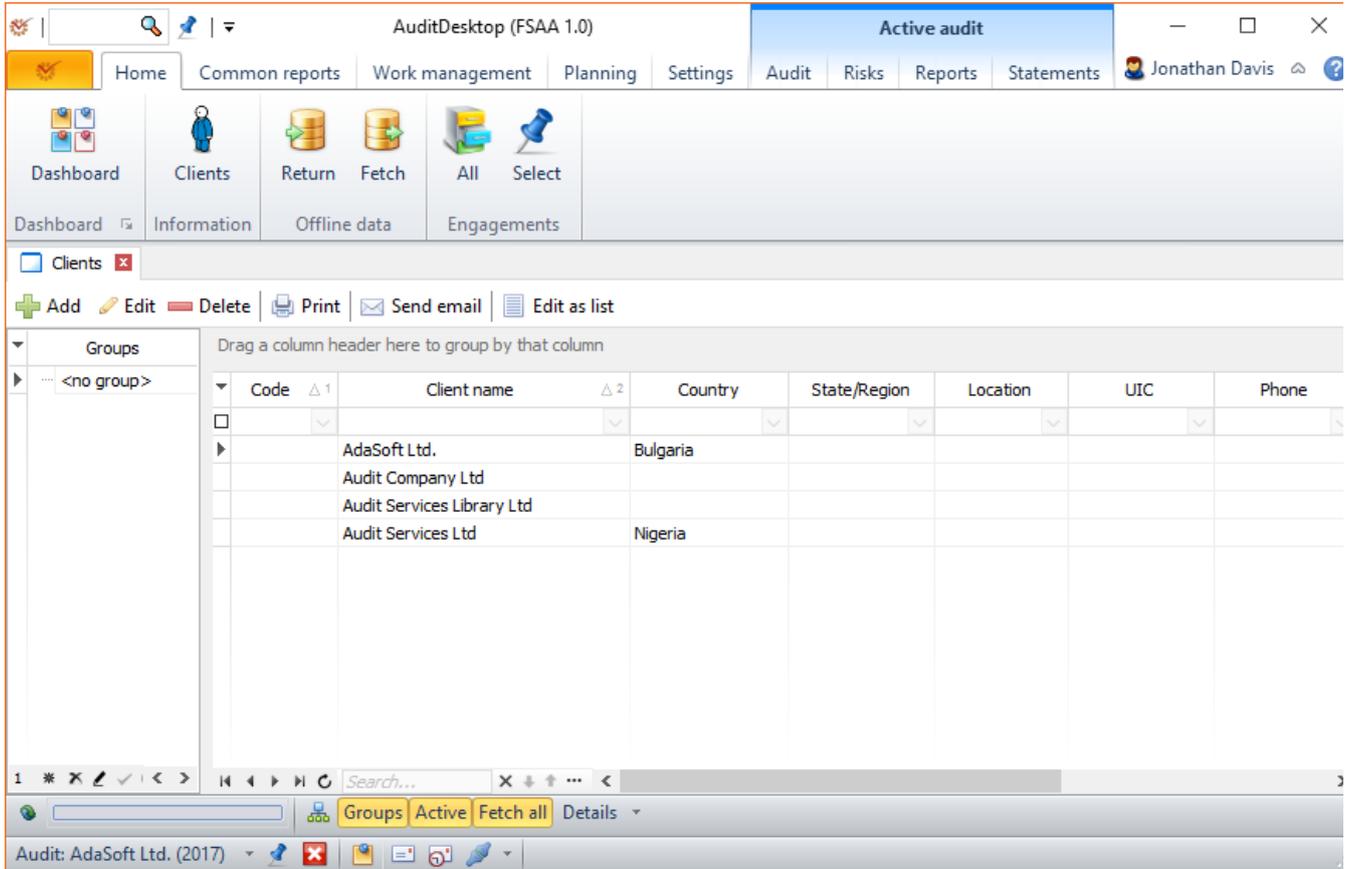


Clients

AuditDesktop supports a **Clients** nomenclature that is used when [creating engagements](#) or reporting [timesheets](#). To access the nomenclature, open the **Home** tab and click **Clients**.



By default, the groups of clients are displayed on the left side of the main window. When you select a group, a list of all its clients will appear on the right.

A [context menu](#) is available for each client. To open it, right click with the mouse on the selected client.

These buttons assist your work with the nomenclature:

- **Add** - opens a window for adding a new client's record
- **Edit** - opens a window for editing an already existing client's data
- **Delete** - deletes the selected client
- **Print** - opens a window for printing templates with the selected or all clients' data
- **Send email** - opens a window for sending messages to selected clients. [Message templates](#) are also available.
- **Edit as list** - opens a window for group client work. It is most suitable to use when you import a client nomenclature.

If you wish to change a client's hierarchy (determine the subsidiaries), left click on the index of the record, hold it and move it over the parent element.

Groups of clients

Clients can be organised into hierarchical groups. New groups can be added by using the standard method for [editing data grids](#). To change hierarchy, click the index of the record and drag it with the mouse.

Filter and visualisation buttons

At the bottom of the window are located the following buttons:

- - activates or deactivates the hierarchical view of clients (client and their subsidiaries)
- **Groups** - shows or hides groups of clients. When the groups are hidden, the list of all clients, of all groups, is shown.
- **Active** - when the button is active, only the active clients are displayed

- **Fetch all** - when selecting an active group (or all groups), all records are loaded from the server at the same time. If the option is not activated, only the visible clients will be visualised, in stages, when scrolling down the list
- **Details** - displays or hides the active client's details