# Multi-client filter and set default client

After the release on 24<sup>th</sup> of August, **Bookkeeper** users and **Approver** users will be able to filter the worklist using multiple clients and they will be able to set a default client for the worklist.

## How it works

When the user clicks on **Client filter** in the worklist, the **Select clients** window will appear. There the user can select multiple clients and apply the filter and/or set one or more clients as default choices.

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## **Client list**

This section shows all the active clients the user has access to in the Worklist. The user can select one or more clients from this list. It allows the user to filter the **Client list** using the *Filter* area.

### **Selected clients**

This section shows the clients that the user has selected from the **Client list**. If user has selected all the clients, then it will show as *All Clients* in this section. If user has selected only a few clients, then it will show the list of the clients that are currently selected. The user can remove clients from this section by clicking on (x) next to the selected clients.



#### **Default Client**

This section shows the default clients user has set. The default for this section will show *All clients* if the user has not chosen a default client. For a user to set a default client, first they need to select one or more clients from the **Client list** and then click **Set as default**. These clients will then be the default clients and will be updated in the **Default client** section as follows.

D	efault client
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0	004 - Client 4 💌

These clients will be saved permanently for the user and when they log in next, the worklist will use these clients as the default and the worklist will be filtered accordingly. If the user wants to remove a client from the **Default client** section, click on (x) button next to the client and it will be updated.