Activating the Customer Search Feature in CC2

Before the search function can be activated for the customer(s), the Search Options must be set in the Preferences module. To set the Search Options:

1. Click on the Menu Button **Preferences**
2. Under the Preferences menu Click **Client Connect**
3. On the left folder tree click on **Search Options**

You are now on the Search Options page.

On the Search Options page, select:

- ➢ **New Only** to enable the search function for CC2. (this is a customer by customer setting)
- ✓ Select the property classes you would like the customers to have access to. (this is a global setting or all customers)
- ✓ Select the status(es) the customers can search (this is also a global setting for all customers)

Now that the Search Options are set, you are ready to add a new contact or select an existing contact from your list of contacts to be sure search is enabled for each contact and check they have a valid email address marked primary.
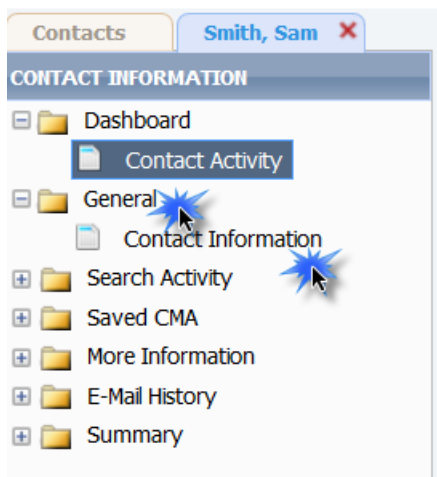
Click on the *Contacts* menu button, *View/Manage Contacts.*
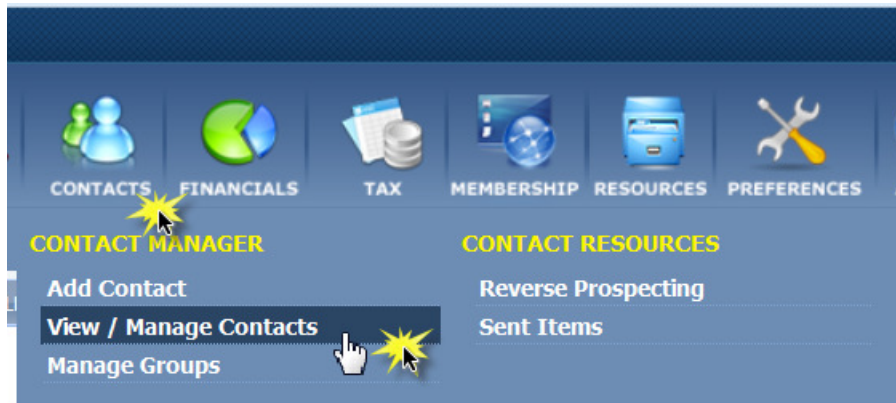
Click on the name of the contact you want to enable to search.
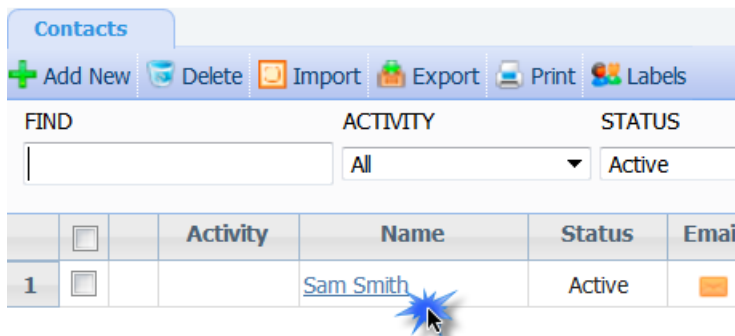
Expand the *General* folder in the file tree. Click on *Contact Information*

This opens the *Contact Information* page.

Choose *New Only* and be sure there is a valid email address marked *Primary*.

On the CC2 dashboard the customer will click on the Menu drop down to access the search function.