

Application	Chreos Client
Module	Clients
Access	“Clients Enquiry”
Minimum service pack	SP44
This document	Clients Enquiry Ref 3.16 Release 2 Published March 2009

Overview


“Client enquiries” allows you to enter a client enquiry. This would usually be about obtaining a product, perhaps including a quote for quantity. This would only be used for an actual order if you have insufficient information about the item to enter it into Chreos stock.

Note: To view, edit, action, or delete an existing enquiry refer to “View Client Enquiries (3.18)”.

Details Displayed

Client Details

This panel displays the client details for the enquiry.

- **Client code, Sort code &  <F3>**. Select the required client. Refer to “Client search (1.3)”.
- **Contact**. Select the client contact that is involved in the enquiry. To add a new contact or edit an existing contact’s details, click the [...] button. Note: When the [...] button is used the ‘Contacts’ page of “Clients | Client management” will open and default to adding a new contact. Once you save the required details, close “Client management” and the “Client enquiries” screen will be available again.
- **Region**. Select the required region.

Enquiry Details

This panel displays the number and information relating to the enquiry.

- **Enquiry #**. An automatically generated enquiry number.
- **Enquiry Date**. Enter the date of the enquiry. This defaults to the ‘Sales date’.

- **Item.** If the enquiry is about a known item select the item. Refer to “Item search (1.5)”. If the enquiry is about an item not yet entered into Chreos leave this blank.
- **Enquiry.** Enter the details of the enquiry. This is a narrative of what the client is looking for.

To Add a Client Enquiry

- Select the client.
- Select the item if required.
- Enter the enquiry details.
- Click the [Save] button.

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