CONVERT DEBTOR ORDER

TO PACKING SLIP

ChreoS

Application	Chreos Client
Module	Clients
Access	"Clients	Convert	Order(s) to Packing Slip"
Minimum service pack	SP44
This document	Convert Debtor Order to Packing Slip Ref 3.11 Release 4 Published March 2009

Overview

"Convert debtor order to packing slip" allows you to covert an existing client order into a packing slip. All or part of an order can be converted, and items from several orders can be combined on the one packing slip.

Details Displayed

- **Client code, Sort code &** 🔍 **<F3>**. Select the required client. Refer to "Client search (1.3)". When you select a client the 'Client orders' page will display all of the active orders for that client.
- **Items Colour Legend**. The item lines within an order appear in various colours that define the status of the item. This is used on 'Order items' and 'Selected items'.
  - **Red Text** – There is none of this item in stock.
  - **Blue Text** – There is not enough of this item for all of the current orders.
  - **Black Text** – There is not enough of this item for this order.
- **Client Orders**. This page displays the following information, listed by the internal order number, for each order that is available to be converted to an packing slip.
  - **Order #** – The order number supplied by the client.
  - **Order date** – The date of the order.
  - **Not before** – The date that the goods can not be delivered before.
  - **Required by** – The date that the goods are required by. This could also be called 'Hold until'.

- **How to supply** – The action that is to occur when the goods become available. The choices are 'Supply and charge' or 'Contact and hold'.
- **Late order** – A 'Late order' is one that can not be supplied by the 'Required by' date. One of the four possible actions will show. They are 'Ask client', 'No time limit', 'Cancel' and 'Cancel and advise'.
- **Delivery address** – The delivery address that the goods are to be sent to.
- **Note** – This will display any notes stored at order creation.
- **Order Items**. This page displays the following details, listed by the internal order number, for each of the items for every order that there is currently active for the client:
  - **Order #** – The order number supplied by the client.
  - **Item code** – The unique identifier of the item.
  - **Item name** – The name of the item.
  - **Order qty** – The amount of the item that has been ordered.
  - **Shelf qty** – The amount of the item currently in stock.
  - **Quantity to ship** – The number of the item that you decide to supply this time.
  - **Order note** – This will display any notes stored at order creation.
  - **Amount to ship** – This gives you the ability to supply part of the quantity of the item. Refer to "To supply part of the quantity of an item" on this information sheet.
- **All suppliable items**. When the [All suppliable items] toggle button is clicked the following details will be displayed for each of the items from the orders that have been selected to be converted into an invoice. These will be listed by the internal order number and the toggle button will change to [Other Orders].
  - **Item code** – The unique identifier of the item.
  - **Item name** – The name of the item.
  - **Order qty** – The amount of the item that has been ordered.
  - **Shelf qty** – The amount of the item currently in stock.
  - **Quantity to ship** – The number of the item that you decide to supply this time.
- **Other Orders**. When the [Other Orders] toggle button is clicked when in the 'Order items' tab, the following details will be displayed for every other active order that has been entered for the item selected on the 'Order Items' page. These will be listed by the internal order number and the toggle button will change to [Selected Items].
  - **Name** – The name of the other clients.
  - **Quantity** – The quantity of the selected item that has been ordered by that client.
  - **Not before** – The date that the order can not be delivered before.
  - **Required by** – The date that the order is required by.

- **Action**. The document that the order is being converted into. This will default to 'Invoice' but it can be changed to 'Packing slip'. To delete the order select 'Delete'.
- **[Up]**. To move an item from 'Selected items' to 'Order items' click this button.
- **[Down]**. To move an order from 'Client orders' or an item from 'Order items' to 'Selected items' click this button.
- **[All Suppliable Items]**. To convert all order lines that can be filled click this button.
- **[Other orders/Selected items]**. To toggle between 'Other orders' and 'Selected items' click this toggle button.
- **[No stock]**. To remove any items from 'Selected items' that are not in stock click this button.
- **[Insufficient stock]**. To remove any items from 'Selected items' that there is insufficient stock to meet the whole order click this button.

To Convert an Order to a Packing Slip

- Select the required client.
- Select the required order from 'Client orders'.
- Select the required items from the order to be converted to an packing slip:
  - To select all of the items double click on the order on the 'Client orders' page or highlight the order and click the [Down] button. All of the items will be listed on 'Selected items'.
  - To select each item individually select the 'Order items' page. Select each item by double clicking on it or highlighting the order and clicking the [Down] button. As each item is selected it will be displayed on 'Selected items'.
  - To move an item from 'Selected items' back to either 'Client orders' or 'Order items' double click on it or highlight it and click the [Up] button.
- To remove any items from the bottom grid that are not in stock click the [No Stock] button.
- To remove any items from the bottom grid where there is insufficient stock to meet the whole order, click the [Insufficient Stock] button.
- When all of the required items are displayed on the bottom grid click the [Process] button.
- The "Packing slip" screen will appear displaying the client and item details from the order.
- Depending on how you have this set up in "Setup (9.1)" the "order number' or 'Order date' will also be displayed on the packing slip.
- Process the Packing slip. Refer to "Debtor Packing Slips (3.8)".

To Supply Part of the Quantity of an Item

- Select the item from the 'Order Items' page.
- Click the [Edit] button.
- Change the quantity in 'Amount to ship'.
- Click the [Save] button.
- The quantity that was entered will appear in the bottom grid. The remaining quantity will remain in 'Order Items'.
- Note: To delete the balance of a partly supplied order refer to "Edit client orders (3.19)".