“Holds” Information Sheet

In Chreos “Holds” are used to record items that have been placed to one side for the Client. There are two different ways to enable a hold in Chreos and one for retrieval.

1. Items can be placed on hold through the “Holds” screen.
2. Items can be placed on hold through the “View Client Orders” screen.
3. Items can be retrieved from “Hold” through Point of Sale.

1. Stock on Hold

This screen can be accessed from “Clients | Holds”.

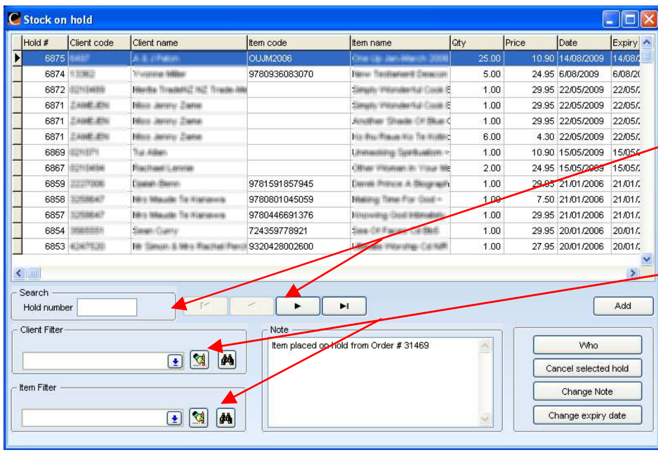


Fig 1. Stock on Hold Screen

The Stock on Hold Screen *(Fig 1.)* displays all stock on hold.
To search for a hold enter the hold number in the Search box and press enter. The hold will be highlighted in the grid. Use the < & > arrows to move up and down the grid.

To filter the search by a particular client hold, select the client or use the search facility.
To filter the search by a particular item hold, select the item or use the search facility.
‘Note’ will show any notes added to the hold and they can be changed or added by clicking [Change Note]and adding details.
To enable a new search, click [ ] to clear the filters.

Fig 1a. Change Note Screen

To display the contact details of the hold, select in the grid and click [Who]. *(Fig 1b.)*

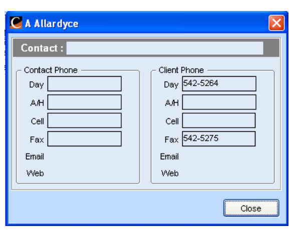


Fig 1b. Contact Details Screen

To cancel a hold click [Cancel selected hold] to display a message box for confirmation. *(Fig 1c.)*

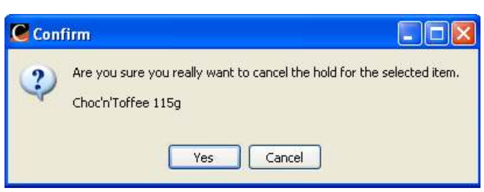


Fig 1c. Cancel Confirmation Screen

To edit the expiry date of a hold click [Change expiry date] to enter the date change. *(Fig 1d.)*

Fig 1d. Edit Hold Expiry Date Screen

2. Adding a Hold

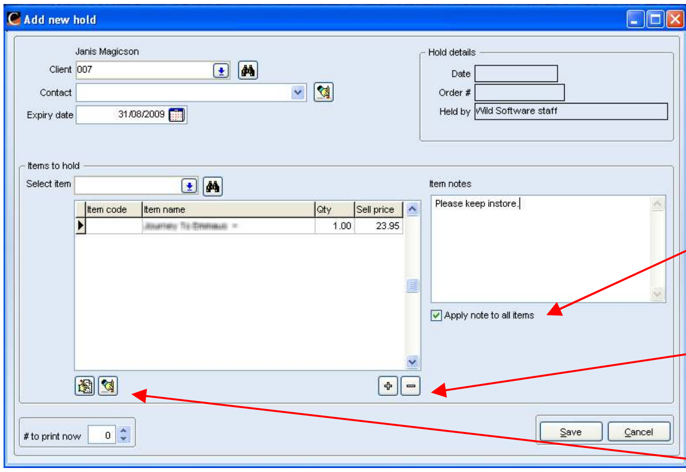


Fig 2. Add Stock on Hold

To add a hold click the [Add] button from *(Fig 1.)* to open another screen *(Fig 2.)*. Select the Client you want to place the hold for. Select a Contact if needed and select an Expiry date for the hold.

Select the items you want to place on hold. Add notes about that particular hold. Any note made will show on each item line of the hold if box is ticked.
To change the quantity of a selected item use the [ ] buttons.

To delete an item click [ ].

To edit the hold click [ ]. This allows you to only edit the quantity and sell price of the selected item and will open a form to allow you to do so *(Fig 2a.)*.

Click [Save] to return to view the items on hold (*Fig 1.)*.

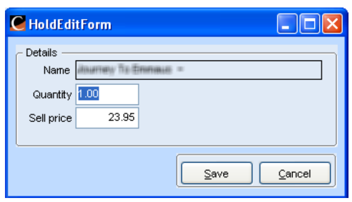


Fig 2a. Hold Edit Form Screen

3. Orders on Hold

Orders can be placed on hold from "View client orders". Go to "Clients | View client orders" *(Fig 3.)*.

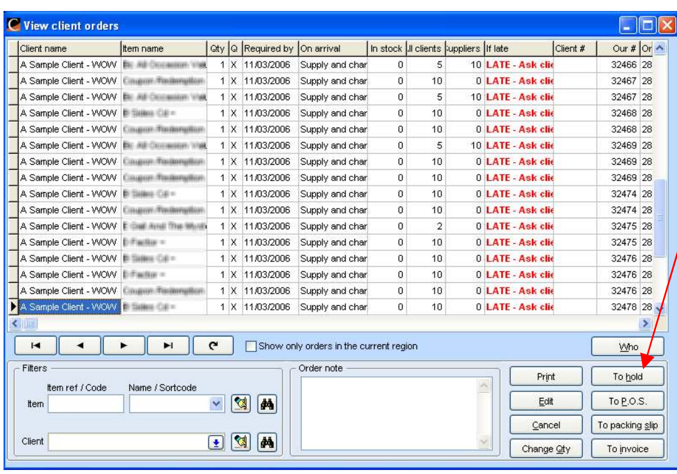
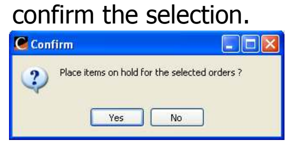


Fig 3. View Client Orders Screen

Select the order you wish to place on hold and click [To hold].

A message box will appear asking you to confirm the selection.



(Fig 3a.Confirmation Screen)

The order will disappear from the "On Order" screen.

Once an order is placed on hold it can be viewed in the "Stock on Hold Screen" *(Fig 1.)*.
Along with the usual hold information the screen will display, the date the order was placed on hold, the order number and the staff member who placed the hold.

4. Holds from POS

You can select an item on hold to be sold to a customer at "Point of Sale". This transaction happens in the P.O.S screen in "Stock | Point of Sale".

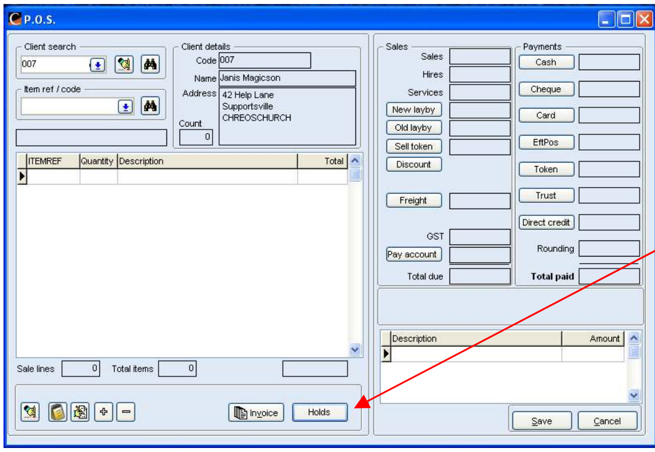


Fig 4. P.O.S Screen

To retrieve items from Hold in the P.O.S screen *(Fig 4.)*, first select a client and then click [Holds] to open a screen showing items on hold for the selected client. See (*Fig 5)*.

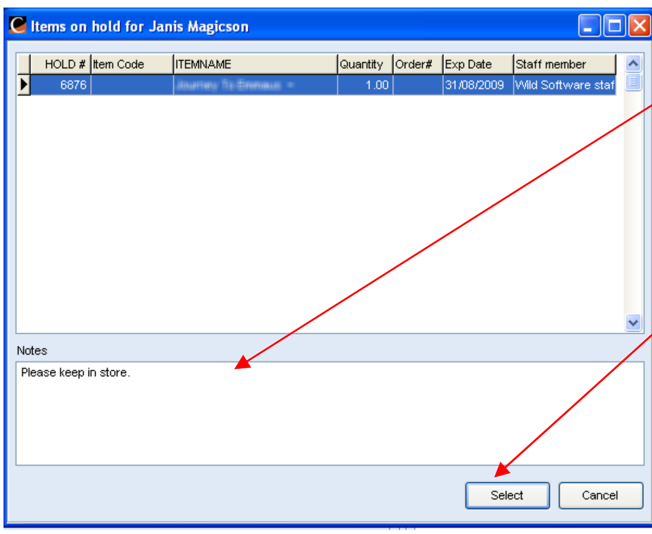


Fig 5. Items on Hold for Client Screen

The Items on Hold for Client Screen will display a grid with all the items that have been put on hold for that client and are available to select for P.O.S. It will also display any notes on the selected hold.

Select the hold by either double clicking or clicking on [Select].

This will place the item into the "P.O.S." screen for processing the sale. See *(Fig 6.)*.

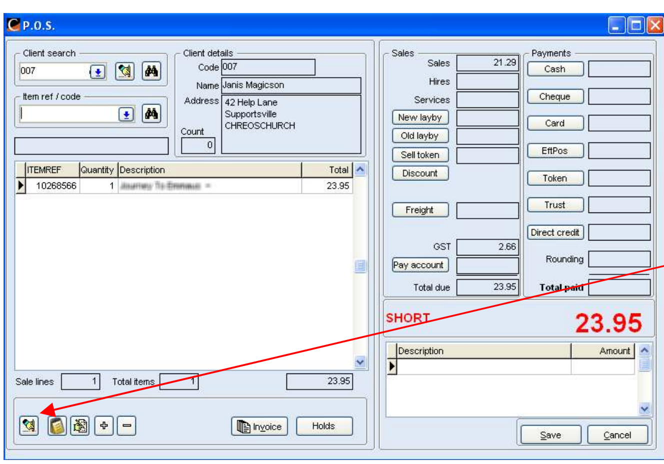


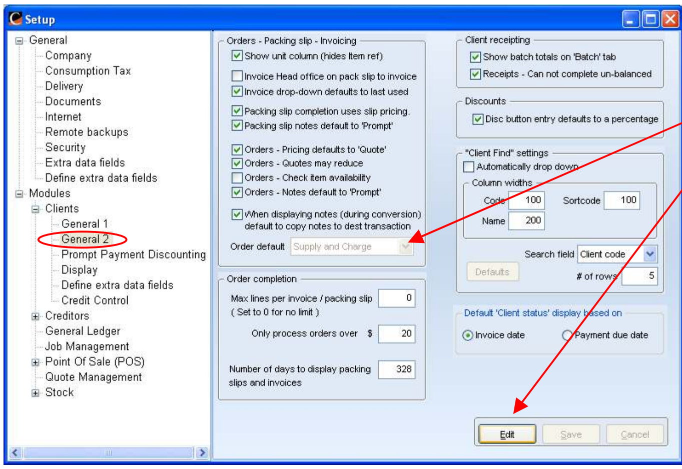
Fig 6. P.O.S Screen

The hold has been placed into the "P.O.S." Screen *(Fig 6.)* and is ready to be processed or added to like a normal P.O.S. transaction.

To delete the selected "hold" item from the P.O.S. transaction click [ ] and the item will go back on hold and can be accessed again at a later date or cancelled as per *(Fig 1c.)*.

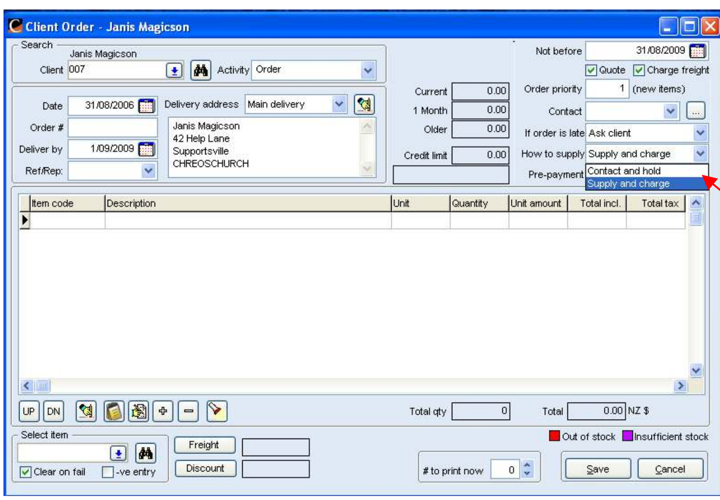
5. Supply & Charge, Contact & Hold

The defaults for 'Supply & Charge' and 'Contact & Hold' options in a Client Order can be set in the Client | General 2 page of "Maintenance | Setup | System" *(Fig 7.)*.



The default for 'Supply & Charge' and 'Contact & Hold' options in a Client Order can be set up by clicking [Edit] and selecting the preferred default.

Fig 7. Setup Screen



In the Client Order, the default setting *(Fig 7.)* is what is selected as appropriate for your particular business needs. You can change the setting from 'Supply and Charge' to 'Contact and Hold' upon order placement in the "Client Order Screen" *(Fig 8.)*.

Fig 8. Client Order Screen

When you select the 'Contact & Hold' option in order placement, this is an indication of how to supply only and will not place the order on "Hold". If you wish to place the order on "Hold" you must go into "Client |View client orders". The order can be managed for a number of options from this screen. See *(Fig 3.)*.