"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 1d. Edit Hold Expiry Date Screen

2. Adding a Hold

	Janis Magica	son			Floid details	
Client	007	•	#		Date	
Contact			💌 💆		Order #	
Expiry date	31	/08/2009 🛅			Held by Wild Software staff	
					l	
Items to hol	id					_
Select item		• #			Item notes	
	Item code	ttem name	Gty	Sell price	Please keep instore.	
	Þ	Journey To Dremaus =	1.0	0 23.95		
						11
					Apply note to all items 🥌	
					Apply note to all items 🦰	
				~	✓ Apply note to all items.	
	<u>a</u>			•	Apply note to all items	
	1	4		*	Apply note to all items	

Fig 2. Add Stock on Hold

C HoldE	ditForm	ľ
- Details -		
Quantit	y 1.00	
Sell pric	e 23.95	
	<u>Save</u> <u>Cancel</u>	

Fig 2a. Hold Edit Form Screen

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.*).

3. Orders on Hold

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

Client name	Item name	Gty	Q	Required by	On arrival	In stock	Il clients	uppliers	If late		Client #	Our #	Or 🔨
A Sample Client - WOW	Bo All-Discassion Vise	1	х	11/03/2006	Supply and char	0	5	10	LATE	- Ask clie		32466	28
A Sample Client - WOW	Coupron-Texatempitton	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32467	28
A Sample Client - WOW	Bc AB Occasion Viak	1	х	11/03/2006	Supply and char	0	5	10	LATE	- Ask clie		32467	28
A Sample Client - WOW	D Sielen G# -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32468	28
A Sample Client - WOW	Coupur-Tectorollium	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32468	28
A Sample Client - WOW	Bc All-Occasion Viel	1	х	11/03/2006	Supply and char	0	5	10	LATE	- Ask clie		32469	28
A Sample Client - WOW	Cooper-Testergilion	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32469	28
A Sample Client - WOW	Coupon Findersplion	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32469	28
A Sample Client - WOW	D Selec Cd -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32474	28
A Sample Client - WOW	Couper-Testiongilton	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32474	28
A Sample Client - WOW	E Coal And The Wysh	1	х	11/03/2006	Supply and char	0	2	0	LATE	- Ask clie		32475	28
A Sample Client - WOW	Diffection -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32475	28
A Sample Client - WOW	B Seles G# -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32476	28
A Sample Client - WOW	Diffection -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32476	28
A Sample Client - WOW	Cooper-Testemplion	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32476	28
A Sample Client - WOW	B Selección -	1	х	11/03/2006	Supply and char	0	10	0	LATE	- Ask clie		32478	28
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		¢,		Show on	ly orders in the cu	rrent reg	ion				(<u>W</u> ho	\mathcal{L}
Filters					Order note				51	Print		To boli	
Item ref / Code	Name / Sortcode		_					2					_
item .		*	2	1 4						Edit		To E.O.:	S.
										<u>C</u> anc	el 🛛	To packing	s slip
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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".



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 4. P.O.S Screen



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.*).



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 [[3]] and the item will go back on hold and can be accessed again at a later date or cancelled as per *(Fig 1c.)*.

Fig 6. P.O.S Screen

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.*).

General	C Orders - Packing slip - Invoicing	Client receipting
Company Consumption Tax Delivery Decomments Internet Remote backups Socurity Extra data fields Define extra data fields Modules Clients Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 1 Ceneral 2 Define extra data fields Credit Control Centors General Ledger Job Management Stock	Order S-Packing sign - Invokcing Show unit column (hides term ref) Whowice Head office on pack sign to invokce Verwice Head office on pack sign to invokce Verwice Head office on pack sign to invokce Verwice Head office of the transmission Verbers - Pricing defaults to Youngt Orders - Check term availability Verbers - Check term availability Ve	We have been set of the set

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

Search —	lanis Magicson						Not befor	e	31/08/2009	
Client	107	💽 🏘 Activity	Order	*				🔽 Quote	Charge f	reight
2.81	or po poor 🖼	Dalissans adduces 1	data dati an		Current	0.00	Order priorit	y <u>1</u>	(new items)	_
Date	31/08/2006	Delivery address	iain delivery		1 Month	0.00	Contac	t	*	
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eliver by	1/09/2009	Supportsville CHREOSCHURCH			Credit limit	0.00	How to supp	ly Supply an	nd charge	~
Ref/Rep:	*						Pre-paymer	t Contact a	nd hold	
How code					4 <u>.</u>			The second se		
•	Description				Unit	Guantity	Unit amount	Total incl.	Total tax	
	Description				Unit	Guantity	Unit amount	Total incl.	Total tax	
	e Description				Unit	Quantity	Unit amount	Total incl.	Total tax	
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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.*).