

TRANSACTIONS

Application	ChreosClient – Chreos 3
Module	File
Access	Various “File Common Open parked transactions”
Minimum service pack	SP33
This document	Parking & Retrieving Transactions Ref 2.2 Release 3 Published February 2003

Overview

“Parking & retrieving transactions” allows you to store transactions that you are in the middle of and to retrieve them at a later time or date.

Screens That Can Be Parked

The ‘Types’ of screens that can be parked are:

- “Client Orders”
- “Debtor Packing Slips”
- “Debtor Invoices”
- “Place Order with Supplier”
- “Inwards Goods”
- “Point of Sale”

To Park a Transaction

- While in the middle of entering a transaction press the <F9> key to park it.
- All of the data will be removed from the screen.

To Retrieve a Transaction

Option 1

- Select the original menu option of the transaction that has been parked. For example, to retrieve a parked debtor invoice select the menu option “Clients | Invoice”.
- Press the <F10> key.
- The “Reopen existing transaction” screen will display each transaction of that type (ie invoice) that has been parked.
- To retrieve a transaction select the required one and click the [Open] button. The details of that transaction will then be displayed on the original screen, for example the invoice screen.
- Note: “Details Displayed” on this information sheet will outline the details displayed on the “Reopen existing transaction” screen.

Option 2

- Select the menu option “File | Common | Open parked transactions”. The “Reopen existing transaction” screen will display every transaction that is currently parked.
- To retrieve a transaction select the required one and click the [Open] button. The details of that transaction will then be displayed on the original screen. For example if you are retrieving a debtor invoice the “Debtor invoice” screen will open and display the details of the transaction.
- Note: “Details Displayed” on this information sheet will outline the details displayed on the “Reopen existing transaction” screen.

Details Displayed

The following details are displayed when you retrieve a transaction using either Option 1 or Option 2.

- **Type.** The type of transaction. This will be one of the transaction types outlined in ‘Screens that can be parked’ in this information sheet.
- **Transaction.** The name of the client or creditor that the parked transaction is for. Note: In “Point of Sale” if a client has not been selected the first item selected will then be displayed.
- **Date Parked.** The date that the transaction was parked.
- **Time Parked.** The time that the transaction was parked.
- **Transaction Date.** The sales date of the transaction.
- **Sales Person.** The user that parked the transaction.
- **Machine.** The machine used to park the transaction.
- **View Transactions on all Machines.** Whether or not parked transactions from all of the machines are displayed. If this is not ticked only the transactions from the machine that the screen is open on will be displayed.

- **Transaction Type.** Select the ‘Type’ of transaction to view. The default is ‘All’. Note: This is only displayed when accessing this screen through “File | Common | Open parked transactions”.
- **[Process All/Process Selected].** This toggle button allows you to either process all of the transactions that are parked without opening them individually, or select two or more and process only those transactions. This button is only activated when accessing the “Reopen existing transaction” screen by pressing the <F10> key because the transactions have to be of one ‘Type’. It will not be activated when entering this screen through the menu option “File | Common | Open parked transactions”.
When this button is clicked the transaction/s will be processed as they have been set to. For example if the ‘E-mail this document’ checkbox is ticked and ‘# to print now’ is 2 then a transaction will be processed, emailed and two copies will be printed. However if the checkbox is not ticked and the ‘# to print now’ is 0 then a transaction will be processed but it will not be emailed or printed.

To Process a Batch of Transactions

- Open the “Reopen existing transaction” screen by pressing the <F10> key from the required menu option. The [Process All/Process Selected] buttons are only activated when accessing this screen this way.
- To process all of the transactions without opening them individually, click the [Process all] button.
- To process two or more transactions select the required ones and click the [Process selected] button.
- Note: As soon as two or more transactions are selected the [Process all] button will toggle into the [Process selected] button.

Related Issues

- The clients, creditors and general ledger periods can not be rolled if there are parked transactions waiting to be processed. If an attempt is made to roll one of these modules a message will appear saying that the module cannot be rolled due to this. The “End of period” screen will have to be closed and the parked transactions processed before the roll can be successfully completed.

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