ChreoS

Application	Chreos Client
Module	Clients
Access	"Clients | Holds
Minimum service pack	SP45
This document	Stock on hold
	Ref 3.32
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Overview

Holds are used to place items on hold and then sold through point of sale at a later date. This screen can be accessed from "Clients | Holds".

Overview

This screen displays the details for all items on hold.

Details Displayed

- **Hold #**. The reference number of the hold.
- **Client Code**. The code of the client who has the item on hold.
- **Client Name**. The name of the client who has the item on hold.
- **Item Code**. The code of the item on hold.
- **Item Name**. The name of the item on hold.
- **Qty**. The quantity of the item that is on hold.
- **Price**. The price of the item on hold if it differs from the 'Sell price'.
- **Date**. The date that the item was placed on hold.
- **Expiry Date**. The date that the hold expires.
- **Order #**. The order number of the item on hold. There will only be one if the item was converted from an order to a hold.
- **Client Order #**. The client order number.
- **Staff Member**. The staff member that placed the order on hold.

To Search for a Required Hold

- Enter the required hold number into the "Hold number" search field.
- Press the <Enter> key.

- The first item on hold with the entered hold # will be selected.

To Filter the Holds

- The client and item search facilities can be used to filter the holds to a required client or item. Refer to "Client search (1.3)" and "Item search (1.5)".

To View Client and Contact Details

- Select the required hold and click the [Who] button. The following details will be displayed:
  - **Contact Name** – The name of the contact at the clients company who made the enquiry.
  - **Contact Phone** – The daytime, after hours, cellular, fax, e-mail and web details of the contact.
  - **Client Phone** – The daytime, after hours, cell phone and fax, e-mail and web details of the client.

To Cancel a Hold

- Select the required hold and click the [Cancel Selected Hold] button.
- A confirmation screen will appear and ask if you really want to cancel the hold. Click the [Yes] button.

To Change the Expiry Date for a Hold

- Select the required hold and click the [Change Hold Date] button.
- The "Edit hold expiry date" screen will appear.
- Select the new expiry date.
- Click the [Save] button.

To Change the Note of a Hold

- Select the required hold and click the [Change Note] button.
- Add or change details to the note.
- Click [Save].

New Holds

Overview

To created a new hold click the [Add] button in the "Stock on Hold" screen to enter details for the new hold.

Details Displayed

- **Client Search &** **<F3>.** Select the required client. Refer to "Client search (1.3)".
- **Contact**. Select the client contact that is involved in the hold. To clear this field, click the [Clear Contact] button.
- **Expiry date**. A default expiry date will be displayed. This date will be a defined number of days ahead of the sales date. Refer to "Setup (9.1)". This date can be edited.
- **Items to Hold**. Displays details about the items selected for the hold.
    - **Select item** **& <F2>**. Select the required item. Refer to "Item Search (1.5)".
    - **Item code**. The code of the selected item.
    - **Item name**. The name of the selected item.
    - **Qty**. The quantity of the selected item.
    - **Sell Price**. The sell price of the selected item.
- **Item Notes**. Displays any notes about the item on hold.
- **Apply note to all items**. Tick to apply any added notes to all items on hold.

To Create a Hold

- Select the required client and contact.
- Edit the 'Expiry date' if it differs to the default.
- Select the item/s to be placed on hold and enter any required notes.
- Click the [Save] button.

To Edit the Hold Quantity or Sell Price

- Click the [Edit] button to show the 'Hold Edit Form'.
- Change the quantity or sell price.
- Click the [Save] button.

To Delete an Item

- Highlight the selected item.
- Click the [Erase] button to delete the selected item.

To Change the Quantity of the Item on Hold

- Click the [+] or [-] button.

To Sell an Item on Hold

- Select the menu option "Stock | Point of sale".
- Select the required client and the [Holds] button will be activated.
- Click the [Holds] button and the "Items on hold" screen will appear. It will display all of the items that the selected client currently has on hold.
- Select the held item to be purchased and click the [Select] button. The item will appear in the "Point of sale" screen.
- Process the sale. Refer to "Point of sale (5.3)".

Related Issues

- An item on order with a client can be placed on hold. This is done in "Clients | Client Orders | View client orders". Refer to "View client orders (3.17)". Note: If an order is marked as 'Contact and hold' in the "How to supply" field, it will not automatically be placed on hold. This is a reference field only.
- When selling an item on hold through point of sale the sale must be completed in that transaction, it cannot be converted into an invoice. If it is converted into an invoice then the item will remain on hold and must be cancelled from the "Hold" tab page.
- The default number of days that an item can be held for is set on the "Modules | Stock | General" page of "Maintenance | setup | System". Refer to "Setup (9.1)".