
Application	Chreos Client
Module	Clients
Access	“Clients View client enquiry”
Minimum service pack	SP44
This document	View Client Enquiries Ref 3.18 Published March 2009

Overview

“View client enquiries” allows you to view enquiries that have been made by clients. They could be about an item that is listed in Chreos or an item that you have no record of.

Details Displayed

Client enquiries

The following details are displayed for each enquiry:

- **Enquiry #.** The number of the enquiry.
- **Client.** The name of the client.
- **Stock Item.** The name of the stock item (if known).
- **Item Ref.** The reference number that uniquely identifies the item.
- **In Stock.** The number of the item that is currently in stock.
- **Date Enquired.** The date that the enquiry was made.
- **Text.** The details of the query. Enquiry text may be edited.

To View Contact Details

- Select the required enquiry. When the enquiry is selected it will be a darker grey than the rest of the enquiries.
- Click the [Who] button and 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 View Enquiries for One Client Only

When the “View client enquiry” screen is initially opened all of the current enquiries will be displayed. To view enquiries for a single client there is the option to filter them.

- Underneath the enquiries is the client search and the item search facility. Select the required client or item. Refer to “Client search (1.3)” or “Item Search (1.5)”.
- The enquiries will now be filtered to only display the enquiries related to the selected client or item.
- To return to the full list of enquiries click the [Erase] button.

To Edit an Enquiry

- Click on the text.
- Edit the details.
- When the screen is closed the edited details will automatically save.

To Order the Item for the Client

If a client had enquired about an item that can be ordered, there is the ability to turn the enquiry into an order.

- Select the required enquiry. When the enquiry is selected it will be a darker grey than the rest of the enquiries.
- Click the [Order Item] button and the “Debtor orders” screen will appear.
- Process the order. Refer to “Debtor Orders (3.15)”.
- Once the “Debtor orders” screen is opened the text from the original enquiry is lost. Note: If you then cancel the order all details of the enquiry are lost.

To Delete an Enquiry

- Select the required enquiry.
- Click the [Delete] button.
- A confirmation message will appear asking if you want to delete the enquiry. Click the [Yes] button.

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