VIEW CLIENT ORDERS

Chreos

Application	ChreosClient – Chreos 3
Module	Clients
Access	"Clients	Client Orders	View client orders"
Minimum service pack	SP36
This document	View Client Orders Ref 3.17 Published May 2004

Overview

"View client orders" allows you to view the details of all of the client orders that have been entered. It also allows you to progress the order in a variety of ways.

Details Displayed

Each line of each current client order is displayed on the grid. The following details are displayed about each line:

- **Client Name**. The name of the client that has ordered the item.
- **Product Name**. The name of the item ordered.
- **Quantity**. The quantity of the item ordered.
- **Q**. This indicates if the order is a quote. An 'X' in this column indicates that it is.
- **Required By**. The date that the order is required by.
- **On Arrival**. What is to be done with the item when it arrives.
- **In Stock**. The quantity of this item currently in stock.
- **All Clients**. The quantity of the item that is currently on client order.
- **Suppliers**. The quantity of the item that is currently on supplier order.
- **If Late**. The number of days left until the 'Required by' date. Once that date has passed instruction from the client on what to do with late arriving items will be displayed in red.
- **Client #**. The client's order number.
- **Our #**. The unique identifier for the order.
- **Order Date**. The date that the order was entered.
- **Pre-Payment**. The amount of any advanced payment for the order.

- **Item Code/Ref & Name/Sort Code**. Select the required item. Refer to "Item search (1.5)". Only order lines for this item will be displayed on the grid.
- **Client Code & Sort Code**. Select the required client. Refer to "Client search (1.2)". Only order lines for this client will be displayed on the grid.

To Filter the Orders to an Item

- Select the require item in the 'Item ref/Code' or 'Name/Sort code'.
- The grid will filter to only display order lines for this item.
- To clear the filter click the [Delete] button.

To Filter the Orders to a Client

- Select the require item in the 'Client code' or 'Name/Sort code'.
- The grid will filter to only display order lines for this client.
- To clear the filter click the [Delete] button.

To Delete an Order Line

- Select the required order line.
- Click the [Edit] button.
- The "Edit client orders" screen will appear.
- Refer to "Edit client orders (3.19)".

To View Contact Details

There are two ways to delete an order line in this screen:

Option 1

- Select the required order line.
- Click the [Who] button and the following details will be displayed:
    - **Contact** – The name of the contact at the clients company who placed the order.
    - **Contact Phone** – The daytime, after hours, cell and fax numbers, and the e-mail and web address of the contact will be displayed.
    - **Client Phone** – The daytime, after hours, cell and fax numbers, and the e-mail and web address of the client will be displayed.

Option 2

- Select the required order line.
- Click the [Cancel] button.
- A confirmation message will appear asking if the order is to be cancelled.

- Click the [Yes] button.

To Change the Quantity of an Order

- Select the required order.
- Click the [Change Qty] button.
- The 'Edit order quantity' screen will appear.
- Edit the quantity and click the [Ok] button.

To Place an Order Line on Hold

- Select the required order line.
- Click the [To Hold] button.
- A confirmation message will confirm that the item are to be placed on hold. Click the [Yes] button.
- The grid will refresh and the items will no longer be displayed.

To Send an Order Line to POS

- Select the required order line.
- Click the [To POS] button.
- The "Point of sale" screen will appear with the client and item selected.
- Process the sale. Once it is saved the "View client orders" screen will reappear.
- Click the refresh button to refresh the grid display.
- Refer to "Point of sale (5.3)".

To Convert an Order Line to a Packing Slip

- Select the required order line.
- Click the [To Packing Slip] button.
- The "Convert client order to packing slip" screen will appear with the client and order selected.
- Process the conversion. Once it is saved, close the "Packing slip" screen and the "View client orders" screen will reappear.
- Click the refresh button to refresh the grid display.
- Refer to "Convert Debtor order to packing slip (3.11)"

To Convert an Order Line to a Packing Slip

- Select the required order line.
- Click the [To Invoice] button.
- The "Convert client order to invoice" screen will appear with the client and order selected.
- Process the conversion. Once it is saved, close the "Invoice" screen and the "View client orders" screen will reappear.
- Click the refresh button to refresh the grid display.
- Refer to "Convert Debtor order to invoice (3.12)"