Manage Quick Tickets

Last Modified on 08/07/2023 1:19 pm CDT

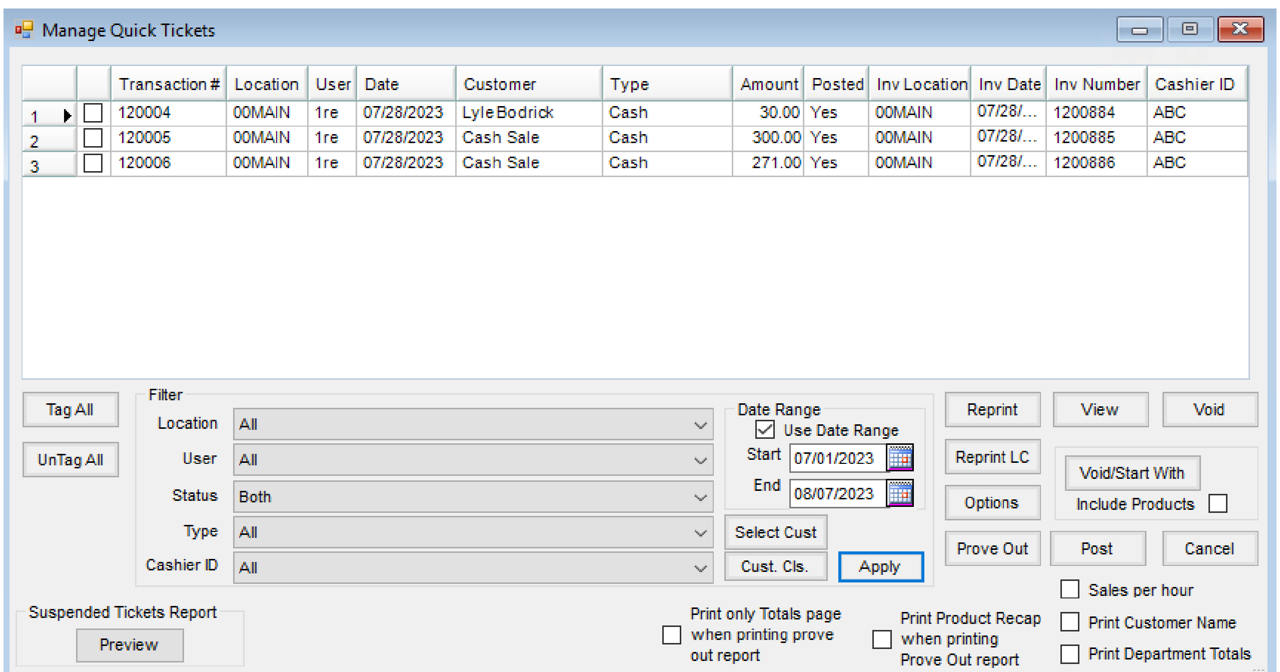
Overview

The Quick Ticket function, found at *A/R / Manage Quick Tickets*, is geared towards quick handling of customer sales, complete with cash and credit card control. Bar code scanning is available here as it is at any *Inventory Selection* screen. An option is available to post each transaction as it is saved, or set the preference to batch post transactions. There is a prove-out report to help with end of day cash drawer/transaction prove-out.

Function (**F5**, **F2**, **F1**, etc.) keys, the mouse, or a touch screen monitor can be used to access any of the larger options on the *Quick Ticket* screen.

Each user must configure some settings before using *Quick Tickets*. These preferences are found at *A/R / Manage Quick Tickets* by selecting **Options**. One of these options is *Online Posting*. If this option is not marked, the transactions are held until they are batch posted to Invoices/Payments at which time inventory is updated. If this option is marked, the Quick Tickets, payments, and inventory amounts post immediately when saved which keeps the balances of the inventory and accounts current. For more on Options, see here.

Important Note: To streamline this function, Invoices requiring association to Fields, Customer splits, Bookings, Prepay, or hazmat documentation must be generated at the standard *Invoice* screen. This function was designed for quick counter sales.

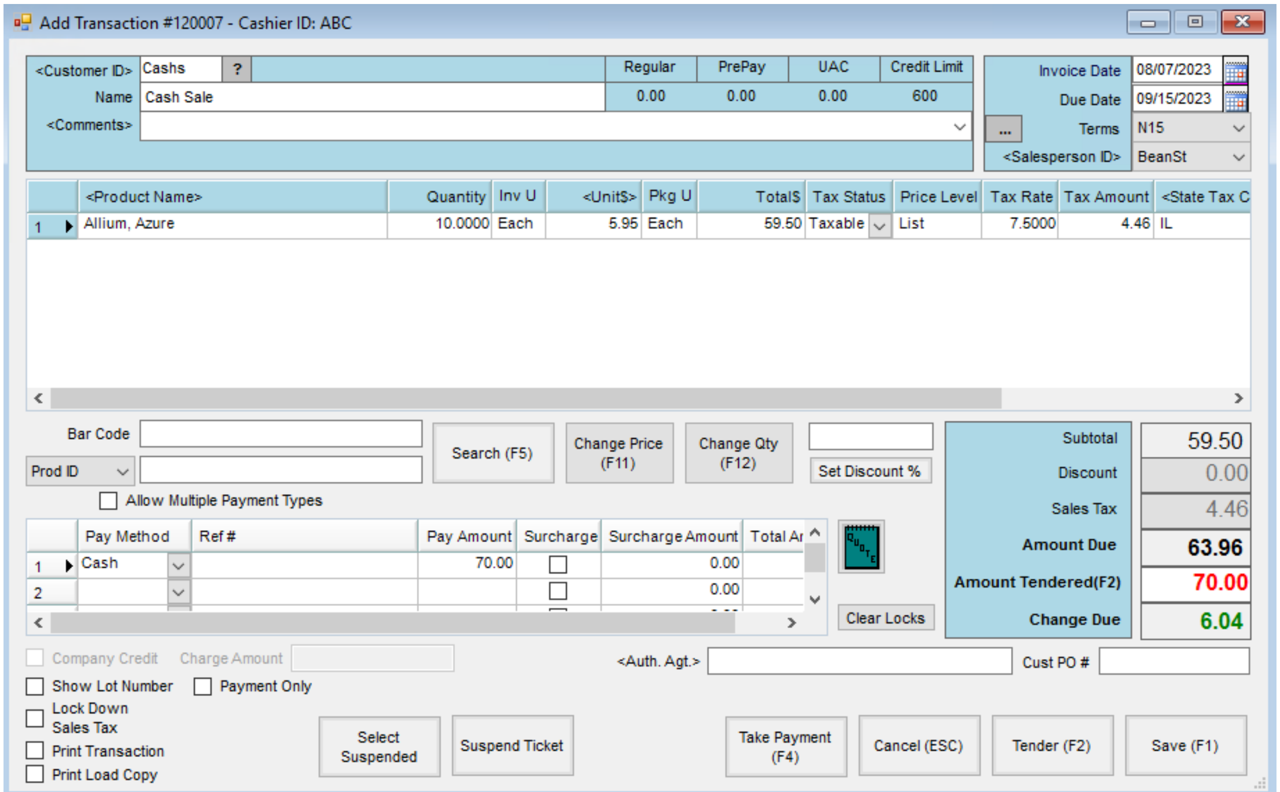


- **Tag All** – This selects all tickets displayed in the grid.
- **UnTag All** – This deselects all tickets displayed in the grid.
- **Filter** – This area allows filtering the tickets that display in the grid by *Location*, *User*, *Status*, *Type*, *Cashier ID*, *Date Range*, *Customer*, or *Customer Classification*. Set the filter options and choose **Apply** to filter the tickets.

- **Reprint –** Select the Quick Ticket in the grid and then choose **Reprint** to reprint the ticket.
- **View –** Choose this to display the selected ticket on the screen.
- **Void –** Only tickets that have not been posted may be voided. Select the ticket and then choose **Void** to void the ticket.
- **Reprint LC –** Select the ticket and choose this to reprint the Load Copy for the ticket.
- **Options** – This area sets the options for the user currently signed in. The options include selection defaults and printing preferences for the Quick Tickets.
- **Void/Start With –** Used for correcting tickets, this option voids the selected ticket and then begins a new ticket to replace it.
- **Include Products –** This is used in conjunction with **Void/Start With**. If the same products should default to the new ticket as they were entered on the voided ticket, select this option.
- **Prove Out –** This displays the End of Day Prove Out report of the selected tickets including totals for those tickets.
- **Post –** This posts the selected tickets as Invoices.
- **Preview** – **Preview** under *Suspended Tickets Report* is a way of seeing tickets that were previously suspended and have not been removed from the *Suspend* area.
- **Print only Totals page when printing prove out report** – When this option is selected, the detail from each ticket is omitted from the Prove Out report. The report includes only totals for the selected tickets.
- **Print Product Recap when printing Prove Out report –** This option allows an additional product recap at the end of the Prove Out report that totals by product.
- **Sales per hour** – This option displays a sales per hour recap for the selected tickets. It displays the number of transactions, a total quantity, and a total amount sold per hour.
- **Print Customer Name –** With this option selected, the customer name prints on the Prove Out report.
- **Print Department Totals** – This option prints the totals by Inventory Department on the Prove Out report.

Add a Quick Ticket Window

To add a Quick Ticket transaction, select the **Cash Register** icon.



The upper portion and grid area of the screen is quite similar to the standard *Invoice* screen.

- **Bar Code –** When using a bar code scanner, the cursor may be set to default to this area, allowing the bar code to be scanned.
- **Prod ID/Alt ID/Prod Name –** When searching for products, enter the first letter of the product in the field to search and press **Enter**. This displays the *Select a Product* screen listing all departments and products starting with the selected letter.
- **Search (F5) –** This brings up the *Select Products* screen.
- **Change Price (F11) –** This places the cursor in the *Unit $* cell of the last row in the product grid, allowing the unit price to be changed. After the price is changed, using **Enter** moves the cursor to the *Bar Code* or *Prod ID / Alt ID / Prod Name* field depending on the *Product Selection* method set.
- **Change Qty (F12) –** Working similarly to **Change Price**, this places the cursor in the quantity area of the last product so the quantity may be updated. After updating the quantity, **Enter** moves the cursor to the *Bar Code* or *Prod ID / Alt ID / Prod Name* field.
- **Set Discount % –** For a discount that applies to all line items on the Quick Ticket, enter the percentage in the field and select **Set Discount %**. The discount percentage is applied to all line items on the Quick Ticket. The discount percentage displays in the *Discount %* column and the price in the *Unit $* column reflects the price of the product less the discount. This is available if the *Use Discounts from Inventory Department* preference is selected under **Options** on the *Manage Quick Tickets* window.
- **Allow Multiple Payment Types –** If multiple payment types are used to pay this Quick Ticket, select this

option.

- **Pay Grid** – Select the *Pay Method*, then optionally enter a reference number. The *Pay Amount* defaults but may be changed if necessary. If the location is set up for applying surcharges to specific payment types, the surcharge information defaults but may be changed.
- **Product Quote –** Quotes given to the customer and saved at the *File / Open / Customer* screen by using the **Product Quote** icon may be called up at the *Quick Ticket* screen and displayed for reference. The product prices do not default based on these customer quotes, however if a quote exists for one of the selected products on the Quick Ticket, the **Quote** icon displays red. By selecting the **Quote** icon, all quoted prices display or double-click the *Unit $* price for the quoted product and the standard pricing options as well as quoted prices for this product to select.
- **Company Credit Checkbox –** If a Payment Method of *Company Credit* is selected, this option is checked and the amount of the Quick Ticket appears in the *Charge Amount* field. This also disables the *Payment* grid.
- **Auth Agt** – An authorized agent may optionally be selected from the customer file for a Quick Ticket.
- **Cust PO # –** A customer Purchase Order number may be entered here. If the *PO Required* option is marked on the customer file, the Quick Ticket must have a Purchase Order number entered before the ticket can be saved.
- **Show Lot Number** – If the item being sold requires lot number tracking, mark this option to display the lot number information in the grid.
- **Lock Down Sales Tax –** If the sales tax amount is changed manually, the *Lock Down Sales Tax* option will be checked. This keeps the sales tax from recalculating regardless of changes made to the Quick Ticket after the sales tax was changed. If changes are made that require the sales tax to be recalculated, the *Lock Down Sales Tax* option may be unchecked.
- **Print Transaction –** If a printed receipt is needed, mark this option to print the transaction when it is saved.
- **Print Load Copy** – Mark this to print a Load Copy when the Quick Ticket is saved.
- **Payment Only –** If the Customer would like to make a Payment on Account, this option may be used to quickly add the payment to the Customer's account. This amount is added to the Unapplied Cash amount on the customer file.
- **Select Suspended –** This retrieves tickets that were previously suspended.
- **Suspend Ticket –** This allows a transaction to be suspended so it can be finished at a later time.
- **Take Payment** – This allows the *Pay Method* to be selected.
- **Tender (F2) –** This defaults the amount due into the *Amount Tendered*. If a different amount was tendered, select **Tender** then type the amount in the *Amount Tendered* area to calculate an amount in *Change Due*.

If *Online Posting* is turned on, each transaction makes an Invoice with the same posting that occurs at *Invoice Posting Notes* and Payment posting found at *Payment Posting Notes*.