Quick Ticket Transactions

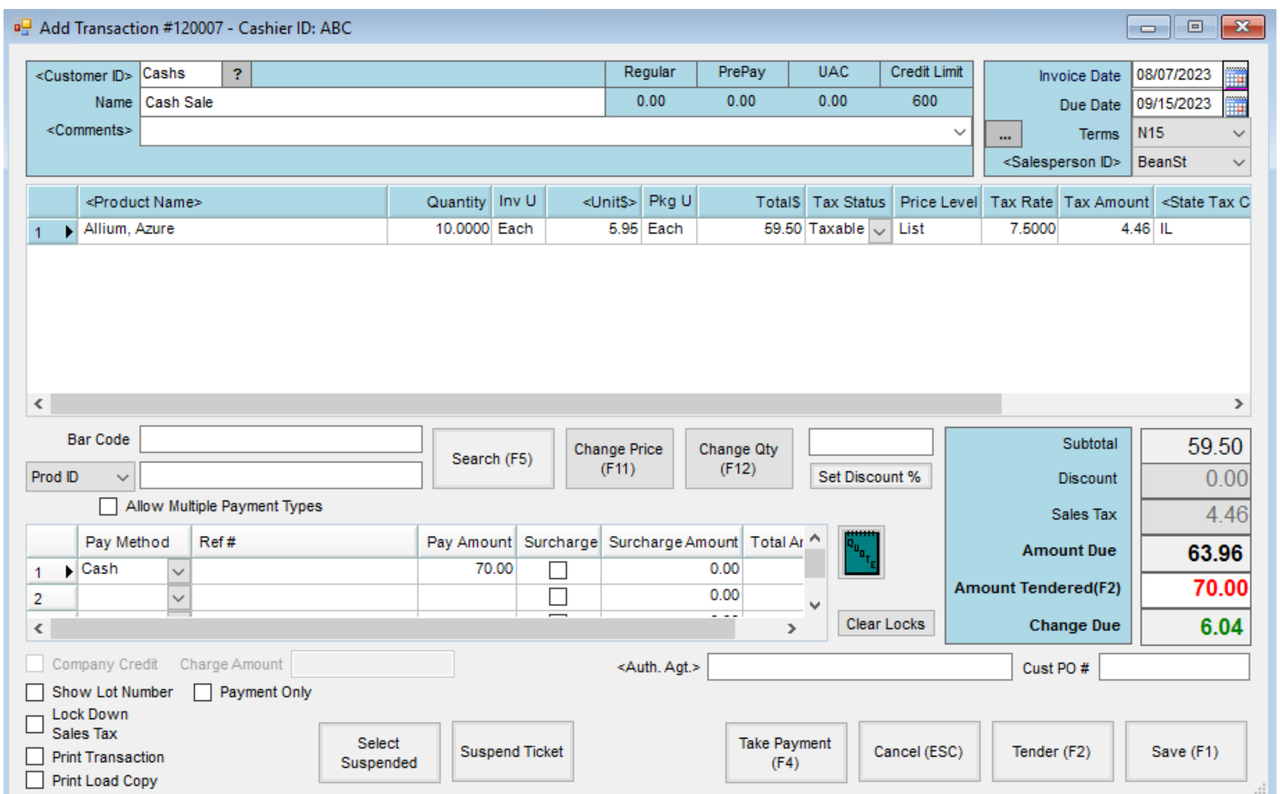
Last Modified on 08/07/2023 1:16 pm CDT

Overview

Get to the *Add a Quick Ticket* screen by selecting the **Cash Register** shortcut icon. Enter the Cashier PIN if required by the Location. This brings up the *Select Customers* screen defaulted to the cash customer selected at the *Quick Ticket Preferences* screen, but any customer in the list may be selected. After choosing the Customer, the *Inventory Selection* window immediately appears based on the preference set under **Options**.

After choosing the products and entering quantities for each, make any changes to pricing, dates, and terms. To give a discount percentage to all products on the Quick Ticket, enter the percentage in the field above **Set Discount %** and then select **Set Discount %**. Once all information has been entered choose **Tender** to calculate the *Amount Due*. Select **Take Payment** then choose the transaction sale type: **Cash**, **Check**, **Company Credit**, **Credit Card**, **JDF Multi-Use**, **AMEX**, **Master Card**, **Visa**, or **Discover**.

The *Amount Tendered* then defaults with the same amount as the *Amount Due*. If the amount being paid is different than the defaulted *Amount Tendered*, type the actual dollar amount received to calculate the *Change Due*. If more than one Payment Method is needed, select the *Allow Multiple Payment Types* option and choose the *Pay Methods* in the grid. Enter the corresponding *Pay Amount* for each payment type in the *Pay Method* grid. If the location is set to apply a surcharge to the selected payment type, this information defaults but may be removed if necessary.



Add a Quick Ticket Process

1. Choose the **Add a Quick Ticket** icon and select the appropriate customer.

   Note: The customer selected as the Cash Customer from the *Quick Ticket Preference* window defaults as highlighted.
2. Select the products, enter the *Quantity*, and choose **Done**.

   Note: To take a payment only, select the *Payment Only* option with no products selected. The dollars are sent to Unapplied Cash.
3. Edit any information if necessary.

   Note: Selecting **Change Price** or **Change Qty** helps edit when scanners or *ProdID Product Selection* methods are used. **Tender** updates calculations.
4. Choose **Take Payment** and select the proper sale type on the *Select Sale Type* window. The *Allow Multiple Payment Types* option is then enabled on the *Add Transaction* window.
5. Edit the *Pay Method* and *Pay Amount* if necessary and choose **Save**.

   Note: Selecting **Suspend Ticket** suspends the transaction to be completed later. **Select Suspended** allows a suspended ticket to be recalled for completion.

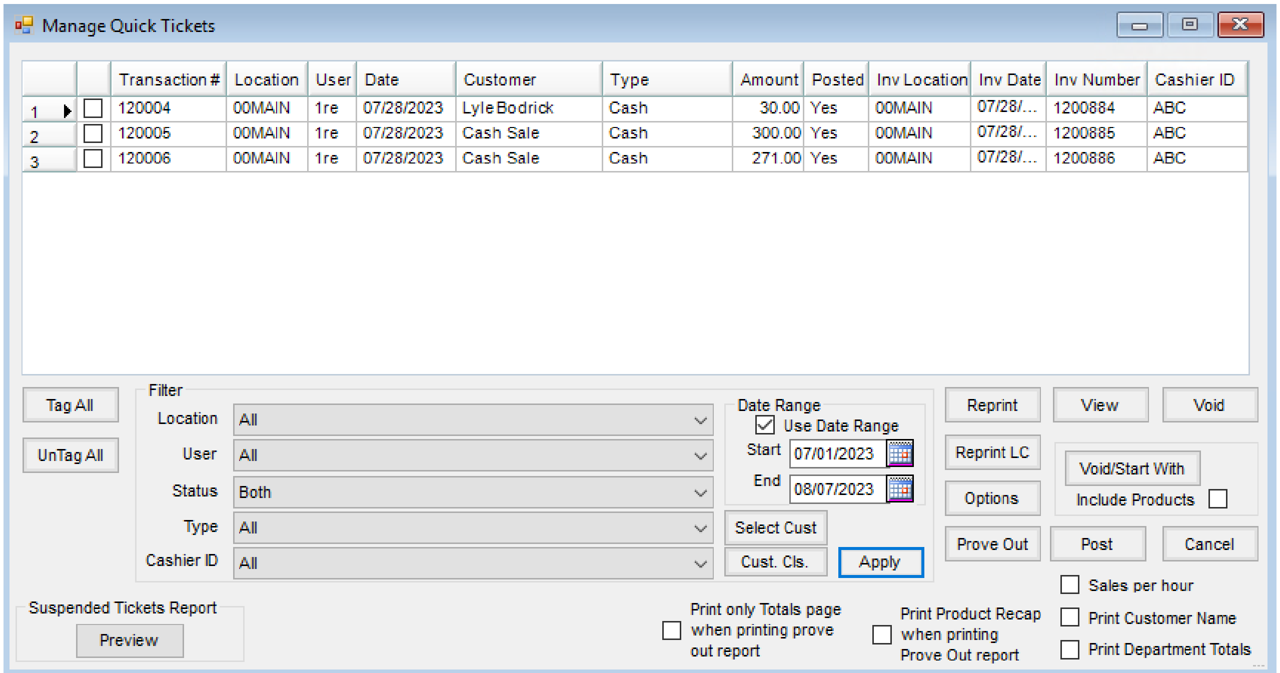
Suspended Quick Tickets

A situation might occur during a Quick Ticket where all the information is not yet available to complete the transaction. Quick Ticket transactions may be suspended during the transaction by using **Suspend Ticket**. This basically puts the ticket on hold and allows other tickets to be done. When the information is available to complete a suspended ticket, retrieve the ticket by choosing **Select Suspended**. Once the suspended ticket is retrieved, it can then be completed.

A Suspended Ticket report may be generated to show information on Suspended Tickets. It can then be decided if the tickets should be completed or if they are no longer needed and should therefore be voided.

Posting

If *Online Posting* is not turned on, then each Quick Ticket transaction is held for batch posting, usually at the end of each day or shift. To post transactions, go to the *Manage Quick Tickets* screen at *A/R / Manage Quick Tickets*. Manually check the first column for each ticket to be posted, and then choose **Post**. The suggested way to post a day's activity would be to filter for *Not Posted* transactions, select **Tag All** to select all entries, and then choose **Post**. All Cash transactions will be combined into one Invoice per default cash customer. All other transactions post as separate Invoices.



Voiding a Quick Ticket

Quick Tickets may be voided from *A/R / Manage Quick Tickets* as long as they have not been posted. Select the Quick Ticket and then choose **Void**. If a Quick Ticket has been posted, then the Invoice created by the posting should be voided.