Quick Ticket Transactions

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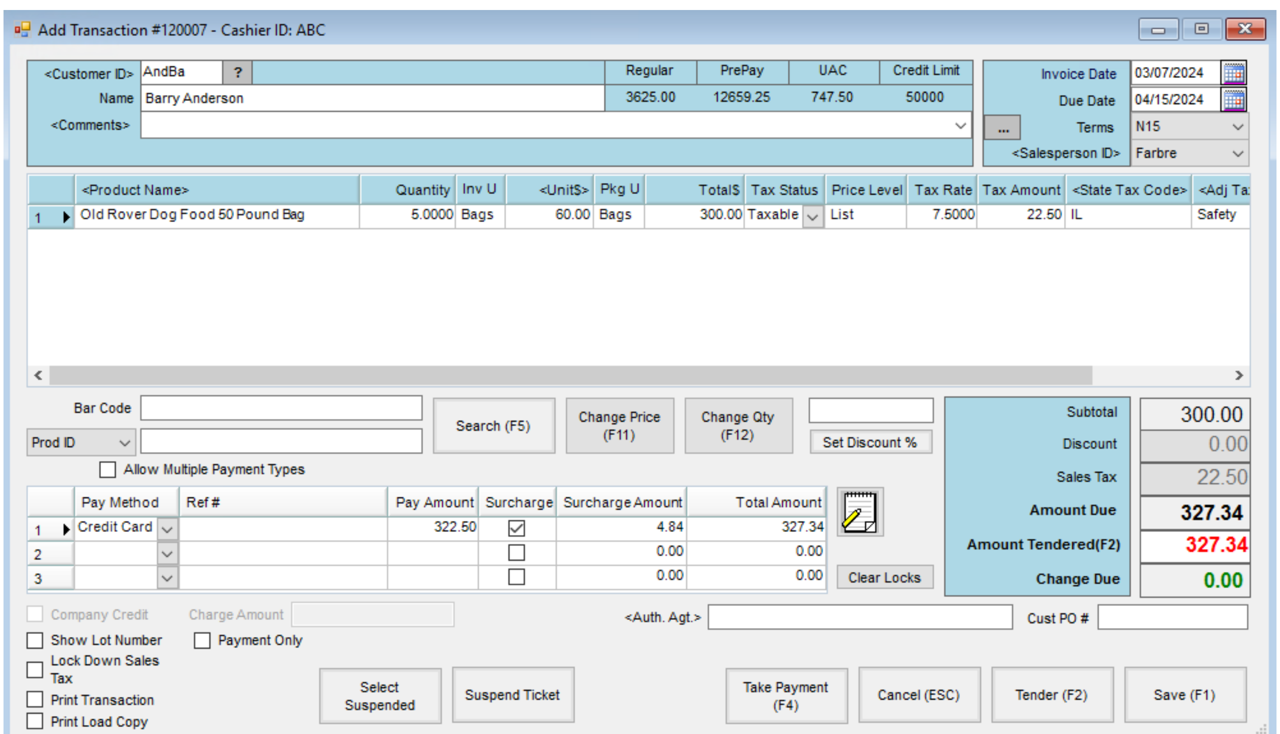
Add a Quick Ticket Window

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

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.

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.



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*.

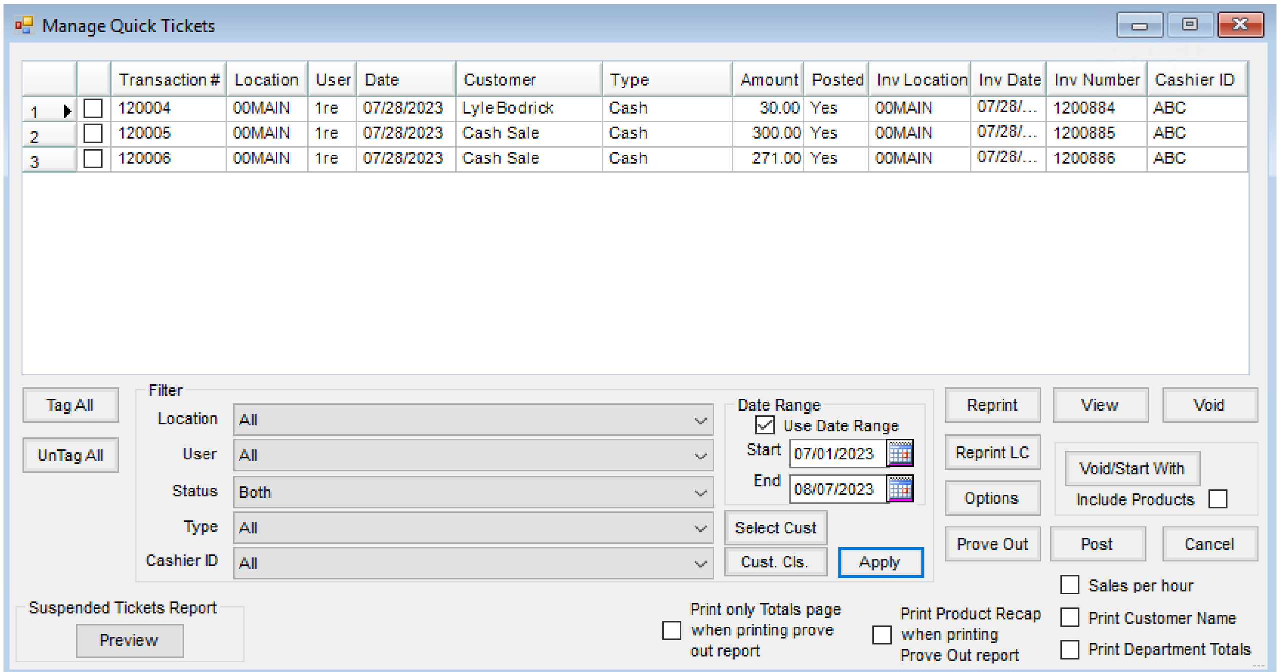
Suspended Quick Tickets

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.



Online and batch posting follow the same steps. Each payment method has its own posting style, and each cash customer used with the cash payment method has an individual posting style as well.

- **Style 1** – *Charge* ticket type for the ticket range
- **Style 2** – *Check* ticket type for the ticket range
- **Style 3** – *Credit Card* ticket type for the ticket range
- **Style 4** – *Cash* ticket type for the customers who are not setup as quick ticket cash customers in the ticket range
- **Style 5** – *JDF Multi-Use* ticket type for the ticket range
- **Style 6** – *Amex* ticket type for the tickets in the range
- **Style 7** – *Visa* ticket type for the tickets in the range
- **Style 8** – *MasterCard* ticket type for the tickets in the range
- **Style 9** – *Discover* ticket types for the tickets in the range
- **Style 10** – *Company Credit* ticket types for the tickets in the range
- **Style 11+** – *Cash* ticket types, each of which represent a Cash Customer set up for Quick Ticket Cash Customers

Styles are important because in some cases, Agvance groups transactions with the same style onto a single invoice. The program starts with the first style and goes to the last one.

Styles 1-10 create a single Invoice and Payment for each transaction.

Style 11+ are grouped together with one Invoice per style. There will be one invoice for each quick ticket cash sale customer that contains all that customer's transactions.

Each style creates regular Agvance Invoices (and possibly Payments), that are posted as the style is scanned. Agvance first locates all the *Charge* transactions and posts an Invoice for each, then locates all the *Check* transactions and posts Invoices and Payments for each, etc.

After each style has been posted to Invoices, the Quick Tickets are marked posted.

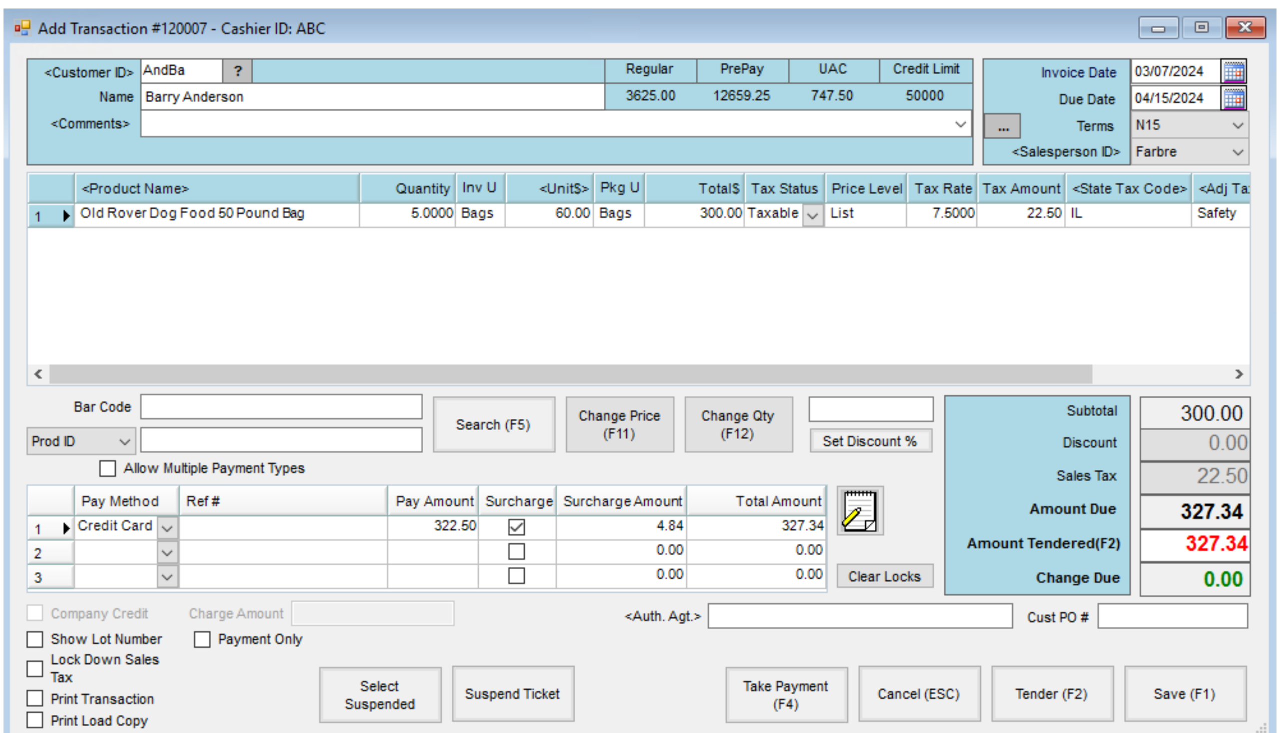
The Invoices and Payments themselves cannot partially post because they are in posting objects, just like Invoices and Payments created elsewhere in Agvance. If the posting breaks, the transactions may not get marked as posted, but the Invoices and Payments will either completely post or not post at all.

Surcharges

It is recommended to verify the local regulations for applying surcharges prior to using this function.

A processing fee surcharge may be applied to Quick Tickets in Agvance. This surcharge is based on the payment method type set up for each location. For more on surcharge setup, review the video above or see **Surcharges on Payments**.

After setup, when adding a Quick Ticket, the *Pay Methods* grid displays additional surcharge options.



When the Quick Ticket is saved, an additional line is added to the Invoice for the surcharge.