

# Quick Ticket Preferences

Last Modified on 08/07/2023 11:54 am CDT

## Overview

Go to *Accounting / A/R / Manage Quick Tickets* and choose **Options** to set some key preferences.

The screenshot shows the 'Manage Quick Tickets' window. At the top, there is a table with the following data:

|   | Transaction #            | Location | User   | Date | Customer   | Type         | Amount | Posted | Inv Location | Inv Date | Inv Number | Cashier ID |     |
|---|--------------------------|----------|--------|------|------------|--------------|--------|--------|--------------|----------|------------|------------|-----|
| 1 | <input type="checkbox"/> | 120004   | 00MAIN | 1re  | 07/28/2023 | Lyle Bodrick | Cash   | 30.00  | Yes          | 00MAIN   | 07/28/...  | 1200884    | ABC |
| 2 | <input type="checkbox"/> | 120005   | 00MAIN | 1re  | 07/28/2023 | Cash Sale    | Cash   | 300.00 | Yes          | 00MAIN   | 07/28/...  | 1200885    | ABC |
| 3 | <input type="checkbox"/> | 120006   | 00MAIN | 1re  | 07/28/2023 | Cash Sale    | Cash   | 271.00 | Yes          | 00MAIN   | 07/28/...  | 1200886    | ABC |

Below the table are several control panels:

- Filter:** Location (All), User (All), Status (Both), Type (All), Cashier ID (All).
- Date Range:**  Use Date Range. Start: 07/01/2023, End: 08/07/2023.
- Buttons:** Tag All, UnTag All, Reprint, View, Void, Reprint LC, Options, Prove Out, Post, Cancel, Void/Start With, Include Products .
- Print Options:**  Print only Totals page when printing prove out report,  Print Product Recap when printing Prove Out report,  Sales per hour,  Print Customer Name,  Print Department Totals.
- Suspended Tickets Report:** Preview button.

Complete the information for each user utilizing the Quick Ticket function. These preferences are set for that particular user.

Quick Ticket Preferences - 1RE

<Cash Customer> Cashes

Default Invoice Type

Online Posting

Set Due Date to Next FM

Use Customer Tax Information

Require Sales Person

Require Signature for Company Credit

Use Discounts from Inventory Department

Terms

Product Selection

Bar Code  Move To Quantity

Product Selection Window

Prod ID / Alt ID / Name  Move To Quantity

Attributes

<Age Restricted Product>

Print Options

Print Location Heading  Center

Receipt Printer

Form Type 8 1/2 x 11 Laser

Print # Copies Printer Port

Collate Copies  How Many Lines 0

LC Printer

LC Form Type 8 1/2 x 11

LC Copies 1

Restricted Product Checking

Don't Check

Moneris Receipt Print Options

Cash Drawer Options

Cash Drawer Port (None)

Printer ADOBE PDF

Open Codes

Baud/Parity/Data/Stop

RTS Enabled  DTR Enabled

Pole Display Options

Port (None)

DTR Enabled Baud/Parity/Data/Stop

RTS Enabled

Message Refresh

Additional Print Options

Save Cancel

- **Cash Customer** – This is set per user so multi-site companies working in the same database may default to their own location’s cash customer.
- **Default Invoice Type** – This indicates which Invoice Type defaults each time the Quick Ticket function is opened. This may be overridden as the tickets are processed.
- **Online Posting** – Selecting this option causes each transaction to create a separate Invoice at the time of the save regardless of the transaction type (cash, check, charge, etc.). Creating separate Invoices takes a bit longer but maintains accurate inventory throughout the day. Leaving this option unchecked causes the transactions to be held until they are posted. To post, go to *A/R / Manage Quick Ticket*, select the tickets to be posted, and choose **Post**.
- **Note:** Inventory is not updated until the transactions are posted to Invoices. If *Online Posting* is not enabled, inventory amounts on hand will not be kept current throughout the day.
- **Set Due Date to Next FM** – This works in conjunction with the *Calculate discounts/due dates by fiscal month* A/R preference and is only available when *Online Posting* is not utilized. If this option is selected, the A/R preference is used and a months ahead term is selected. The fiscal month is used as the basis for determining

the discount dates. If the Location Preference for the *Invoice Due Date* is set to *Terms* and a months ahead term is used, then the due date is also set based on the fiscal month of the Quick Ticket.

**Example:** A company has a retail store. The office closes at 5:00 on the last day of the month but the retail store remains open later. The fiscal month has not yet been closed but the business done after 5 p.m. should be included in the next fiscal month. With this option selected, the Quick Ticket transactions created at the store during those later hours are saved on the last day of the month but will really be posted in the following fiscal month (when the office is open the following business day). Therefore, the discount or due date on the Quick Tickets should not be one month ahead but should be two months out from the transaction date. This option could be selected when the office staff leaves at 5:00. It automatically gets deselected when the fiscal month is closed.

- **Use Customer Tax Information** – With this option selected, the tax rate on the Quick Ticket is based on the tax information on the Customer file instead of the Location.
- **Require Sales Person** – Before saving the Quick Ticket, a salesperson selection is required if this option is selected.
- **Require Signature for Company Credit** – When using the *40 Character Plain Text' Form* type and a signature pad is being used, this option requires the Customer to sign the signature pad when using the *Company Credit Pay Method*.
- **Use Discounts from Inventory Departments** – If discounts are set on the Inventory Department, this option allows those discounts to be used on the *Quick Ticket* screen. When selected, the columns in the *Product* grid are changed. *Original Price* and *Discount %* columns show in the *Product* grid which allows entering discounts for individual line items.
- **Product Selection** – This choice is the default when processing a Quick Ticket transaction. Choosing *Product Selection Window* causes the standard *Product Selection* window to display without double-clicking on the *<Product Name>* heading. Choosing *Bar Code* causes the cursor at the *Quick Ticket* screen to be ready to accept a bar code scan. *Prod ID / Alt ID / Name* causes the cursor to be in the input area ready for the selection of Product ID, Alternate ID, or Name, and the information to be entered.
- **Print Options** – This allows the selection of the printer and number of copies of the transaction, receipts, and load copies that will print. On the receipts, it also controls whether the location heading prints. Select the *Form Type* which includes *8 ½ x 11 Laser*, *8 ½ x 11 Laser 2*, *8 ½ x 5 ½ Laser*, *8 ½ x 5 ½ Dot Matrix*, *40 Character Dot Matrix*, *4.4" Star Thermal*, *40 Character Plain Text*, or *8 ½ x 5 ½ Generic*. For the Load Copy, select the *Printer, Form Type*, and enter the number of *Copies* to print.
- **Cash Drawer Options** – the Quick Ticket function can open a cash drawer connected to the computer via serial or parallel port. Indicate the *Cash Drawer Port* and the *Open Codes* for the cash drawer model being used. If *Com1 – Com4* is selected, the *Baud/Parity/Data/Stop* information must also be entered along with selecting if the *RTS* or *DTR* is enabled.
- **Note:** The cash drawer instruction manual normally contains information about the type of port and open

codes needed. If not, a hardware technician may need to be consulted.

- **Terms** – Terms are available for the 8 ½ x 5 ½ Laser Form Type. Verbiage may be entered to print on the Quick Ticket.
- **Age Restricted Product Attribute** – Some products are not to be sold to under-age customers. Setting an attribute on the product for the *Age Restriction* and then setting the required age in that attribute will require the Customer's date of birth to be entered at the save of any Quick Ticket where those products are used. If the customer is obviously old enough to buy the product, 99999999 can be entered to bypass entering the date of birth.
- **Restricted Product Checking** – Although the Quick Ticket function does not do the thorough permit checking like the standard *Invoicing* screen, a warning or stop the sale of restricted product may be used at this screen. If permit checking is preferred, set this to *Warn Only* or to *Disallow* (the sale). If no permit checking is necessary, choose *Don't Check*.
- **Moneris Receipt Print Options** – These options enable when the location is using the *Moneris Secure Pass Thru (POSPAD)* option for Moneris Bank Card Processing.
  - **Printer** – Select the printer for the Moneris payment receipts.
  - **# of Duplicates** – Enter the number of copies of receipts that should print for Moneris transactions.
  - **Printer Type** – Select the option for the Moneris payment receipt. Options are *Standard, 40 Character Dot Matrix*, or *40 Character Plain Text*.
- **Pole Display Options** – For cash registers with a pole display, the port and connection information may be completed along with the *Message* to display on the pole while the Quick Ticket is idle. The *Refresh* time should be entered in milliseconds.
- **Additional Print Options** - This area allows additional options for the Quick Ticket document.

Setup Quick Ticket Print Options

Print Second Signature Line     Print Product Lot Number

Print Quick Ticket Message

Print Message Above Signature Line

Print list price on any invoice line item where the price does not match the list price

Save    Cancel

- **Print Second Signature Line** – If two signature lines are needed on the Quick Ticket document, select this option.
- **Print Product Lot Number** – When this option is selected and the *8 1/2 x 11 Laser Form Type* is used, the product lot numbers print on the Quick Ticket document.
- **Print Quick Ticket Message** – This option allows an additional message to print on the Quick Ticket document.
- **Print Message Above Signature Line** – Optionally print another message located above the signature line.
- **Print list price on any invoice line item where the price does not match the list price** – With this option selected, when the Unit Price entered on the Quick Ticket is lower than the List Price of the product, both the Unit Price and List Price are shown on the Quick Ticket document.

## Setup

1. Setup preferences for Quick Tickets are found at *Accounting / A/R / Manage Quick Tickets*. From here, select **Options**.  
**Note:** Preferences must be set for each user accessing Quick Tickets.
2. Double-click in the *Cash Customer* field and select the default customer for Quick Ticket generic transactions.  
**Note:** A customer called *Cash Sales* may be added for this purpose.
3. Select the preferred *Default Invoice Type*. This defaults as the preferred *Pay Method* on the *Select Sales Type* window of the Quick Ticket.  
**Note:** The customer and the Pay Method may be edited when processing the Quick Ticket.

4. Choose the *Product Selection* method preferred when adding a ticket.

**Note:** This will prevent having to select a different Product Selection method each time a Quick Ticket is processed.

5. Select *Print Options*, *Cash Drawer Options*, and any other preferred setup options available.

6. Choose **Save**.