

Hold That Thought... CAM32's Ticket Functions Explained

Overview

Hold Ticket is a generic term for any kind of transaction that is not fully tendered, but saved in an "open" state. There are 5 types of tickets that fall under this umbrella. To process any of these types, you'll need to:

- Assign a printer to the "Hold Ticket" and "Pick Ticket" categories in **Define Workstations**
- Enable "Use Hold Ticket Facilities" option in **Define POS > Define Operator Stations**
- Assign a key to the "Edit Ticket" function, as well as for each particular ticket type (explained below), under **Define POS > Define Operator Stations > F3 Keyboard**

All types generate a Ticket Number and can be pulled up later by ticket number or customer record (if a customer was attached to the ticket initially).

Hold Ticket

While "Hold Ticket" is a generic term covering all types of tickets, one of the types is specifically referred to as a Hold Ticket. This is used any time you need to save a transaction without tendering any amount. The printed copy shows the item details as well as Ticket Total and Remaining Balance. For example, customer requests merchandise to be held until closing, customer left wallet in car, etc.

Hold Tickets can be associated with a specific customer, but it is not required. Assign the "**File Ticket**" key for this one, and use it after you are finished ringing the items at POS. Once you choose the File Ticket option, choose Hold Ticket to file it as a Hold Ticket and print a copy, or simply choose File Ticket again to file it as a Hold Ticket without printing a copy.

Pick Ticket

Similar to a Hold Ticket, however, the printed copy does not show item prices. For example, in a mail or phone order fulfillment environment, you may print a Pick Ticket for the warehouse staff to pull the order. Once the order is ready, it is placed with the Pick Ticket (which could also be used as the Packing Slip) and the ticket is accessed by the order fulfillment staff to tender the order out before shipping.

Once you choose the **File Ticket** option at POS after ringing the items, simply choose Pick Ticket to file it and print the copy.

Layaway

Used to place items on layaway for a specific customer. The printed copy shows item details as well as payments taken to-date (one combined total for previous payment amounts and "today's payment" shown separately). You can take an initial payment while creating the Layaway, but it is not required.

Assign the "**Layaway**" key for this one, and use it *before* you begin the transaction at POS. A customer selection is required, so if you haven't selected a customer prior to choosing the Layaway function, you will be prompted to select one at that time.

Backorder*

Used to process sales for items that are not currently in stock. Use the Qty Ordered field to indicate how many of this item are required, and the Qty Shipped field to indicate how many are currently available. Anytime Qty Shipped is less than Qty Ordered, the difference is saved on a Backorder ticket. At a minimum, you must tender payment for the Qty Shipped, but can leave the balance due for the backordered merchandise, payable when the merchandise arrives to your store (or is shipped to your customer).

There is no special key used at POS for Backorder Tickets, nor is a customer record required. Rather, anytime you change Qty Shipped to be less than the Qty Ordered during an invoice, a backorder ticket is created.

Special Order

This is the same idea as a backorder ticket, because it is meant for merchandise not currently in stock. However, a Special Order must be initiated prior to beginning the transaction at POS. In addition, a customer record is required (you will be prompted to select a customer upon choosing the Special Order function if you have not selected one already). After that, you still use the Qty Shipped field to indicate how many are being sold today, the difference being the quantity saved on Special Order.

The benefit of the Special Order is that you can use the Suggested Order module to generate PO's based on any outstanding Special Orders. You will also receive notification via the Requested Item Receipt Report whenever you receive merchandise into the system that is on an outstanding Special Order, whether the merchandise is received on a PO, or even through an Inventory Adjustment.

Assign the "**Special Order**" key for this one, and use it before beginning your transaction at POS.