

Ticket - Consolidating Tickets AV Ref # 570

There is also a video showing how to perform this function: Ticket - Consolidating Tickets (00:46) – AV Ref# 312

About:

You may occasionally have situations where one customer has multiple open workorders that people have been working on. Maybe one employee started a ticket and another employee was not aware and started a new ticket for the same customer. The easiest method for merging those tickets together is the Consolidate ticket function available on the Ticket screen.

How:

1. **Ticket Lookup** is the easiest method to find a ticket. Click on the Tickets icon on your tool bar:

BPOS Application File Views Appointments Tickets Inventory Customers Contacts Vehicles VSR Suppliers Links Set Store Help **T H** CLEAR 6 8 RESET 2 Q 8 <u>_</u> R R -Tickets Clear Appt etch# Last Recent Workorder Quote Inventory TireBrands RESET Customers History Contacts Vehicles History VSR

2. Find your customer's multiple tickets:

File Views Appointments Ticl	kets Inventory (Customers Co	intacts Vehicle	s VSR Suppliers L	inks Set Store Help									
Clear Appt Tickets Fetcher Lost	necent Workorder Q	b C Inventory	RESET Customers	🦾 🤶 🔊	es History VSR CARFAX ServiceCAT VSOC	C Inspection TPMS ATD TC								
LOGIN: AATECH					STORE NAME: HITS DEMO ST	TORE #2								
VIEW: SALES COUNTER			CU	STOMER: AAA SALE	S [70825] VEHICLE: 2012 HONDA #	ACCORD [TAG: AFT4777]	STORE: 6							
Ticket Scan														
Lookup														
● All ○ Ticket# ○ Custome	er# 🔿 Short Nan	e OVehicle	Tag 🔿 Order#											
Status () All Open () Clo	sed Select	Dates Custom	- F5	~ From 04/26	3/2016 🧐									
Type Al Workorder	⊖Quote ⊡Inci	ude 12/31/203	2	To 06/25	5/2016 🚳									
Exact Match ALL SALES	REPS	V Route#	Store# Store	2 V Max Resu	ts 500 ×									
Display View Retail Wh	tolesale													
Find Cl	ear Input Clear	All Recent 0	Open TireLink O	rders Help	Find Clear Input Clear All Recent Open TireLink Orders Help									
Ticket Scan, Maro, CD Data	Talet See, Nuclear Sec.													
incke scan More GP Data														
Hener cearr Mole of Data														
Ticket # T	A ×	SR#	Cust #	Short Name	Name	Tag#	Date	Yr-Make-Model						
Ticket # T -7542539 QUO	A ×	SR#	Cust # 176843	Short Name ADERHOLT	Name BETCY ADERHOLT	Tag# GJY-464	Date 04/26/2016	Yr-Make-Model 2010 KIA FORTE						
Ticket # T -7542539 QUO -7542518 QUO	A ×	SR# H B	Cust # 176843 212864	Short Name ADERHOLT HORTON	Name BETCY ADERHOLT CHARLES HORTON	Tag# GJY-464 YOUNIVDR	Date 04/26/2016 04/26/2016	Yr-Make-Model 2010 KJA FORTE 2008 MERCEDES-BENZ S550						
Ticket # T -7542539 QUO -7542518 QUO -7542500 QUO	A × 0 0 0	SR# H B B	Cust # 176843 212864 171811	Short Name ADERHOLT HORTON REGAN	Name BETCY ADERHOLT CHARLES HORTON JOHN REGAN	Tag# GJY-464 YOUNIVDR NWV-7332	Date 04/26/2016 04/26/2016 04/26/2016	Yr-Make-Model 2010 KJA FORTE 2008 MERCEDES-BENZ S550 2012 BUICK ENCLAVE						
Ticket # T -7542539 QUO -7542518 QUO -7542500 QUO -7542459 QUO	A × 0 0 0	SR# H B B I	Cust # 176843 212864 171811 195686	Short Name ADERHOLT HORTON REGAN PETERS	Name BETCY ADERHOLT CHARLES HORTON JOHN REGAN CORY PETERS	Tag# GJY-464 YOUNIVDR NWV-7332 ADT-1814	Date 04/26/2016 04/26/2016 04/26/2016 04/26/2016	Yr-Make-Model 2010 KIA FORTE 2008 MERCEDES-BENZ S550 2012 BUICK ENCLAVE 2006 HONDA ACCORD						
Ticket # T -7542539 QUO -7542518 QUO -7542509 QUO -7542459 QUO -7542459 QUO	A × 0 0 0 0 0	SR# H B B I H	Cust # 176843 212864 171811 195686 211887	Short Name ADERHOLT HORTON REGAN PETERS CAMPBELL	Name BETCY ADERHOLT CHARLES HORTON JOHN REGAN CORY PETERS JEFE CAMPBELL	Tag# GJY-464 Y OUNI VDR NW V-7332 ADT-1814 Y W P.7874	Date 04/26/2016 04/26/2016 04/26/2016 04/26/2016 04/26/2016	Yr-Make-Model 2010 KJA FORTE 2008 MERCEDES-BENZ S550 2012 BUICK ENCLAVE 2008 HONDA ACCORD 2009 ACINDA ACCORD						
Ticket # T -7542539 QUO -7542509 QUO -7542500 QUO -7542500 QUO -75424501 QUO 1680007 WO	A × 0 0 0 0 0 0	SR# H B B I H 2	Cust # 176843 212864 171811 195686 211887 70825	Short Name ADERHOLT HORTON REGAN PETERS CAMPRELL AAA	Name BETCY ADERHOLT CHARLES HORTON JOHN REGAN CORY PETERS JEEE CAMPBELI AAA SALES	Tag# GJY-464 YOUN VDR NW V-7332 ADT-1814 YWP-7874 AFT4777	Date 04/26/2016 04/26/2016 04/26/2016 04/26/2016 04/26/2016 04/26/2016	Yr-Make-Model 2010 KJA FORTE 2008 MERCEDES-BENZ 5550 2012 BUICK ENCLAVE 2008 HONDA ACCORD 2019 ACLIRA TSX 2012 HONDA ACCORD						
Ticket# T -7542539 QUO -7542518 QUO -7542500 QUO -7542459 QUO -7542451 QUO -7542451 QUO 16806007 WO 1680608 WO	A × 0 0 0 0 0 0 0 0 0 0 0	SR# H B B I H 2 2	Cust # 176843 212864 171811 195686 211887 70825 70825	Short Name ADERHOLT HORTON REGAN PETERS CAMPRELL AAA AAA	Name BETCY ADERHOLT CHARLES HORTON JOHN REGAN CORY PETERS JEEE CAMPBELI AAA SALES AAA SALES	Tag# GJY-464 YOUNVDR NWV-7332 ADT-1814 YWP-7874 AFT4777 AFT4777	Date 04/26/2016 04/26/2016 04/26/2016 04/26/2016 04/26/2016 04/26/2016	Yr-Make-Model 2010 KJA FORTE 2008 MERCEDES-BENZ 5550 2012 BUICK ENCLAVE 2008 HONDA ACCORD 2019 ANDRA ACCORD 2012 HONDA ACCORD 2012 HONDA ACCORD						
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3. Double-click on one of the tickets to bring it up on your screen. Click on the **Consolidate** button at the bottom of the screen:

Ticket Vie	w/Edit (168060)	7)														
Main Lin	e Items Appoint	ments Custome	er Info Vehicle Info	Comments Pa	yments											
Ticket #	1680607	Date	04/26/2016	Salesrep 2 -	O'LOUGHLIN	🤏 Tax Taxa	v ST #2 OPE	WORK OR	XER.							
Cust #	70825	Short Name	AAA	Pa	rking Space 🗸	Route#										
Namo																
Address	1642 STATERIAL	LC PD		-												
Autress	CODIFILIE	LLC NO	CI NO. 70 2003													
City	CORNELIUS		SINC ZIP 2007													
Tag# AFT	T4777	Year 2012	Make HONDA		Model ACCORD		Mileage	43000 🕥								
Item Sur	mmary (Select L	ine Items Tab	To Edit)													
Ref	# Proc	suct #		Description		City	Unit	Unit	Amount	MC	DEPT	PC	TC	Salesrep	ST	
100	0 07671	P10	5/65R15 BWBEG-A	DVANTAGE TA		4.0	86 9500	TET	347.80	.2	3	1	1	SCOTT		~
100	2 TP2	TR	E PROTECTION PL	AN		1.0	00.0000			-2	Ť		0	SCOTT		
100-	4 2NCSCRA	P 2%	N.C. DISPOSAL TA	X		4.0	1.7400		6.96	-2	1 I	1	0	SCOTT		
100	6 DIS	SC	RAP TIRE RECYCLI	E FEE		4.0	2.5000		10.00	-2	D	1	0	SCOTT		
100	8 99DM	DIS	MOUNT & MOUNT			4.0	9.5000		38.00	-2	т	1	0	SCOTT		
101	0 99B	UF	ETIME COMPUTER	BALANCE TIRE	S	4.0	9.5000		38.00	-2	т	1	1	SCOTT		
101:	2 VALVE7	RUI	3BER VALVE STEM			4.0			No Charge	-2	0	N	0	SCOTT		
101-	4 99R	UF	ETIME ROTATION			4.0			No Charge	-2	т	N	1	SCOTT		
101	6 *	EVI	ERY 5000 MILES			1.0				-2			0	SCOTT		
101	8 99RH	TIR	E PROTECTION W/	ARRANTY		4.0	8.6950		34.78	-2	R	1	1	SCOTT		
102	0	'FR	EE" TIRE REPAIRS	S FOR UFE OF	TIRE.	1.0				-2			0	SCOTT		
102	2	IF 1	TRE IS NOT REPAR	BABLE IT WILL	BE	1.0				-2			0	SCOTT		
102-	4 .	REI	PLACED 1ST 2/32N	DS AT NO CHA	RGE. THEN	1.0				-2			0	SCOTT		
102	6 .	PR	0-RATED FOR REM	AINDER OF TR	EADLIFE.	1.0				-2			0	SCOTT		
102	8 99CA	ALI	GNMENT CHECK			1.0			No Charge	-2		N	0	SCOTT		
																~
			M	erchandise	Service		Fet	Subtotal	Sales	Тах	Total					
				347.8	0 1	27.74	0.00		175.54	30.49		506.03				
					Discard	d Main Changes	Clear Vehicle	Write-In Vehic	le Add Contacts							
-																
	Ful View GARFAXTools ServiceCAT RVSOC ServiceCAT RVSOC ServiceCAT RVSOC Customer History Cust Value Index Vehicle History VSR's Override Credit Hold Adjust Total															
			Conte	cte Detrech (Consolidate Print Wo	korder Drint I	expection Print	dulti Drint & C	Ince Close Sa		Zeturn Deturn	Hab				
			Gorna	cia ricifean e	The wo	Pillin	rapication Plant	in the c		in care a r	Return					

4. A pop up box will list all available tickets for this customer. You can right-click on each ticket to see the detail and to verify you do want to consolidate that particular ticket to your current one:

🔀 Consolidate Tickets X									
Ticket #	Туре	Has Appt?	Date	Total					
1680608	Invoice	No		410.06	^				
1680605	Invoice	No	Show Ticket Detail	104.11					
					Y				
Right click to see ticket items									
	Consolidate Cancel Suggest Help								

5. When you are ready to consolidate the ticket(s), you can select each ticket individual or highlight them all and then click on the **Consolidate** button. Now, all of your multiples have been combined into one ticket.

**NOTE - Users must have password permission to both create and close invoices (P16, P21). If you need to give a user password permission to perform this function, please contact your system administrator.