

Ticket – Editing Customer On Tickets AV Ref #634

About:

You may find that you need to edit the customer on a ticket. It might be that a ticket was duplicated or the wrong customer was added to a ticket. If you have password permission, you can change the customer on a ticket easily.

How:

1. Find the ticket in question by clicking on the **Ticket** lookup icon on your toolbar:

BPOS Application																	
Fil	e Vi	ews	Appoir	tments	Tio	kets	Inventory	Custo	omers	Contacts	Vehicles	VSR	Suppliers	s Links	Set St	ore H	lelp
C	lear	Appt	Tickets	[# Fetch#	↓ Last	Tecent	Workorder	Cuote	© Inventor	y TireBrand	s RESET	Custome	s History	Contacts	ং Vehicles	ංකී History	VSR

2. Find the ticket in question and double-click on it to make it your active ticket:

Ticket Scan							
ookup:							
● All ○ Ticket# ○ Customer# ④	© Customer# ◎ Short Name ◎ Vehicle Tag ◎ Order#						
Status Call Open Closed	Selec	t Dates Toda	у	✓ From	10/05/2016 💿		
Type 💿 All 🔘 Workorder 🔘 Qu	ote 🔲 In	clude 12/31/2	2032	То	10/05/2016 🔊		
Exact Match ALL SALESREPS		 Route 	# Store	# Store 1 🔹	Max Results 500 -		
Display View							
Find Clear In	put	ar All Recent	Open Tire	Link Orders Help	•		
Ticket Scan More GP Data							
Ticket # T	Α	*	SR#	Cust #	Short Name	Name	Tag#
1680668 W O		0		10001	ACCOUNT	CASH ACCOUNT-WF	
1680669 W O		0		53031	MAADIR	NOUREDDINE MAADIR	MAADIRI
1680670 WO		0	1	127244	AA	AA PIERCE ELECTRIC	BK-1038

- 3. On the **Ticket View/Edit** screen (shown below), to change the customer, click on on the binoculars beside the **Customer #** field.
- 4. Perform a customer lookup to find your customer just as you normally would and double-click to add them to your ticket. Or, if your search doesn't find the customer in question, you can click on the Add Cash Customer button to add them to your system:

File Views Appointments Tickets Inventory Cus	tomers Contacts Vehicles VSR Suppliers Links Set Store Help							
Clear Appt Tickets Fetch# Last Recent Workorder Quote	Inventory TireFrands RESET Customers History Contacts Vehicles History VSR CARFAX ServiceCAT VSOC Inspection TFMS ATD							
LOGIN: AATECH VIEW: SALES COUNTER	STORE NAME: HITS DEMO STORE #1 CUSTOMER: CASH ACCOUNT-WF [10001] VEHICLE: STORE: 1							
Ticket View/Edit (168 43) Main Line Items At 43 Customer Info Vehicle Info Payments								
Ticket # 1680668 Date	10/05/2016 Salesrep ST#1 OPEN WORK ORDER							
Name CASH ACCOUNT-WF	Short Name ACCOUNTEWF Full Name -#4							
Address THANKS FOR YOUR BUSINESS City CHARLOTTE St	Short Name ○ Full Name ○ Customer # ○ Phone# ○ Last 4 Phone# ○ Email ○							
Tag# S Year Mak	✓ All Stores Show Inactive Max Customers: 50 ▼							
Item Summary {Select Line Items Tab To Edit	Find Clear Recent (max 20) Cash Acct Temporary Customer Edit Customer Add Cash Customer Help							
Ref# Product # Desc	ST# CUST# Short Name Name Address City							

5. From there, you will proceed as you normally would by putting the vehicle on the ticket and adding your line items.

Option Settings:

**NOTE - Users must have password permission to invoice, add cash customers and close invoices (P16, P21, P25). Users must also have password permission to change a customer on a workorder (P77). If you need to give a user password permission to perform this function, please contact your system administrator.