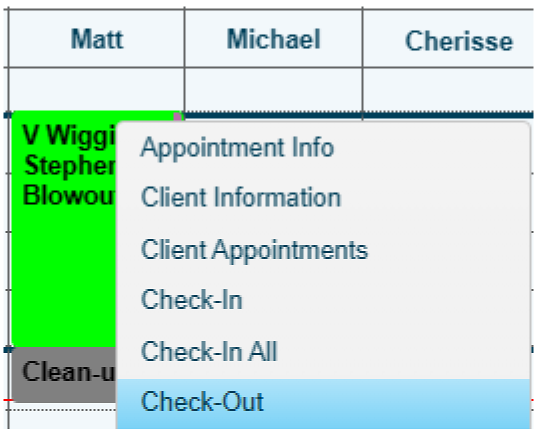
Service Sale

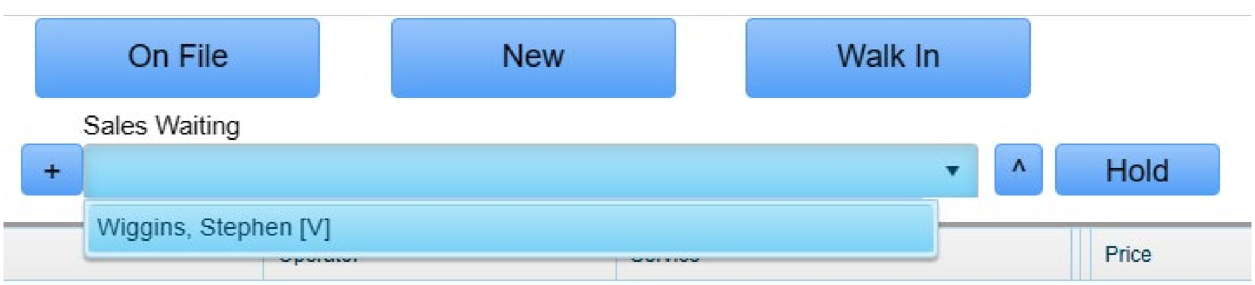
Creating a ticket from an existing appointment

1. There are two ways to initiate the sale of an existing appointment. The first is by right clicking an existing appointment and selecting 'Checkout.'

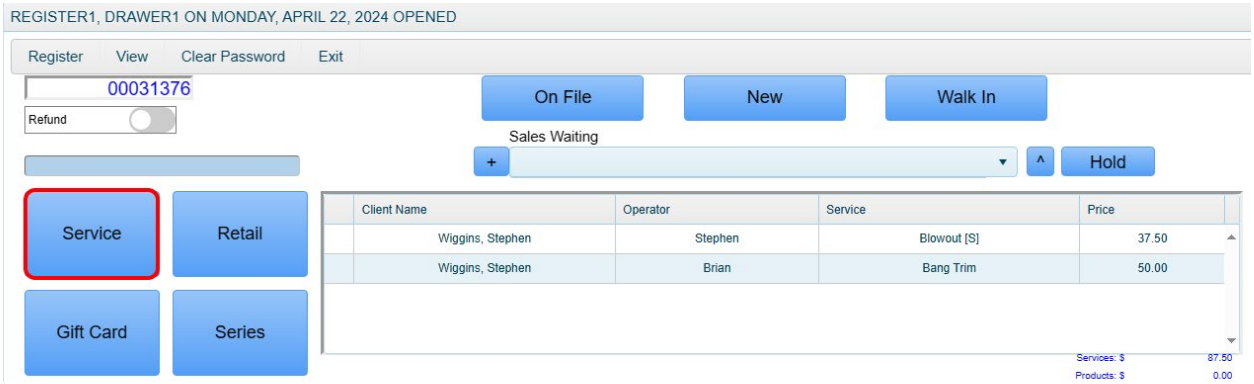


2. The second way is to first click the Sales button from the main screen.

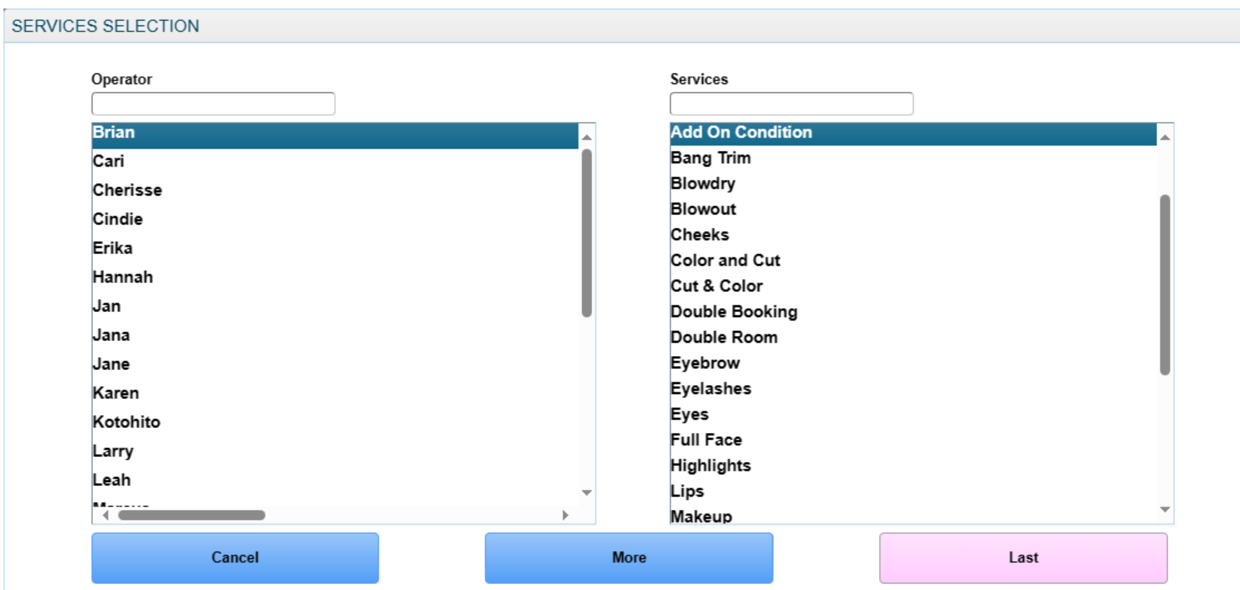
3. Once in the sales screen, click the 'Sales Waiting' drop down to select the customer you wish to checkout.



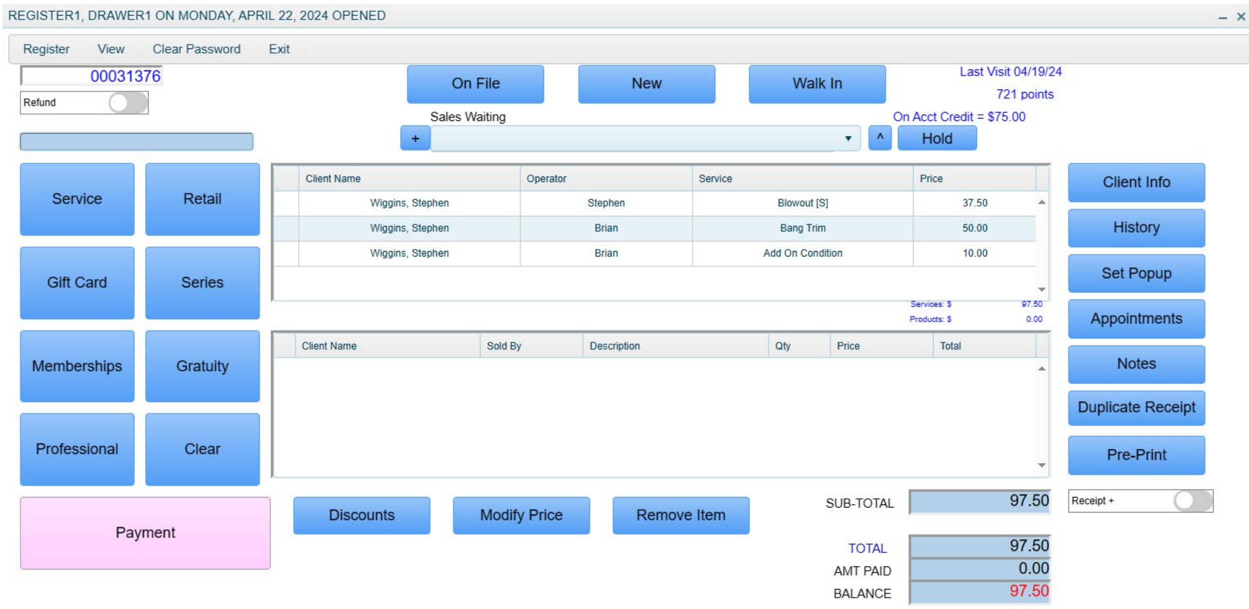
4. If this client had an add on service that was not on the appointment book, you can add it now by clicking the ‘Service’ button. Otherwise, skip to step 6.



5. Select the Operator that performed the add on service, then select the service itself from the list on the right followed by clicking the ‘Last’ button.

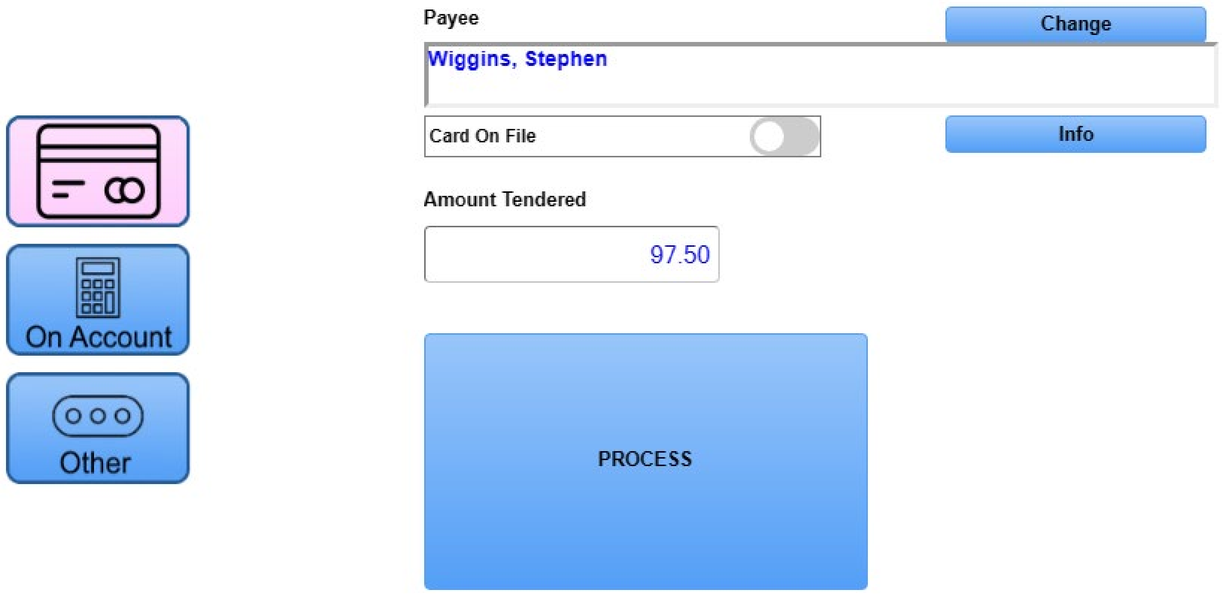


6. Click the Payment button



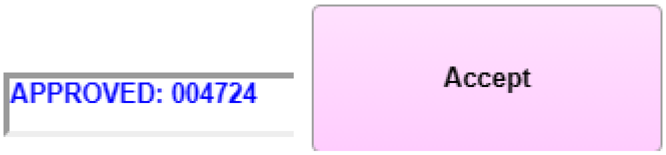
7. Select a payment type. In this example we will choose Credit Card.

8. If this customer wishes to charge a card they already have on file with you, select ‘Card on File’ before clicking the ‘Process’ button, otherwise just click ‘Process.’

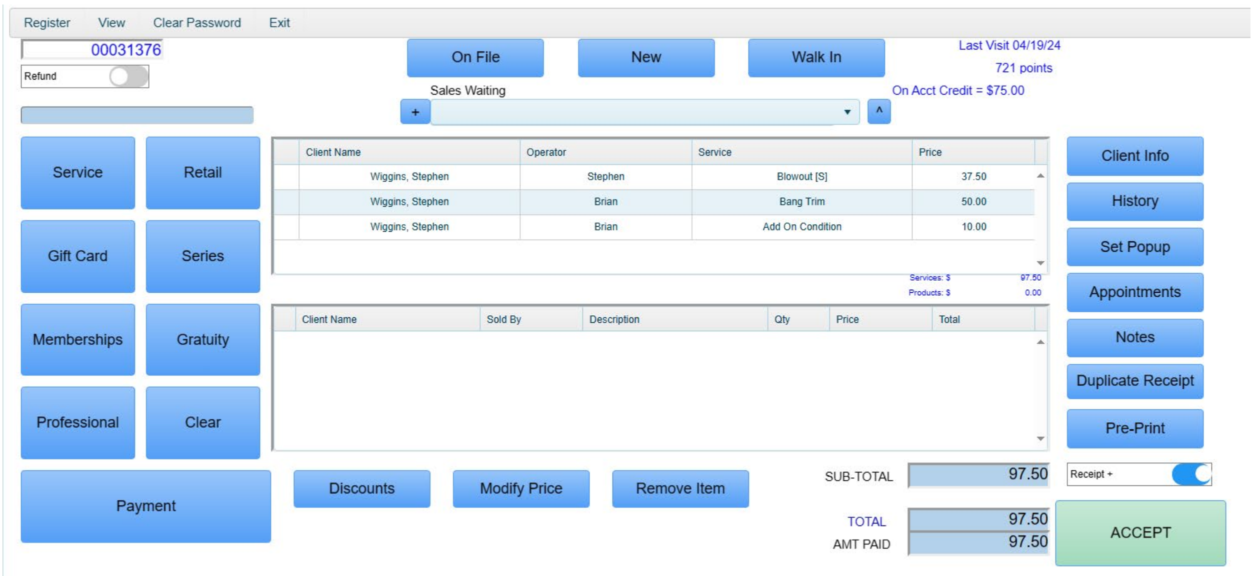


9. Follow the prompts on your credit card device to charge the card.

10. Once you receive the on-screen approval code, click the Accept button.



11. Lastly, click the ‘Accept’ button to finalize the transaction.



12. Note* If the customer will be paying by multiple payment types, you will be brought back to the payment type window after applying each method of payment until the full balance owed is paid at which time you will be taken back to the final sales window where you can then click the ‘Accept’ button.