

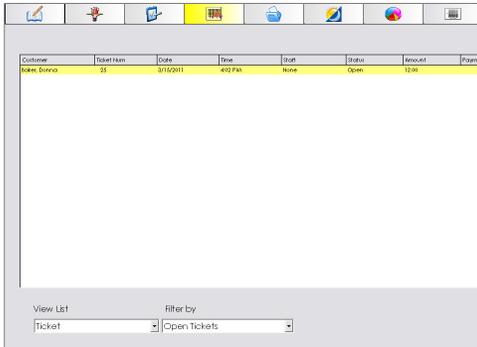
# operations check up

Follow these steps to ensure you are performing at an optimal level.

## Closing Open Tickets

*Making sure that the only tickets open are for the current day is crucial to accurate reporting. Open tickets can have products and services on them and must be processed each day before closing.*

1. From the Ticket icon.
2. In the View List menu, choose Tickets (this is the default view).
3. Filter by, Open Tickets.
4. Make sure the only tickets open are for the current day
5. Open each past day ticket to process or void.



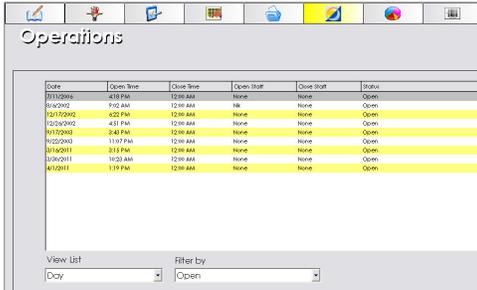
Customer	Ticket Num	Date	Time	Chart	Status	Amount	Payment
Jules, Donna	31	3/16/2011	4:52 PM	None	Open	12.00	

View List: Ticket | Filter by: Open Tickets

## Closing Open Shifts/Days

*Making sure days and shifts are properly closed is one of the biggest mistakes we see. It's important to monitor this for accurate reporting.*

1. From the Operations icon.
2. View List field, choose Day.
3. Filter by, Open.
4. Make sure the only Day that is open is for the current day.
5. View each past day and reconcile and close any open shifts if necessary and close the day.



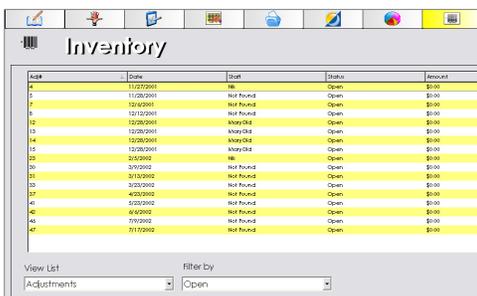
Date	Open Time	Close Time	Open Chart	Close Chart	Status
3/16/2011	4:18 PM	12:00 AM	None	None	Open
3/16/2011	9:16 AM	12:00 AM	None	None	Open
3/17/2011	6:52 PM	12:00 AM	None	None	Open
3/23/2011	4:31 PM	12:00 AM	None	None	Open
3/16/2011	2:48 PM	12:00 AM	None	None	Open
3/22/2011	11:07 PM	12:00 AM	None	None	Open
3/16/2011	3:15 PM	12:00 AM	None	None	Open
3/16/2011	1:23 AM	12:00 AM	None	None	Open
3/16/2011	1:10 PM	12:00 AM	None	None	Open

View List: Day | Filter by: Open

## Closing Open Inventory Adjustments

*Open inventory adjustments can skew your on-hand quantities resulting in incorrect purchase orders. It's important to process adjustments every day. Any open adjustments from previous days should be processed or voided.*

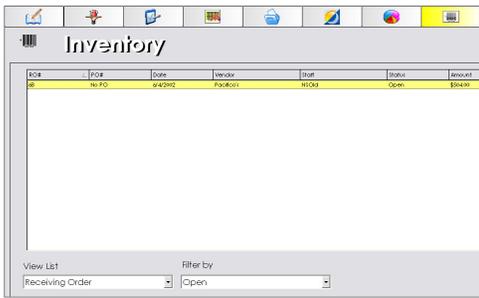
1. From the Inventory icon.
2. In the View List drop down menu, choose Adjustments.
3. Filter by, Open.
4. Verify that there are no open adjustments on the list displayed. If there are open adjustments, double click on the open adjustment and click the Void button.



Adj#	Date	Chart	Status	Amount
1	11/27/2010	None	Open	\$0.00
2	11/28/2010	Not Found	Open	\$0.00
3	12/14/2010	Not Found	Open	\$0.00
4	12/12/2010	Not Found	Open	\$0.00
5	12/28/2010	Not Found	Open	\$0.00
6	12/28/2010	Not Found	Open	\$0.00
7	12/28/2010	Not Found	Open	\$0.00
8	12/28/2010	Not Found	Open	\$0.00
9	12/28/2010	Not Found	Open	\$0.00
10	12/28/2010	Not Found	Open	\$0.00
11	12/28/2010	Not Found	Open	\$0.00
12	12/28/2010	Not Found	Open	\$0.00
13	12/28/2010	Not Found	Open	\$0.00
14	12/28/2010	Not Found	Open	\$0.00
15	12/28/2010	Not Found	Open	\$0.00
16	12/28/2010	Not Found	Open	\$0.00
17	12/28/2010	Not Found	Open	\$0.00
18	12/28/2010	Not Found	Open	\$0.00
19	12/28/2010	Not Found	Open	\$0.00
20	12/28/2010	Not Found	Open	\$0.00
21	12/28/2010	Not Found	Open	\$0.00
22	12/28/2010	Not Found	Open	\$0.00
23	12/28/2010	Not Found	Open	\$0.00
24	12/28/2010	Not Found	Open	\$0.00
25	12/28/2010	Not Found	Open	\$0.00
26	12/28/2010	Not Found	Open	\$0.00
27	12/28/2010	Not Found	Open	\$0.00
28	12/28/2010	Not Found	Open	\$0.00
29	12/28/2010	Not Found	Open	\$0.00
30	12/28/2010	Not Found	Open	\$0.00
31	12/28/2010	Not Found	Open	\$0.00
32	12/28/2010	Not Found	Open	\$0.00
33	12/28/2010	Not Found	Open	\$0.00
34	12/28/2010	Not Found	Open	\$0.00
35	12/28/2010	Not Found	Open	\$0.00
36	12/28/2010	Not Found	Open	\$0.00
37	12/28/2010	Not Found	Open	\$0.00
38	12/28/2010	Not Found	Open	\$0.00
39	12/28/2010	Not Found	Open	\$0.00
40	12/28/2010	Not Found	Open	\$0.00
41	12/28/2010	Not Found	Open	\$0.00
42	12/28/2010	Not Found	Open	\$0.00
43	12/28/2010	Not Found	Open	\$0.00
44	12/28/2010	Not Found	Open	\$0.00
45	12/28/2010	Not Found	Open	\$0.00
46	12/28/2010	Not Found	Open	\$0.00
47	12/28/2010	Not Found	Open	\$0.00

View List: Adjustments | Filter by: Open

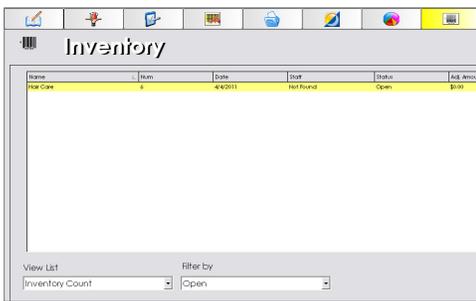




### Closing Open Purchase or Receiving Orders

*Open inventory orders can skew your on-hand quantities. It is important to process purchase orders when they are complete and receiving orders should be processed the same day the items are received.*

1. From the Inventory icon.
2. In the View List drop down menu, choose either Purchase Orders or Receiving Orders.
3. Filter by, Open.
4. Verify that the orders displayed are current. If there are old orders in the list, double click on them to open and click process or void them.



### Closing Open Inventory Counts

*Open inventory counts skew your on-hand quantities. It is important to process counts as soon as possible to ensure accurate levels.*

1. From the Inventory icon.
2. In the View List drop down menu, choose Inventory Count.
3. Filter by, Open.
4. Verify that the counts displayed are current and active. If there are old counts in the list, double click on them to open and void them.

