1. Select green icon for Total Customer Value.
   - $ - Total Spend
   - Wrench – Total Parts Value
   - Gears – Total Service Value
2. Select dropdown to change Sale Type.
3. Select **Counterperson** to change Counterperson.
4. Select envelope to view messages. Envelope is yellow when messages are available.
5. Select exclamation icon to view Tech Alerts. Icon is gray if no Tech Alerts are present.
6. **Actions** dropdown lists primary actions for Counter Sale. These include:

   - Approve Parts
   - Manage Special Orders
   - Move Parts to RO
   - Place on Hold
   - Retrieve Holds/Quotes
   - Retrieve Closed Invoice/RO
   - Search Part
   - Search Kit
   - View Appointments
   - View Sales

7. **Print** dropdown lists items to print for Counter Sale. These include:
   - Cashier/Close
   - Picking Ticket
   - RO Picking Ticket
   - Print Quote
   - Shipping Label

8. Customer Information: Select the customer's name to view customer's information, select a new customer, update customer information, change pricing level, or add/modify customer shipping addresses. Select **Phone** to view, add, or modify the customer's phone number. You can also select which phone number will appear. If an A/R Customer is selected, the **A/R #** and **A/R Terms** display below the customer name.

9. **Invoice #** displays any invoice tied to the counter sale.

10. **PO #** allows you to attach a Purchase Order Number to the counter sale.

11. **Price Level** shows customer's current price level. Select it to change the price level for the current counter sale.
12. **Sale Type** displays the type of sale, determined by the type of customer selected.
13. Select the **Part Number** to view the part number entry record. You can modify the record as needed using Functions. A red exclamation point indicates a remark on the part. On RO tickets, the Labor Op will display and you can select it for more detail.
14. Select the **Bin/Shelf** number listed to modify the bin or shelf for the part.
15. Select the **List** price to view Cost, Trade, and List.
16. Select the pencil icon in the **Action** column to add comments to the part. Select the clock icon to view part history.
17. Select **Function** to view functions available for the entire ticket. Select the manufacturer code to switch to another manufacturer.
18. Select **Freight** to enter shipping information.
19. Select **Fees/Discounts** to apply a fee or discount to the ticket.
20. Select **Taxes** to switch the transaction to tax exempt.

21. Select **Deposit** to override special order deposits.
22. Select **Total** to view gross profit for the transaction.
23. Select the **Shipping** button to view the customer's shipping addresses. You can add addresses here as well.
24. Select **Save** to save the ticket as a quote. On RO tickets, saving approves parts.
25. Select **Exit** to exit and delete the transaction.
26. Select **Cancel** to return to the Parts Application menu. You will be prompted to choose **OK** to delete or **Cancel** to return to the ticket.
27. **Accept Catalog** updates parts from the parts catalog.