

Notes on Counter Tickets (Parts Sales Orders)

1. When part is in stock and customer is cash or a charge

Make a counter ticket using customers name (never ever "Cash") get address and phone number, email if they have one.

Charge out the parts on counter ticket, verify they are on the shelf, bring parts to counter.

Post counter ticket and hand counter ticket to cashier, send customer to cashier for payment.

Cashier should make new cash drawer receipt, verify totals and process cash receipt.

Stamp customers copy of counter ticket "Paid" and send customer back to parts counter.

Verify "Paid", in the event it's a charge have driver sign your copy of counter ticket in case you need to prove he picked it up later, hand out parts.

2. When part is not in stock and customer is cash.

Look up part in catalog, give price to customer, explained parts MUST be prepaid

Make a counter ticket using customers name (never "Cash").

Charge out the parts, order missing parts from the counter ticket and print SOR slip (2 will print). (in the event you do not have customer pre pay – make a clear note on counter ticket "NOT PAID" and on SOR slip)

Post counter ticket and hand counter ticket to cashier, send customer to cashier for payment.

Cashier should make new cash drawer receipt, verify totals and process cash receipt.

Stamp customers copy of counter ticket "Paid" and attach SOR slip to customers copy.

Place SOR slip in SOR file under customers last name, when parts arrive pull SOR slip from box (customer last name will be printed on shipper and parts tag – you can't go wrong), call customer!! Write a note on SOR slip that you called and re-file SOR. Place part in SOR pick up location. If you call a few times and they don't come in, photo copy the SOR slip, fold it just right to place in window envelope and mail them a copy (nice to have the address now!).

When customer arrives pull SOR slip from box, verified paid by looking at customer card if customer does not have stamped paid receipt. Hand out part and say "thanks".

If you have some parts in stock and some not in stock and customer has paid, give them the parts you do have in stock and have them sign your copy of the counter ticket.

3. When part is not in stock and customer / company is a charge.

Look up part in catalog, give price to customer.

Make a counter ticket using customers / company name. Get a PO number from customer.

Charge out the parts, order missing parts from the counter ticket and print SOR slip (2 will print).

Release counter ticket (not post).

Give SOR slip to customer if they are there in person.

Place SOR slip in SOR file under company last name, when parts arrive pull SOR slip from box (company last name will be printed on shipper and parts tag – you can't go wrong), call customer!! Write note on SOR slip that you called and re-file SOR. Place part in SOR pick up location.

When customer arrives (or your drop off) pull SOR slip from box, Post the counter ticket now, have them sign your copy of the counter ticket., you will have to change dates on the header of counter ticket to current date. This will set up a receivable for your office AR person to handle.

If you have some parts in stock and the customer wants those and the others ordered – it's best to make two counter tickets, post the one you hand the parts out on and release the other till parts arrive. For advanced users you can also post just the shipped items. Please call MPK support for training if this is not something you are not familiar with.

When payment arrives, cashier should make new cash drawer receipt, verify totals and process cash receipt.