

Vision POS - Creating a Quote

Purpose and Overview

Write up a price quote for a walk-in customer. No invoice is generated, only a quote is provided to the customer.

Steps

Step	Application	Action
1	GK OMNI	Click on 'Customer / Vehicle'
2	Customer / Vehicle	Input the customer phone number
3	Customer / Vehicle	Click the 'SEARCH BY CUSTOMER' button
4	Customer / Vehicle	Select the customer record
5	Customer / Vehicle	Click the 'SELECT CUSTOMER' button
6	Customer / Vehicle	Select the customer vehicle from the 'Vehicles' area
7	Customer / Vehicle	Click 'APPLY CUSTOMER/VEHICLE'
8	Product Browse	Click 'Product Browse'
9	Product Browse	Select product(s) and/or service(s) by click 'ADD TO CART'
10	Product Browse	Verify the cart with the customer by clicking 'VIEW CART'
11	Product Browse	Click 'PROCEED TO CHECKOUT'
12	GK OMNI	Click 'Create / Update Quote'
13	GK OMNI	Select quote delivery by clicking 'PRINT' or 'EMAIL & PRINT'

Contact

If you have any questions, please contact VisionStoreExperienceTeam@discounttire.com.