Vision POS - Scheduling a Tire Rotation & Balance for a New Customer

Purpose and Overview

How to write up a Rotation & Balance for a new customer with an appointment for a later date/time.

Steps

Step	Application	Action
1	Customer / Vehicle	Search by a customer attribute
2	Customer / Vehicle	Verify that there is no existing customer record
3	Customer / Vehicle	Click 'Create New Customer'
4	Customer / Vehicle	Enter all required fields
5	Customer / Vehicle	Enter any other attributes for the customer
6	Customer / Vehicle	Click 'Create Customer'
7	Customer / Vehicle	Confirm Address Verification
8	Customer / Vehicle	Click 'Add New Vehicle'
9	Customer / Vehicle	Search for a vehicle or add a new vehicle
10	Customer / Vehicle	Click 'Add Vehicle to Customer'
11	Customer / Vehicle	Fill out additional vehicle information
12	Customer / Vehicle	Select 'Apply Customer / Vehicle'
13	GK OMNI	Click 'Product Browse'
14	Product Browse	Select Tire Rotation Quick Link
15	Product Browse	Click 'Proceed to Checkout'
16	Product Browse	Click 'Checkout'
17	GK OMNI	Click 'Service Later'
18	GK OMNI	Select 'Yes' to Add / Modify Appointment
19	Appointments	Select Appt Date / Time
20	Appointments	Click 'Confirm'

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Step	Application	Action
21	Appointments	Click 'OK' to confirm
22	GK OMNI	Select the type of receipt

Contact

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