

Vision POS – Service Later

Purpose and Overview

Write up an invoice for a later service. These steps are written generically for either products or services.

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 'Checkout'
13	GK OMNI	Click 'Service Later'
14	GK OMNI	Click 'NO' if product needs to be auto-sourced (not delivered yet)
15	GK OMNI	Click 'YES' to add an Appointment
16	Appointments	Select a Time and Date for the customer's appointment
17	Appointments	Click 'Confirm'
18	GK OMNI	Select receipt delivery method

Contact

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