Vision POS - Unplanned Fleet

Purpose and Overview

Write up a walk-in Fleet customer for a tire purchase. Then the vehicle is clicked in and out of the Service Area.

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	Click 'TIRES'
10	Product Browse	Confirm the quantity
11	Product Browse	Click 'ADD TO CART'
12	Product Browse	Click 'VIEW CART'
13	Product Browse	Click 'PROCEED TO CHECKOUT'
14	GK OMNI	Click 'CHECKOUT' which will bring up the AR Charge Requirements screen
15	GK OMNI	Display AR Charge Requirements Screen
16	GK OMNI	Fill in the Fleet Customer data
17	GK OMNI	Click 'OK'
18	GK OMNI	Click 'Checkout'
19	GK OMNI	Click 'Service Now'
20	GK OMNI	Select 'Waiting' or 'Drop-off'

Step	Application	Action
21	GK OMNI	Confirm the Estimated Completion Time (Promise Time) with customer
22	GK OMNI	Click 'YES'
23	GK OMNI	Select 'AR Charge' which will bring up the AR Charge Requirements screen
24	GK OMNI	Display AR Payment Screen
25	GK OMNI	Click 'Enter'
26	GK OMNI	Select Receipt Method
27	GK OMNI	Click 'PRINT'
28	GK OMNI	Click 'OK'
29	CSL	Click 'CSL'
30	CSL	Verify that the customer ticket automatically moved to the Service Queue
31	CSL	Click 'PULL LIST' in top banner
32	CSL	Click the checkbox to filter by 'Service Queue'
33	CSL	Highlight the desired customer ticket
34	CSL	Click the 'PULL' button
35	CSL	Click 'CUSTOMER SERVICE LIST' in top banner
36	CSL	Click the 'ADD to BAY' button on the customers ticket in the Service Queue
37	CSL	Assign a Bay Number
38	CSL	Click the red 'ADD TO BAY' button to move the ticket to the In Bay queue
39	CSL	Click the blue 'Work Order' link of the customer ticket
40	CSL	Click the checkbox for 'PRE-BENEDICTION COMPLETED'
41	CSL	Click the 'SAVE EDITS' button
42	CSL	Type "Service Coordinator" in the 'Service Coordinator / Sign-Off' field
43	CSL	Click the red 'Bay Out' button

Contact

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