

Vision POS - Unplanned Purchase

Purpose and Overview

Write up a walk-in customer for a tire/wheel 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	Select Driver Type
11	Product Browse	Click 'SHOW TREADWELL RESULTS'
12	Product Browse	Select the desired tire model
13	Product Browse	Confirm the quantity
14	Product Browse	Click 'ADD TO CART'
15	Product Browse	Click 'VIEW CART'
16	Product Browse	Click 'PROCEED TO CHECKOUT'
17	GK OMNI	Click 'Checkout'
18	GK OMNI	Click 'Service Now'
19	GK OMNI	Select 'Waiting' or 'Drop-off'
20	GK OMNI	Confirm the Estimated Completion Time (Promise Time) with customer
21	GK OMNI	Click 'YES'

Step	Application	Action
22	GK OMNI	Click 'Credit Card'
23	GK OMNI	Dip/Tap/Swipe the credit card
24	GK OMNI	Click 'OK'
25	GK OMNI	Select the desired Receipt Method
26	CSL	Click 'CSL'
27	CSL	Click 'PULL LIST' in top banner
28	CSL	Click the checkbox to filter by 'Service Queue'
29	CSL	Highlight the desired customer ticket
30	CSL	Click the 'PULL' button
31	CSL	Click 'CUSTOMER SERVICE LIST' in top banner
32	CSL	Click the 'ADD to BAY' button on the customers ticket in the Service Queue
33	CSL	Assign a Bay Number
34	CSL	Click the red 'ADD TO BAY' button to move the ticket to the In Bay queue
35	CSL	Click the blue 'Work Order' link of the customer ticket
36	CSL	Click the checkbox for 'PRE-BENEDICTION COMPLETED'
37	CSL	Click the 'SAVE EDITS' button
38	CSL	Type "Service Coordinator" in the 'Service Coordinator / Sign-Off' field
39	CSL	Click the red 'Bay Out' button

Contact

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