

Vision POS - Unplanned Service

Purpose and Overview

Write up a walk-in customer for a free service. 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	Select the 'TIRE ROTATION AND BALANCE' quick link
10	Product Browse	Click 'PROCEED TO CHECKOUT'
11	Product Browse	Click 'Checkout'
12	GK OMNI	Click 'Service Now'
13	GK OMNI	Select Waiting or Drop-off
14	GK OMNI	Confirm the Promise Time with the customer
15	GK OMNI	Click 'CONTINUE'
16	GK OMNI	Confirm a \$0.00 Balance
17	GK OMNI	Click 'OK'
18	CSL	Click 'CSL'
19	CSL	Verify that the customer ticket automatically moved to the Service Queue
20	CSL	Click the 'ADD to BAY' button on the customers ticket in the Service Queue
21	CSL	Assign a Bay Number

Step	Application	Action
22	CSL	Click the red 'ADD TO BAY' button to move the ticket to the In Bay queue
23	CSL	Click the blue 'Work Order' link of the customer ticket
24	CSL	Click the checkbox for 'PRE-BENEDICTION COMPLETED'
25	CSL	Click the 'SAVE EDITS' button
26	CSL	Type "Service Coordinator" in the 'Service Coordinator / Sign-Off' field
27	CSL	Click the red 'Bay Out' button

Contact

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