

POS - Appointments

Introduction

Your store will receive an update for the POS. Please review these changes with your team.

Important: Keep your workstations powered on so they can receive the update.

- **Real Time Appointment Quick View** – The Quick View icon now shows a real time view of Available Appointments.
- **More access points** – Now you can access the Appointment list from the Layaways, Quotes, Web Orders, and BOPIS tabs in the POS.
- **New appointment screens** – The appointment screens have a new look/feel. Okta provides an automatic, secure login.
- **Front Room appointments / Back Room appointments**
 - Whenever a customer creates an appointment on the website, both a Front Room appointment and a Back Room appointment is created.
 - Your team can only create Back Room appointments.
- **Appointment list** – You can now print the entire appointment list.

Appointment times explained

The customer receives an appointment time 15 minutes earlier than the service area appointment time displayed to your store.

You are expected to use these 15 minutes to greet and build a relationship with the customer, discuss their immediate need and purpose for coming into the store, conduct VTV, and identify any additional true needs.

Configuring store appointments

Managers/AVPs –

Please refer to [Configuring Store Appointments QRG](#) for details on how to adjust/update your time slots.

Login Workaround

If you are not logged into the Appointments screens automatically, make sure all fields are clear and select the **Log in with Okta** button.

Confirming inventory for appointments

The day before appointment:

- In the afternoon, print the Appointment List for the next day.
- On the **Appointment List** screen, open each appointment individually and confirm the inventory needed for each appointment. Call the customer if inventory will not be available for the appointment.

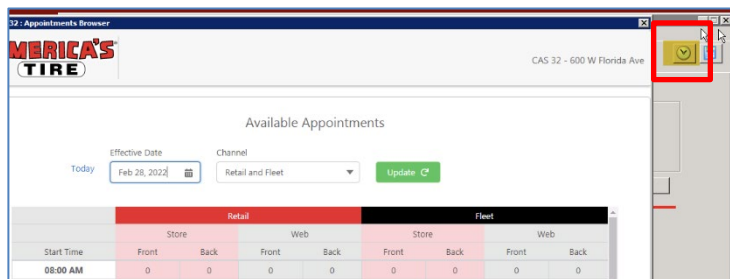
The day of service:

- Early on the morning of the appointment, look at the **Pull List** on the CSL to reconfirm all inventory needed for the day's appointments.

Appointment Quick View

To view a real-time display of available appointments, select the clock icon in the upper right corner of the Main screen.

Note: You can also view appointments from the **Appointment List** screen.

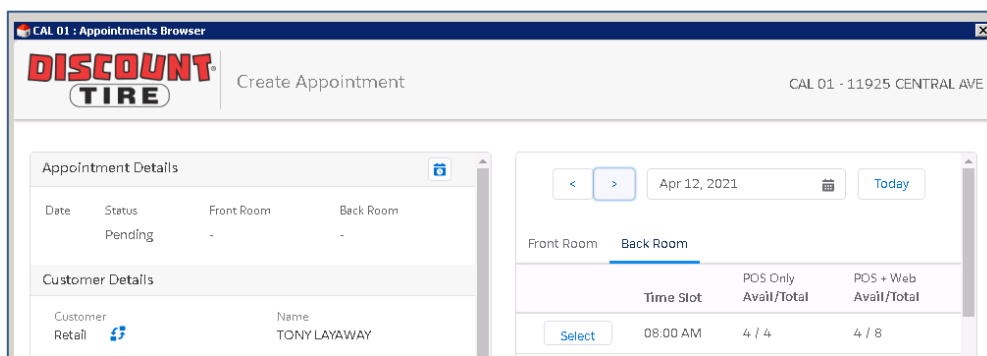


Front Room Appointments

These are appointments created by our customers on the website.

You will see these consultation/front room appointments display at the top left on the Appointments screen, and on the Front Room tab on the right side.

Ensure that your team is aware that these front room appointments are only created on the website by customers. Store employees cannot create Front Room appointments for their customers.



Back Room Appointments

You now have a new appointments screen.

Key sections of the screen include:

Appointment Details

Displays existing appointments for this customer.

Customer Details / Vehicle Details

Displays relevant customer and vehicle information.

Select the edit icon to update this information.

Add a mobile phone number to the SMS field for the customer to receive text reminder for their appointment.

Schedule appointments on the Back Room tab.

Back Room appointments - Select the date at the top right and use this section to schedule appointments.

View appointments from POS Layaways screen

The Reschedule button on the Layaways screen has been relabeled **View/Edit**.

Select the **Cancel Appointment** or **Reschedule Appointment** button at the bottom of the Appointments screen. If no changes are needed, close the window.

Cancel Appointment

Reschedule Appointment

Print Appointment List

You can quickly print the day's appointment list.

Note: You can also view and edit appointments here.

Appointment Log

AZP05: Appointment Browser
More Options...

DISCOUNT TIRE Appointment Log AZP05 - 1709 E Southern Ave

Start Date: Apr 19, 2021

End Date: Apr 19, 2021

Appointment Status: ☒ All (15) ☐ Missed (10) ☐ Cancelled (2) ☐ Completed (3)

Rescheduled: ☒ Both (15) ☐ Yes (4) ☐ No (11)

Reset **Search**

ACTIVE

Status	Res...	Sch...	For...	Form #	Name	Pho...	Date	Time	Off...	Can...
Missed	N	WEB	Service...	0000000	Connie Klm	(123) 123-1234	Apr 19, 2021	10:15 AM	2021-Q...	
Missed	N	WEB	ROPIS		JOHN VURDELJA	(123) 123-1234	Apr 19, 2021	10:30 AM	2021-Q...	
Missed	N	WEB	Service...	0000000	Connie Klm	(123) 123-1234	Apr 19, 2021	10:30 AM	2021-Q...	
Missed	N	WEB	ROPIS		JOHN VURDELJA	(123) 123-1234	Apr 19, 2021	10:45 AM	2021-Q...	
Completed	Y	WEB	Service...	8202589	CAMERON I AMBY	(480) 766-4478	Apr 19, 2021	12:30 AM	2021-Q...	

Contact

IF YOU NEED HELP contact the Service Desk at 800 366-4399 or email Support@discounttire.com.