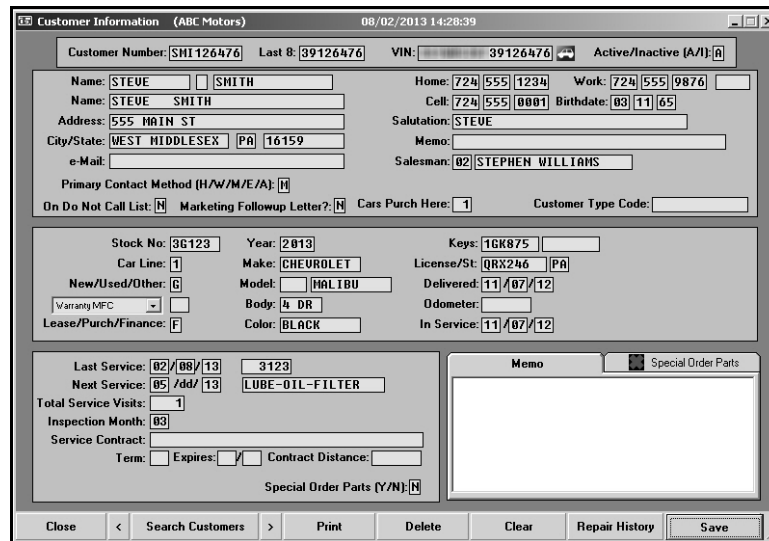


## Chapter 2 Customer Information

The **Customer Information** button on the Service Writing menu is used to enter, view, and edit customer and vehicle information. When you create a repair order for a new customer, the system automatically creates a customer file. You only need to create a file on this screen if you want the customer's information in the system before the customer comes in for service. The Customer Information screen can also be accessed on the Repair Orders menu by clicking **Customer History**.



The screenshot shows the 'Customer Information' window for 'ABC Motors' on 08/02/2013 at 14:28:39. The window is divided into several sections:

- Customer Information:** Fields for Customer Number (SMI126476), Last 8 (39126476), VIN (39126476), and Active/Inactive (A/I) status.
- Personal Information:** Name (STEVE SMITH), Home and Work phone numbers (724/555/1234), Cell number (724/555/0001), Birthdate (03/11/65), Address (555 MAIN ST, WEST MIDDLESEX, PA 16159), Salutation (STEVE), and Salesman (02/STEPHEN WILLIAMS).
- Vehicle Information:** Stock No (3G123), Year (2013), Keys (16K875), Car Line (1), Make (CHEVROLET), License/St (QRX246 PA), New/Used/Other (G), Model (MALIBU), Delivered (11/07/12), Lease/Purch/Finance (F), Color (BLACK), and In Service (11/07/12).
- Service History:** Last Service (02/08/13), Next Service (05/04/13), Total Service Visits (1), Inspection Month (03), and Service Contract details.
- Special Order Parts:** A section for Special Order Parts (Y/N) and a Memo field.

At the bottom, there are buttons for Close, Search Customers, Print, Delete, Clear, Repair History, and Save.

**Tip:** This screen is integrated with Chrysler VIP, Ford Oasis, and General Motors VIS. A **Get VIP**, **Get OASIS**, or **Get VIS** button will appear if the VIN is for a Chrysler, Ford, or General Motors vehicle and you have your Chrysler, Ford, or General Motors user name and password entered on the appropriate DCS integration setup screens.

## Adding a New Customer

Some of the fields will be updated automatically by the system as the vehicle is brought in for service. The information entered on this screen can be pulled to a repair order. If information is edited when the repair order is being generated, the information on this screen is automatically updated to reflect the changes. Similarly, new customers who are entered when a repair order is being generated will automatically have a customer information file created. You should always search for the customer in the system before entering a customer file to ensure there will not be duplicate entries. Please refer to “Recalling a Customer’s Information” on page 2:2 to learn how to search for a customer.

1. Type the appropriate information in each field. (Press F1 to view the Help page for this screen and to read about the information required in each field.)
2. Press ENTER to advance to the next field.
3. Click **Save** to save the information entered.

## Recalling a Customer’s Information

There are four ways to recall a customer’s information:

- Type the customer number in the **Customer Number** field. The customer number is the first three letters of the customer’s last name and last six digits of the vehicle’s VIN. The customer’s information fills in on the screen.
- Type the first three letters of the customer’s last name in the **Customer Number** field, and click **Search Customers** (or press F3). The system displays a list of customer’s whose last name begins with the letters. Click the customer in the list you want to select, and the customer’s information fills in on the screen.
- Type the last eight characters of the VIN in the **Last 8** field. The system will display the record for the first customer/vehicle with a matching VIN. Click the arrow buttons on the side of the **Search Customers** button to scroll through the records. Click < to displays the previous customer’s information. Click > to display the next customer’s information. The customer’s information is displayed on the screen. (You can also scroll by pressing F2 to view the previous record and F4 to view the next record.)
- Click **Search Customers** (or press F3). On the Customer Search Criteria screen, type the first three letters of the customer’s last name, the customer’s full or partial last name, the last four digits of the customer’s phone number, or the customer’s license plate number. A list of the customers who meet the criteria you entered appears. Click the customer you want to select. The customer’s information fills in on the screen.

## Editing a Customer's Information

1. Select the customer.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

## Deleting a Customer's Information

A password is **required** to delete customer information. This security feature ensures only authorized personnel can delete files.

1. Select the customer.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.
4. Type the password.

## Printing a Customer's Information

1. Select the customer.
2. Click **Print**.
3. When prompted to verify your printer is ready, select your print criteria.

## Viewing a Customer's Service History

1. Select the customer.
2. Click **Repair History**.
3. A list of repair orders for the customer is displayed.

Service History						
R/O	Date	Odom	TN	Repair	Labor	Parts
40348B	02/08/08	3123	09 W	RECALL 1245780	37.80	39.60
40348A	02/08/08	3123	02 Q	LUBE-OIL-FILTER	16.50	4.75

'Click' Line To View R/O Detail

- Click a repair order to view the finished R/O. A summary of the repair order opens on your screen.

View R/O																											
<b>ABC Motors</b>																											
West Middlesex, PA 16159 (800) 473-4630																											
40348	2	G1WH52K739126476	STEVE SMITH		02:00:00																						
2007	CHEVROLET	BLAZER	BLACK	555 MAIN STREET		10:31																					
				WEST MIDDLESEX PA 16159																							
3123	3123	11/07/05	GRX246			02:09:00																					
				(724) 555-1234	(724) 555-0876	PAID																					
<b>(1) LUBE-OIL-FILTER</b>																											
				Labor	[02] 3	16.50																					
				Engine Oil Up To 6qt	1	1.																					
				Total Labor		16.50																					
				Total Lubricants		1.75																					
				Total Repair (QuickName)		18.25																					
<b>(2) RECALL 1245780</b>																											
				Labor	[09] 7	37.80																					
				(F)10069210 (SENSOR R)	1	39.60																					
				Total Labor		37.80																					
				Total Parts		39.60																					
				Total Repair (Warranty)		77.40																					
<table border="0" style="width: 100%;"> <tr> <td>Labor Time</td> <td>--C/P--</td> <td>--W/C--</td> <td>--INT--</td> <td>Total</td> <td></td> <td></td> </tr> <tr> <td>Total Labor</td> <td>16.50</td> <td>37.80</td> <td>.00</td> <td>54.30</td> <td></td> <td></td> </tr> <tr> <td>Total Parts</td> <td>.00</td> <td>39.60</td> <td>.00</td> <td>39.60</td> <td>O/A</td> <td></td> </tr> </table>							Labor Time	--C/P--	--W/C--	--INT--	Total			Total Labor	16.50	37.80	.00	54.30			Total Parts	.00	39.60	.00	39.60	O/A	
Labor Time	--C/P--	--W/C--	--INT--	Total																							
Total Labor	16.50	37.80	.00	54.30																							
Total Parts	.00	39.60	.00	39.60	O/A																						

- If you select to view a repair order in the list that is too old, you will receive a message indicating that there is no data available for the selected R/O. Click **OK** to acknowledge the message.
- Click **Back** to return to the Service History list.
- Click **Back** to close the customer's history.