

Vision POS - Appointments QRG

Purpose and Overview

This document provides step-by-step instructions to schedule and manage customer appointments.

The overall process is divided into the following process steps:

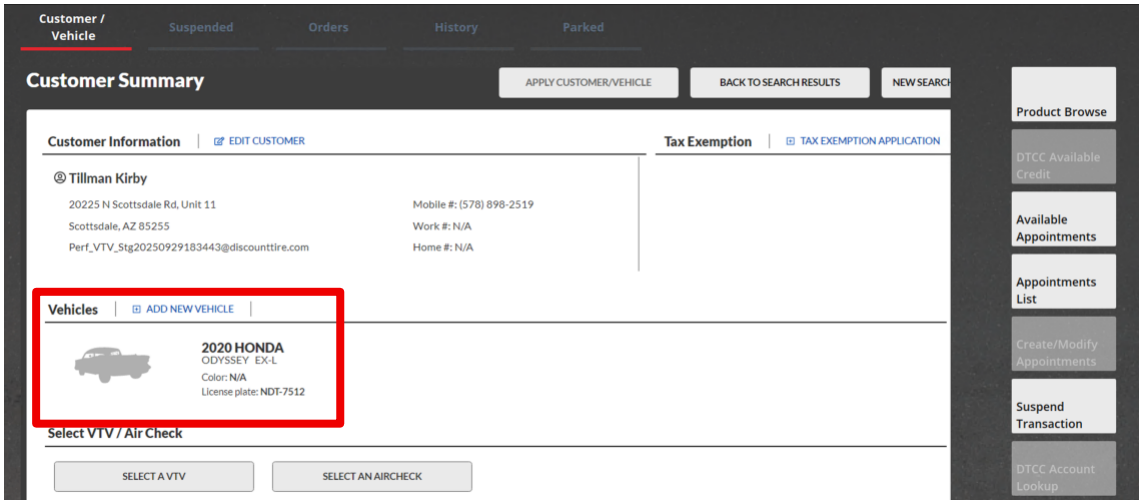
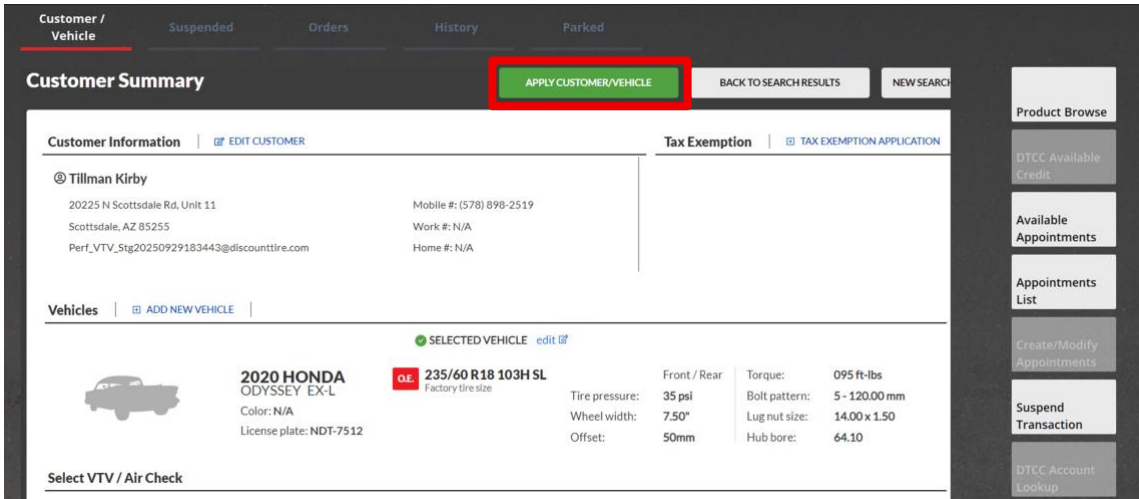
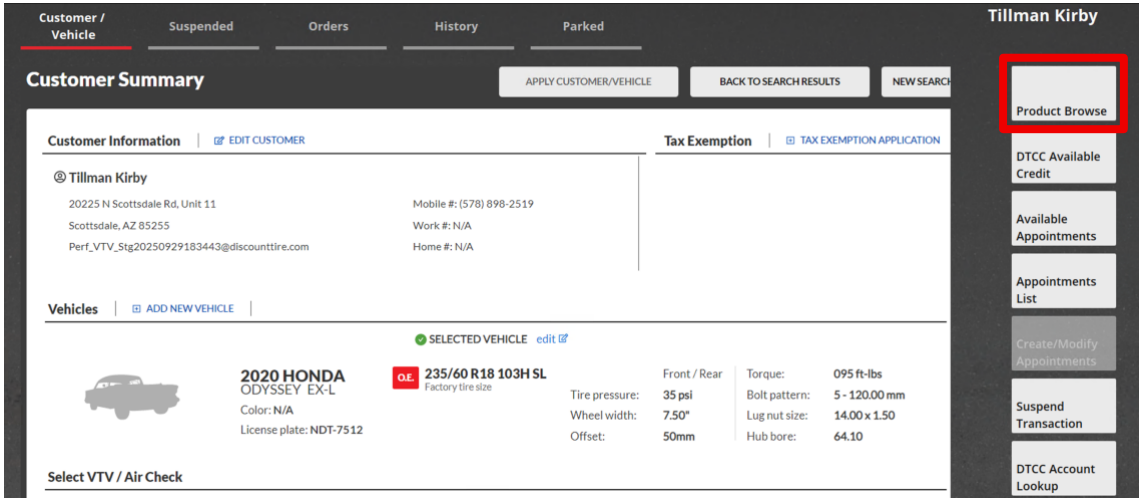
- Scheduling an Appointment
- Rescheduling an Existing Appointment
- Canceling an Appointment

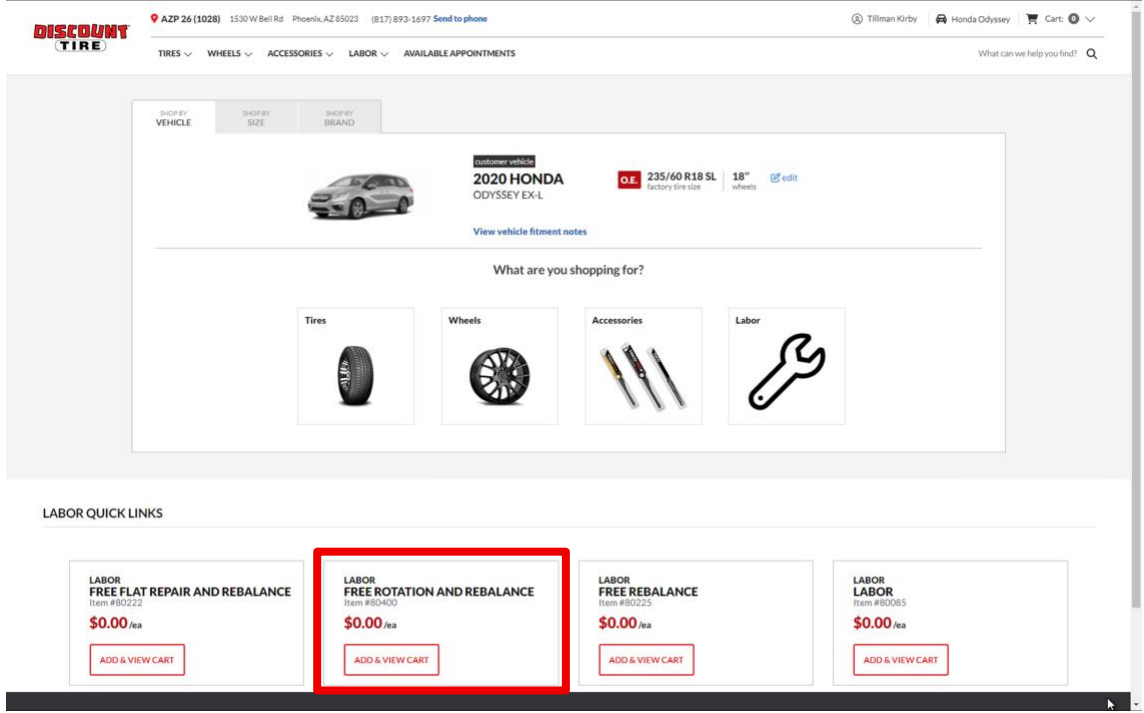
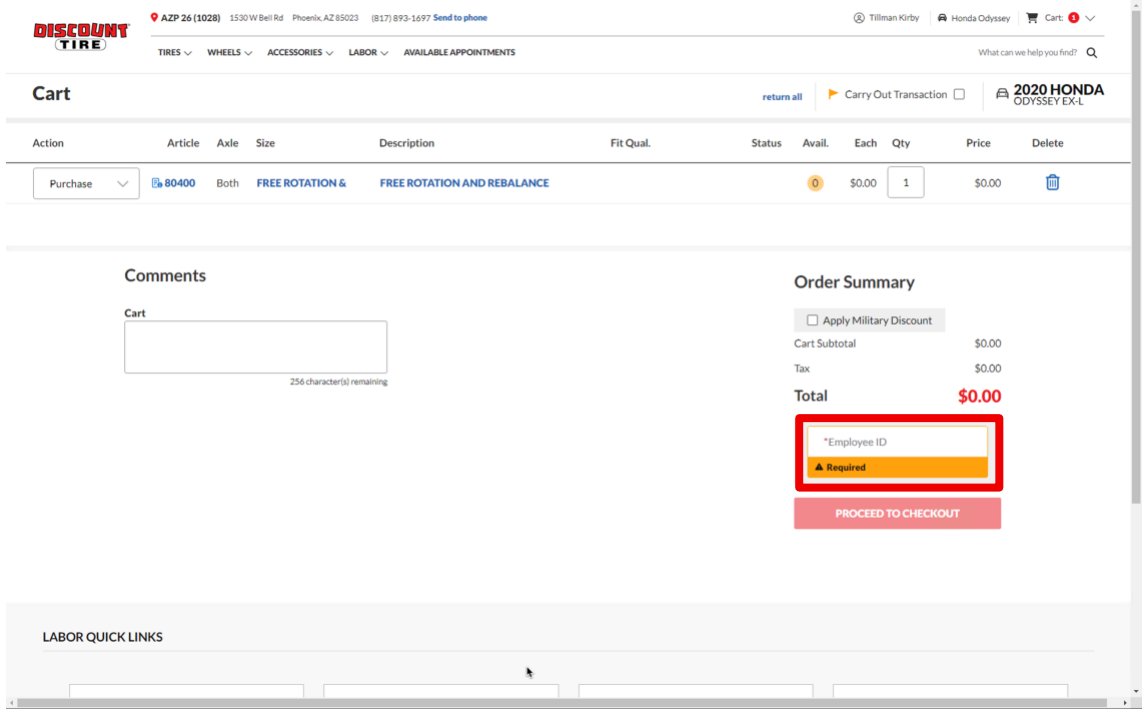
Scheduling an Appointment

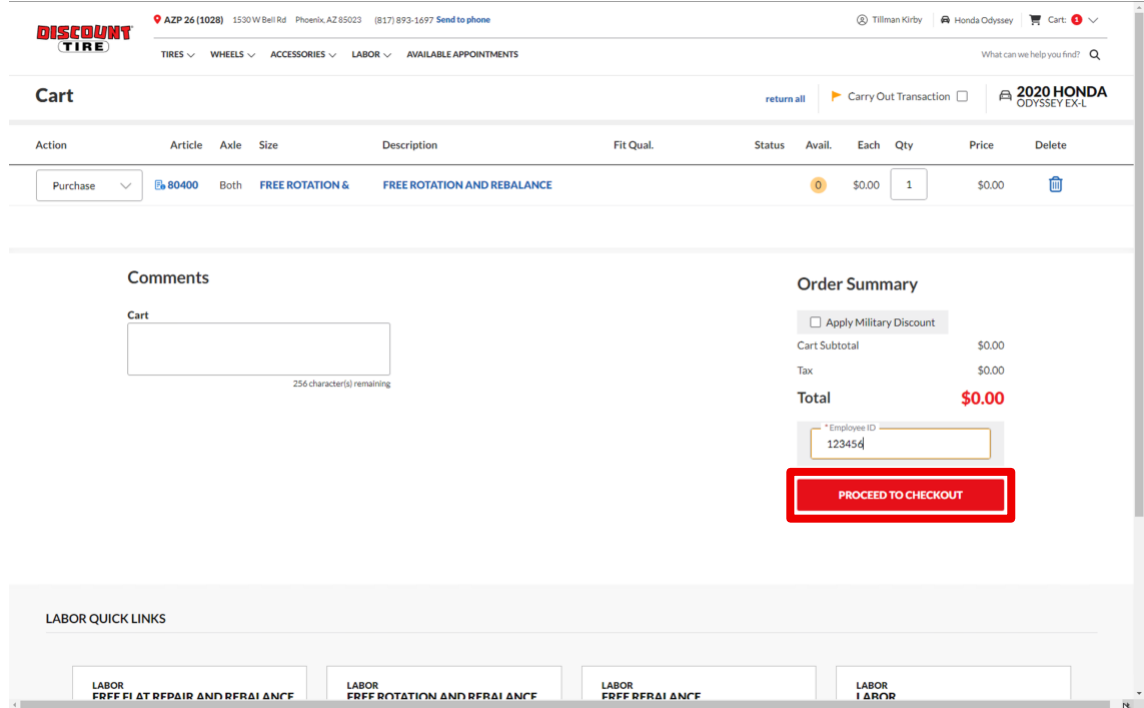
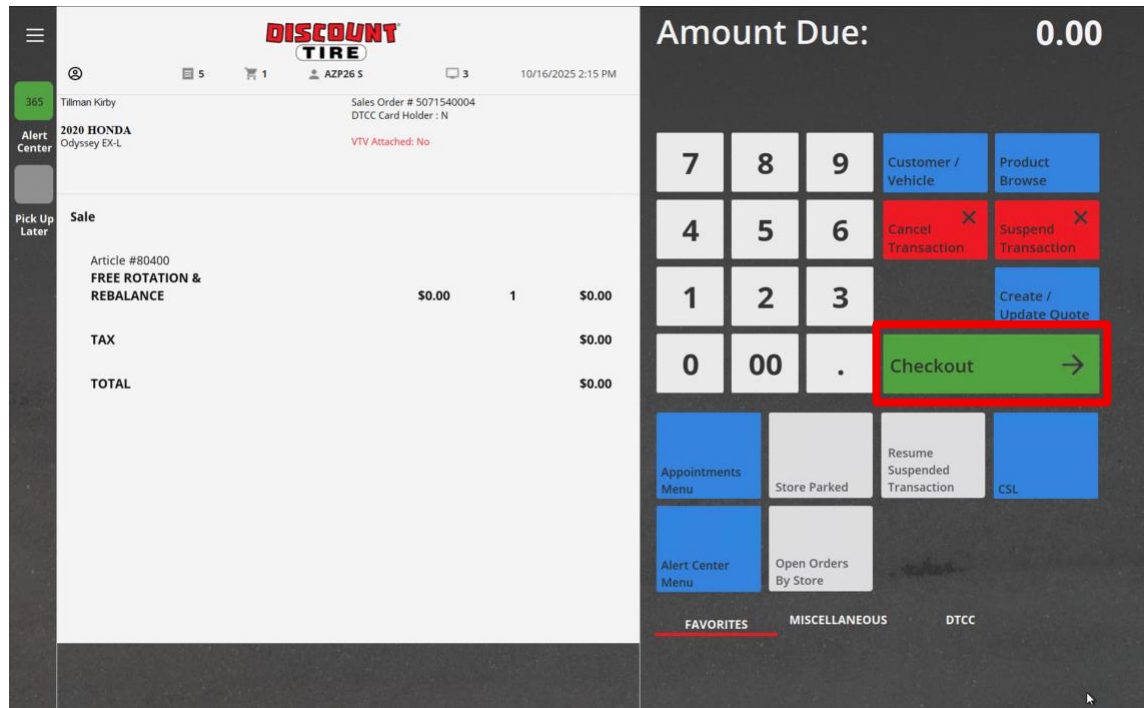
Follow this process to schedule an appointment for a customer. For this example, we will assume the customer is calling in and you are scheduling an appointment for a rotation and balance.

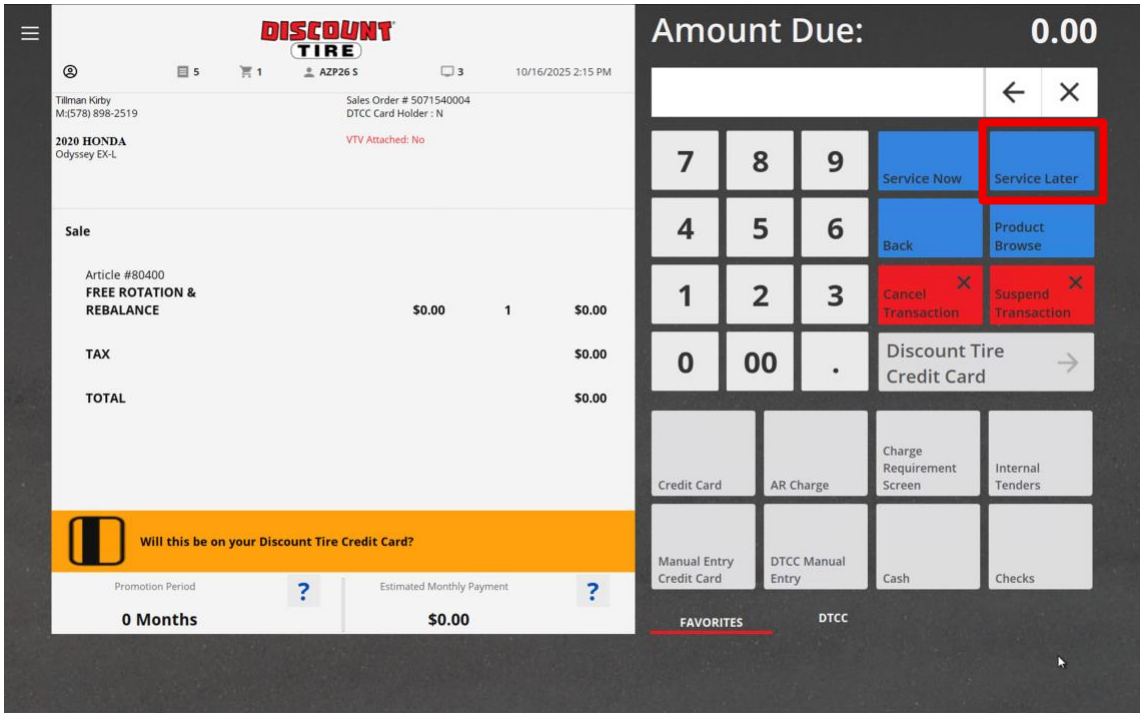
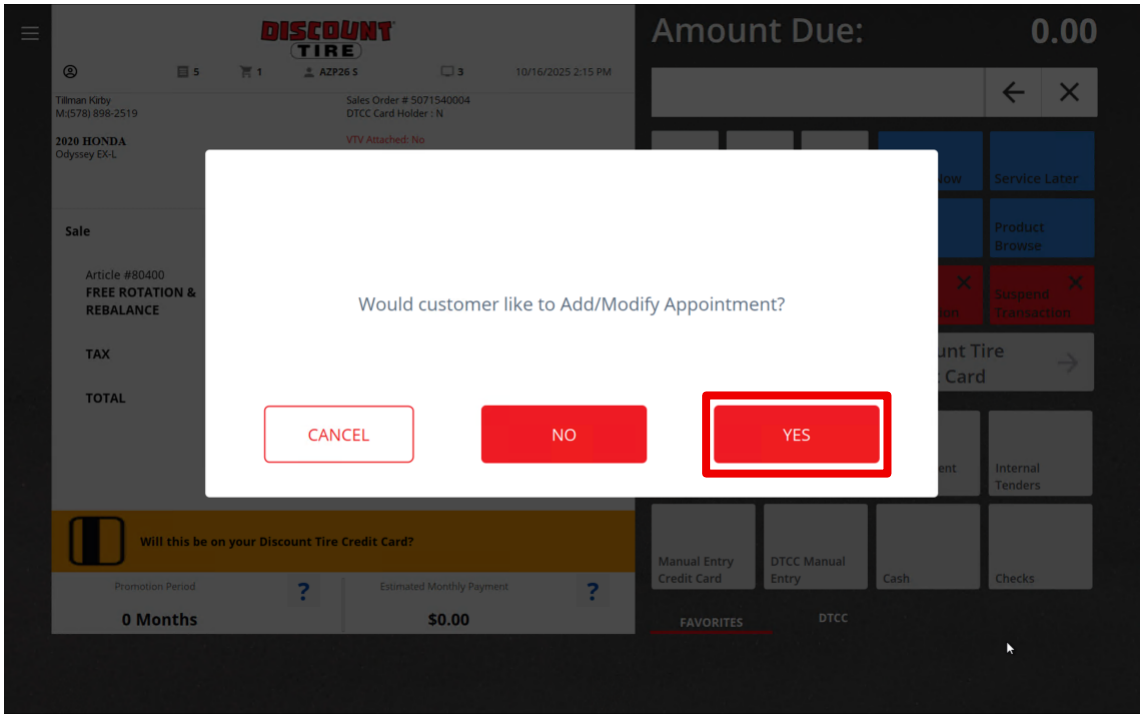
Step	Action
1	From the main screen, click Customer / Vehicle.

Step	Action
2	Enter the customer's phone number.
3	Click the SEARCH BY CUSTOMER button.
4	Select the customer record.
5	Click the SELECT CUSTOMER button.

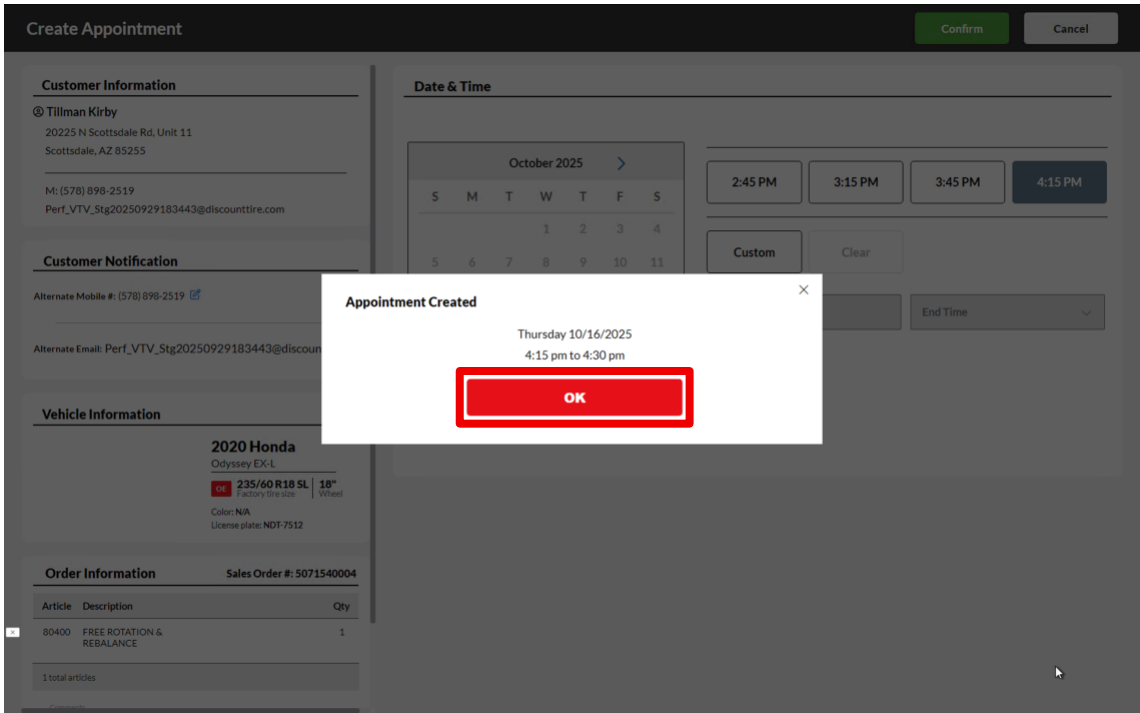
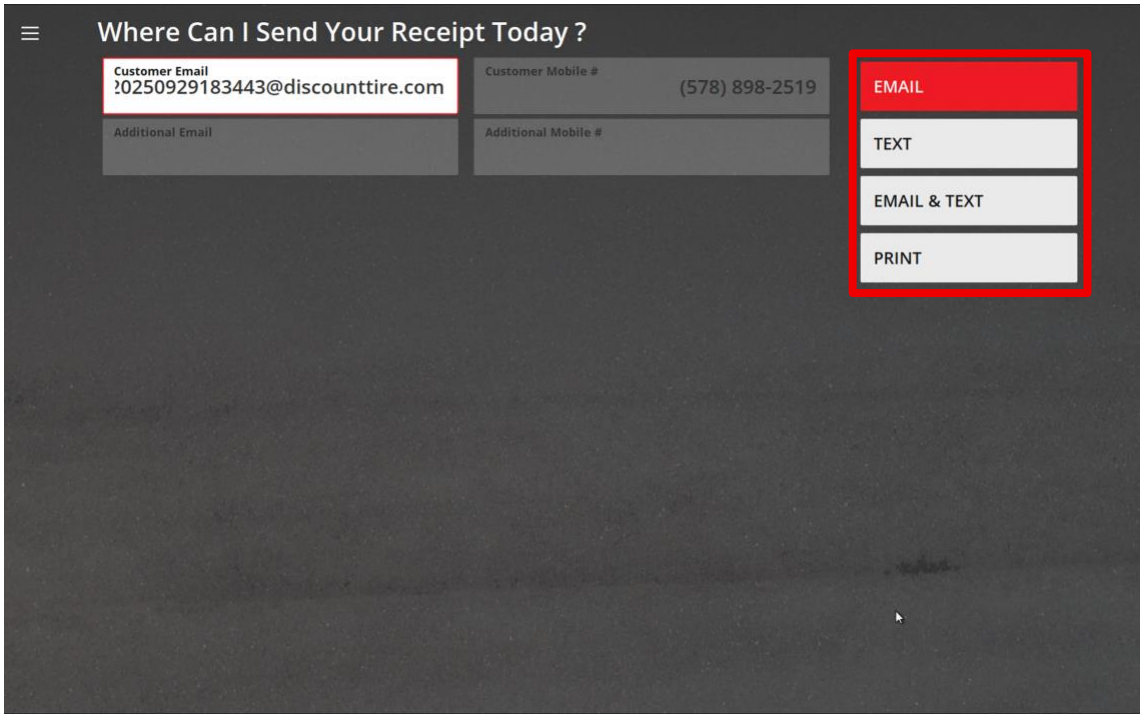
Step	Action
6	Select the customer vehicle or add a new vehicle if needed.  The screenshot shows the 'Customer Summary' page for Tillman Kirby. The 'Vehicles' section is highlighted with a red box, showing a 2020 Honda Odyssey EX-L. The 'Customer Information' section shows details for Tillman Kirby, including address, phone numbers, and email. The 'Tax Exemption' section is also visible.
7	Click the APPLY CUSTOMER/VEHICLE button.  The screenshot shows the 'Customer Summary' page for Tillman Kirby. The 'APPLY CUSTOMER/VEHICLE' button is highlighted with a red box. The 'Vehicles' section shows the 2020 Honda Odyssey EX-L with its specifications.
8	Click Product Browse.  The screenshot shows the 'Customer Summary' page for Tillman Kirby. The 'Product Browse' button is highlighted with a red box. The 'Vehicles' section shows the 2020 Honda Odyssey EX-L with its specifications.

Step	Action
9	Select the appropriate products and/or services. For this example, we will be selecting FREE ROTATION AND REBALANCE.  The screenshot shows the Discount Tire website interface. At the top, there's a navigation bar with the store location (AZP 26 (1028) 1530 W Bell Rd Phoenix, AZ 85023) and contact information. Below the navigation bar, there's a section for 'What are you shopping for?' with icons for Tires, Wheels, Accessories, and Labor. Under the 'LABOR QUICK LINKS' section, four service options are listed: 'FREE FLAT REPAIR AND REBALANCE', 'FREE ROTATION AND REBALANCE' (highlighted with a red box), 'FREE REBALANCE', and 'LABOR LAVOR'. Each option has an 'ADD & VIEW CART' button.
10	From the 'Cart' screen, enter your Employee ID.  The screenshot shows the 'Cart' screen on the Discount Tire website. The cart contains one item: 'FREE ROTATION & FREE ROTATION AND REBALANCE' with a price of \$0.00. Below the cart items, there's a 'Comments' section and an 'Order Summary' section. In the 'Order Summary' section, the 'Employee ID' field is highlighted with a red box and marked as 'Required'. Below the 'Employee ID' field is a 'PROCEED TO CHECKOUT' button.

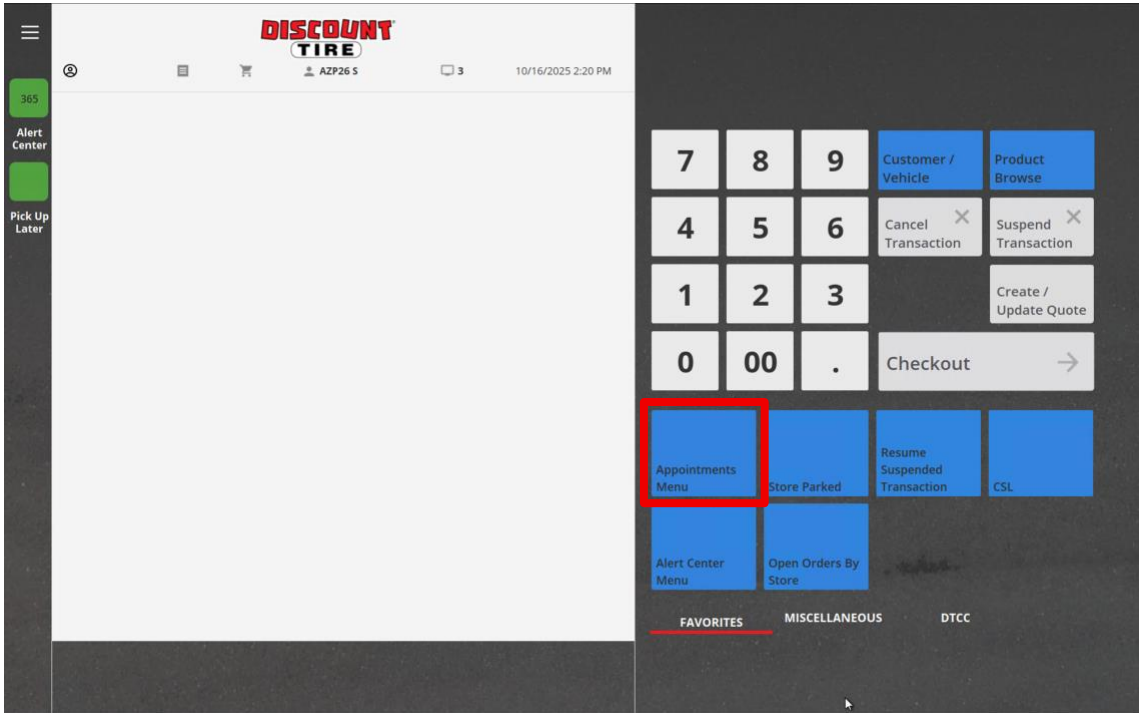
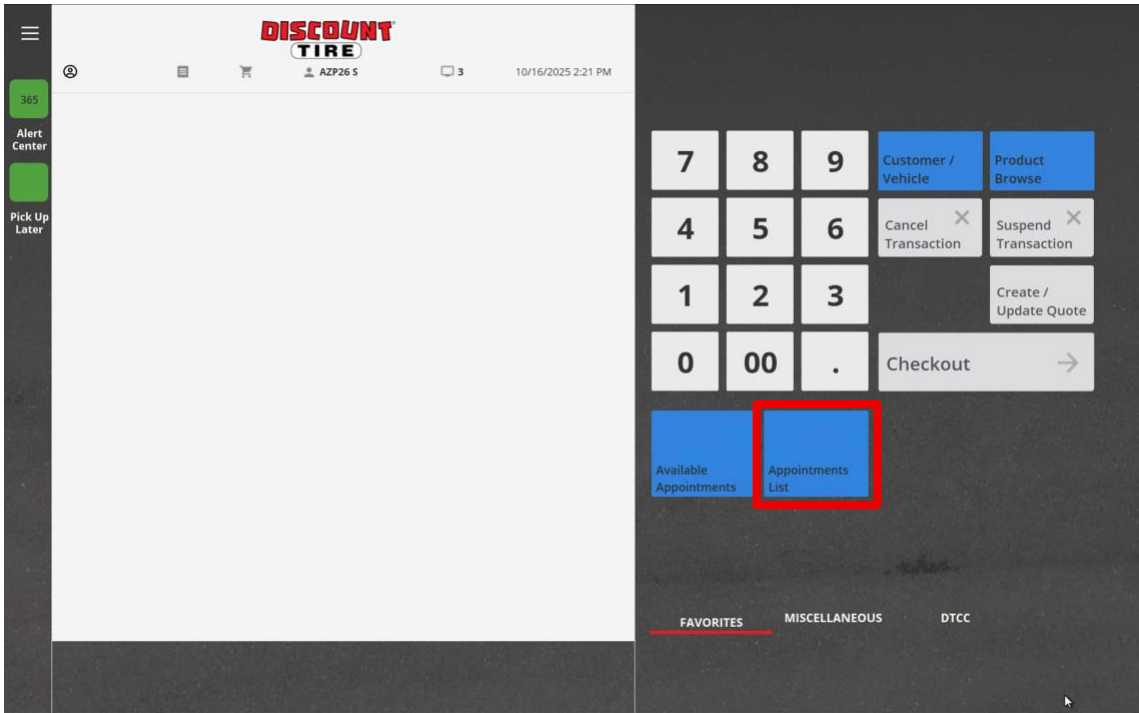
Step	Action
11	Click the PROCEED TO CHECKOUT button. 
12	Click Checkout. 

Step	Action
13	Click Service Later. 
14	On the pop-up screen, click YES. 

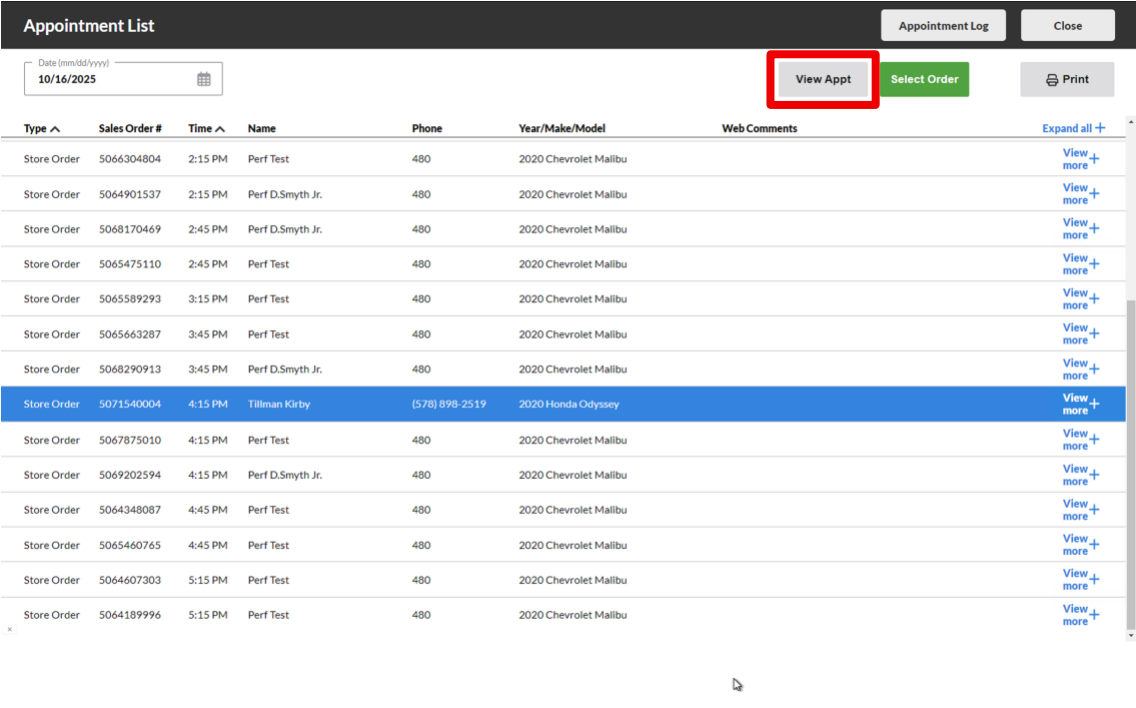
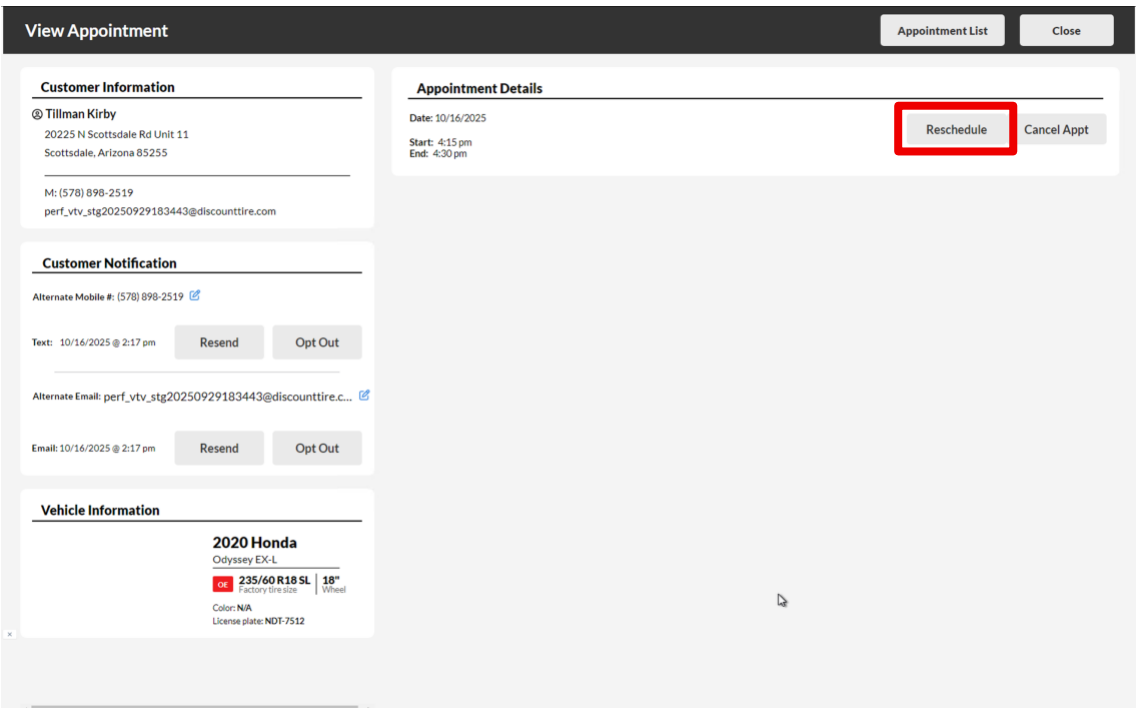
Step	Action																																																
15	Select a date and time that works for the customer. Create Appointment Customer Information © Tillman Kirby 20225 N Scottsdale Rd, Unit 11 Scottsdale, AZ 85255 M: (578) 898-2519 Perf_VTV_Stg20250929183443@discounttire.com Customer Notification Alternate Mobile #: (578) 898-2519 Alternate Email: Perf_VTV_Stg20250929183443@discounttire.com Vehicle Information 2020 Honda Odyssey EX-L 235/60 R18 SL 18" Factory tire size Wheel Color: N/A License plate: NDT-7512 Order Information Sales Order #: 5071540004 <table border="1"> <thead> <tr> <th>Article</th> <th>Description</th> <th>Qty</th> </tr> </thead> <tbody> <tr> <td>80400</td> <td>FREE ROTATION & REBALANCE</td> <td>1</td> </tr> </tbody> </table> 1 total articles Date & Time October 2025 <table border="1"> <thead> <tr> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> </tr> </tbody> </table> 2:45 PM 3:15 PM 3:45 PM 4:15 PM Custom Clear Start Time End Time	Article	Description	Qty	80400	FREE ROTATION & REBALANCE	1	S	M	T	W	T	F	S				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
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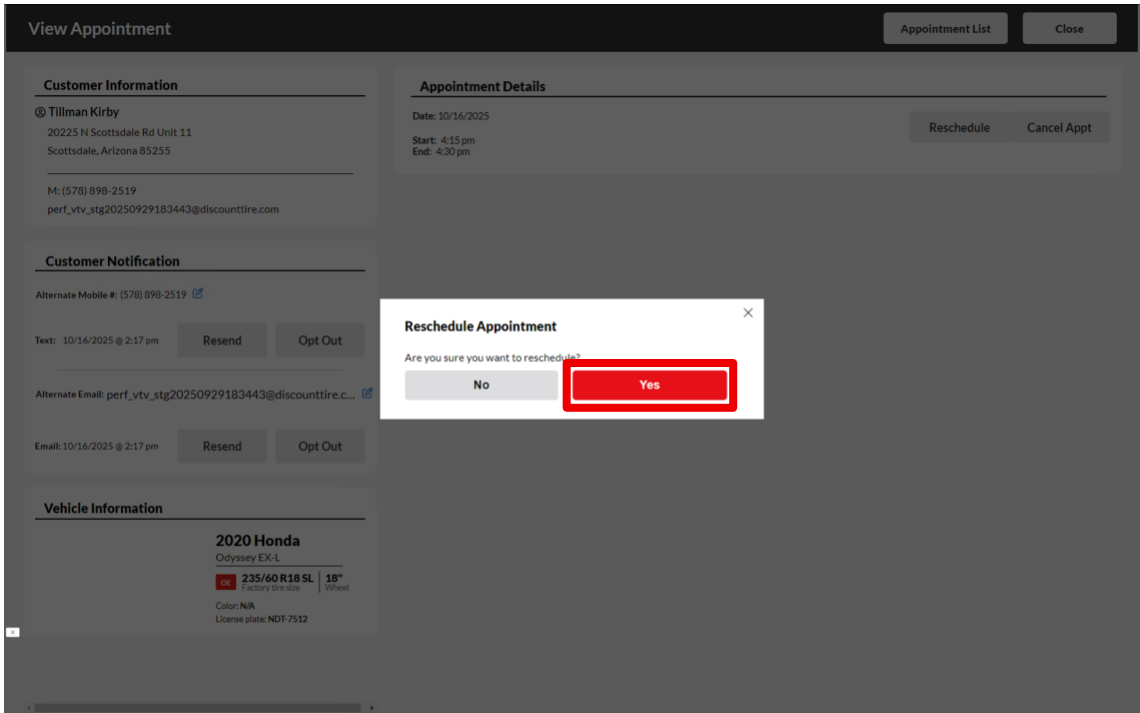
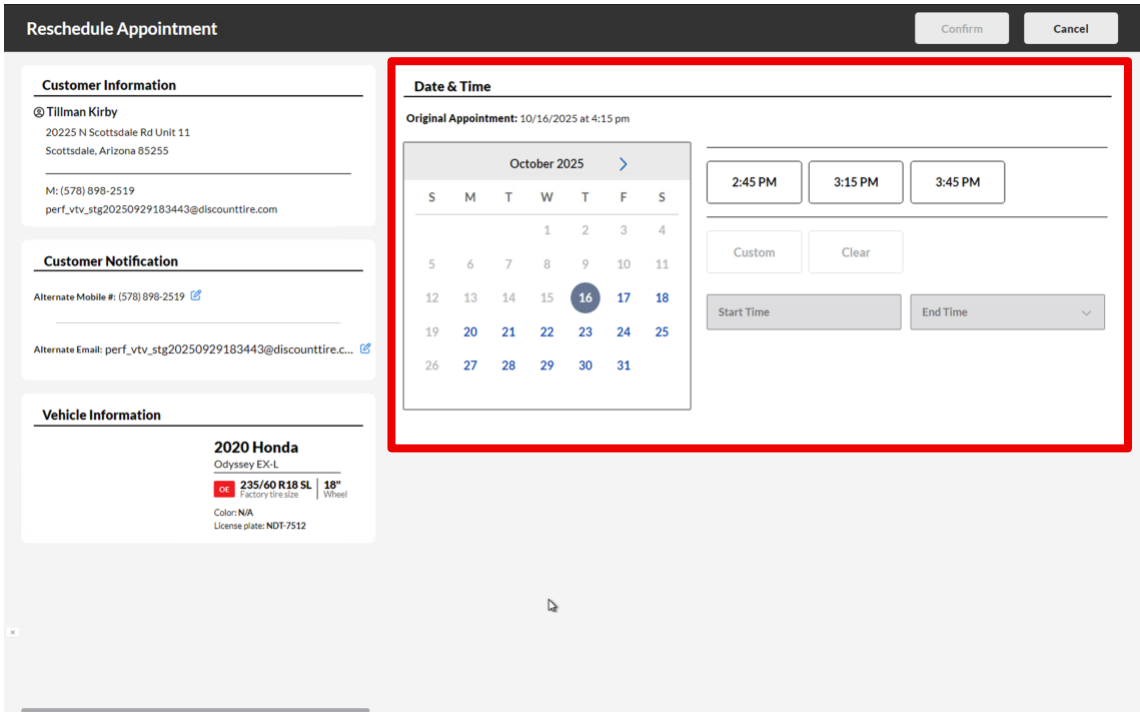
Step	Action
17	Click OK on the pop-up window. 
18	Select how the customer would like to receive the receipt. 

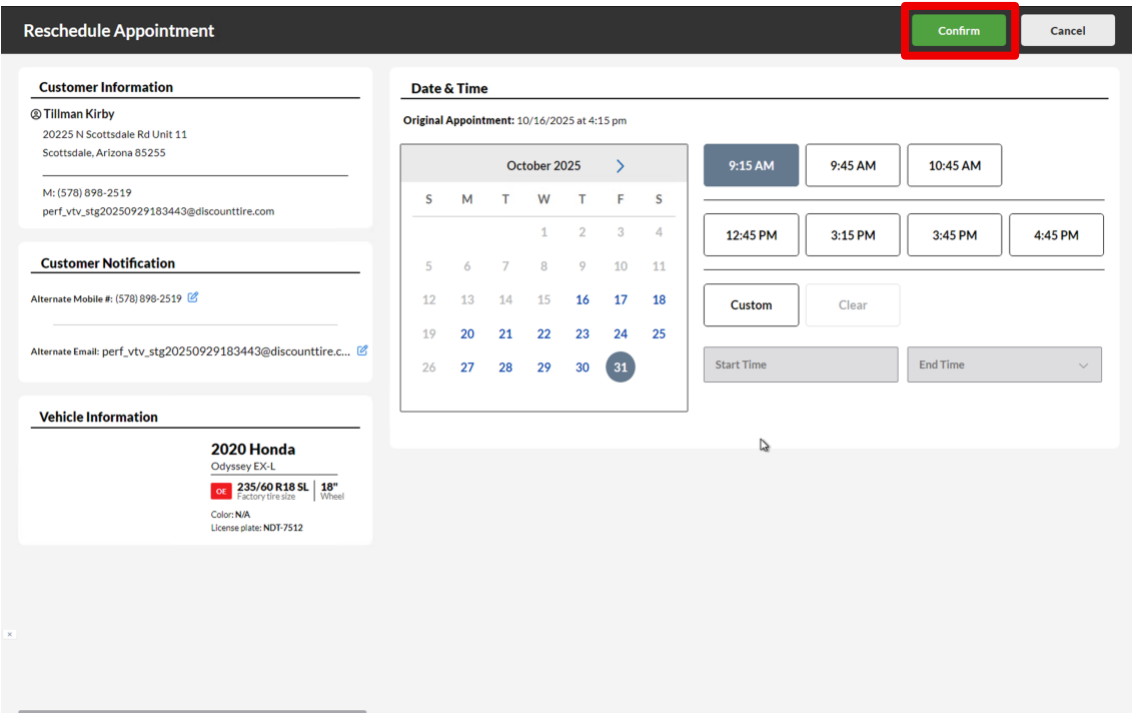
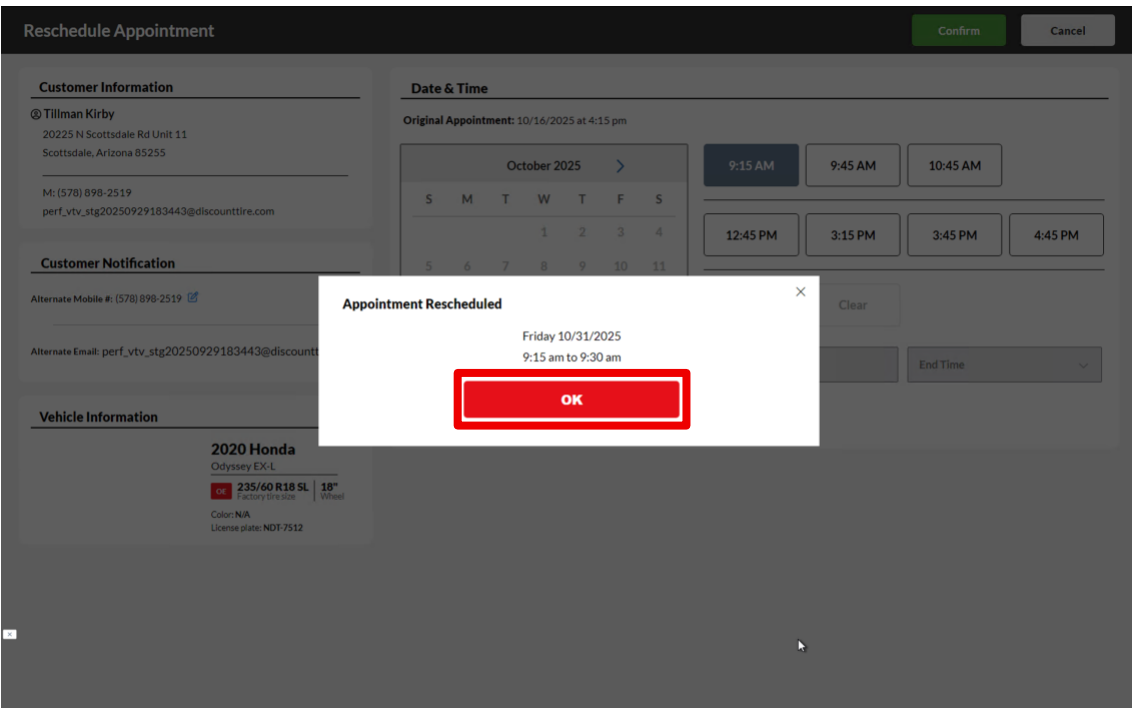
Rescheduling an Existing Appointment

Step	Action
1	From the main screen, click Appointments Menu.  The screenshot shows the main interface of the Discount Tire POS system. On the left is a sidebar with a menu icon, a status bar showing '365', and buttons for 'Alert Center' and 'Pick Up Later'. The main area has the 'DISCOUNT TIRE' logo and a header with user information 'AZP26 S' and a clock showing '10/16/2025 2:20 PM'. On the right is a numeric keypad (0-9, ., 00) and several function buttons: 'Customer / Vehicle', 'Product Browse', 'Cancel Transaction', 'Suspend Transaction', 'Create / Update Quote', 'Checkout', 'Appointments Menu' (highlighted with a red box), 'Store Parked', 'Resume Suspended Transaction', 'CSL', 'Alert Center Menu', and 'Open Orders By Store'. At the bottom are tabs for 'FAVORITES', 'MISCELLANEOUS', and 'DTCC'.
2	Click Appointments List.  This screenshot is identical to the one in Step 1, showing the same main interface. In this step, the 'Appointments List' button, located below the 'Appointments Menu' button, is highlighted with a red box.

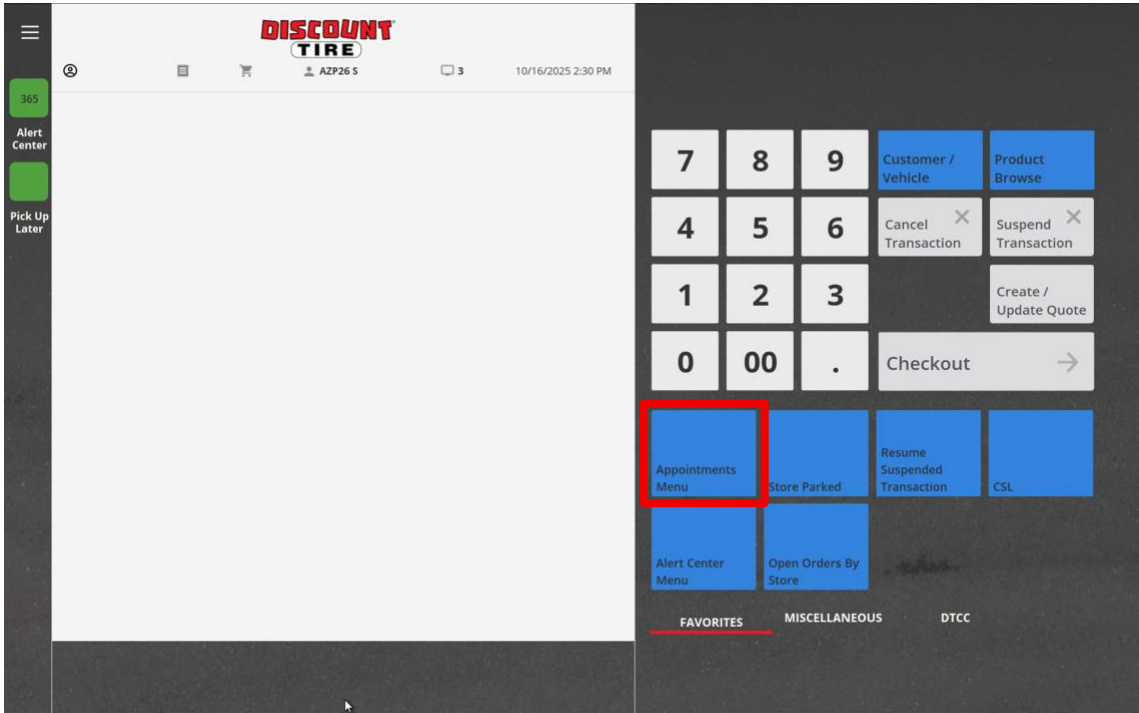
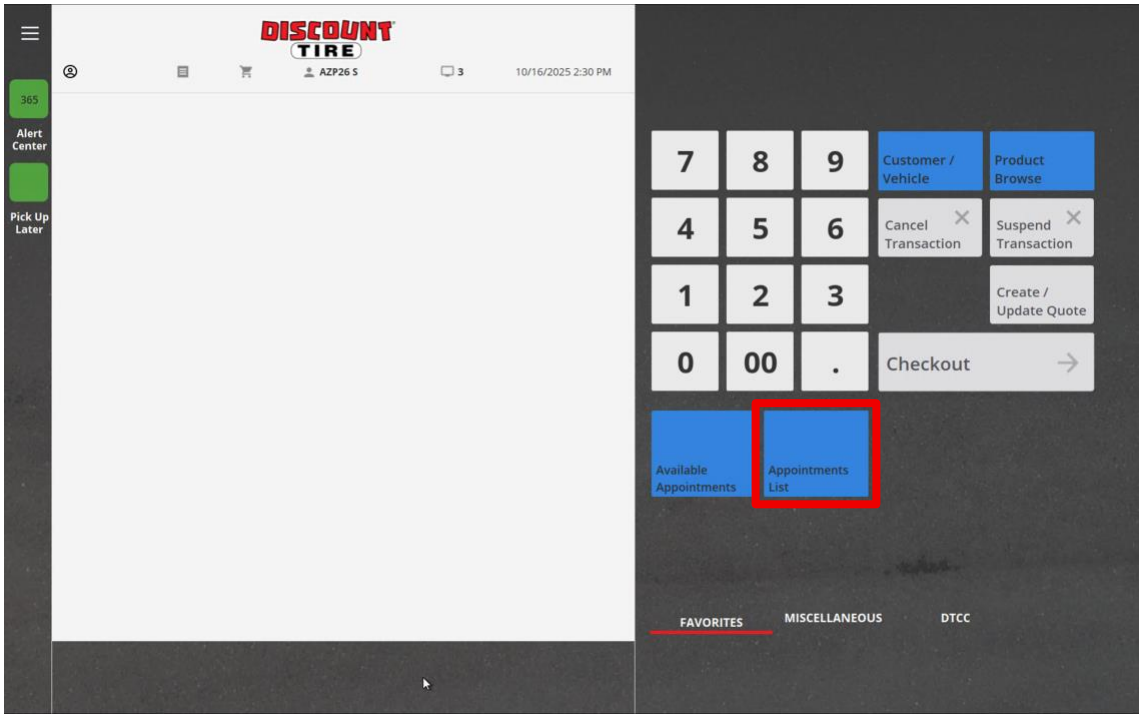
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3	Select the appropriate date. Appointment List Date (mm/dd/yyyy) 10/16/2025 Appointment Log Close View Appt Select Order Print <table border="1"> <thead> <tr> <th>Type ^</th> <th>Sales Order #</th> <th>Time ^</th> <th>Name</th> <th>Phone</th> <th>Year/Make/Model</th> <th>Web Comments</th> <th>Expand all +</th> </tr> </thead> <tbody> <tr><td>Store Order</td><td>5067186922</td><td>12:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065450866</td><td>12:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064234465</td><td>12:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5069251777</td><td>12:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5066492443</td><td>1:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td>Some comments about the order</td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064775688</td><td>1:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068289336</td><td>1:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068240557</td><td>1:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5066304804</td><td>2:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064901537</td><td>2:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068170469</td><td>2:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065475110</td><td>2:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065589293</td><td>3:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065663287</td><td>3:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> </tbody> </table>	Type ^	Sales Order #	Time ^	Name	Phone	Year/Make/Model	Web Comments	Expand all +	Store Order	5067186922	12:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5065450866	12:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5064234465	12:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5069251777	12:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5066492443	1:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu	Some comments about the order	View more +	Store Order	5064775688	1:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5068289336	1:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5068240557	1:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5066304804	2:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5064901537	2:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5068170469	2:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5065475110	2:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5065589293	3:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5065663287	3:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +
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6	Click the Reschedule button.  View Appointment Appointment List Close Customer Information @ Tillman Kirby 20225 N Scottsdale Rd Unit 11 Scottsdale, Arizona 85255 M: (578) 898-2519 perf_vtv_stg20250929183443@discounttire.com Appointment Details Date: 10/16/2025 Start: 4:15 pm End: 4:30 pm Reschedule Cancel Appt Customer Notification Alternate Mobile #: (578) 898-2519 Text: 10/16/2025 @ 2:17 pm Resend Opt Out Alternate Email: perf_vtv_stg20250929183443@discounttire.c... Resend Opt Out Vehicle Information 2020 Honda Odyssey EX-L 235/60 R18 SL 18" Factory tire size Wheel Color: N/A License plate: NDT-7512																																																																																																																								

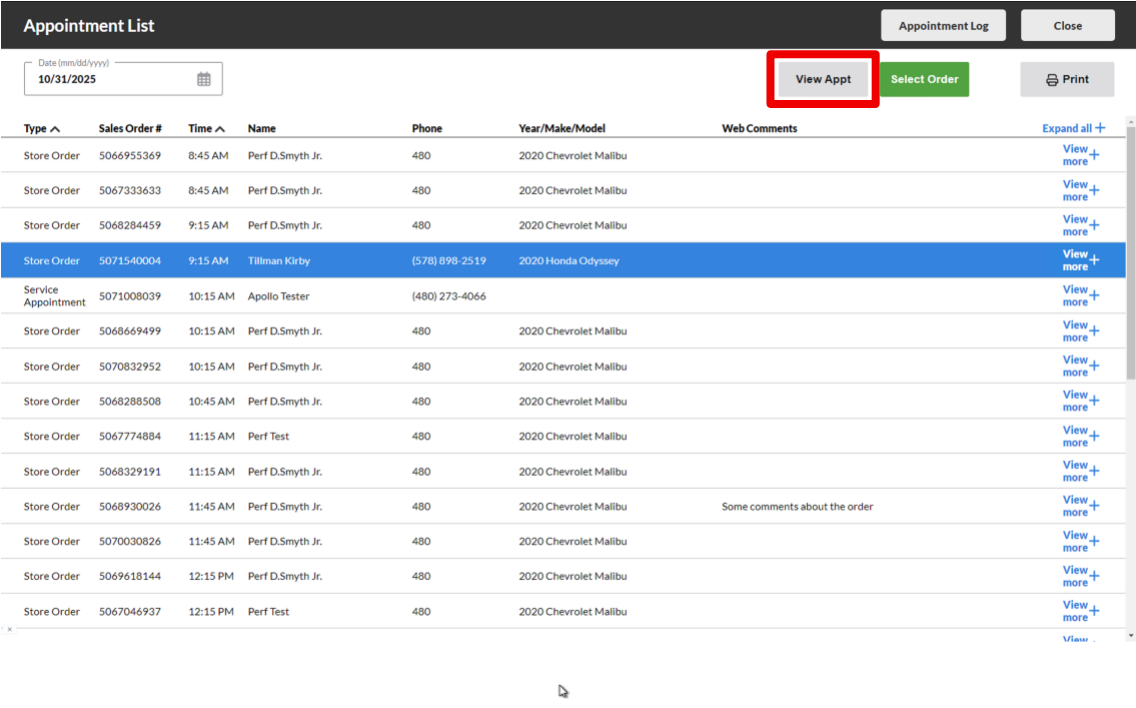
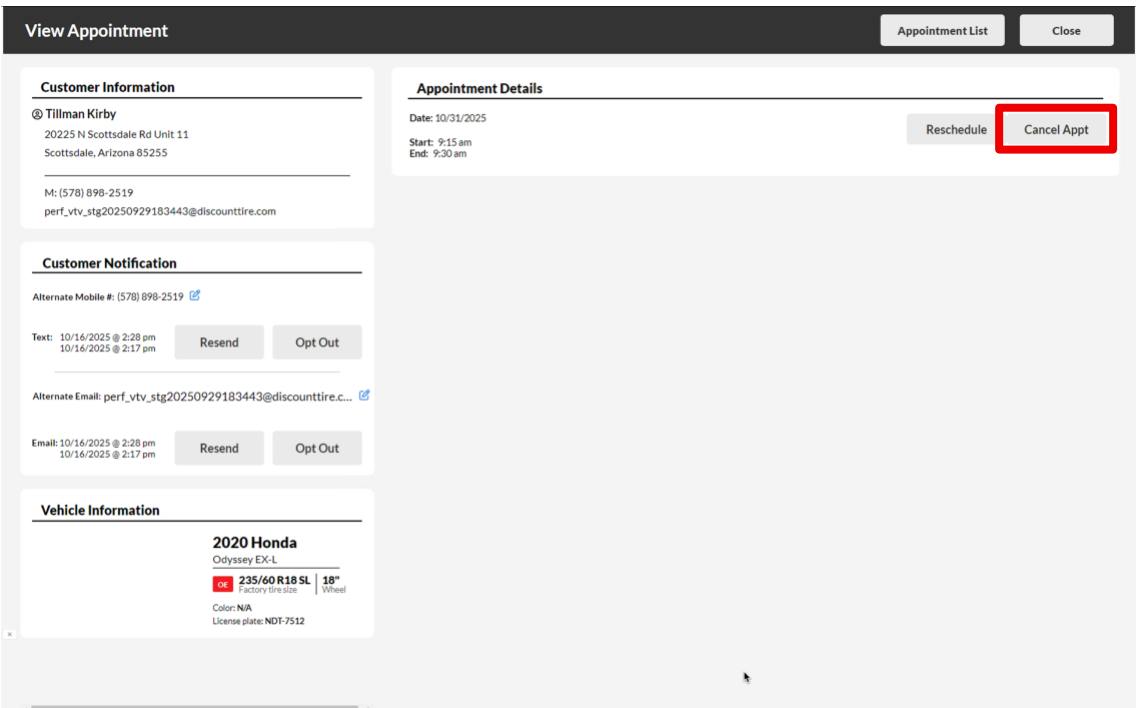
Step	Action
7	Click Yes on the pop-up window. 
8	Select a date and time that works for the customer. 

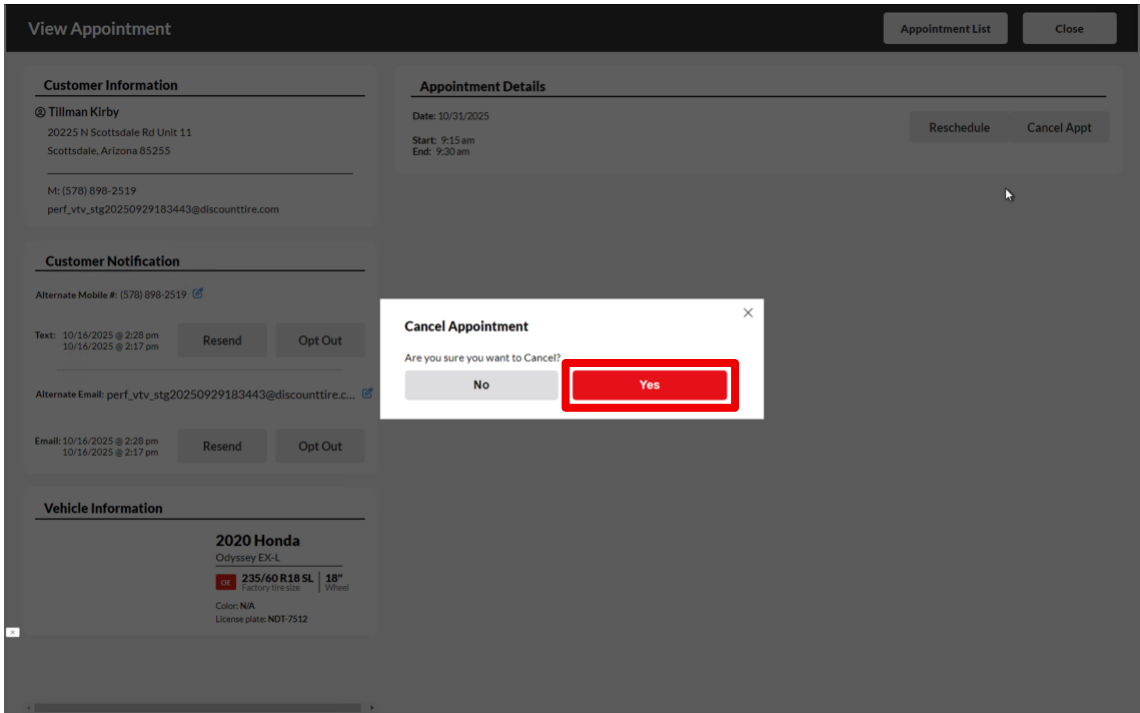
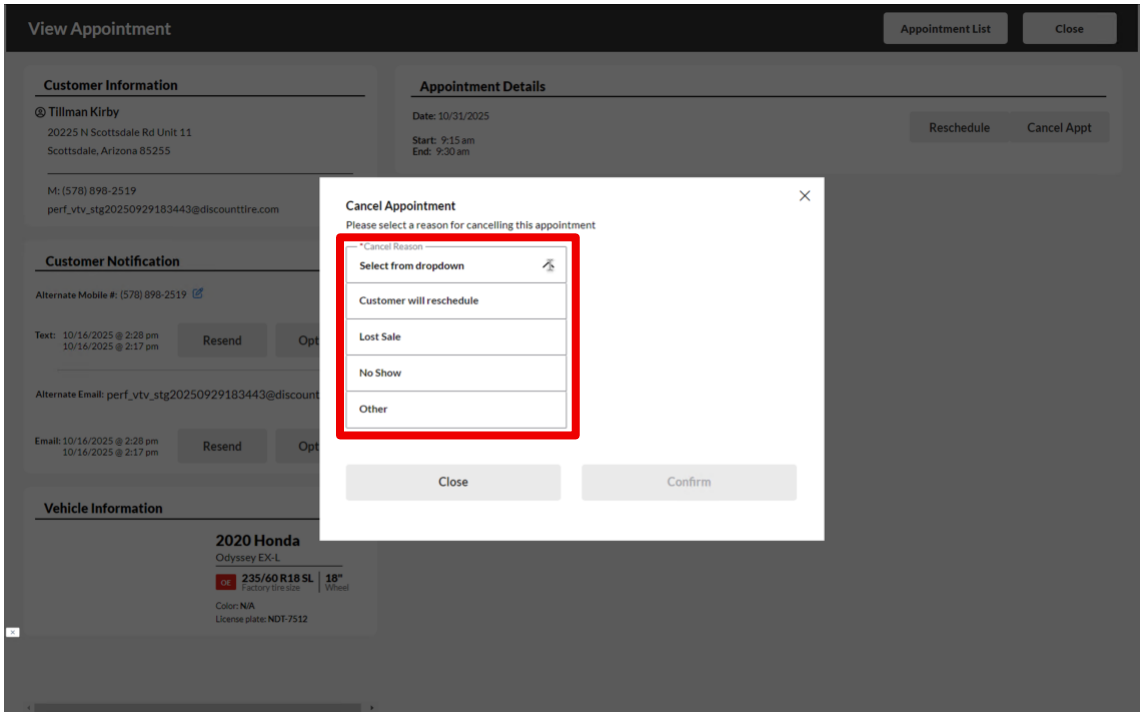
Step	Action
9	Click the Confirm button.  The screenshot shows the 'Reschedule Appointment' interface. At the top right, the 'Confirm' button is highlighted with a red rectangle. The interface is divided into three main sections: Customer Information, Date & Time, and Vehicle Information. The Customer Information section lists the name 'Tillman Kirby', address '20225 N Scottsdale Rd Unit 11, Scottsdale, Arizona 85255', phone '(578) 898-2519', and email 'perf_vtv_stg20250929183443@discounttire.com'. The Date & Time section shows the 'Original Appointment' as '10/16/2025 at 4:15 pm' and a calendar for 'October 2025'. The Vehicle Information section shows a '2020 Honda Odyssey EX-L' with '235/60 R18 SL' tires and '18" Wheel'.
10	Click OK on the pop-up window.  The screenshot shows the same 'Reschedule Appointment' interface as in Step 9, but with a 'Appointment Rescheduled' pop-up window in the center. The pop-up window displays the text 'Appointment Rescheduled', 'Friday 10/31/2025', and '9:15 am to 9:30 am'. The 'OK' button on the pop-up is highlighted with a red rectangle. The background interface is dimmed.

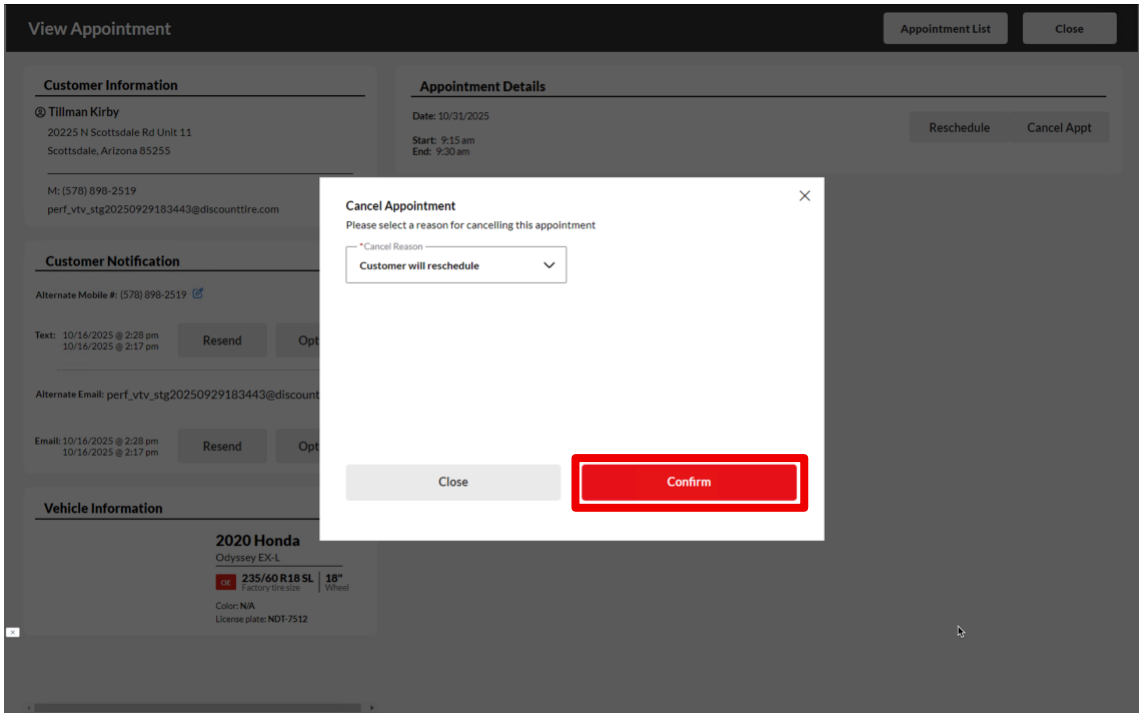
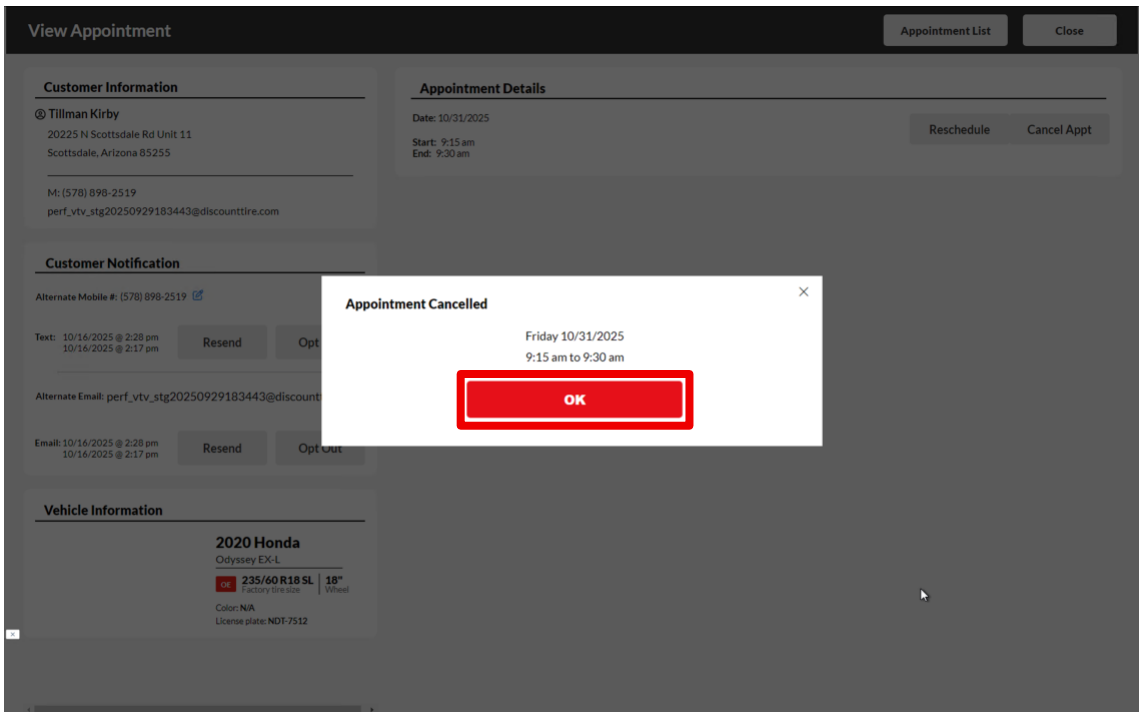
Canceling an Appointment

Step	Action
1	From the main screen, click Appointments Menu.  The screenshot shows the main interface of the Discount Tire Vision POS. On the left is a sidebar with a menu icon, a status bar showing '365', and buttons for 'Alert Center' and 'Pick Up Later'. The main area has the Discount Tire logo and some status information. On the right is a large grid of buttons. The 'Appointments Menu' button, located in the bottom-left section of the grid, is highlighted with a red rectangular box.
2	Click Appointments List.  This screenshot is identical to the one in Step 1, showing the same main interface. In this step, the 'Appointments List' button, located in the bottom-right section of the button grid, is highlighted with a red rectangular box.

Step	Action																																																																																																																								
3	Select the appropriate date. Appointment List Date (mm/dd/yyyy) 10/16/2025 Appointment Log Close View Appt Select Order Print <table border="1"> <thead> <tr> <th>Type ^</th> <th>Sales Order #</th> <th>Time ^</th> <th>Name</th> <th>Phone</th> <th>Year/Make/Model</th> <th>Web Comments</th> <th>Expand all +</th> </tr> </thead> <tbody> <tr><td>Store Order</td><td>5067186922</td><td>12:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064234465</td><td>12:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5069251777</td><td>12:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064924443</td><td>1:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td>Some comments about the order</td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064775688</td><td>1:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068289336</td><td>1:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068240557</td><td>1:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5066304804</td><td>2:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5064901537</td><td>2:15 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065475110</td><td>2:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068170469</td><td>2:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065589293</td><td>3:15 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5065663287</td><td>3:45 PM</td><td>Perf Test</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> <tr><td>Store Order</td><td>5068290913</td><td>3:45 PM</td><td>Perf D.Smyth Jr.</td><td>480</td><td>2020 Chevrolet Malibu</td><td></td><td>View more +</td></tr> </tbody> </table>	Type ^	Sales Order #	Time ^	Name	Phone	Year/Make/Model	Web Comments	Expand all +	Store Order	5067186922	12:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5064234465	12:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5069251777	12:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5064924443	1:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu	Some comments about the order	View more +	Store Order	5064775688	1:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5068289336	1:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5068240557	1:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5066304804	2:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5064901537	2:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5065475110	2:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5068170469	2:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +	Store Order	5065589293	3:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5065663287	3:45 PM	Perf Test	480	2020 Chevrolet Malibu		View more +	Store Order	5068290913	3:45 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +
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Store Order	5067774884	11:15 AM	Perf Test	480	2020 Chevrolet Malibu		View more +																																																																																																																		
Store Order	5068329191	11:15 AM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +																																																																																																																		
Store Order	5068930026	11:45 AM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu	Some comments about the order	View more +																																																																																																																		
Store Order	5070030826	11:45 AM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +																																																																																																																		
Store Order	5069618144	12:15 PM	Perf D.Smyth Jr.	480	2020 Chevrolet Malibu		View more +																																																																																																																		
Store Order	5067046937	12:15 PM	Perf Test	480	2020 Chevrolet Malibu		View more +																																																																																																																		
6	Click the Cancel Appt button.  View Appointment Appointment List Close Customer Information @ Tillman Kirby 20225 N Scottsdale Rd Unit 11 Scottsdale, Arizona 85255 M: (578) 898-2519 perf_vtv_stg20250929183443@discounttire.com Appointment Details Date: 10/31/2025 Start: 9:15 am End: 9:30 am Reschedule Cancel Appt Customer Notification Alternate Mobile #: (578) 898-2519 Text: 10/16/2025 @ 2:28 pm 10/16/2025 @ 2:17 pm Resend Opt Out Alternate Email: perf_vtv_stg20250929183443@discounttire.c... Resend Opt Out Vehicle Information 2020 Honda Odyssey EX-L 235/60 R18 SL 18" Factory tire size Wheel Color: N/A License plate: NDT-7512																																																																																																																								

Step	Action
7	Click Yes on the pop-up window. 
8	Select the Cancel Reason from the dropdown list. 

Step	Action
9	Click Confirm. 
10	Click OK on the confirmation pop-up window. 

Contact

If you have any questions, please contact your Buddy Store or your AVP.