



QuickStart Guide

Opening Appointments from a Deal

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ARKONA QuickStart Guide

Use this QuickStart Guide to learn how to open a service appointment from a deal.

- 1. Select the deal that you want to open an appointment on.**
 - a. Enter the stock number on line 1; or
 - b. Use function **20=Retrieve** to select the deal by customer name.

- 2. Select the service writer.**
 - a. Use Fast Path Code **SA=Service Appointment** to display the First Visit Appointment Confirmation window.
 - b. To change service writers, hit F4 on the Service Writer* field to display a list of service writers.
 - c. Take option **1=Select** by a service writer and press [ENTER] to select. You may have to page down to see all of the service writers.

- 3. Select the appointment date and time.**
 - a. Use function **F6=Select Appointment** to display the Appointment Time Selection screen.
 - b. Type in the date for the appointment and press [FIELD EXIT].
 - c. Change the appointment type if desired. Hit F4 on the Type* field to select Service, Body Shop, or First Visit appointment.
 - d. Enter any comments such as "Needs a rental car".
 - e. Set Loaner = Y if the customer will need a rental car.
 - f. Take option **1=Select** by the appointment time and press [ENTER]. You may have to page down to see all available appointment times on that date. The appointment is created and you are returned to the Deal screen.