



## **QuickStart Guide**

### **Adding Comments to Customers**

October 2004

## Adding Comments to Customers

ARKONA QuickStart Guide

*Use this QuickStart Guide to learn how to attach comments to customers in the Service Department.*

- Comments added to customers stay with the customer record not with the vehicle.
- When you add comments to customers in the Service Department, they can be reviewed from two places:
  1. You can add or review customer comments while opening a repair order.
  2. You can also review the comments using option **60=Customer Contact** on the Service Department menu.

### Adding comments to customers while opening a repair order:

1. Get to the Open Repair Order list screen.
  - a. Take option **1=Repair Orders** from the Service Department menu.
  - b. Key in your service writer password and hit [FIELD EXIT] to display the Open Repair Orders list screen.
2. Search for vehicle by any of the 5 search methods.
3. Take option **1=Select** by a vehicle to display the Customer Vehicle Information screen.
4. Use function **F22=Customer Notes** to display the Customer Contact window.
  - The Customer Contact window shows all of the contacts the customer has made with the dealership, e.g. parts sales, vehicle purchase, etc., and all of the comments added to the customer from any department.

| Op | Date    | Description                                       | Amount | Mileage | Document  |
|----|---------|---|--------|---------|-----------|
| -  | 6/22/04 | When Susan came in she was the nicest person I've |        |         | +         |
| -  | 6/22/04 | Parts Sale  | 21.08  |         | 5105831   |
| -  | 6/22/04 | Service Sale                                      | 401.50 | 14940   | 6001985   |
| -  | 6/22/04 | Vehicle Sale 90 GEO                               |        |         | A906E0797 |
| -  | 6/22/04 | A/P Check   | 100.00 |         | 1888312   |
| -  | 6/01/04 | This is a good customer.                          |        |         |           |

Customer Name MARAFINO, SUSAN Phone 492-242-8242  
 1=Source

The Description column shows what type of contact the customer made with the dealership.

This is a comment that has been added.

The + symbol indicates there are additional lines to the comment. Take option 1=Source by the comment to view.

Bottom

F3=Exit F6=Add Comments F8=Customer Information F12=Cancel

### Customer Contact Window

- Use function **F6=Add Comments** to display the Comments window.
- Enter the date that you want to record the comments on and type in the comments you want to keep with the customer and press [ENTER] to save.
  - The comments display in the Customer Contact window.
- Use function **F3=Exit** to return.
  - Function **F22=Customer Notes** displays in red to indicate comments have been added to the customer.
  - To review the customer comments**, use function **F22=Customer Notes** when you see it displayed in red.

### Reviewing customer comments using option 60=Customer Contact:

- Take option **60=Customer Contact** from the Service Department menu to display the Customer Selection screen.
- Search by last name.
- Take option **1=Select** by any of the customer's vehicles to display the Owner Vehicles screen.
  - The same customer contact information will display no matter which vehicle you select.
  - If the customer does not have any vehicles** take option **1=Select** by the customer name.
- Use function **F11=All Hist** to display Customer Comments.
  - Contacts can be added from Customer Contact, but they cannot be reviewed from the Service Department.