



***SETUP REVERSE PHONE LOOKUP
CUSTOMER CONTACT***

VAST Enterprise Retail

The material in this document is applicable for VAST Enterprise – Retail v 6.7.9 and greater.

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INTRODUCTION

This new feature allows you to look up Customer Information, such as name and address by entering the **PHONE NUMBER** on the **CUSTOMER CONTACT** screen or the **APPOINTMENTS** screen. The requirements for this to function are:

- A **HIGH SPEED INTERNET** connection that is connected all the time.
- An Internet Service Provider **other than AOL or MSN**. Reverse lookup will **NOT** work with either of these Providers.

NOTE - There may be a **MONTHLY FEE** associated with this feature.

1. TELEPHONE NUMBER REVERSE LOOKUP

a. Control File – Additional Tab

The following steps show you how to setup and use **REVERSE TELEPHONE LOOKUP**:

- Open **Maintenance** and go to **Controls**.
- Click on the **Additional** tab, and check the box next to **Use Reverse Phone Lookup**.
- Click **Done** to leave the screen.

The screenshot shows the 'Control File' window with the 'Additional' tab selected. The 'Use Reverse Phone Lookup' checkbox is checked and circled in red. Other options include 'Using Telephone Scripts', 'Using Text Messaging', 'Using MPI', and 'Using Oil Labels'. The 'Shop Hours' section shows 'Open' at 06:00 AM and 'Close' at 08:00 PM. The 'Number of Bays' is set to 4. The 'Customer Screen Default Focus' is set to 'Name'. The 'Select Tire Size Print Format' is set to 'S - Search Size'. The 'Company 3194' is displayed at the bottom left, and 'Cancel' and 'Done' buttons are at the bottom right.

- In the **Point of Sale**, click on the **Customer Contact** menu option.
- Hit your **TAB** key so you are moved to the **Telephone** number field.
- Type in a **Phone Number** and click the **F1 Button**. The **Area Code** defaults to the same Area Code as the Shop. If the Area Code is different, simply type in the different code.

The screenshot displays the 'Customer / Auto' software interface. The window title is 'Customer / Auto'. The interface is divided into two main sections: 'Customer' on the left and 'Auto' on the right. The 'Customer' section includes fields for Name (F5 - No Search), Gender (MALE), Address, City, State, Zip/Postal Code, Home Phone (610 261 4210), Other Phone, Ext, Use, Work Phone, Ext, Use, E-Mail Address, and checkboxes for 'Taxable Customer' and 'Leasing Company'. There is also an 'Advertisement' dropdown menu and checkboxes for 'Rework', 'Over The Counter', 'Third Party', and 'Disallow Tagalongs'. The 'Auto' section includes fields for Year, Make, Model, Engine, Mileage In (with a checkbox for 'km'), Vehicle Type, License, State, Color, Insp Date, and VIN Number. There are also checkboxes for 'Reasons / Inspection Forms', 'Service Comments', 'Salesperson', 'Manager', and 'Estimator'. At the bottom, there are buttons for 'History', 'Info', 'Vehicle Profile', 'Customer Profile', 'Back', and 'Next'. A checkbox at the bottom right asks 'Will this be a Fleet team invoice?'.





VAST will first search your database for this customer information based on the phone number. If it does not find it, it will go out to an **INTERNET LOOKUP** site, and will search for the **NAME** and **ADDRESS** associated with that phone number.

If VAST does not find the phone number on the internet, it will return a message: **CUSTOMER NOT FOUND**.

NOTE - If you are running **REALTIME**, VAST will perform a **REALTIME** lookup before it searches the **INTERNET**.

- Verify with the customer that this is their correct **NAME** and **ADDRESS**.

Customer No	Customer	Phone	Address
0	BETH A HARTMAN	(610)261-4210	135 S FRONT ST COPLAY PA 18037

Customer Search  Get More  Add New  Cancel  Select


If it is, click the **SELECT** button on the bottom of the screen. VAST will fill in all of the customer's information for you, and you can continue from there.

NOTE - The **GENDER** will default to **MALE** for Retail customers and **BUSINESS** for Business customers.

If VAST finds information on the **INTERNET** based on a Phone Number, and the information has a comma (,) it will be interpreted to be a **RETAIL** customer. Ex: Wilson, Michael – will be entered into VAST with **GENDER-MALE**.

If the information **DOES NOT** have a comma (,) it will be interpreted as a **BUSINESS** customer. Ex: SAM'S LUMBER YARD – will be entered into VAST with **GENDER _ BUSINESS**

SO, if a Name of a Business has a comma in it, it will be entered into VAST as a **RETAIL** customer. It may not always be exact.

- If the **NAME** and **ADDRESS** that is brought back for you is **NOT** the correct information, click the **ADD NEW**  Add New button on the screen, and you will be presented with the blank **CUSTOMER CONTACT** screen, so you can start typing the information.
- This will work in the **APPOINTMENT** screen as well. Click on the **ADD** button on the top of the screen.

The screenshot shows the 'Appointments' window. At the top, there are buttons for 'Graph', 'List', 'Add', 'Edit', 'Erase', and 'Print'. Below these are three columns labeled 'Bay #1', 'Bay #2', and 'Bay #3'. A list of times from 08:45 to 12:15 is shown on the left. On the right, a calendar for July 2011 is displayed, with the 21st highlighted. At the bottom, there are buttons for 'Select Date Range', 'Day', 'All', and 'Done'.

- Tab to the **PHONE** field, type the **TELEPHONE NUMBER** and click the **F1** Button.

The screenshot shows the 'Appointment Information' window. It is divided into two main sections: 'Customer/Auto' and 'Appointment'.

Customer/Auto Section:

- Name (F5 - No Search): [Empty field]
- Address: [Empty field]
- City: [Empty field] State: [Empty field] Zip/Postal Code: [Empty field]
- Year: [Empty field] Make: [Empty field]
- Model: [Empty field]
- Home Phone: 610 261 4210 (with F1 button) Work Phone: [Empty field] Ext: [Empty field]
- Buttons: Cust Message, Service Comments

Appointment Section:

- Work Type: Description Time
- NONE 0
- Exhaust 0
- Brake 0
- Shocks 0
- Struts 0
- Coils 0
- Front End 0
- Alignment 0
- Lube Oil F 0
- Miscellane 0
- Shop Suppl 0
- Heating an 120
- Slot: 1 Bay [Empty field]
- Arrival Date: 07/21/2011
- Drop Off: [Empty field]
- Quoted Parts: \$0.00 Quoted Labor: \$0.00
- Duration: 0 Completion Time: [Empty field]

Buttons at the bottom: Quote, Select Estimate, Cancel, Done.

- This will first search your local database, and if nothing is found, it will go out to the **INTERNET** and search for the **NAME** and **ADDRESS**. The same rules apply in the **APPOINTMENT** screen, as do in **CUSTOMER CONTACT**. If the information is correct, click **SELECT**. If not, click **ADD NEW** and enter the information manually. Then continue with the **APPOINTMENT** screen as you normally would.

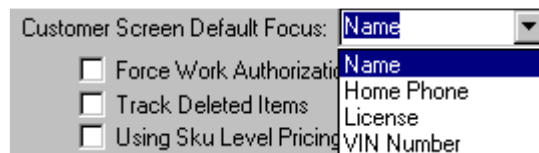
2. CUSTOMER CONTACT STARTING POINT – TG # 11268

VAST Enterprise Retail provides the ability to select where your **DEFAULT STARTING** point will be on the **CUSTOMER CONTACT** screen. In previous versions of **VAST**, when you open the **CUSTOMER CONTACT** screen, it would always start with the **CUSTOMERS NAME** and you could search or move from there. **VAST** now gives you the flexibility to select which of the following starting points you would like your system to begin with. You can choose from:

- **NAME** (the default)
- **HOME PHONE**
- **LICENSE**
- **VIN Number**

You can customize the search process to be more efficient for your organization. To set this up and use it, please perform the following steps:

- a. Open VAST Maintenance
- b. Go to **CONTROLS** and click on the **ADDITIONAL** tab. Near the bottom right hand corner, you will see **Customer Screen Default Focus**.
- c. Click the on the drop down arrow and you will see the following list to choose from.



- d. Select the option you would like, and then click the **DONE** button to leave **CONTROLS**. Click **OK** to the message that appears telling you that your changes will take affect the next time you open **VAST POINT OF SALE**.
- e. Open **VAST POINT OF SALE**. If you already had **VAST POS** open, you will need to quit out of it and go back into it.
- f. Click on **CUSTOMER CONTACT**. Based on which option you selected in **MAINTENANCE**, you will now see that this is where your cursor is located and ready to search. Just **TYPE** and hit the **F1** button to search or if you wish to move to one of the other search options, hit the **TAB** key to move around the screen as you normally would.