

Changing Customer Information on an RO with Tasks

Once an RO has tasks, you cannot modify the Header Information. In particular changes to the Customer's Master record (Card) are not reflected in the RO Header.

If changes to the customer record are made after the RO has tasks, you can re-validate the customer information by following these steps:

1. Click in the Customer Name field and then click the ellipsis (...)

61861 Mark Stephenson - Repair Order

General Customer Invoicing Vehicle

RO No. : 61861 C Open Priority : 5

Customer Name : Mark Stephenson ... Create Date/Time : 11/08/02 7:45 AM

Work Phone : 404.705.2823 Promised Date/Time : 11/08/02

VIN : WVWBH63B91P048770 Closed Date/Time :

Vehicle Year : 2001 Mileage In / Out : 31586 0

Vehicle Make : Volkswagen Service Advisor : 227

Vehicle Model : Passat GLX Tag No. : 1234

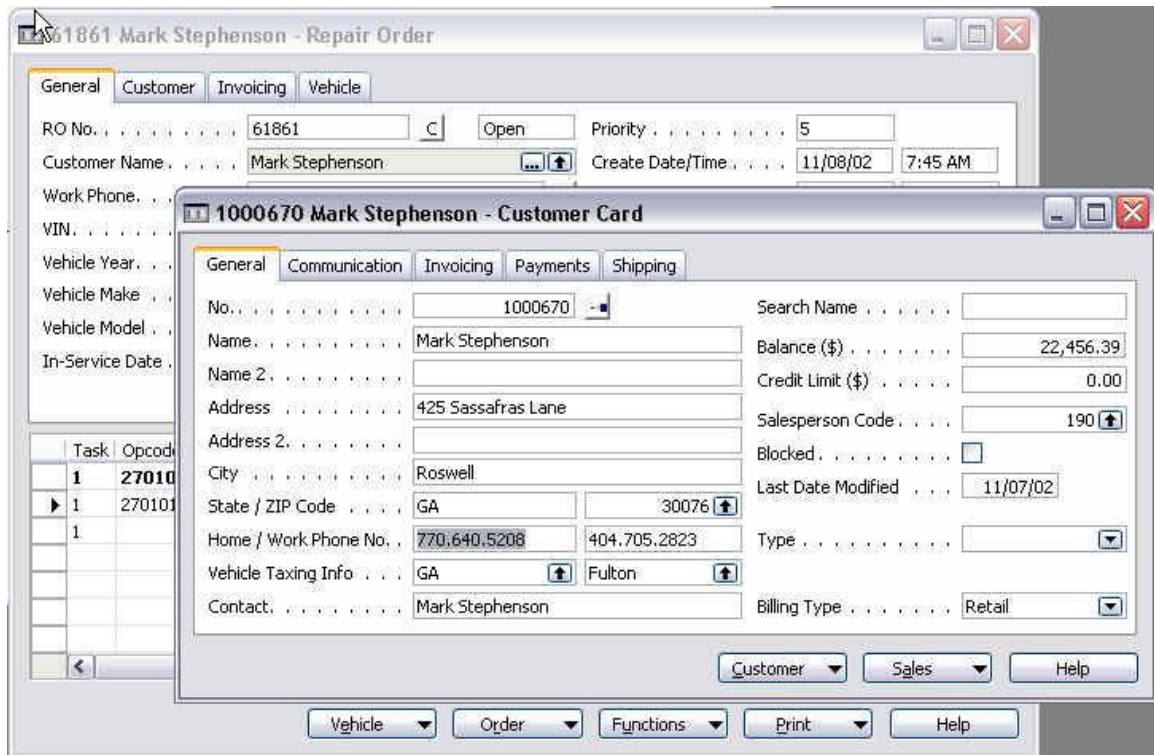
In-Service Date : Shop Supplies : Current VIP : No

Contract Deductible :

Task	Opcode	Status	Description	Part/Tech	Quantity	Pay T...	Availa...	Pa
1	270101	Not Started	Oil Change					
▶ 1	270101		Unassigned	LIA		CP		
1			LOF					

Vehicle Order Functions Print Help

2. Make the required changes to the customer card



3. Close the customer card and select Function->Header Changes->Re-validate Customer Info

