

# Update Customer & Vehicle Information

## Steps and Processes to be followed

# Customer & Vehicle Details - Update / Modification of Data

## Requirement : –

- a) There are frequent changes in customer & vehicle details like – change in contact number/ e-mail ids, vehicle temporary to permanent registration number etc.
- b) Currently there is no option available for updating or modifying the customer and vehicle details in the system.

## Enhancement : –

- a) Option created for updating/ modifying the customer & vehicle details in system. Screen has been provided under transaction for updating the details.

**Report Link : Menu → Transaction → Update Customer**

- c) Dealer can search the details based on Registration / Mobile / VIN number.
- d) Based on the information availability in the data base, current details will be visible on the screen (Customer & Vehicle information).
- e) Dealer can correct/ modified details in the required field & save the data.

# Customer & Vehicle Details - Update / Modification of Data

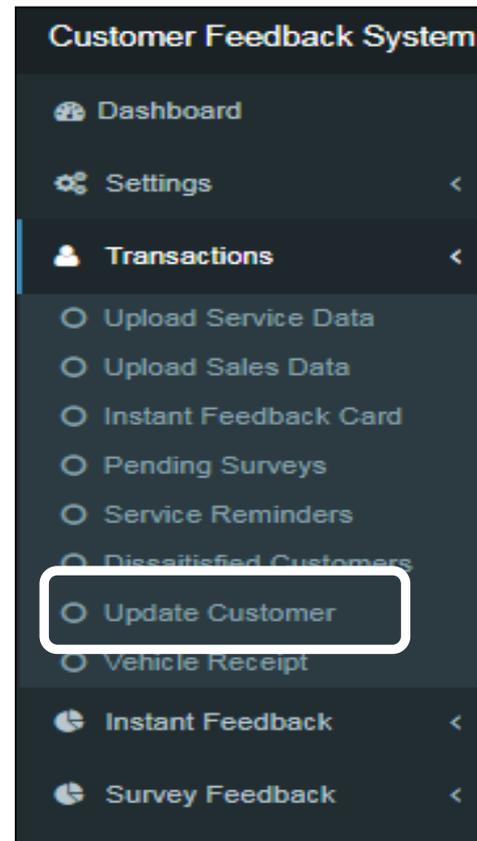
## Procedure :

**Step 1 :** Open the Customer details updation screen thru following link.

**Transaction Link : Menu → Transaction → Update Customer**

**Step 2 :** Select the customer & vehicle current information based on VIN / Registration / Mobile Number.

**Step 3 :** Update the customer / vehicle latest information & save the data.



# Customer & Vehicle Details - Update / Modification of Data

## Procedure :

Based on the latest information data get updated in the master for future references.

Report Link – “Update Customer”

Selection based on VIN / Mobile / Registration number

Customer information display for correction / updation

The screenshot displays the 'Update Customer' interface. On the left is a dark sidebar menu for the 'Customer Feedback System' with options: Dashboard, Settings, Transactions, Upload Service Data, Upload Sales Data, Instant Feedback Card, Pending Surveys, Service Reminders, Dissatisfied Customer, Update Customer (highlighted), Vehicle Receipt, Instant Feedback, Survey Feedback, SMR Report, and Dissatisfied Conv. Report. The main content area has a title 'Update Customer' and a search section: 'Serach by VIN Number or Mobile Number or Registration Number' with a text input field 'Please Enter VIN Number/Mobile Number/Registration Number' and a 'Search' button. Below is a form with six fields: 'Customer Name\*' (text), 'Contact Number\*' (text), 'Email Id\*' (text with 'Email Address' placeholder), 'VIN Number\*' (text), 'Registration Number\*' (text), and 'Vehicle\*' (dropdown menu). A 'Save and Next' button is in the bottom right corner. Three callout boxes with arrows point to the 'Update Customer' menu item, the search section, and the form fields.

**Thank You**