



Creating a New Estimate for New Customer/Vehicle

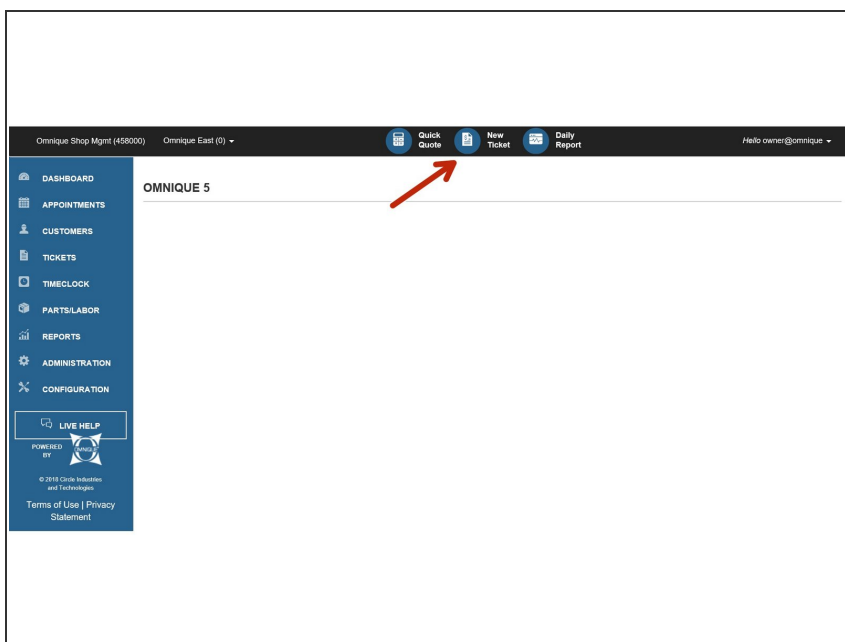
Here you will learn how to create a new estimate using a new customer and a new vehicle.

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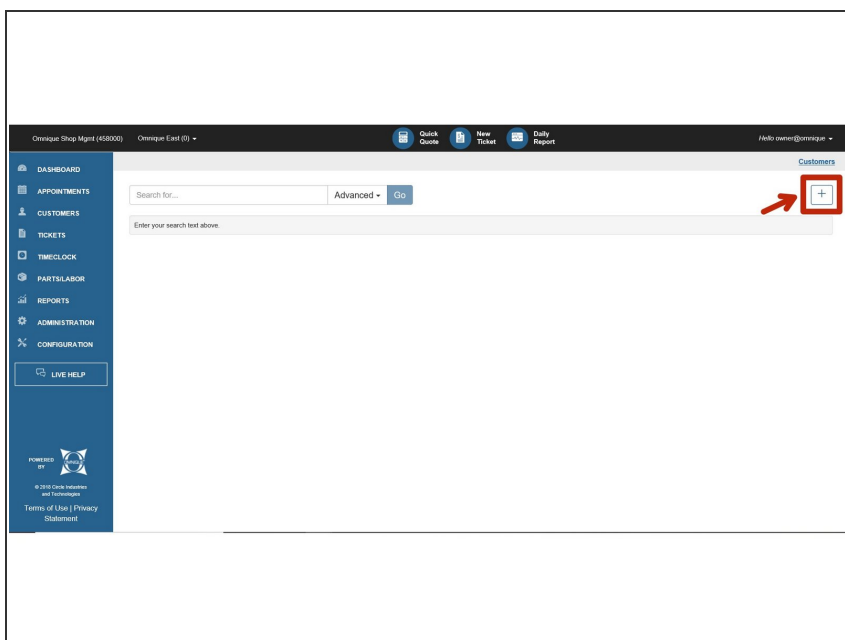
New Estimate

Step 1 — Creating a New Estimate for New Customer/Vehicle



- To begin a New Ticket click on the **New Ticket** Tab.

Step 2 — Creating a New Estimate for New Customer/Vehicle



- Click on the **+** button to create a new customer.

Step 3 — Creating a New Estimate for New Customer/Vehicle

The screenshot shows the 'NEW TICKET' form in Step 1 of 3 - Enter Customer Information. The form is titled 'New Customer' and includes the following fields:

- *Business Name: [Text Field]
- AND/OR
- Title: [Text Field]
- *First Name: [Text Field]
- *Last Name: [Text Field]
- Primary Phone Number: [(111) 222-3333]
- Phone Type: [Business]
- Alternate Phone Number: [(111) 222-3333]
- Phone Type: [Business]
- *Email: [Text Field]
- ☐ Customer agrees to receive marketing related emails?

The form also includes a sidebar with navigation links: DASHBOARD, APPOINTMENTS, CUSTOMERS, TICKETS, TIMECLOCK, PARTSLABOR, REPORTS, ADMINISTRATION, CONFIGURATION, and LIVE HELP. The footer includes the text 'POWERED BY' and '© 2019 Omnicore Industries and Technologies Terms of Use | Privacy Statement'.

- Enter in customer information.
- All required fields are shown with a **Red Asterisk**.
- All fields shown with a **Green Asterisk** are not required but strongly encouraged to complete.
- **i** Entering a zip code in the address section first will automatically pull up the city, state, and country.

Step 4 — Creating a New Estimate for New Customer/Vehicle

The screenshot shows the 'NEW TICKET' form in Step 2 of 3 - Enter Vehicle Information. The form is titled 'New Vehicle' and includes the following fields:

- Phone Number: [Text Field]
- Phone Type: [Business]
- *Email: [Text Field]
- ☐ Customer agrees to receive marketing related emails?
- Mailing Address
 - ☒ US/Canada ☐ Foreign
 - Mailing Name: [Text Field]
 - Line 1: [Text Field]
 - Line 2: [Text Field]
 - Zip Code: [Text Field]
 - City: [Text Field]
 - State: [Select State]
 - Country: [Text Field]

The form also includes a sidebar with navigation links: DASHBOARD, APPOINTMENTS, CUSTOMERS, TICKETS, TIMECLOCK, PARTSLABOR, REPORTS, ADMINISTRATION, CONFIGURATION, and LIVE HELP. The footer includes the text 'POWERED BY' and '© 2019 Omnicore Industries and Technologies Terms of Use | Privacy Statement'.

At the bottom right, there are three buttons: Cancel, Continue (highlighted with a yellow arrow), and Save.

- Upon completion, click **Continue** to save and add new vehicle.

Step 5 — Creating a New Estimate for New Customer/Vehicle

The screenshot shows the 'EDIT VEHICLE' form in the Omnique Shop Manager. The form is divided into sections: 'VEHICLES', 'Return to Ticket', and 'Change Vehicle'. The 'VEHICLES' section is active. It contains a 'Reference Numbers' section with a 'Region' dropdown set to 'Canada' and a 'Mileage Unit' dropdown set to 'Miles'. Below these are fields for 'Other ID', 'Note', 'License', 'State' (set to 'Colorado'), 'VIN', and a 'QuickVIN' button. Red arrows point to the 'License' and 'State' fields, and a blue arrow points to the 'VIN' field. A 'Refresh Vehicle Details' link is at the bottom.

i Vehicle information can be added three different ways, by license plate #, VIN #, or by entering in the year/make/model manually.

- Enter a license plate number (if applicable), then click **QuickVIN**. Vehicle Information will successfully populate if the plate number is valid.

i Make sure the correct State is selected from the drop down list.

- If the license plate number is unknown or does not exist, enter in a complete VIN number, then click **Refresh Vehicle Details**. Vehicle information will successfully populate if the VIN number is valid.

! If both the a license plate number and VIN number are unknown or do not exist, continue to Step 6.

Step 6 — Creating a New Estimate for New Customer/Vehicle

The screenshot shows the 'Vehicle Specifics' form in the Omnique Shop Mgmt interface. The form includes the following fields:

- License: [Empty]
- State: Colorado (dropdown)
- QuickVIN: [Empty]
- VIN: [Empty]
- Color: [Empty]
- Year: [Empty] (dropdown)
- Make: [Empty] (dropdown)
- Model: [Empty] (dropdown)
- Package/Trim: [Empty] (dropdown)
- Engine: [Empty] (dropdown)
- Transmission: [Empty] (dropdown)

A green arrow points to the 'Save' button at the bottom right of the form.

- Select the year, make and model of the vehicle from the drop down lists.
- *i* If the vehicle details are not found within the drop down lists, the vehicle information will need to be added to the Omnique system manually. This can be done in the Configuration tab. Click [here](#) to learn more.
- Once all necessary vehicle information has been added, click **Save** to save vehicle details. A new ticket will then be created.