

*Suttons*

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# REASSIGNING/ EDITING CUSTOMER OWNERSHIP

Standard Operating Procedure

**DRAFT**

Standard Operating Procedure

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# OVERVIEW



## WHAT IS A CUSTOMER ENTITY ID?

Every customer in **Era Power** has a unique identification number called an **Entity ID**. This number is shown in the Customer Details section of **Era Power** in both the **Customer Maintenance Menu, Vehicle System** and via a **Repair Order**.

RO Number U15691 Dept Service Homebush A

Parts  Sublet  POLs  Misc  Lab

**Customer Details**

Reassign **231426** Bill To

OSB Status (U) James Allan Simpson

2/17

Meadow Bank NSW 2114

Phone (02) 9907 (0) (0400) 592

The customer's **Entity ID** is then **linked to a vehicle(s)**

One **Entity ID** (one customer) can also have **multiple vehicles** under their ownership meaning customers can update their details on one **Entity ID** and it will carry across to all owned vehicles, and you do not need to update every record for every vehicle they own.

## POTENTIAL ISSUES

Customer Entity IDs can be updated/overwritten when a new owner presents a vehicle for service, instead of **reassigning** the vehicle to a new owner. This will create errors in the database where **customers will be linked to vehicles they do not own**, and the **original owner details** erased from the vehicle ownership history.

Entity Id 231426 James Allan Simpson

**Entity**

Business Name

First Name James

Middle Name

Last Name Allan Simpson

Preferred James

## CAUSE

When a new owner presents a vehicle for service, the user **changes/overwrites the customer details of the existing Entity ID**, instead of **re-assigning** the ownership of the vehicle to a **new Entity ID** via the **Re-Assign** button.

# SCENARIOS & SOLUTIONS



## SCENARIO 1

The person claiming ownership of the vehicle requires their details to be updated.  
*For example: a new address, mobile, email or other personal detail update, such as marketing and communication preferences.*

## SOLUTION

You can change/update the details as needed via the existing Entity ID.

Entity Id	231426	James Allan Simpson
Entity		
Business Name		
First Name	James	
Middle Name		
Last Name	Allan Simpson	
Preferred	James	

# SCENARIOS & SOLUTIONS



## SCENARIO 2

A new customer presents and claims ownership of the vehicle.  
*For example: the vehicle was sold, and then purchased by this person.*

## SOLUTION

You *must* click the *Reassign* button and follow the prompts to complete. This will transfer the vehicle to a new owner and will create a **new entity ID**. Task complete.

The screenshot shows a 'Customer Details' form with the following fields and values:

<b>Reassign</b>	231426	Bill To	<input type="text"/>
<b>OSB Status (U)</b>	James Allan Simpson		
	2/17		
	Meadow Bank	NSW	2
<b>Phone</b>	<b>(H)</b> (02) 9807 ...	<b>(B)</b> <input type="text"/>	<b>(M)</b> (0408) 583

# SCENARIOS & SOLUTIONS



## SCENARIO 3

A customer presents to the dealership. Although the owner of the vehicle is correct, the person driving the vehicle is the contact for the day.

*For example: Jane Doe is driving the car, but the Entity ID is under John Smith..*

## BE AWARE

This scenario is very common for vehicles owned by companies or businesses. The company or business owner will be registered as the owner, and the drivers may either be assigned to that vehicle or could change regularly.

## SOLUTION

In these instances you can add a **Driver Contact** via the **Alternate contact details** section whilst creating the appointment or from within an existing Repair Order. This leaves the ownership intact but allows for the drivers details to be recorded.

**When creating a new appointment,** add the driver's details to the **Alternate Contact Details** section.

Customer Details

Customer Number **Reassign** 779355 Frampton Freight Pty Limited **Use customer** Avail Credit : 25000.00 Credit Limit : 25000.00 Alternate C

Business Name Frampton Freight Pty Limited Contact Type Business Drivers Mob

Customer Frampton Freight Pty Limited Privacy Code 01 All Contact OK Name Bob

Street Address 1 Bobialla Street Address 2 Idaville Road OSB Status (U) Home phone Email Bob@gmail.com

Use customer details for

Alternate Contact Details

Drivers Mobile (0400) 555 222

Name Bob

Email Bob@gmail.com

Customer Details

**Reassign** 779355 **Bill** 903... **Frampton...**

**OSB Status** Frampton Freight Pty Limited

Bobialla

Merriva N... 23...

Phone (H) (B) (02) 6... (M) (0428) ...

Home Email office@framptonfarms.com.au

Business Email

**Driver Name** Bob **Mobi** 0400555111

**When adding to an Open RO,** add the driver's details to the **Driver's Name** section.

Phone (H) (B) (02) 6... (M) (0428) ...

Home Email office@framptonfarms.com.au

Business Email

**Driver Name** Bob **Mobi** 0400555111