Information From a Customer That is NOT Given Directly to the Advisor Handling the RO or Appointment – Procedure:

1 Put all information from the customer in writing precisely as the customer communicates it.

2 Enter the information into the RO Notes field.

3 If the advisor on the RO is at the shop today, message him to alert him to the information.

OR

4 If the advisor on the RO is NOT at the shop today, email him to alert him to the information.

5 Do not rely only on verbal communication. Record everything in writing to prevent mistakes.