

Registration Renewal

One the most commonly completed transactions for Vehicle Services is a registration renewal.

The Scenario:

Scott Royal has a vehicle that is about to expire. He gives me his plate number, so we can look up the vehicle.

Registration Renewal

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| New Manager springboard | |
| Since the action to be performed will be on an existing customer, I'll start by searching for that customer. | |
| | Select Search manager |

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| Search | |
| As I said, Scott has provided me with the plate number for his vehicle. So I will search by that. | |
| Search field | 55556US |
| Tapestry returns 2 search results, both for a 2014 Ford Explorer owned by Scott Royal. The first result shows a match for the Patriot plate and the second result shows a match for a combination of the plate and first 5 of the VIN. | |
| Under the Vehicle Ownership Account hyperlink, the expiration date shows this vehicle's registration expires on July 31 st 2017. | |
| Since I am doing a transaction regarding the registration, I will select the Vehicle Ownership Account hyperlink. | |
| | Select Vehicle Ownership hyperlink |

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| Vehicle Ownership Account | |
| Notice the Expires date in the Account Attributes section. It is July 31, 2017. Tapestry will change the color of the Expires date when you're within 30 days of expiration to orange. | |
| There are a few things I'd like to point out here on the Vehicle Ownership Account springboard. There is an Important icon next to the Expires date and the text is orange. This color coding indicates that the registration is expired. | |

| Vehicle Ownership Account (cont.) | |
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| In the registration tab and sub-tab, the current registration is a New Reg. From here I can also easily determine the valid dates for this registration, the Expiration date, the Plate Type and ID, and which office issued the registration. | |
| Before I continue on to the Renewal, let's view Scott Royal's individual Customer springboard. | |
| Owners section | Select Scott Royal hyperlink |
| On Scott Royal's Individual Customer springboard, we can see two vehicles linked to him: the Ford Explorer I wish to renew as well as an Audi S4. We will see shortly how him being linked to two vehicles in Tapestry will affect our transaction. | |
| I am now going to close his Individual Customer springboard. | |
| Navigation Panel | Select Close Manager icon for Scott Royal |
| I am taken back to the last springboard I had open: The Vehicle Ownership Account springboard. | |
| So far, we've done activities that deal with the Title, so we've selected the Issuance Transaction action button on the Vehicle Customer springboard. Now we're working on the registration, or account, so I need to select the Issuance Transaction action button here on the Vehicle Ownership Account springboard. This action button will open a list of transactions relating to the registration and plates for this Vehicle Ownership Account . | |
| | Select Issuance Transaction action button |
| To renew the registration, I will select the Vehicle Registration Renewals hyperlink. | |
| | Select Vehicle Registration Renewals Hyperlink |

| Vehicle Detail | |
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| This is the Vehicle Registration Renewal activity springboard. The first sub-section displays vehicle details for all vehicles owned by this owner. The top vehicle will always be the vehicle the Registration Renewal was initiated from. The Renew checkbox for this vehicle will also always be checked. | |
| Any other vehicles owned by the registered owner of the first vehicle will be listed below. Here, I can see that Scott also owns a 2015 Audi S4. | |
| Tapestry displays all vehicles owned by this owner so that we can renew all of them simultaneously. To add the Audi to the activity, I would simply select the Renew checkbox. We'll do this together in another exercise. For now, the Audi's registration doesn't expire until December, so we'll leave the Renew checkbox unchecked and continue with renewing only the Ford Explorer. | |
| When all vehicles to be renewed are marked with checks in their Renew checkboxes, the next step is to select the Next action button. As we've seen with other vehicle activities, we can also Cancel this activity. You'll notice there is no Save action button. This is because a renewal is such a fast transaction, it isn't going to save that much time by saving for later. | |
| | Select Next action button |

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| Renewal Information | |
| <p>Before I enter any information into this sub-section, let's examine the Section Outline more closely.</p> <p>We are currently in the Ownership section, the Registration Information sub-section. Moreover, there's what appears to be another Section Outline forming within this sub-section. This structure reflects Tapestry's ability to renew more than one registration at a time. The Registration Information sub-section we're currently in is specifically for the first vehicle listed in the Vehicle Detail sub-section.</p> <p>Within this Registration Information sub-section, we are in the Renewal Information section. At the top of this section is the Title Assignment. It is not editable, because this is only a registration renewal transaction. If a change to the title were necessary, I would need to complete a different vehicle activity.</p> <p>We can choose to Update Contact information by selecting yes or no.</p> <p>Another option I have in this section is to add a Veteran's Certificate Number which discounts registration fees for veterans. Mr. Royal is not a veteran, so I will not add a number to this field.</p> <p>Moving down this sub-section we come to Plate Information. There is the option to change plates when renewing a registration. In this case, Mr. Royal would like to switch to the Standard Yellow Plate, so we'll select No from the Same Plate? drop-down.</p> | |
| Same Plate? | No |
| <p>Since we entered No, Tapestry not only displays fields for Registration Term and Expire Date but also fields to select at New Plate Type or to Use an Existing NM Plate.</p> <p>First, Mr. Royal wants another 2 year Registration Term.</p> | |
| New Plate Type | Standard Yellow |
| Same Plate? | No |
| Registration Term | 2 Years |
| <p>With all fields satisfied in this sub-section, we can proceed by selecting the Next action button. If Mr. Royal decided that he did want to renew his other vehicle's registration as well, that would be a good opportunity to select the Previous action button and return to the Vehicle Detail sub-section. Before we proceed, take a look at the Section Outline. At the moment, the sub-section we're on is the Registration</p> | |
| | Select Next action button |

| Plate Information | |
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| <p>The Plate Information sub-section in a Registration Renewal works exactly the same way it does in other registration activities. The plate number is automatically populated based on my inventory. If the customer chooses at this point to change the plate type, that must be done in the Renewal Information sub-section.</p> <p>Also, we still have the Missing, Damaged, and Grab Next Inventory action buttons to utilize as needed.</p> <p>511TLR is present and undamaged so I'm going to select the Next action button to continue.</p> | |
| | Select Next action button |

| Donations | |
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| <p>This is the donations section. Here, customers have the option to donate to the Veterans Fund or Children's Eyesight Fund. If the customer would like more information about the funds, you can select the hyperlinks to view additional information.</p> | |
| | Select Veterans Fund hyperlink |
| <p>A Definition Box with a short description of the fund displays. To close it, select the Close icon or click anywhere outside of the box.</p> <p>We will not be taking any donations for the Veterans or Children's Eyesight Funds, so we will select \$0 for each followed by the Next action button.</p> | |
| Donate to the Veterans Fund? | Select \$0 selector button |
| Donate to the Children's Eyesight Fund? | Select \$0 selector button |
| | Select Send Verification/Donations |
| Now we can proceed to the Fees sub-section by selecting the Next action button. | |
| | Select Next action button |

| Fees | |
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| After confirming the fees, verify that the customer has a form of payment. Even though we can't Save a renewal activity, we still need to verify the customer has a form of payment. If they do not, select the Cancel action button. It will be quick and easy to recreate the activity when they return. | |
| If they have payment, select the Next action button to continue. | |
| | Select Next action button |

| Summary | |
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| Here you see a summary of the transaction. The balance that the customer owes shows in red, and the new Expiration date displays as well. We will now submit this activity so that we can accept a payment. | |
| | Select Submit action button |

| Vehicle Ownership Account | |
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| With the other activities we've done, Tapestry automatically navigated to the Vehicle Customer springboard. That is because we began them from the Vehicle Customer springboard. For a Registration Renewal, we began the activity from the Vehicle Ownership Account springboard. So <i>that</i> is where Tapestry navigates upon Submitting the activity. | |
| Notice how this springboard has changed: | |
| <ol style="list-style-type: none"> 1) There is now a balance 2) There is now a Renewal transaction in the Account Registration History | |
| There are other things that have not <i>yet</i> changed because I have not taken a payment. | |
| <ol style="list-style-type: none"> 1) Expires date is still July 31, 2017 2) Plate Number is still 55556US 3) Based on the blue hyperlink, the New Reg is still the active Registration type. | |
| Once I take a payment, those things will change. I'm going to do that now by selecting the Accept a Payment action button and selecting the Check hyperlink. | |
| | Select Accept A Payment action button |
| Individual Payment Type | Select Check hyperlink |

| Cashiering Payment | |
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| Routing Number | 107112122 |
| Account Number | 45412214 |
| Check Number | 5841 |
| Check Amount | 167.00 |
| | Select Save action button |

Cashiering Interaction

The payment has been processed and now I can print my documents by selecting the **Quick Print** action button.

Select **Quick Print** header button

This time, we only get a registration document to print and the cashiering receipt. There is no title document since the Registration Renewal has no bearing on the title. After printing the documents

Close Registration **IE** tab

Close Cashiering **IE** tab

When we select the **OK** action button, Tapestry will navigate back to the **Vehicle Ownership Account** springboard.

Select **OK** action button

Vehicle Ownership Account

See how things have updated with the payment.

- 1) The **Balance** is \$0
- 2) **Expires** date is now September 30, 2019
- 3) **Plate Number** is now **511TRL**
- 4) Based on the blue hyperlink, the Renewal is still the active Registration type.

Navigation Panel

Select **Close Manager** icon

