

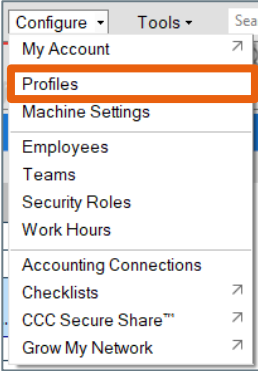
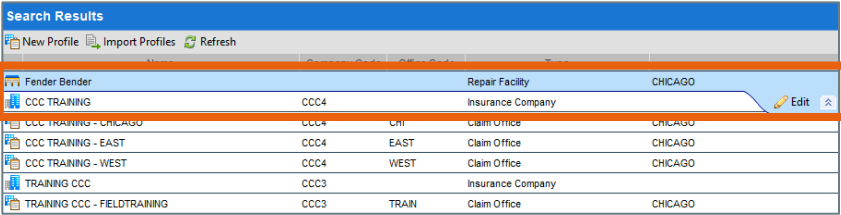
Communicating with the Customer Experience Dashboard

Purpose

The Customer Experience Dashboard not only allows you to keep track of your customer's communications with your shop, but it also allows you to send texts or emails directly from the Dashboard as soon as an Opportunity is created. This job aid describes how to set up message templates, identify the primary customer contact, and send texts or emails from the Customer Experience Dashboard.

Message Templates

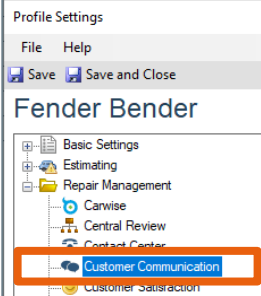
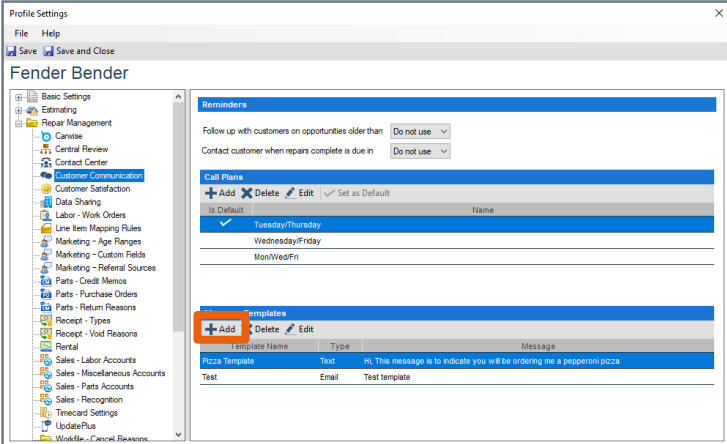
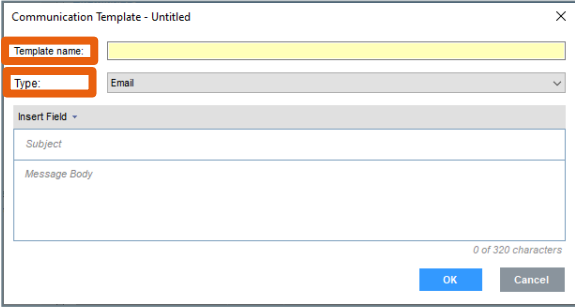
To begin using this feature, you must first set up message templates for each type of message you want to be able to send. Message Templates are created and updated in your Repair Facility Profile or Location Profile. You must specify if a template is for text or email and then fill in the details. Once created, you will then be able to select it on the Customer Experience Dashboard.

Step	Action
1	<p>Go to the Configure Menu and select Profiles.</p> 
2	<p>Open your Repair Facility Profile or select Edit.</p> 

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Communicating with the Customer Experience Dashboard, Continued

Message Templates, Continued

Step	Action
3	Scroll down to Repair Management and select Customer Communications . 
4	Go to Message Templates and select Add . 
5	The Communication Template window displays for you to complete. Enter a Template Name and choose Email or Text as the Type . 
6	Use Insert Field to pull information from the Workfile to personalize the message.

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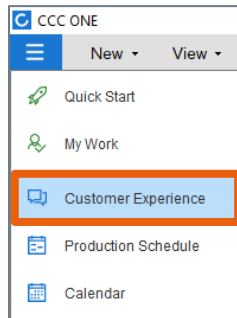
Communicating with the Customer Experience Dashboard, Continued

Message Templates, Continued

Step	Action
7	Enter the message you want displayed.
8	Select OK to add it.

Send Messages Once you have created Message Templates and have selected the Primary Contact, it is time to go to the Customer Experience Dashboard to send your messages.

From the dashboard menu, select **Customer Experience**.



Step	Action
1	Select desired Workfile / Opportunity and select Contact Customer in the mini toolbar.

Customer Experience

[-All-] + New Appointment Print Export

Priority	RO Number	Contact Customer	Owner	Vehicle	Last Contact	To Do	Due Date
Opportunity				2015 GMC Sierra 1500	--	--	--
Opportunity				2019 TESL Model S A...	--	--	--
Opportunity				2006 MAZD RX-8 Aut...	--	--	--
Opportunity				2019 TESL Model S A...	--	--	--

Mini toolbar: Contact Customer (highlighted with an orange box)

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Communicating with the Customer Experience Dashboard, Continued

Send Messages, Continued

Step	Action
1	<p>The Customer Communications window will appear.</p> 
2	Select the way you want to send your Message.
3	Select Send to send your email or Text.
4	Select OK to leave the Contact window.

The message displays on the **History Panel** after you select Send.

Contact Customer

Send a text message

Repairs Update

TARAH Hello. Please call the shop when you can. We have an update.

67 of 320 characters

Send

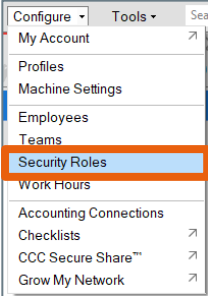
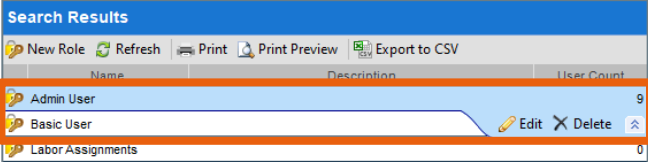
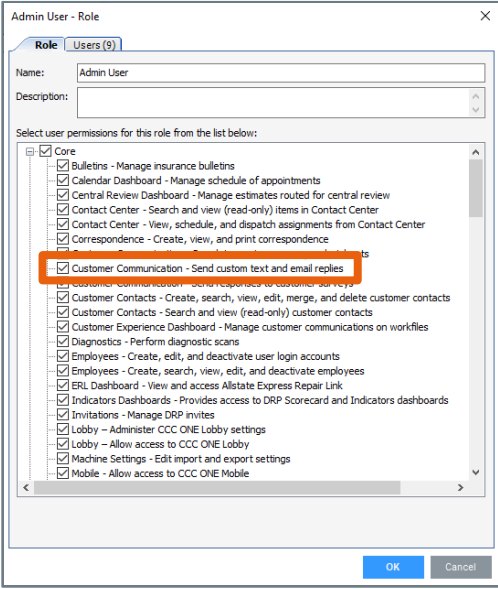
OK

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Communicating with the Customer Experience Dashboard, Continued

Custom Messages

It is important to note that you cannot edit the Messages you send unless you have the proper Security Permissions.

Step	Action
1	<p>Select the Configure drop-down menu, then Security Roles.</p> 
2	<p>Admin User > Edit.</p> 
3	<p>Ensure that the Customer Communication Permission box is checked to allow the user to Send custom text and email replies.</p> 
4	<p>Select OK.</p>

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Communicating with the Customer Experience Dashboard, Continued

Notes Tab The Messages between you and the Customer also display on the **Notes** tab.

