Using 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. This job aid describes how to identify the primary customer contact and send texts or emails from the Customer Experience Dashboard.

Primary Contact

The Messaging feature in the Customer Experience Dashboard uses the Primary Contact and Communications Preference settings you have selected on the Workfile **Contacts** Tab.
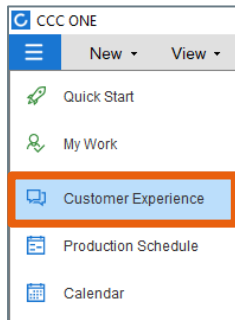

The **Primary Contact** is shown in dark blue and if there are several Contacts, you can select which one will be primary.
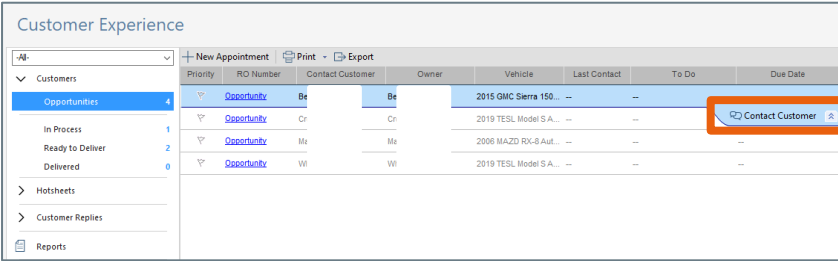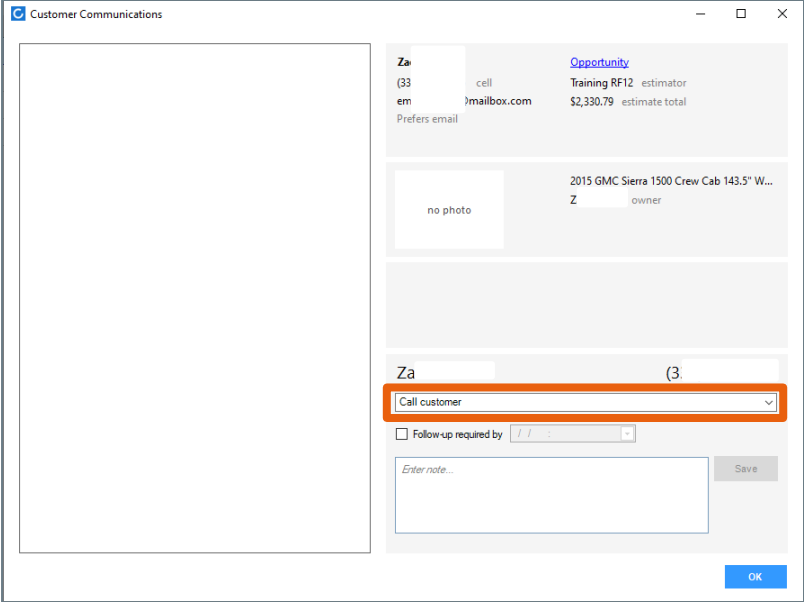
Remember: You must enter a valid email address and/or a Cell Phone number to send email or SMS messages via the Customer Experience Dashboard.

Using the Customer Experience Dashboard, Continued

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.
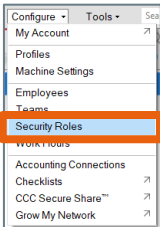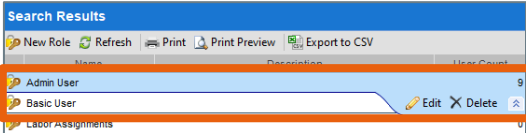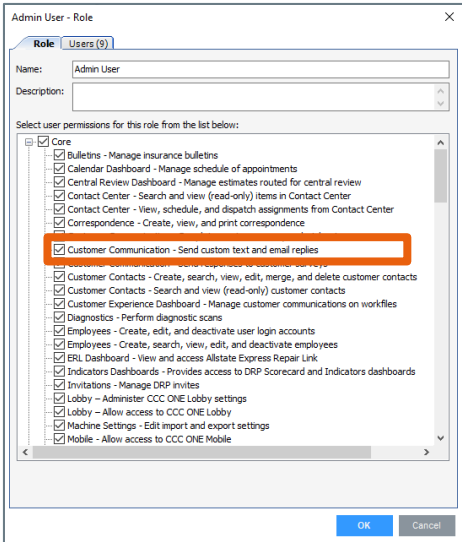

Step	Action
1	Select desired Workfile and click on **Contact Customer** in the mini toolbar. The **Customer Communications** window will appear.
2	Select the way you want to send your Message.

3	Click **Send** to send your email or Text.
4	Click **OK** to leave the Contact window.

The message displays on the History Panel after you click Send.

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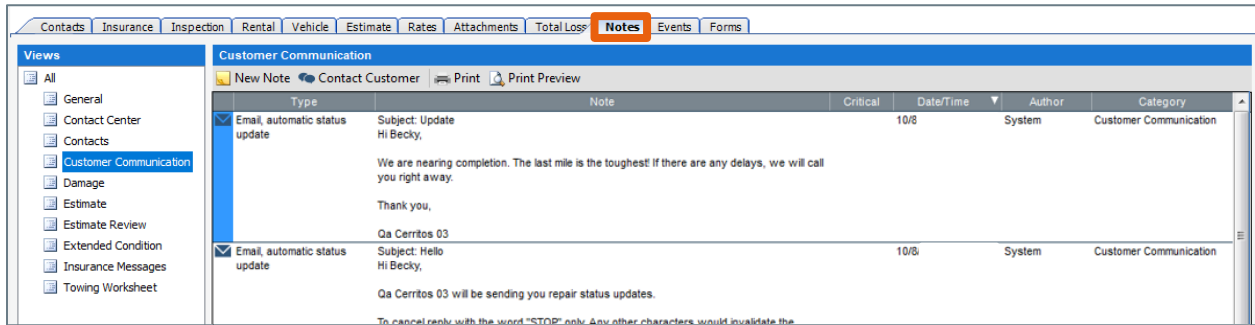
It is important to note that you cannot edit the Messages you send unless you have the proper Security Permissions.

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

Using the Customer Experience Dashboard, Continued

Notes Tab

The Messages you send, and your Customer's replies also display on the **Notes** tab.

| Contacts | Insurance | Inspection | Rental | Vehicle | Estimate | Rates | Attachments | Total Loss | **Notes** | Events | Forms |

Views

- All
  - General
  - Contact Center
  - Contacts
  - Customer Communication
  - Damage
  - Estimate
  - Estimate Review
  - Extended Condition
  - Insurance Messages
  - Towing Worksheet

Customer Communication

New Note · Contact Customer · Print · Print Preview

Type	Note	Critical	Date/Time ▼	Author	Category
Email, automatic status update	Subject: Update Hi Becky, We are nearing completion. The last mile is the toughest! If there are any delays, we will call you right away. Thank you, Qa Cerritos 03		10/8	System	Customer Communication
Email, automatic status update	Subject: Hello Hi Becky, Qa Cerritos 03 will be sending you repair status updates. To cancel reply with the word "STOP" only. Any other characters would invalidate the		10/8:	System	Customer Communication