

# 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 screenshot displays the 'All Contacts' interface. At the top, there is a table with columns for Contact Type, Name, Primary Phone, Secondary Phone, Fax, and Company. One contact is highlighted in dark blue, indicating it is the primary contact. Below the table, the details for 'Smith, Bob' are shown. The 'Contact Type' is 'Vehicle Owner - Insured'. The 'Phone Number(s)' section shows a phone number '(123) 456-7890' with a 'Day' type. The 'Comm. Preference' is set to 'Call - (123) 456-7890'. The 'Address(es)' section shows a home address: '167 The ColorGreen St, Chicago, IL, 60607'.

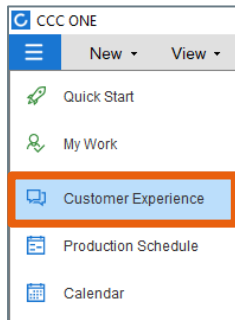
The **Primary Contact** is shown in dark blue and if there are several Contacts, you can select which one will be primary.

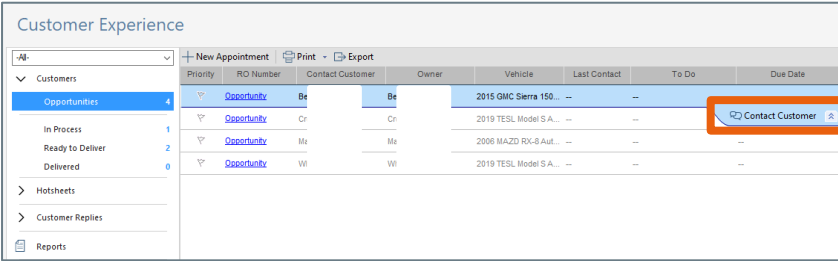
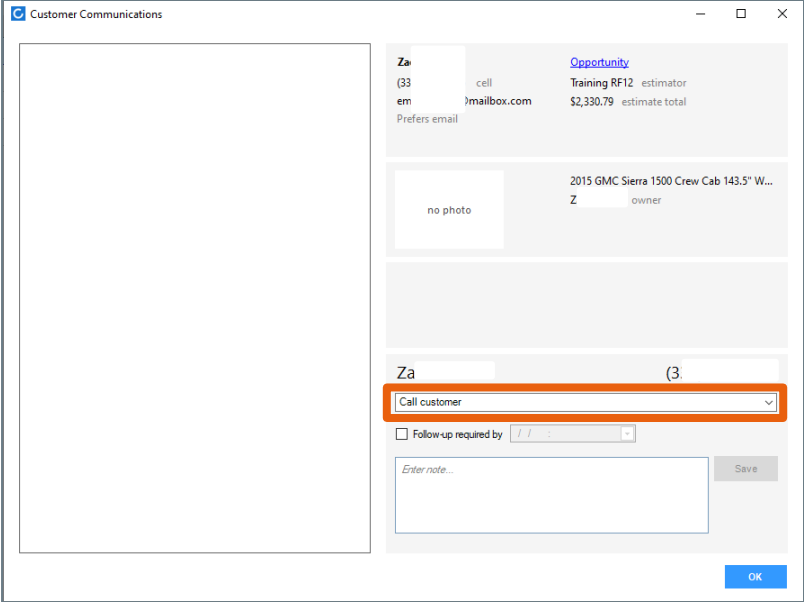
**Remember:** You must enter a valid email address and/or a Cell Phone number to send email or SMS messages via the Customer Experience Dashboard.

*Continued on next page*

# 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.



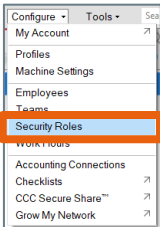
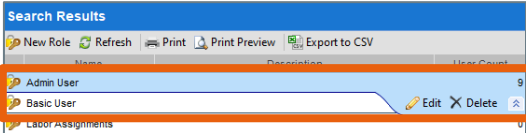
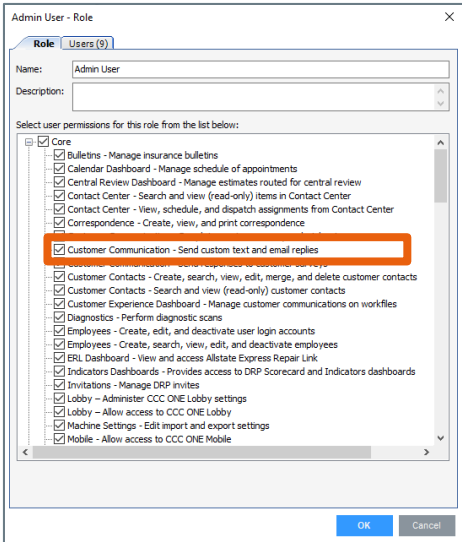
Step	Action
1	<p>Select desired Workfile and click on <b>Contact Customer</b> in the mini toolbar.</p>  <p>The <b>Customer Communications</b> window will appear.</p> 
2	Select the way you want to send your Message.

3	Click <b>Send</b> to send your email or Text.
4	Click <b>OK</b> to leave the Contact window.

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

### Custom Messages

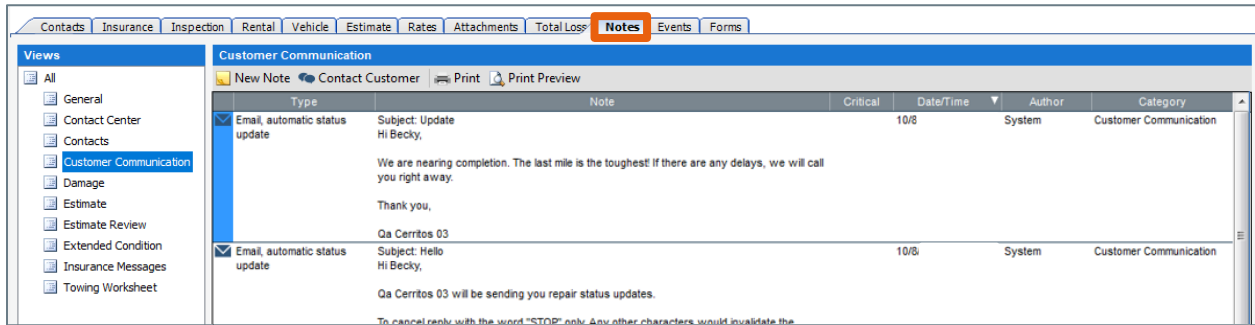
It is important to note that you cannot edit the Messages you send unless you have the proper Security Permissions.

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

## Using the Customer Experience Dashboard, Continued

### Notes Tab

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



The screenshot shows the 'Notes' tab in the Customer Experience Dashboard. The interface includes a top navigation bar with tabs for Contacts, Insurance, Inspection, Rental, Vehicle, Estimate, Rates, Attachments, Total Loss, Notes (highlighted), Events, and Forms. A left sidebar lists various views, with 'Customer Communication' selected. The main area displays a table of notes with columns for Type, Note, Critical, DateTime, Author, and Category. Two notes are visible, both marked as checked.

Type	Note	Critical	DateTime	Author	Category
<input checked="" type="checkbox"/> 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
<input checked="" type="checkbox"/> Email, automatic status update	Subject: Hello Hi Becky,  Qa Cerritos 03 will be sending you repair status updates.  <small>To cancel reply with the word "STOP" only. Any other characters would invalidate the</small>		10/8	System	Customer Communication