

Direct Vehicle Appointment

Steps and Processes to be followed

Service Appointment - Directly reported to Dealers

Requirement : –

- a) In many cases customer directly contacting Dealers for vehicle Service Appointment.
- b) Currently Service appointment capturing option is available only through the Service Reminder follow-up screen.

Enhancement : –

- a) Option has been provided at Dealer login for capturing the Service Appointment reported directly to the workshop.

Transaction Link : Menu → Transaction → Direct Service Appointment.

- c) Based on the details captured, vehicle wise Service Appointment list is generated for further action.
- d) Executive can also generate the report in Excel format through “Download Report” option.

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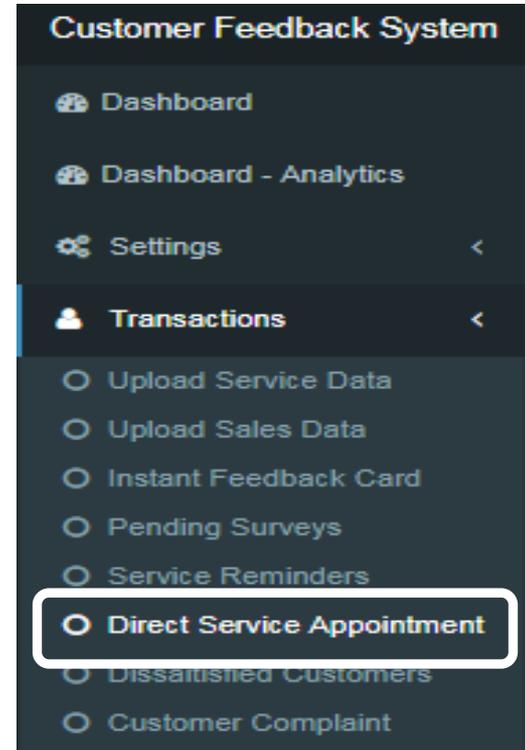
Procedure :

Step 1 : Open the transaction screen thru following link

Report Link : Menu → Transaction → Direct Service Appointment

Step 2 : Select the customer & vehicle current information based on VIN / Registration / Mobile Number.

Step 3 : Update the Appointment details – Booking Date/ Time / Service Type etc. and save the data. Any special request or instruction from customer, to be updated in Remarks column.



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Procedure :

Step 3 : Update the Appointment details and save the data. The information get updated in Service Appointment list.

The screenshot shows a web form titled "Direct Service Appointment". At the top, there is a search bar labeled "Search by VIN Number or Mobile Number or Registration Number" with a "Search" button. Below this is a grid of input fields for customer and vehicle information. A callout box labeled "Vehicle Search Window" points to the search bar. Another callout box labeled "Vehicle Appointment Details" points to the grid of fields. A third callout box labeled "Additional Remarks from Customer" points to a "Remarks" text area at the bottom left. A "Save and Next" button is located at the bottom right.

Customer Name*	Contact Number*	Email Id*	VIN Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Registration Number*	Vehicle*	Booking Date*	Booking Time
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Service Type*	Mileage		
<input type="text"/>	<input type="text"/>		
<input type="text"/>			

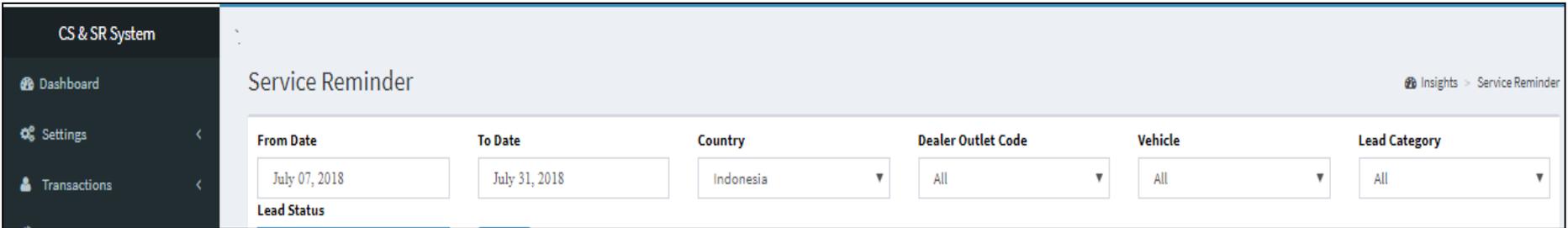
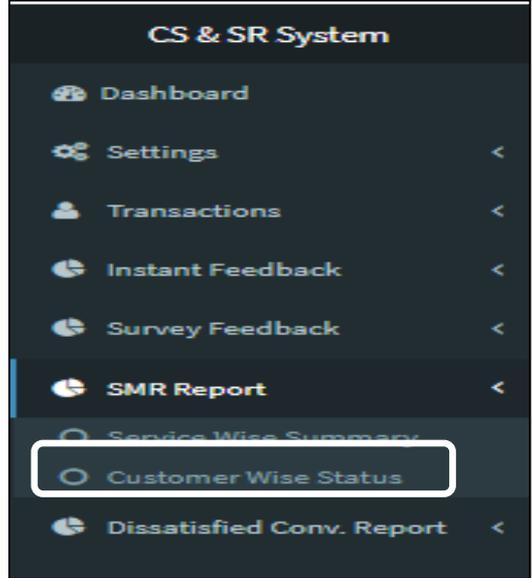
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Service Appointment List - Procedure :

Step 1 : Open the report thru following link

Report Link : Menu → SMR Report → Customer Wise Status

Step 2 : Select the parameters for report generation like – Date range, Outlet, Vehicle category, Lead Category.



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Service Appointment List - Procedure :

Step 3 : Select the “Lead status” as “Service Appointment” to generate the list thru “Search” button.

From Date: November 01, 2018

To Date: November 21, 2018

Vehicle: All

Lead Category: All

Lead Status: Service Appointment

Search

Enter search

Download Report

S.No.	Outlet	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service	Mileage	Follow Up Date	Service Due	Status
1	NG010-Suzuki Auto Testing	abcd	12345	Alto 800 Std w/ PS M/T				2999	21-11-2018	05:00 pm 1K PMS	Service Appointment

Thank You