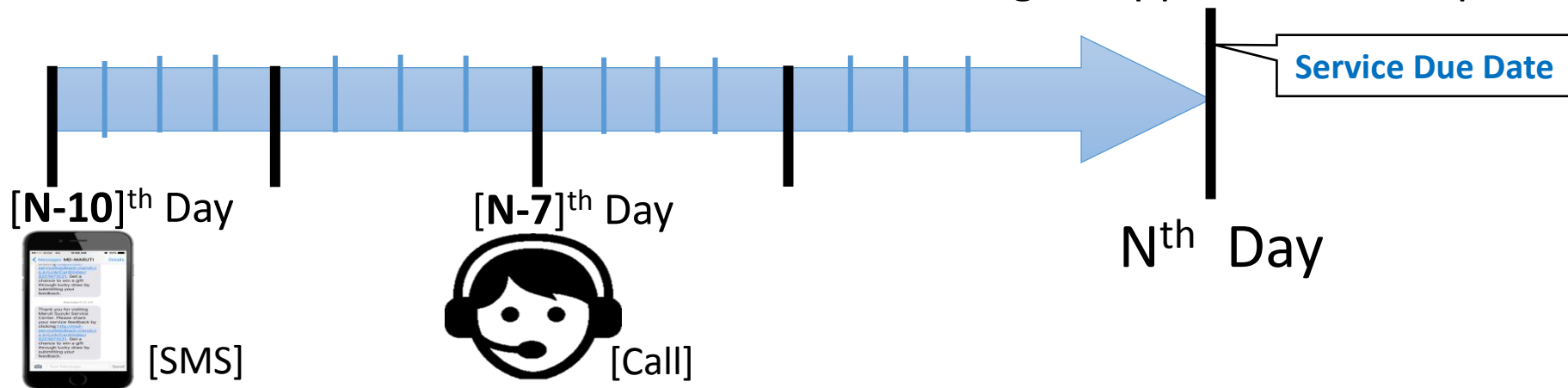


Service Reminder to Customers

Steps and Processes to be followed

Service Reminder Call Generation – Logic

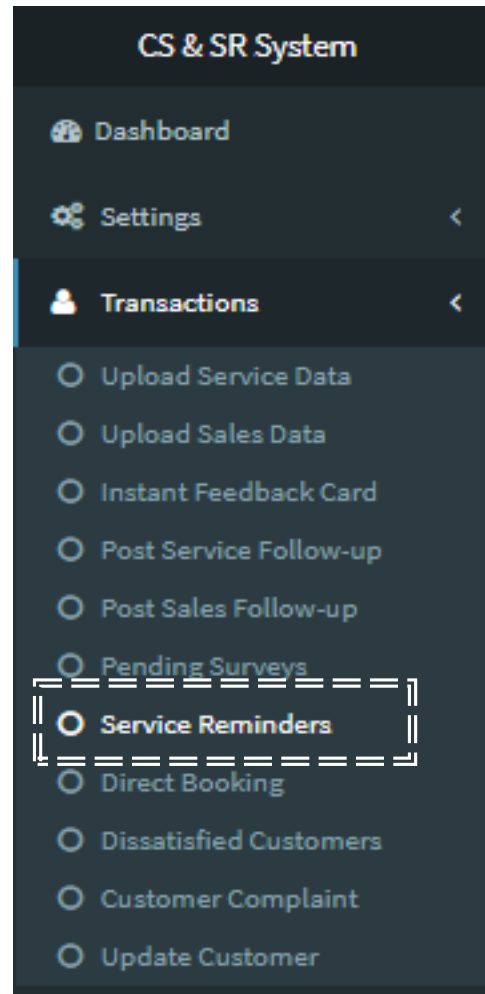
- ❖ For 1st Periodic / Free Service the due date is worked out based on the vehicle sale date & 1st service due schedule (**time period**).
- ❖ For subsequent periodic services the due date is worked out based on last service date & subsequent services due schedule (**time period & mileage**).
- ❖ “Service Due Reminder” call will be done based on service due date generated by the system: -
 - > Automated SMS sent to the customers 10 days prior to “Service Due date”.
 - > Service Reminder call list get generated 7 days prior to “Service Due date”. Customer Care executive contact the customers for Service reminder and taking an appointment for periodic service.



Service Reminder - Call to Customer..

Step 1: Click on “Service Reminder” in menu bar.

Menu Bar → *Transactions* → “*Service Reminders*”



Service Reminder - Call to Customer..

Step 2 - Following screen will appear with list of all "Service due" cases.

Today's Calling Plan - Due Cases



GENERATED FOR TODAY

73



NO ACTION - LEADS

145



SERVICE APPOINTMENT

287

Generated For Today



Download Report

All Leads : 73

Fresh Leads : 58

Follow Ups : 13

Non Contactable - Earlier : 2

S.No.	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service	Mileage	Follow Up Date	Follow Up Time	Service Due	Service Due Date	Status	Action	
1	BUANG SANJAYA	085775938295	ERTIGA	27-04-2018	27-04-2018	FSC	0	20-09-2018		FSC	30000	27-09-2018	Fresh	View
2	VIRA AYU VILANDI	081295343761	BALENO Hatchback AT	27-04-2018	27-04-2018	FSC 5000	0	20-09-2018		FSC	10000	27-09-2018	Fresh	View
3	ABDUR RAUF	081930000316	IGNIS A/T	06-03-2018	27-04-2018	FSC	0	20-09-2018		FSC	30000	27-09-2018	Fresh	View

Service Reminder - Call to Customer..

Step 3 - Dealer has to select the option for customers follow-up as per job/calling plan (Data is divided into three major buckets).

CS & SR System

- Dashboard
- Settings
- Transactions
- Upload Service Data
- Upload Sales Data
- View Customers
- Instant Feedback Card
- Pending Surveys
- Service Reminders
- Dissatisfied Customers
- Instant Feedback
- Survey Feedback
- SMR Report
- Dissatisfied Conv. Report

Today's Calling Plan - Due Cases

- GENERATED FOR TODAY**: 56
- NO ACTION - LEADS**: 3811
- SERVICE APPOINTMENT**: 78

Generated For Today

All Leads : 56 Fresh Leads : 56 Follow Ups : 0 Non Contactable - Earlier : 0

S.No.	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service	Mileage	Follow Up Date	Follow Up Time	Service Due	Service Due Date	Status	Action
1	DELOS ANGELES, FERNANDO	0998-8697176	MC Celerio 1.0 GL CVT	08-09-2018	09-03-2018	10K PMS	964	02-07-2018		15K PMS	09-07-2018	Fresh	View
2	MARY GRACE ESCARCHA PRINCIPIO	0975-2191178	MC Celerio 1.0 GL CVT	02-05-2018	09-03-2018	10K PMS	1281	02-07-2018		15K PMS	09-07-2018	Fresh	View
3	DENNIS A. ANG	0917-5511061	Ciaz 1.4 GLA/T	20-12-2017	09-03-2018	5K PMS	460	02-07-2018		10K PMS	09-07-2018	Fresh	View
4	LILIA JACINTO	9175290888	Ertiga 1.4 GL M/T	18-12-2017	09-03-2018	5K PMS	2532	02-07-2018		10K PMS	09-07-2018	Fresh	View

GENERATED FOR TODAY
56

List of customers whose Service reminder call is generated for contacting in today's date (Fresh & Follow-up calls).

NO ACTION - LEADS
3811

List of customers whose reminder call was already generated, but could not be contacted during previous dates.

SERVICE APPOINTMENT
78

List of customers who have given the Service appointment date

Service Reminder - Call to Customer..

Step 4 – Based on job/ calling plan Dealer can further select the type of leads.

❖ The leads was further divided into different sub buckets for better understanding & action by the Dealer executive.

The screenshot shows the 'CS & SR System' dashboard. The main section is titled 'Today's Calling Plan - Due Cases'. It features three summary cards: 'GENERATED FOR TODAY' (56), 'NO ACTION - LEADS' (3811), and 'SERVICE APPOINTMENT' (78). Below these is a 'Pending Cases' section with four filters: 'All Leads : 3811', 'Pending Leads : 3597', 'Follow Ups : 91', and 'Non Contacted : 123'. A search bar and 'Download Report' button are also present. At the bottom, a table lists customer details.

S.No.	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service	Mileage	Follow Up Date	Follow Up Time	Service Due	Service Due Date	Status	Action
1	ROSSANO DE LEON	+639178456577	APV GA M/T	15-06-2007	28-02-2018	165K PMS	162342	21-08-2018		115K PMS	28-08-2018	Pending	View

All Leads : 3811

Total consolidated list of all “Service due leads” for selected “Calling Plan”.

Pending Leads : 3597

List of customers whose service due leads were generated but still no action was done.

Follow Ups : 91

List of customers who were already contacted & provided today’s date for next follow-up.

Non Contacted : 123

List of customers who were already attempted but still non-contactable and Dealer put the Today’s date for next follow-up

Service Reminder - Call to Customer..

Step 5 – Based on selection ([All Leads](#) / [Fresh Leads](#) / [Follow-up](#) / [Non Contactable](#)), customer due list gets generated for service reminder, with following information :

- a) Customer details – Name / Contact No.
- b) Vehicle details – Model / Sale date / last service date & Mileage
- c) Response details – Due Service / Follow-up date & Time / last follow-up status

Step 6 – To follow-up with customer, Dealer executive has to select the “[View](#)” option under “Action” category.

The screenshot displays the 'CS & SR System' dashboard. The main section is titled 'Today's Calling Plan - Due Cases'. It features three summary cards: 'GENERATED FOR TODAY' with 56 leads, 'NO ACTION - LEADS' with 3811 leads, and 'SERVICE APPOINTMENT' with 78 appointments. Below these are filters for 'Generated For Today' with four categories: 'All Leads : 56', 'Fresh Leads : 56', 'Follow Ups : 0', and 'Non Contactable - Earlier : 0'. A table lists customer records with columns for S.No., Customer Name, Mobile#, Vehicle Model, Vehicle Sale Date, Last Service Date, Last Service, Mileage, Follow Up Date, Follow Up Time, Service Due, Service Due Date, Status, and Action. The first row is highlighted in blue, and the 'View' button in the Action column is circled in red.

S.No.	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service	Mileage	Follow Up Date	Follow Up Time	Service Due	Service Due Date	Status	Action
1	DELOS ANGELES, FERNANDO	0998-8697176	MC Celerio 1.0 GL CVT	08-09-2018	09-03-2018	10K PMS	964	02-07-2018		15K PMS	09-07-2018	Fresh	View
2	MARY GRACE ESCARCHA PRINCIPIO	0975-2191178	MC Celerio 1.0 GL CVT	02-05-2018	09-03-2018	10K PMS	1281	02-07-2018		15K PMS	09-07-2018	Fresh	View

Service Reminder - Call to Customer..

Step 7 – Based on selection “View” option - following screen will opens with (customer & vehicle) information, for contacting the customer by Dealer executive.

Customer & Vehicle Information

Vehicle Previous visit history (last 5 times)

Today's Calling Plan - Due Cases

Customer Detail

 V Kartik
 9741597905
 Ciaz
 Reg No : KA05MV8915
 Vin No : MHYKZE81SGJ325377

Service Histroy

#	Service Date	Service Type	Mileage	Job Card No.
1	20-06-2018	1K PMS	505	7015065

Call History

#	Status	Status Details	Follow Up Date	Follow Up Time	Remarks
1	Contacted	Call Again	15-09-2017	10:30 AM	Busy, Call Again

Call Activity

Contacted

- Service Appointment
- Already Serviced
- Call Again
- Vehicle - Sold / Not in Possession
- Not Intrested
- Wrong Number

Non Contacted

- Phone ringing
- Switched Off
- Phone Busy

Previous contact / call history with the customer

Submit

Back

Selection option for updating customer response

Service Reminder - Call to Customer..

Step 8 – Based on customer response, Dealer will select the follow-up status (**Contacted / Non contacted Response type**) & submit the details thru “Submit” button.

Today's Calling Plan - Due Cases

Customer Detail

 V Kartik
 9741597905


 Ciaz
 Reg No : KA05MV8915
 Vin No : MHYKZE81SGJ325377

Service History

#	Service Date	Service Type	Mileage	Job Card No.
1	20-06-2018	1K PMS	505	7015065

Call History

#	Status	Status Details	Follow Up Date	Follow Up Time	Remarks
1	Contacted	Call Again	15-09-2017	10:30 AM	Busy, Call Again

Call Activity

Contacted

- Service Appointment
- Already Serviced
- Call Again
- Vehicle - Sold / Not in Possession
- Not Intrested
- Wrong Number

Non Contacted

- Phone ringing
- Switched Off
- Phone Busy

Submit

Back

Options for updating follow-up status – As per customer response during the contact

Service Reminder - Customer response details

Contacted

Service Appointment

- Customer provided appointment for the due service.
- [Appointment Date & Time to be entered in the system]

Already Serviced

- Customer already got the vehicle serviced .
- User has to capture the remark and get the same entered in the system.

Call Again

- Customer is busy and requested for another call.
- [Next follow-up Date & Time to be entered in the system]

Vehicle Sold / Not in possession

- Customer has sold the vehicle / not available.
- [Once this option selected follow-up gets closed]

Not Interested

- Customer is not interested to visit this workshop or dealer.
- [Once this option selected, follow-up gets closed]

Wrong Number

- The contact number is not correct.
- [Once this option is selected, follow-up gets closed]

Non Contacted

Phone Ringing

- Customer phone is ringing and not picked.
- [Next follow-up Date & Time to be entered in the system]

Switched Off

- Customer phone is switched off .
- [Next follow-up Date & Time to be entered in the system]

Phone Busy

- Customer phone is continuously busy & not responded.
- [Next follow-up Date & Time to be entered into the system]

Service Reminder - Call to Customer..

Step 9 – Based on customer response, Dealer executive submit the details and following confirmation message will appear.

Generated For Today Search

All Leads : 2

Fresh Leads : 0

Follow Ups : 2

Non Contactable – Earlier : 0

S.No.	Customer Name	Mobile#	Vehicle Model	Vehicle Sale Date	Last Service Date	Last Service Mileage	Follow Up Date	Follow Up Time	Service Due	Service Date
	V KARTHIK	97475979					06-02-2018	10:50 am	5K PMS	16-02-20
	ANJANABEN KALPESHKUMAR PATEL	98275862					06-02-2018	03:30 pm	5K PMS	16-02-20

Success: Customer status updated successfully

OK

** (The Service due follow-up is kept active for 2 months from the due date of Service. After two months if customer does not turned-up for service, the current service follow-up get closed and new follow-up generated automatically for next periodic service)*

Thank You