Autosoft
Dealer Management System

Chapter 1 CSI/SSI Overview and Setup

The Customer Survey Index (CSI) and Sales Survey Index (SSI) module allows you to perform follow-up for service and sales customers. You can conduct telephone surveys, record results for mailed surveys, and generate reports based on the survey results. This module is a valuable tool for measuring customer satisfaction and identifying your dealership's strong and weak points concerning customer service.
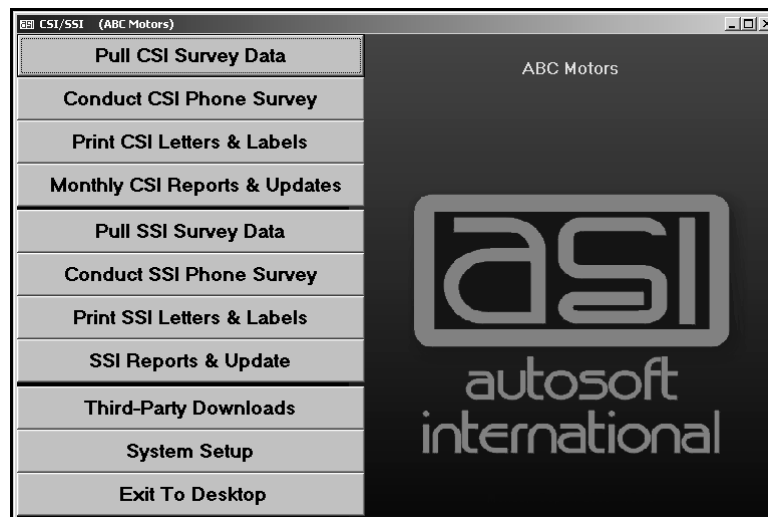
Downloading Information for Third-Party Software

If your dealership uses third-party software to perform follow-up, use **Third Party Downloads** button to open the Third-Party Downloads menu. The options on this menu allow you to download information from Autosoft FLEX DMS for the third-party software. Click the button that corresponds to the software program you use for follow-up to open the downloading menu for that software. Press F1 while on the submenu to view downloading instructions specific to that software.

Entering Setup Information

The first thing you need to do is enter your setup information. Click **System Setup** to open the System Setup menu. The menu is divided into two parts. The top part contains options that allow you to enter survey questions, comments, and advisor and technician information used for CSI. The bottom part of the menu contains options that allow you enter survey questions and salespeople's information used for SSI. The last menu option allows you to create letters you can print for both CSI and SSI. Once you begin conducting surveys, you can use this menu to view the survey statistics for advisors, technicians, the dealership, the purchased vehicles, and the salespeople.
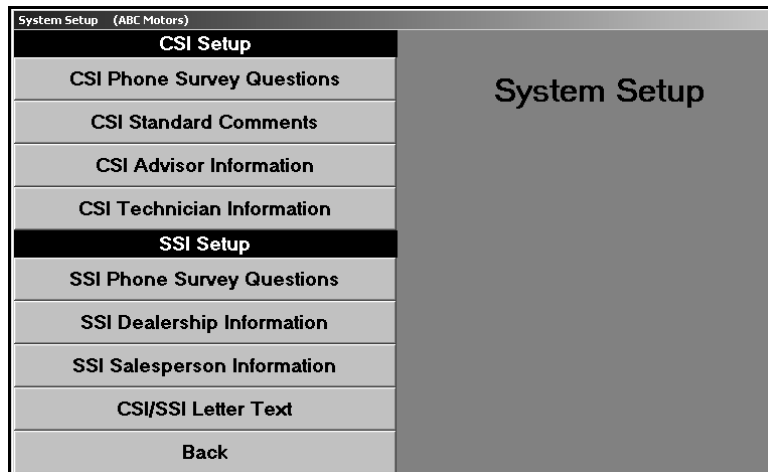
CSI Phone Survey Questions

You can enter up to four survey questions that allow the customers to rate their experience on a scale from 1 to 5. The system comes with default questions. You can edit these questions or enter your own questions to meet your dealership's survey needs. Just type a question in each field, and click **Save**. Each line holds up to 45 characters. The first question should be specific to the technician's performance. All of the questions will apply to the service advisor. If you edit the fields and want to restore the default questions, click **Fill With Defaults**.
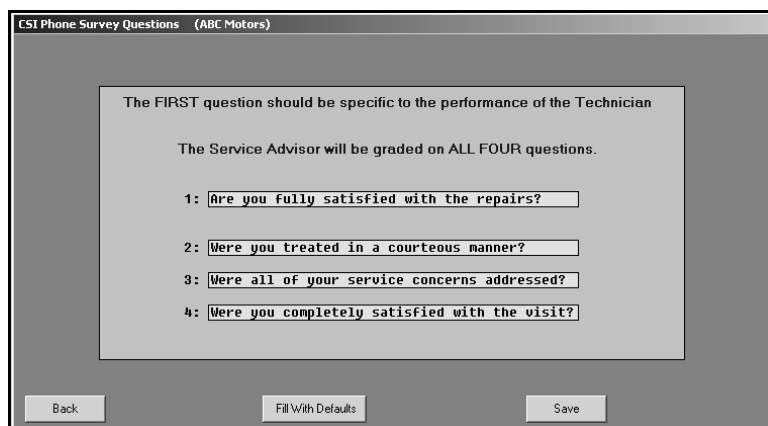
CSI Standard Comments

This option allows you to enter standard customer comments. These comments are available when you conduct phone surveys to quickly enter customers' responses. When creating comments, it is not necessary to create an entry for every possible comment. Instead, you are creating comment categories that will be used to group customer comments. Although the comments print on various printouts, they serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that come up during the surveys so the issues can be addressed immediately.

Use the **Comment No.** field to assign the comment an ID number. In **Comment**, type a brief comment. This field holds up to 30 characters, including spaces. Click **Save** to save the comment. The comment appears in the list window on the right side of the screen.

```
SSI/CSI Parameters   (ABC Motors)                    01   WORK NOT DONE ON TIME
                                                     02   PROBLEM NOT FIXED
                                                     03   CHARGES TOO HIGH
                                                     04   PERSONNEL WERE RUDE
                                                     05   INCONVENIENT SERVICE HOURS
                          New Comment                06   NO COURTESY CAR AVAILABLE
                                                     07   PARTS ON ORDER TOOK TOO LONG
         Comment No.: 99                             08   DIDN'T CALL WHEN FINISHED
                                                     09   TECH COULDN'T ANSWER QUESTIONS
                                                     10   HAD TO RETURN
              Comment: NOT INTERESTED IN SURVEY      11   WORK WAS DONE ON TIME
                                                     12   ALL PROBLEMS ADDRESSED
                                                     13   CHARGES LOWER THAN EXPECTED
                                                     14   PERSONNEL WERE VERY FRIENDLY
                  Activity ...                       15   FLEXIBLE SERVICE HOURS
                                                     16   APPRECIATE SHUTTLE SERVICE
                        Month: [    ]                17   ORERED PARTS ARRIVED QUICKLY
                                                     18   CALLED PROMPTLY WHEN FINISHED
                        Year:  [    ]                19   TECH ANSWERED ALL QUESTIONS
                                                     20   VEHICLE FIXED WITHOUT PROBLEM


       Back          Print          Save          Delete
```

As you enter survey results, the system automatically tracks the number of times each comment was used during the current month and during the current year. Just enter the comment number, or click the comment in the list to view the activity.

You can print the statistics for all the comments by clicking **Print**. When prompted to verify your printer is ready, select your print criteria. The printout lists the monthly and yearly activity for each code. This may help you identify codes you do not use.

If you want to delete a comment, select the comment from the list, and click **Delete**. Click **OK** when prompted to verify you want to delete the record. The comment is removed from the list.

CSI Advisor Information

If you integrate with Service Writing, the Service Advisors screen automatically pulls the advisors entered in the Service Writing setup. The list window on the right side of the screen lists all of the advisors in the system.

If you do not integrate with Service Writing, you will need to enter the advisors. To add an advisor, enter a two-digit advisor code and the advisor's name. Click **Save** to save the information. The advisor appears in the list window on the right side of the screen.

Once you begin entering surveys into the system, you can use this screen to view customer satisfaction survey ratings for each advisor. Enter the advisor's two-digit code, or click the advisor in the list window on the right side of the screen.

The middle part of the screen displays the advisor's customer satisfaction survey ratings. The information identifies the number of customer surveys (units) conducted for each month and the advisor's estimated percentage rating for each of the survey questions (entered on the CSI Phone Survey Questions screen).

Click **Print** to print the statistics for all of the advisors. When prompted to verify your printer is ready, select your print criteria.

CSI Technician Information

The Technician Information screen works like the Service Advisors screen. If you integrate with Service Writing, the screen automatically pulls the technicians entered in the Service Writing setup. If you do not integrate with Service Writing, you will need to enter the technicians. The middle of the screen will display the customer satisfaction survey ratings for each technician once you begin entering survey results into the system.

```
Technician Information   (ABC Motors)                              01  TOM
                                                                   02  STEPHEN
                                                                   03  DAVID
                                                                   04  FRANCIS
                                                                   05  FRED
                    Code: 01                                       06  JOHN
                                                                   07  STEVE
                    Name: TOM                                      08  RALPH
                                                                   09  DARRELL
                           CSI Scores
                  Mo      Unit      a.        b.

                  01        0
                  02        0
                  03        0
                  04        0
                  05        0
                  06        0
                  07        0
                  08        0
                  09        0
                  10        0
                  11        0
                  12        0


        Back              Save            Print            Delete
```

SSI Phone Survey Questions

The SSI questions allow customers to rate their sales experience on a scale from 1 to 5. The top four fields are for questions about the dealership's performance. The last four fields are for questions about the salesperson's performance. The system comes with default questions. You can edit these questions or enter your own questions to meet your dealership's survey needs. Just type a question in each field, and click **Save** to save the questions. If you edit the fields and want to restore the default questions, press the F9 key on your keyboard.

```
SSI Phone Survey Questions   (ABC Motors)

        Dealership Performance
        2a.  Were you greeted promptly and professionally?
        2b.  Were you satisfied with the vehicle selection?
        2c.  Would you recommend this delaership to a friend/relative?
        2d.  How do you rate your overall satisfaction with the dealer?


        Salesman Performance
        3a.  How would you rate the salesperson's product knowledge?
        3b.  Would you purchase your next vehicle from this salesperson?
        3c.  Were the owner's and warranty manuals explained?
        3d.  Were the vehicle features and controls demonstrated?
        3e.  How do you rate the salespersons overall performance?


        Back                                              Save
```

SSI Dealership Information

After you begin entering survey results in SSI, you use this screen to view customer satisfaction survey ratings for vehicles, the dealership, and salespeople. The information on this screen is updated for statistical analysis every time you use the **Survey Update** button on the SSI Phone Survey menu. The update removes the completed SSI Surveys from the active list, compiles the survey data, and makes the results available on SSI reports.

Click the button on the bottom of the screen that corresponds to the statistics you want to view: Vehicle, Dealership, or Salesman. The screen displays the number of customer surveys (units) conducted for each month and the estimated percentage rating for each survey question. The number of columns that display information depends on which statistics you selected to view.

SSI Salesperson Information

If you integrate with Accounting, Desk Manager, and Traffic, the Salesman Information screen automatically pulls the salespeople entered in those modules. If you do not integrate with these modules, you will need to enter the salespeople. Type a two-digit salesperson code and the salesperson's name, and click **Save** to save the information. Click **Delete** to remove salespeople as needed. Remember, this removes the salespeople from Accounting, Desk Manager, and Traffic, too. The middle of the screen will display the customer satisfaction survey ratings for each salesperson once you begin entering survey results into the system.

CSI/SSI Letter Text

The Design Letters screen allows you to create letters. All letters created in the CSI/SSI, Showroom Traffic, and Marketing modules are available in a common letter database. Therefore, letters you create on this screen are available in Showroom Traffic and Marketing, and letters created in Showroom Traffic and Marketing are available in CSI/SSI. Similarly, any changes you make to letters here automatically update the letters in Showroom Traffic and Marketing, too.

```
Design Letters   (ABC Motors)

        Letter No.: 01   Description: THANK YOU FOR VISITING OUR DEALERSHIP

                                      Dear \CN

                                      I would like to take this opportunity to thank you for coming into
                                      our dealership.   Although you have not yet made the final decision
                                      on your new car purchase, it is my concern that you were happy with
     Start On Line: 5                 the treatment you received from our sales staff while you were here.

                                      We realize that the purchase of a vehicle is a big decision to make,
     Suppress ....                    and this is why we strive to make your next vehicle putchase an
                Date                  enjoyable experience at ABC Motors.
             Address
                                      It is our philosophy to offer a good product and good service at a
                                      mutually agreeable price.   I welcome any questions or comments
                                      that you may have.  Feel free to contact me at any time.  Our
                                      ability to satisfy our customers is the reason we are in business
                  Save                today.

                                      Although you may not have found the exact vehicle you were looking
                                      for, please keep in mind that we receive many cars and trucks each
                                      day.  It may be possible for us to locate the exact vehicle that
                                      you need in a very short time.

                                      If I can be of any further assistance to you, please don't hesitate
                                      to call or stop in.  We are here to serve you from 9 a.m. until
                                      6 p.m. weekdays, and 9 to noon on Saturdays.

         List        Print            Looking Forward to seeing you,

         Exit        Help
```

You can create any type of letter, but you cannot format the letter font. All letters print using Times New Roman 12 point font. The system will pull customer information and use it to create the header (customer's name and address). You can have the system pull customer-specific information and add it to the letter by using specific merge codes preceded by a backslash (\). Below is a list of codes you can use in the letters. You can display this list by clicking **Help** on this screen.

**** for ignore the line

\CN for customer's name (salutation line)

\DN for dealership's name

\MD for vehicle's model

\MK for vehicle's make

\PN for prospect's name (salutation line)

\SG for sender's name (signature line)

\SM for salesperson's name

\TI for sender's title

\YR for vehicle's model year.

Tip: If the customer's name is not printing for the \CN code, the salutation for the customer has not been entered for that customer record. You can add, edit, or delete the salutation for each customer on the Edit Compiled List screen for both CSI and SSI letters.

Creating a New Letter

1. Assign a number to the letter you are creating. (Click **List** to view a list of existing letters.)

2. Type a description of the letter.

3. Indicate the start line. The start line is the same as the top margin. This determines how far down on the paper the text begins printing.

4. Select if you want the date and address suppressed. Click the box to select it, and a checkmark appears in the box. Click the box again to clear the checkmark.

5. Use the white area to type your letter. **_You must press ENTER_** to force line breaks as you type, or the text will not print properly.

6. Insert the merge codes where needed. If you are entering more than one merge code, be sure to leave a space in between the codes so the merged information prints properly.

7. When you are finished typing the letter, click **Save**.

8. Click **Print** to print a copy of the letter to ensure it prints properly. Make changes as needed.

Editing a Letter

Once you create a letter, you cannot delete it. If you find that you do not want a letter you created, simply give the letter a new description, edit the letter text, and save the letter.

1. Type the letter number, or click **List** to display a list of existing letters. Click on the letter in the list you want to view.

2. The screen displays the selected letter.

3. Edit the information as needed.

4. Click **Save** to save the changes.

Tip: If a letter is not printing correctly, you may need to delete the text and retype the letter.

Once you enter your system information, you can begin conducting CSI and SSI follow-up.

Chapter 2 CSI Follow-Up

The first four buttons on the CSI/SSI menu are for CSI follow-up. The buttons are organized on the menu systematically. Work your way through each menu option.

Pulling CSI Survey Data

You begin your CSI follow-up by pulling the survey data you want to use. Click **Pull CSI Survey Data** to open the CSI Working Data menu. When the menu opens, the system prompts you to select the working data. The dates refer to the dates the Service Department closed the repair orders in the Service Writing module. The list includes the last six days of repair orders updated using the Daily R/O Update.
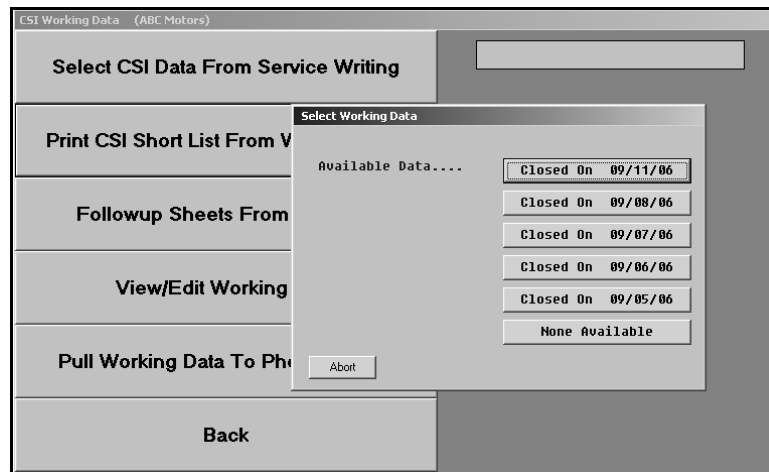
The dates on your menu should appear in order from the most recent date to the oldest date. If the menu is missing a date, Service did not perform a Daily R/O Update on that date. Similarly, if Service performs multiple Daily R/O Updates, the menu will displays the same date on multiple buttons. If an older date appears in the list, it is possible that a repair order has customer pay and warranty on it. The warranty on the repair order could stay open for days, weeks, or months. When Service closes the warranty repair, the old date of when Service originally opened the repair order will appear in the list.

Click the date you want to select, and the menu options on the CSI Working Data menu correspond to data you selected. Click **Select Working Data From Service Writing** to open the working list again as needed. Once you select the data, use the remaining menu options to view, edit, print, and update the survey list.

Tip: The customer's "On Do Not Call List" entry in the customer information file determines if a customer is pulled to the phone survey list.

Print CSI Short List From Working Data

Use this button to print a list of customers pulled from the working data. The list prints four closed repair orders per page. It displays the customer's name, address, and phone number, the repair order closing date, the vehicle's year, make, and model, the advisor and technician for the repair order, and the followup survey questions.

1. Click **Print CSI Short List From Working Data**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

3. Once you select your print type, click **Print**.

Followup Sheets From CSI Data

Use this button to print the followup sheets from the working data. One repair order will print per page. The printout lists the customer's information, service history, and the followup survey questions.

1. Click **Followup Sheets From CSI Data**.

2. In **Start With**, type the repair order number you want to print or use as the starting point. You can also click on the "Click for List" message to select the customer from a list. To print all of the repair orders, leave the field blank.

3. When prompted to verify your printer is ready, select your print criteria.

View/Edit Working Data

Use this button to open the Edit Compiled List screen to view the list of closed repair orders in the current working list and to change the status of repair orders as needed. You can only print followup sheets for active repair orders.

1. Click **View/Edit Working Data**. The Edit Complied List screen appears and displays all of the repair orders on the list.

2. Click **More** or **All** to view additional repair orders or the complete list of repair orders as needed.

3. Click repair order to change its status from "Active" to "Removed" or from "Removed" to "Active."

4. Click **Back** when you are finished editing the list.

Pull Working Data To Phone Survey

Use this button to pull the working data to a phone survey list. You can view the list from the CSI Phone Survey menu using the **View Phone Survey List button**.

4. Click **Pull Working Data To Phone Survey**.

5. Click **OK** when prompted to verify you want to pull the data.

Conduct CSI Surveys

Once you compile and pull the survey data, you are ready to conduct the surveys. Click **Conduct CSI Phone Survey** to open the CSI Phone Survey menu. You use this menu to conduct and manage your CSI surveys. The options allow you to conduct phone surveys and enter results of mailed surveys. In addition, you can print reports based on the survey information, including a "Red Eye" report that indicates customers who need immediate attention.
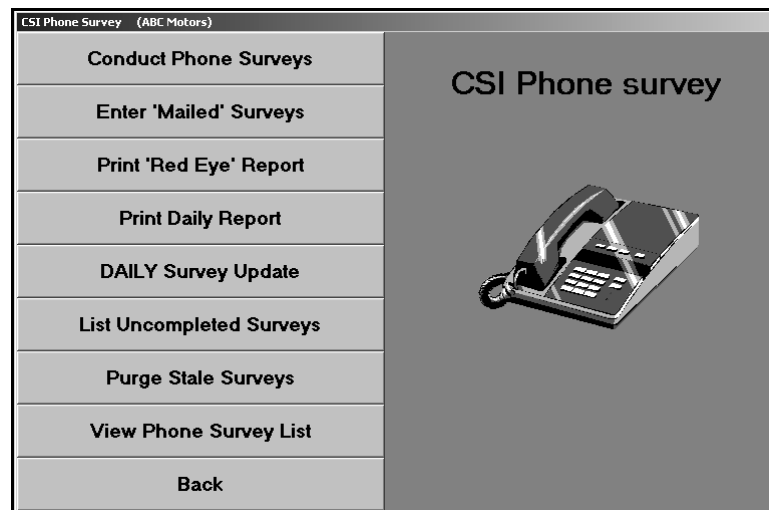
Conduct Phone Surveys

Use this button to open the CSI Phone Survey screen to conduct phone surveys. The screen displays all of the CSI survey questions you entered in the System Setup, so all you have to do is follow the questions on the screen and record the customer's response.

1. Click **Conduct Phone Surveys**. The CSI Phone Survey screen appears.

2. The right side of the screen lists the customers on the survey list. Type the repair order number, or click the customer in the list you want to select. You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.

3. The top of the screen displays the customer's name, address, and phone numbers, as well as the number of times the dealership has attempted to contact the customer. The bottom part of the screen displays the customer's name, so you can ask for the customer by name.

4. At this point, you have several options depending on the scenario.

The Customer is Interested in Participating in the Survey

    a.   If the customer is home and wants to participate in the survey, click **Continue**.

    b.   The next screen displays four CSI survey questions. Read each question, and type the rating number. You can also click to select the appropriate rating. When you have asked all of the questions, click **Next**.

c. The next screen allows you to enter two customer comments. Each comment field holds up to 60 characters. You can type the comments or use the standard comments entered in the System Setup. The right side of the screen displays the list of standard comments. Type the comment number, or click a comment in the list to select it.

Comments are not required entries, and you do not want to record every comment verbatim. Instead, you want to summarize the general idea. In reality, you will not be tracking individual comments to follow up on each one. Instead, comments serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that need to be addressed immediately. For example, if customers keep making negative comments about the waiting room, the surveyor would make note of this and inform the appropriate parties in the dealership so the situation could be addressed. If a customer is passionate about complaint, you should flag the customer as a "red eye" rather than just record the comment.

d. Indicate if this is a "Red Eye" customer by typing **Y** for yes or **N** for no in the **Red Eye** field. Red-eye customers are customers who require immediate attention from the dealership. You can print a list of these customers using the **Print 'Red Eye' Report** button on the CSI Phone Survey menu.

e. Click **Finish** to save the survey.

f. The system marks the survey as "Completed" and returns you to the initial CSI Phone Survey screen.

g. The CSI Phone Survey screen automatically displays the information for the next customer in the list. Continue to conduct surveys. The system displays a "That's All" message when you reach the end of the survey list. If necessary, you can exit the screen and return later to complete the surveys.

The Customer is not Interested in Participating in the Survey

a. If the customer is not interested in participating in the survey and you want to document this, click **Next** on this screen.

b. Click **Next** on the screen that displays the questions. This will take you to the comment screen.

c. Type a comment stating the customer is not interested in the survey. If you created a standard comment for this situation, select the comment from the comment list.

d. Click **Finish** to save the comment. This marks the survey as "Completed" and documents the comment.

Tip: You can click to select the **Add This Customer To "Do Not Call List"** box to flag that this customer is on the do not call list and should not be contacted. This will add the flag to the customer's service record and will prevent the customer from being pulled to future survey lists.

The Customer is not Home

a. If the customer is not home, type a time that you can reach the customer.

b. Click **Next**.

c. Then, click **Abort**. The system saves the time you entered the "response" and keeps the customer "Active" in the phone survey list. The CSI Phone Survey screen displays the "Last Call" information when you select the customer to attempt to complete the survey again. The list of uncompleted surveys lists the number of times you attempted to contact the customer. The number of "tries" is based on the number of times you aborted the survey.

Another Action Needs to be Taken

a. If you need to take another action, type the appropriate letter in the field at the bottom of the screen.

Type **A** to abort the survey. Using "A" for abort ensures the system tracks the number of times you attempt to contact the customer.

Type **N** to take no action.

Type **L** to flag the customer to receive a letter.

b. The customer's status in the phone list displays the selection.

Removing Surveys from the List

1. Select the customer.

2. Click **Remove**.

3. Click **OK** when prompted to verify you want to delete the record. The customer is removed from the list.

Enter 'Mailed' Surveys

Use this button to open the Enter "Mailed" CSI Survey Replies screen to enter the results of surveys you mailed to customers.

1. Click **Enter 'Mailed' Surveys**. The Entered "Mailed" CSI Survey Replies screen appears.

4. Type the repair order number, or click **Survey List** to select the repair order from the phone survey list. Click on the customer you want to select. (You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.)

5. The top of the screen displays the customer's name, address, and phone numbers.

6. The next part of the screen displays the four CSI survey questions you entered in the System Setup. For each question, type the rating number, or click to select the appropriate rating. The first column is for rating 1, the second for rating 2, etc.

7. Next, type up to two customer comments. Each comment field holds up to 60 characters. You can type the comments or use the standard comments entered in the System Setup. To use the standard comments, type the comment number, or click **Comments List** to display a list of the available comments. Click on a comment to select it.

8. Indicate if this is a "Red Eye" customer by typing **Y** for yes or **N** for no in the **Red Eye** field.

9. The system will mark the survey as "Completed." If you do not fill in the **Red Eye** field, you must click **Save** to save the information.

Deleting a Survey

1. Select the customer.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record. The customer is removed from the list.

Print 'Red Eye' Report

Use this button to print a list of customers flagged as "Red Eye." These customers need immediate attention. The report displays the customer's name, phone number, and survey comments.

1. Click **Print 'Red Eye' Report**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

3. Once you select your print type, click **Print**.

Print Daily Report

Use this button to print a report that indicates the survey activity for the day. The report displays the repair order number, service date, customer's name, vehicle's year, make, and model, the advisor for the repair order and the advisor's average score for the survey, the technician for the repair order and the technician's average score for the survey, and the customer's comments. The report also displays the number of follow-ups completed and the average scores for the department and technician. An asterisk (∗) prints next to the customers who gave a dissatisfied response (1—very dissatisfied or 2—dissatisfied) to any questions. This allows you to quickly identify these responses.

1. Click **Print Daily Report**.

2. When prompted to verify your printer is ready, select your print criteria.

DAILY Survey Update

Use this button to compile the survey information. This generates the survey statistics and updates them to the advisors' and technicians' files. You can view the information from the advisors' and technicians' files from the System Setup menu or by printing the Month-To-Date Dealer Report. The update removes all completed surveys from the survey list; if you want to print letters for customers who completed the surveys, do not complete the daily update until after you print the letters.

1. Click **Daily Survey Update**.

2. Click **OK** when prompted to verify you want to update the information.

List Uncompleted Surveys

Use this button to print a list of the customers that have not completed their survey. The list displays the repair order number, customer's name, service date, number of days since the service date, and the number of times the dealership has attempted to contact the customer.

1. Click **List Uncompleted Surveys**.

2. When prompted to verify your printer is ready, select your print criteria.

Purge Stale Surveys

Use this button to remove surveys older than a specified number of days from the system. This removes _**all**_ surveys older than the specified number of days, regardless of the status.

1. Click **Purge Stale Surveys**.

2. Type the number of days you want to use to delete the surveys.

3. Click **OK** when prompted to verify you want to purge the surveys.

View Phone Survey List

Use this button to view the list of customers on the phone survey list. The list will indicate which customers have completed the surveys and which customers are still active and need to complete the survey.

Printing CSI Followup Letters

After you conduct the surveys, you print followup letters as needed. Click **Print CSI Letters & Labels** to open the Print Letters/Labels menu. You use this menu to print CSI customer letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (\TI) on the signature line, or the system will not pull the information you enter.
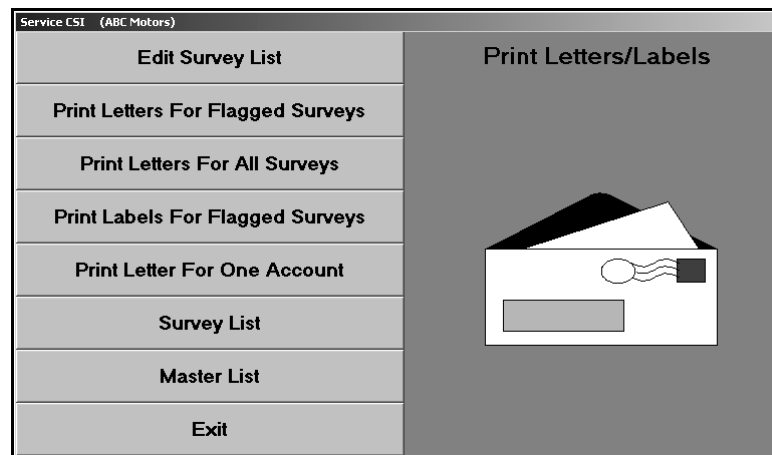
Edit Survey List

Use this button to open the Edit Compiled List screen to determine which customers should receive letters. Once you update the completed surveys, this screen displays only the customers you flagged to receive a letter. If you do not update the surveys, the screen lists all of the customers on the active survey list.

1. Click **Edit Survey List**. The Edit Compiled List screen appears.

2. The right side of the screen displays the phone survey list and indicates the letter status for each customer. If you entered an "L" for send letter on the survey screen, the customer's status reads, "Letter."

3. The information for the first customer on the list automatically fills in on the screen. You can also select individual customers by entering the repair order number or by clicking the customer in the list. The screen displays the selected customer's information.

4. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the mailers. If you need to permanently edit the information, you must edit it in the customer's master file.

5. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the salutation line of the letter.

6. Click one of the three buttons that correspond to the action you want to take:

   - Click **Send Letter** to flag the customer to receive a letter. If you select to flag the customer for a letter, the letter status next to the customer's name will read, "Letter."

   - Click **No Letter** to flag the customer not to receive a letter. Customers you flag not to receive letters have a status of "No."

   - Click **Remove From List** to remove the customer from the list.

7. As you click the buttons, the next customer's information automatically fills in on the screen. Continue work your way through the list. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

Print Letters For Flagged Surveys

Use this button to print letters for the customers you flagged to receive letters.

1. Click **Print Letters For Flagged Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Letters will print for all of the flagged surveys from this customer on. If you want to print letters for all of the flagged surveys, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For All Surveys

Use this button to print letters for all of the customers on the survey list.

1. Click **Print Letters For All Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Letters will print for all of the customers from this customer on. If you want to print letters for all of the customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Print Labels For Flagged Surveys

Use this button to print mailing labels for customers with flagged surveys.

1. Click **Print Labels For Flagged Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Labels will print for all of the flagged customers from this customer on. If you want to print labels for all of the selected customers, leave this field blank, and press ENTER.

3. When prompted to verify your printer is ready, select your print criteria.

Print Letter For One Account

Use this button to print a letter for a specified customer from the master customer database.

1. Click **Print Letter For One Account**.

2. In **Account Number**, type the account number for the customer you want to select. You can click the "Click Here For List" message to search for the customer in the database. Type the first three letters of the customer's last name. A list of the customers whose last name begins with those letters appears. Click the customer you want to select.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Survey List

Use this button to view the survey list. The same list opens when you click "Click Here For List" on the print prompts. The list displays the repair order number, last service date, customer's name, number of days since service, and survey status (active, aborted, send letter, etc.).

Master List

Use this button to search for a customer in the customer master files.

1. Click **Master List**. The Search Customer Base screen appears.

2. Type the first three letters of the customer's last name. A list of the customers whose last name begins with those letters appears. The list displays the account number, customer's name, and the vehicle's year, make, and model.

3. Click **Return** to close the search screen.

Performing the Monthly CSI Update

At the end of the month, use the **Monthly CSI Reports & Updates** button to print the monthly summary report and update the month-end data. You can print the month-to-date report any time during the month to check the statistics as needed. However, do not perform the monthly update until all of the surveys for the month are complete. This compiles all of the survey results for the month and updates the advisors' and technicians' statistics.
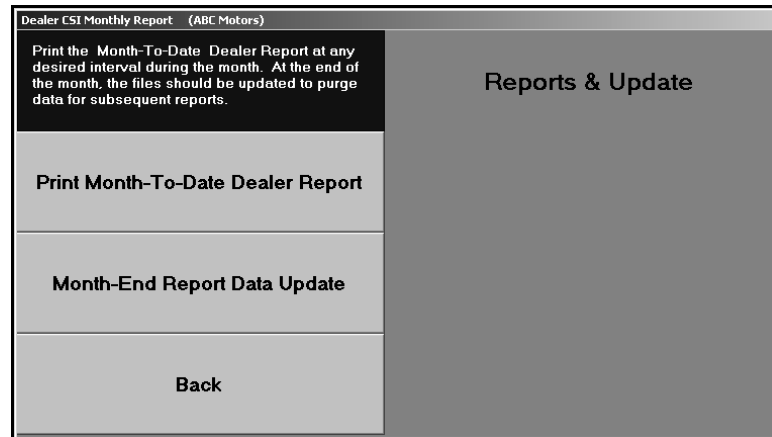
Print Month-To-Date Dealer Report

As you conduct surveys and complete the daily survey update, the system compiles the survey results and makes them available on this report.

1. Click **Print Month-To-Date Dealer Report**.

2. When prompted to verify your printer is ready, select your print criteria.

The first part of the report lists the repair orders for each advisor, and the second part of the report lists the repair orders for each technician. For each repair order, the report displays the repair order number, customer's name, service date, the vehicle's year, make, and model, the customer's phone numbers, the technician or advisor for the repair order, the ratings for each survey question, and the customer's comments. The report then displays the year-to-date monthly totals for each survey question for each advisor and technician. These are the same statistics available on the Advisor and Technician Information screens in the CSI/SSI setup.

The bottom part of the report provides a management summary. The first part displays the standard comments used on the surveys in order of frequency. The second part provides the total number of repair orders submitted, follow-ups completed, and red-eye customers. The third part of the management section breaks down the information for each month and provides the yearly totals. It identifies the total number of repair orders submitted and the overall rating percentage for each CSI survey question.

Month-End Report Data Update

Use this button to update the survey information for the month. Make sure you have all of the surveys completed that need to be completed. The update clears the individual repair order information from the Month-To-Date Dealer Report. Once you run the monthly update, you cannot view the list of customers who completed surveys for each advisor and technician. However, the system retains the monthly statistics for each advisor and technician.

1. Click **Month-End Report Data Update**.

2. Type the month you are updating.

3. Click **OK** when prompted to verify you want to update the information.

Chapter 3 SSI Follow-Up

The four middle buttons on the menu are for SSI follow-up. Like the CSI menu options, the SSI menu options are presented systematically. The order of activities for SSI is the same as CSI.

Pulling SSI Survey Data

SSI follow-up is similar to CSI follow-up. Click **Pull SSI Survey Data** to open the Compile SSI Survey List menu. You use this menu to compile the survey data. Once you compile the data, you use the remaining menu options to edit, print, and update the survey list.
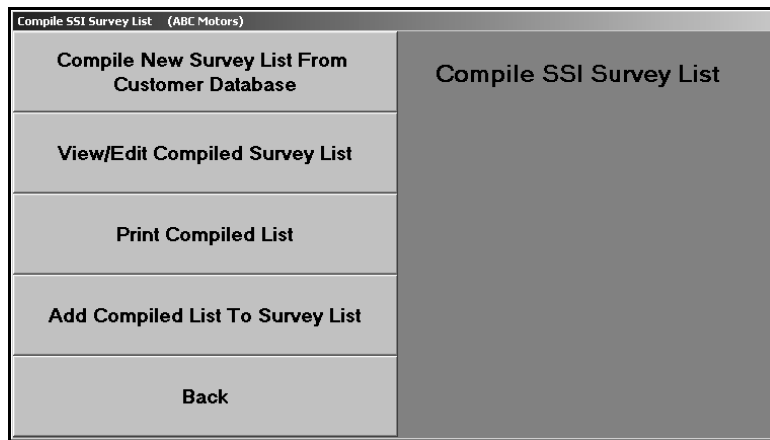
Compile New Survey List From Customer Data Base

The Compile SSI List From Customer Master File menu allows you to compile a survey list using the customer master file. You can select to compile the list based on vehicle type, car line, or salesperson. Only select one compiling option. If there is an existing list, the system overwrites it when you to compile another list. Based on the option you select and the criteria you enter, the system scans the customer master files and generates a list of customers.
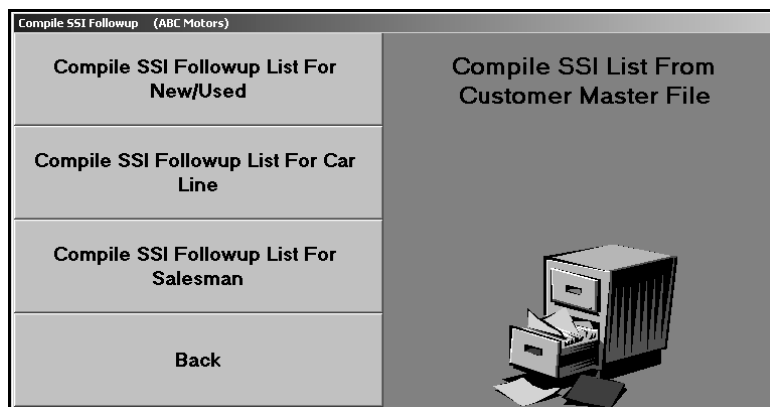
Compile SSI Followup List For New/Used

Use this button to compile the followup list based on a specific vehicle type.

1. Click **Compile SSI Followup List For New/Used**.

2. Indicate the vehicle type you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.

3. Type the inclusive dates you want to use. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

Compile SSI Followup List For Car Line

Use this button to compile the followup list based on a specific car line.

1. Click **Compile SSI Followup List For Car Line**.

2. In **Car Line**, type the car line you want to use to generate the list, or select the car line from the drop-down list.

3. Type the inclusive dates you want to use. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

Compile SSI Followup List For Salesman

Use this button to compile the followup list based on a specific salesperson.

1. Click **Compile SSI Followup List For Salesman**.

2. In **Salesman Number**, type the salesperson's ID number, or select the salesperson from the drop-down list.

3. Type the inclusive dates you want to use to generate the list. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

View/Edit Compiled Survey List

After you compile the data, use this button on the Compile SSI Survey List menu to view and edit the compiled list. You can remove customers from the list by changing their status.

1. Click **View/Edit Compiled Survey List**. The Edit Compiled List screen appears and displays the customers on the compiled survey list.

2. Click **Prev** and **Next** to advance through the pages of the list, or click **All** to view all of the customers on the list.

3. Click customers to change their status from "Active" to "Remove" or from "Remove" to "Active." The system only pulls "Active" customers to the survey list.

4. When you are finished editing the list, click **Back**.

Print Compiled List

Use this button to print the compiled list. For each sale on the survey list, the printout lists the customer's account number and name, the vehicle's model year, model name, and make, and the sale date.

1. Click **Print Compiled List**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

3. Once you select your print type, click **Print**.

Add Compiled List To Survey List

Use this button to add the edited compiled list to the survey list.

1. Click **Add Compiled List To Survey List**.

2. When prompted, type a description for the list. The heading prints on the top of the list when you print it. You can enter up to 50 characters.

3. Click **OK** when prompted to verify you want to add the list.

Conducting SSI Surveys

Once you have your SSI survey list, you conduct your surveys. Click **Conduct SSI Phone Survey** to open the Conduct SSI Phone Survey menu. The options on this menu allow you to conduct phone surveys and enter the responses for mailed surveys. Once you finish the surveys, you print the daily summary and update the surveys.
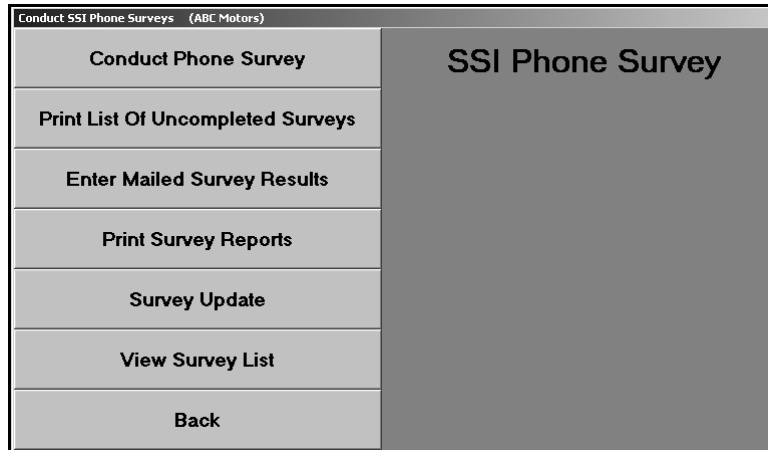
Removing "Customers" from the Survey List

The survey list may include dealer trades and wholesale sales. Use the following instructions to remove dealer trades or wholesale sales from the phone survey list once you have compiled it and pulled it to the active survey list.

1. Return to the CSI/SSI menu.

2. Click **Print SSI Letters & Labels**.

3. Click **Edit Compiled List**.

4. Click the record you want to remove from the survey list in the list window on the right side of the screen.

5. Click **Remove**.

6. Repeat steps 4 and 5 for each record you want to remove from the list.

7. Click **Back** to close the screen.

8. Click **Exit** to return to the CSI/SSI main menu.

9. Click **Conduct SSI Phone Survey**.

Conduct Phone Survey

Use this button to open the SSI Phone Survey screen to conduct phone surveys. The screen displays all of the SSI survey questions you entered in the SSI setup, so all you have to do is follow the questions on the screen and record the customer's response.

1. Click **Conduct Phone Survey**. The SSI Phone Survey screen appears.

2. Type the customer number, or click **List** to select the customer from the survey list. Click the customer you want to select. You can also click the arrow buttons on each side of the **List** button to scroll through the list.

3. The top of the screen displays the customer's name, address, and phone numbers, as well as the number of times the dealership has attempted to contact the customer. The bottom part of the screen displays the customer's name and a brief introduction for the phone call. The information includes the make of the vehicle the customer purchased.

4. At this point, you have two options depending on the scenario.

The Customer is Interested in Participating in the Survey

a. Click **Next**.

b. The next screen displays questions about the customer's satisfaction with the purchased vehicle and satisfaction with your dealership. Read each question, and type the rating number. You can also click to select the appropriate rating. (The first column is for rating 1, the second for rating 2, etc.)

   The first question is a standard question about the customer's satisfaction with the vehicle. Use the **Comment** field below this question to enter the customer's comment about the satisfaction with the vehicle. This field holds up to 60 characters. This is an optional entry.

   The next four questions relate to the customer's satisfaction with your dealership. The letters corresponds to the questions you entered under **Dealership Performance** on the SSI Phone Survey screen in the System Setup.

c. When you have asked all of the questions, click **Next**.

d. The next screen displays questions about the customer's satisfaction with the salesperson. The letters corresponds to the questions you entered under **Salesman Performance** on the SSI Phone Survey screen in the System Setup. Read each question, and type the rating number. You can also click to select the appropriate rating.

e. When you have asked all of the questions, click **Next**.

f. The final screen allows you to enter customer comments. You can enter up to two comments. Each field holds up to 60 characters. Remember, comments are not required entries, and you do not want to record every comment verbatim. Instead, you want to summarize the general idea. In reality, you will not be tracking individual comments to follow up on each one. Instead, comments serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that need to be addressed immediately.

g. When you are finished, click **Finish**. The system will mark the survey as "Completed" and return you to the initial SSI Phone Survey screen.

h. The SSI Phone Survey screen automatically displays the information for the next customer in the list. Continue to conduct surveys.

The Customer is not Home or not Interested in Participating in the Survey

a. Type the appropriate letter in the field at the bottom of the screen.

    Type **A** to abort the survey. Using "A" for abort ensures the system tracks the number of times you attempt to contact the customer.

    Type **L** to flag the customer to receive a letter.

    Type **C** to mark the survey as completed.

b. The customer's status in the phone list will display the selection.

Print List Of Uncompleted Surveys

Use this button to print a list of the surveys that need to be completed. The report lists the salesperson's ID number, customer's name, city where the customer lives, and the vehicle's make and model. The bottom of the report identifies the total number of uncompleted reports.

1. Click **Print List Uncompleted Surveys**.

2. When prompted to verify your printer is ready, select your print criteria.

Enter Mailed Survey Results

Use this button to open the Enter Mail-In Surveys screen to enter the results of surveys you mailed to customers.

1. Click **Enter Mailed Survey Results**. The Enter Mail-In Surveys screen appears.

2. Type the customer number, or click **Survey List** to select the customer from the survey list. Click the customer you want to select. You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.

3. The top of the screen displays the customer's name and phone number.

4. The next part of the screen displays the SSI survey questions. Type the rating number, or click to select the appropriate rating.

   Question 1 is a standard question about the customer's satisfaction with the vehicle. Use the **Comment** field below this question to enter the customer's comment about the satisfaction with the vehicle.

   Question 2 relates to the customer's satisfaction with your dealership. The letters corresponds to the questions you entered under **Dealership Performance** on the SSI Phone Survey screen in the System Setup.

   Question 3 relates to the customer's satisfaction with the salesperson. The letters corresponds to the questions you entered under **Salesman Performance** on the SSI Phone Survey screen in the System Setup.

5. Next, type up to two customer comments. Each comment field holds up to 60 characters.

6. Click **Save** to save the survey.

Print Survey Reports

Use this button to print the results of the surveys you conducted. The report displays each customer's ratings for each survey question. The end of the report displays the customer's overall satisfaction summary and total ratings based on the average of all of the surveys.

1. Click **Print Survey Reports**.

2. Type a heading for the report you are printing.

3. When prompted to verify your printer is ready, select your print criteria.

Survey Update

At the end of the day, use this button to update the survey information. This generates the survey statistics and updates them to the Dealership Information screen and to the salespeople's files in the System Setup. The update removes all completed surveys from the survey list. If you want to print letters for customers who completed the surveys, print the letters *before* you complete the daily update.

1. Click **Survey Update**.

2. Indicate if you want to hold the uncompleted surveys in the survey list or delete them. Type **Y** (for yes) to hold the surveys in the list or **N** (for no) to dump the surveys.

3. Click **OK** when prompted to verify you want to update the information.

View Survey List

Use this button to view the list of customers on the survey list. The list indicates which customers have completed the survey and which customers are still active and need to complete the survey.

Printing SSI Followup Letters

After you conduct the surveys, you print the followup letters as needed. Click **Print SSI Letters & Labels** to open the Print Letters menu. You use this menu to print SSI customer letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (\TI for) on the signature line, or the system will not pull the information you enter.
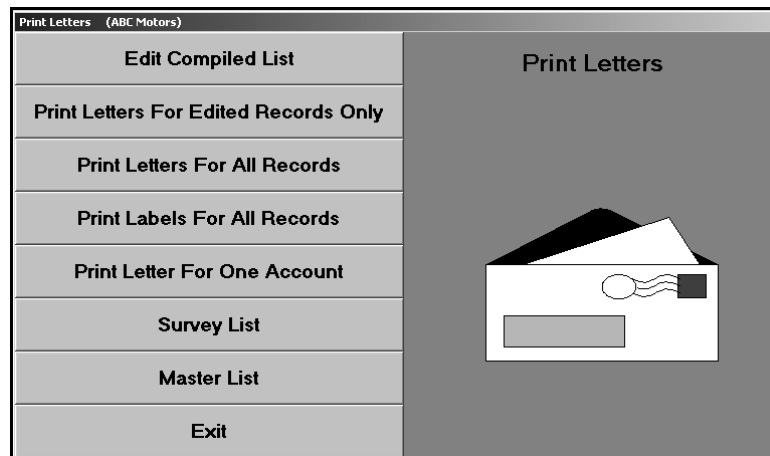
Edit Compiled List

First, use the Edit Compiled List screen to select which customers should receive letters. Once you update the completed surveys using the Update option on the SSI Phone Survey menu, this screen displays only the customers you flagged to receive a letter. If you do not update the surveys, the screen lists all of the customers on the active survey list.

1. Click **Edit Compiled List**. The Edit Compiled List screen appears.

2. The window on the right side of the screen displays the phone survey list and indicates the letter status for each customer. If you entered an "L" for Send Letter on the survey screen, the customer's status reads, "Y."

3. The information for the first customer on the list automatically fills in on the screen. You can also select individual customers by typing the repair order number, or by clicking the customer in the list on the right side of the screen. The screen displays the selected customer's information.

4. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the mailers. If you need to permanently edit the information, you must edit it in the customer's master file.

5. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the salutation line of the letter.

6. Click one of the three buttons that correspond to the action you want to take:

   - Click **Send Letter** to flag the customer to receive a letter. If you select to flag the customer for a letter, the letter status next to the customer's name will read, "Letter."

   - Click **No Letter** to flag the customer not to receive a letter. Customers flagged not to receive letters have a status of "No."

   - Click **Remove From List** to remove the customer from the list.

7. As you click the buttons, the next customer's information automatically fills in on the screen. Continue work your way through the list.

8. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

9. Click **Back** to close the screen.

Print Letters For Edited Records Only

Use this button to print letters for the customers you want to receive letters.

1. Click **Print Letters For Edited Records Only**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Letters will print for all of the flagged customers from this customer on. If you want to print letters for all of the selected customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For All Records

Use this button to print letters for all of the customers on the survey list.

1. Click **Print Letters For All Records**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Letters will print for all of the customers from this customer on. If you want to print letters for all of the customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Print Labels For All Records

Use this button to print labels for all of the customers on the survey list.

1. Click **Print Labels For All Records**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Labels will print for all of the customers from this customer on. If you want to print labels for all of the selected customers, leave this field blank, and press ENTER.

3. When prompted to verify your printer is ready, select your print criteria.

Print Letter For One Account

Use this button to print a letter for a specified customer.

1. Click **Print Letter For One Account**.

2. In **Account Number**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Survey List

Use this button to view the survey list. The same list opens when you click "Click Here For List" on the print prompts. The list displays the account number, customer's name, and the vehicle's year, make, and model. To view a specific customer on the list, type the first three letters of the customer's name. A list of the customers on the list whose last name begins with those letters appears. (You can click **Master List** to search for a customer in the master list.)

Master List

Use this button to display the Search Customer Base screen to search for a customer in the master list. You can select a customer from the list and print a letter for the customer.

1. Click **Master List**. The Search Customer Base screen appears.

2. Type the first three letters of the customer's last name.

3. A list of the customers whose last name begins with those letters appears. The list displays the account number, customer's name, and the vehicle's year, make, and model.

4. To print a letter for the customer, click the customer.

5. Type the letter number you want to send, or select the letter from the drop-down list.

6. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

7. Click **OK** when prompted to verify your printer is ready.

Performing the Monthly SSI Update

At the end of the month, use the **SSI Reports & Updates** button to print the batch SSI report and to update the survey results for the month. You can print the month-to-date report any time during the month to check the statistics as needed. However, do not perform the monthly update (option 2) until all of the surveys for the month are complete. The update compiles all of the survey results for the month and updates the statistics to the Dealer Information screen in the System Setup.

Print Batch SSI Dealer Report

As you conduct surveys and complete the daily survey update, the system compiles the survey results and makes them available on this report. Click this button when you want to print the summary of the SSI surveys. You can print this report any time during the month. The report has three sections.

The first part of the report displays each customer's satisfaction ratings for each salesperson. In addition to listing the customer rating for each sales question on the survey, the report displays the customer's name, the delivery date for the vehicle, and the purchased vehicle's make and model year. The bottom part of each salesperson's section will display the salesperson's monthly and year-to-date percentage rating for each sales question on the survey.

The next part of the report serves as a management summary. It displays each customer's satisfaction ratings for each salesperson and the dealership. In addition to listing the customer rating for each sales and dealership question on the survey, the report displays the customer's name, the delivery date for the vehicle, and the purchased vehicle's make and model year. The bottom part of each salesperson's section will display the salesperson's monthly and year-to-date percentage rating for each sales question on the survey.

The final part of the report displays monthly and overall percentage ratings for each question on the survey.

1. Click **Print Batch SSI Dealer Report**.

2. In the Survey Description field, type a heading for the report. The heading prints on the top of the printout. Press TAB or ENTER to continue.

3. When prompted to verify your printer is ready, select your print criteria.

Update Batch Data

Use this button to update the survey information for the month. Only update the data after you have completed all of the surveys for the month. The update clears the individual survey information from the Batch SSI Dealer Report. Once you run the monthly update, you cannot view the list of customers who completed surveys. However, the system retains the monthly statistics for vehicles, salespeople, and the dealership.

1. Click **Update Batch Data**.

2. Type the month you are updating.

3. Click **OK** when prompted to verify you want to update the information.