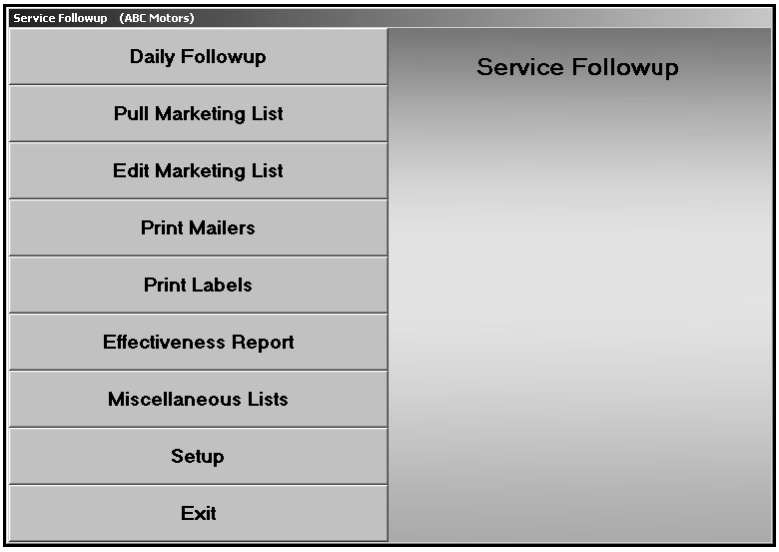
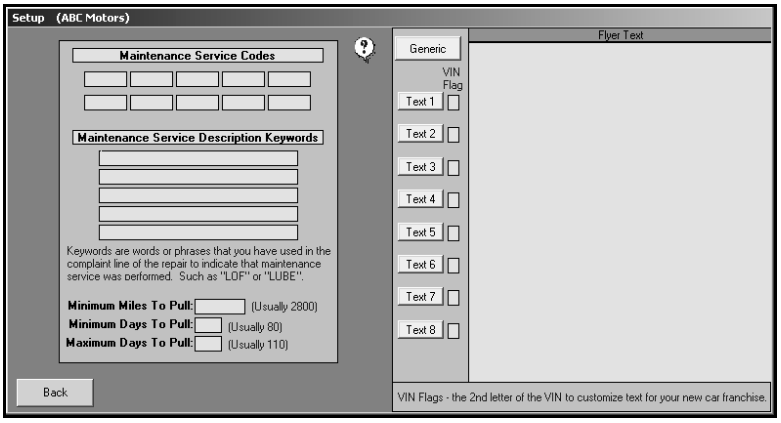
# Chapter 11 Followup & Marketing

The Service Followup menu is used to assist you with activities that promote customer retention. The options allow you to create followup mailers and print followup lists. Click the button that corresponds to the menu option you want to select. The appropriate submenu or screen appears. When you are finished, click **Exit** to return to the Service Writing menu.




## Setup

Before you can use the followup program, you must create your followup mailers. Use the **Setup** button to enter the parameters you want to use when generating the followup lists and to enter text for the mailers you want to send out. (The instructions on the following page explain the information required in each field and how to enter your mailer text.)



**Important:** You must use pre-printed forms to use this feature. Autosoft can print the forms, or another vendor can print the forms based on a form from Autosoft. The forms must match the Autosoft form exactly in order to work with this module.

## Using Trouble Codes or Service Menu Codes

The Maintenance Service Code setup of postcard reminders is sensitive to the use of trouble/fail codes and service menu codes. Please review the following information before entering your setup information. It will help you decide whether you should use trouble/fail codes or service menu codes.

### Trouble Fail Code Usage

A trouble code allows you to assign specific general ledger accounts to the item to specific where the labor for the repair will post. The postcard setup will find the occurrences of the trouble/fail code as created in the Trouble/Fail Code setup. A postcard scan for trouble/fail codes is not sensitive to whether or not the **Labor Operation** field is left blank in the Trouble/Fail Code setup. The trouble/fail code used for a repair order is recorded to the R/O history and is searchable in a postcard search.

### Service Menu Code Usage

When creating menu codes, you can assign parts associated with repair and add customer presentation for up sales. The postcard setup will find the use of a service menu codes **IF** the **Labor Operation** field and **Code** field in the Enter Service Menu Operations setup match. For example, code SPE needs to be in the **Code** field and **Labor Operation** field. The codes must match in spelling for a valid search. If the **Labor Operation** field is left blank, then essentially the postcard search for the usage of that code will be null.

## Adding Setup Information

1. In **Maintenance Service Codes**, enter up to ten codes that apply to follow up as they appear in either the menu codes or trouble codes, and the system will search for the codes when generating the marketing list. If the system finds one of the codes entered here in a customer's service history file, it will check to see how long ago the service was done. If the service falls within the minimum or maximum days specified on this screen, the system will pull that customer to the marketing list.

2. Under **Maintenance Service Description Keywords**, type up to five descriptions you want the system to search for when generating the marketing list. The system searches the Customer Complaint line in the repair order history for the descriptions.

3. In **Minimum Miles To Pull**, type the minimum miles a vehicle should have (based on the system's estimation of accumulated miles) before it is included on the marketing list.

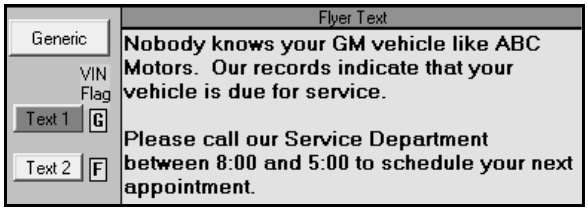
4. In **Minimum Days To Pull**, type the minimum number of days since the last service that should elapse before the customer is added to the marketing list.

5. In **Maximum Days To Pull**, type the maximum number of days since the last service date that should elapse before the customer is added to the marketing list.

6. Click **Generic**, and use the Flyer Text area to type a general message that will print on all non-manufacturer-specific mailers. *You must press ENTER* to force line breaks as you type, or the text will not print properly.

7. Click the **Text** buttons, and use the Flyer Text area to type messages that will print on all manufacturer-specific mailers. *You must press ENTER* to force line breaks as you type, or the text will not print properly.

8. Use the **VIN Flag** field to indicate the manufacturer for the text you are adding. The second letter on the VIN indicates the manufacturer. Type that letter in the **VIN Flag** field. For example, all General Motors vehicles have G as the second letter of the VIN. To assign a GM-specific message, you would type G in this field.

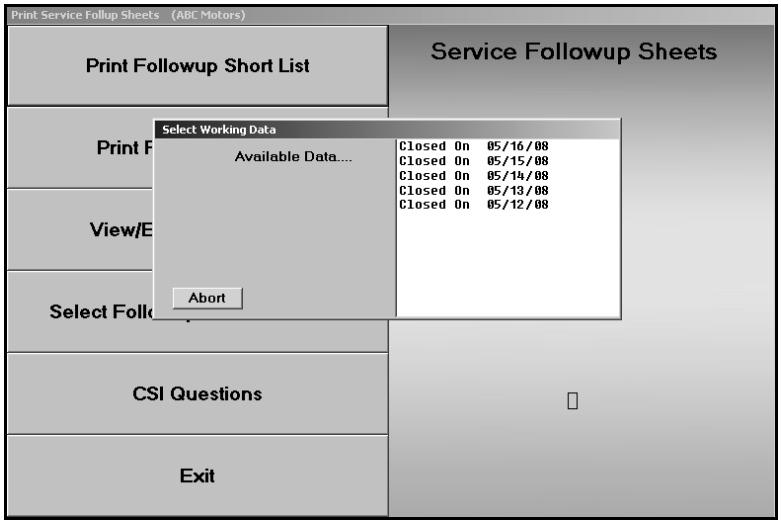



9. Click **Back** when you are finished entering the setup information. The system automatically saves the information you enter.

# Daily Followup

This button advances you to the Service Followup Sheets menu. This menu is used to conduct daily service followup. You can print followup short lists or detailed followup sheets. Both options allow you to conduct surveys to rate customer satisfaction based on a scale from 1 to 5. The survey questions are tailored to fit the needs of your dealership.

When you first access this menu, you are prompted to select the date for the working data you want to use. The data is based on the repair order closing date. Each date listed contains the repair orders that were closed on that date. The data only includes information for the last six days. You cannot go back further than six days. The followup list is based strictly on the repair order list for the service date selected. The customer's status (A for active or I for inactive) and the customer's "On Do Not Call List" entry in the customer information file *do not* determine if a customer is pulled to this followup list.




The dates in the data list should appear in order from the most recent date to the oldest date. If the menu is missing a date, Service did not perform the Daily R/O Update on that date. Similarly, if Service performs multiple Daily R/O Updates, the menu will display the same date on multiple lines.

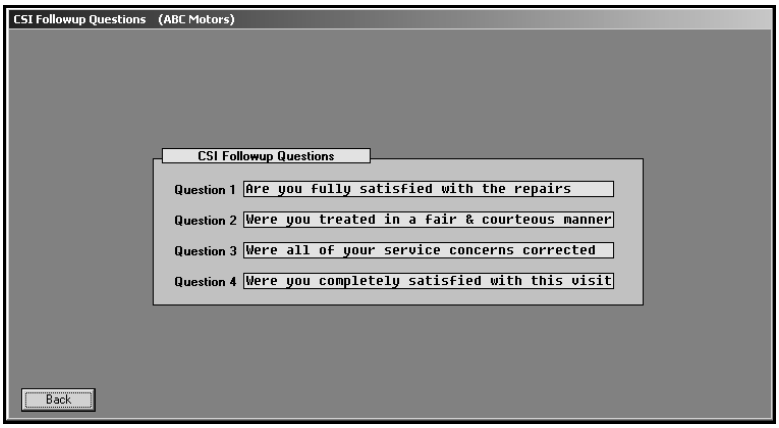
If one or more dates appear to be out of order in the Select Working Data list, check to see if there is a closed repair order for the day that has an old open date (days or weeks ago). This might be caused, for example, by a repair order that contained both customer pay and warranty work, where the warranty repair remained open for a period of time. When the repair is finally closed, the repair order is included in the Daily R/O Update. The Daily R/O Update displays the oldest open date for all of the repair orders updated as the date in the data list. The repair order with the oldest open date will be the first repair order in the closed repair order list for that day and will be the first repair order displayed when viewing the repair order data in Adobe® Acrobat® Reader®.

To select the working data, click the date you want to select. (You must select working data to continue. If you click **Abort**, the system will return you to the Service Followup menu.) The data for the date you selected becomes the working list for all of the menu options. The selected date is displayed on the bottom of the menu for your reference. If you need to change the date, click **Select Followup List To Process** to display the list of available data again.

To begin working with the data and to print the followup sheets, click the button that corresponds to the menu option you want to select. The appropriate prompt or screen appears. When you are finished, click **Exit** to return to the Service Followup menu.

## CSI Questions

Before you can print the followup sheets, you must enter the text that you want to print on the sheets using the **CSI Questions** button. These are the same questions entered in the CSI/SSI module. You can enter up to four questions that allow the customers to rate their service on a scale from 1 to 5. Simply type up to four questions in the fields provided. When you are finished, click the **Back** to return to the Service Followup Sheets menu. The system automatically saves the information.

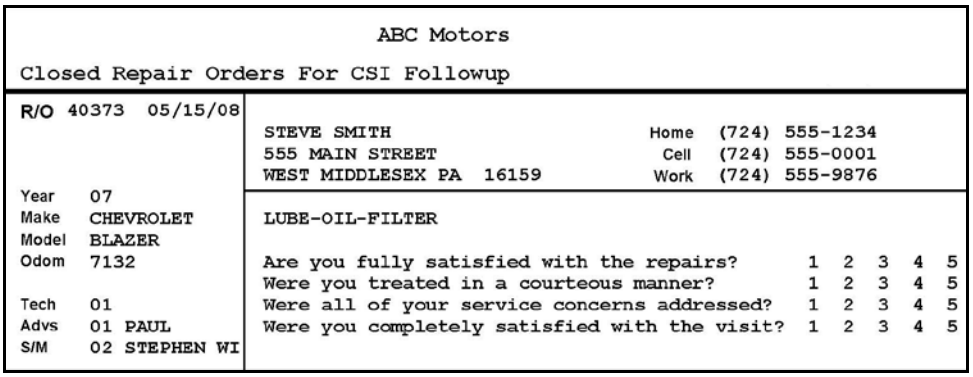



> **Tip:** These are the same questions found in the CSI/SSI module. If you edit the questions here, the changes pull to the CSI/SSI module. Similarly, changes made to the questions in the CSI/SSI module automatically pull to the Service Writing Daily Followup.

## Print Followup Short List

Click **Print Followup Short List** to print a followup short list for all of the closed repair orders. This list can be used to conduct phone surveys if your dealership does not want to mail out customer surveys. When prompted to verify your printer is ready, select your print criteria.

The list prints four closed repair orders per page. It displays the customer's name, address, and phone numbers, the repair order number and closing date, the vehicle's year, make, model, and mileage, the advisor and technician for the repair order, and the followup survey questions.



ABC Motors

Closed Repair Orders For CSI Followup

| | | | | |
|---|---|---|---|---|
| R/O 40373 05/15/08 | STEVE SMITH | Home | (724) | 555-1234 |
| | 555 MAIN STREET | Cell | (724) | 555-0001 |
| | WEST MIDDLESEX PA 16159 | Work | (724) | 555-9876 |
| Year 07 | LUBE-OIL-FILTER | | | |
| Make CHEVROLET | | | | |
| Model BLAZER | | | | |
| Odom 7132 | Are you fully satisfied with the repairs? | 1 2 3 4 5 | | |
| | Were you treated in a courteous manner? | 1 2 3 4 5 | | |
| Tech 01 | Were all of your service concerns addressed? | 1 2 3 4 5 | | |
| Advs 01 PAUL | Were you completely satisfied with the visit? | 1 2 3 4 5 | | |
| S/M 02 STEPHEN WI | | | | |

## Print Followup Sheets

Use this button to print followup sheets for customers. This printout can be used to conduct individual surveys through the mail.

1. Click **Print Followup Sheets**.

2. In the list, click the box in front of the customer's name to select the customers for whom you want to print the followup sheets. A check mark appears in the box to indicate the customer has been selected. You can also use the **Select All** button to select all customers and the **Clear All** button to clear the boxes for all customers.

3. Click **Print Selected**.

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

Each customer's survey prints on a separate page. The printout lists the customer's information, service history, details for the most recent service, and the followup survey questions.

ABC Motors

Salesman: 02 - STEPHEN WILLIAMS

| | | |
|---|---|---|
| R/O 40373 05/15/08 | 39126476 | |
| Year 07 | STEVE SMITH | Home (724) 555-1234 |
| Make CHEVROLET | 555 MAIN STREET | Cell (724) 555-0001 |
| Model BLAZER | WEST MIDDLESEX PA 16159 | Work (724) 555-9876 |
| Odom 7132 | Steve | Service Visits: 2 |
| | | Cars Purch Here: 1 |
| Tech 01 PAUL | | Birthday May, 19 |
| Advs 01 | | |
| Delivered 11/07/07 | | |

On a scale from 1 to 5 how would you rate the following?

| | | | | | |
|---|---|---|---|---|---|
| Are you fully satisfied with the repairs? | 1 | 2 | 3 | 4 | 5 |
| Were you treated in a courteous manner? | 1 | 2 | 3 | 4 | 5 |
| Were all of your service concerns addressed? | 1 | 2 | 3 | 4 | 5 |
| Were you completely satisfied with the visit? | 1 | 2 | 3 | 4 | 5 |

| | | | |
|---|---|---|---|
| Repair 1 | LUBE-OIL-FILTER | (Q) | 31.57 |
| Repair 2 | ROTATE TIRES | (C) | 11.85 |
| | | Total Repairs | 43.42 |

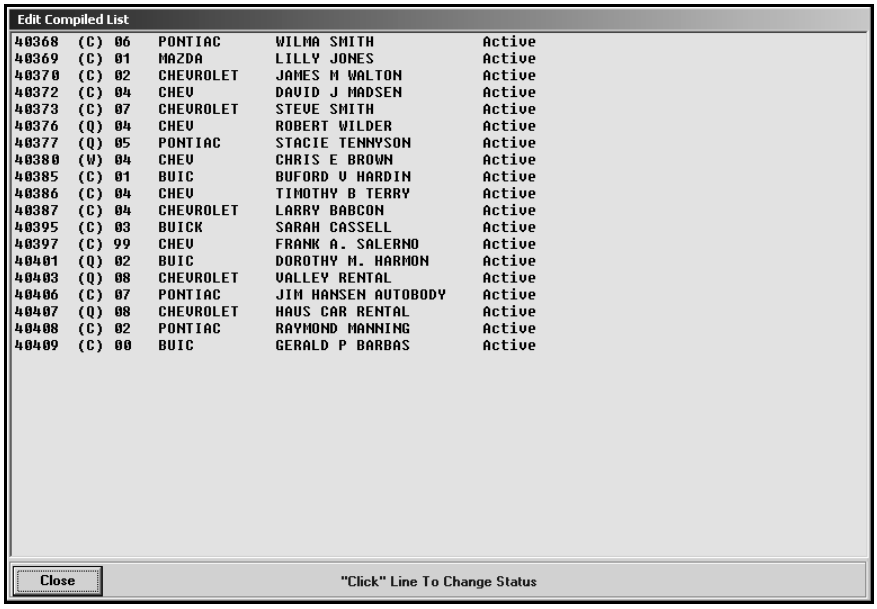
Repair History

| R/O | Date | Odom. | TN | Repair | | Total |
|---|---|---|---|---|---|---|
| 40373B | 05/15/2008 | 7132 | 01 | ROTATE TIRES | (C) | 11.00 |
| 40373A | 05/15/2008 | 7132 | 01 | LUBE-OIL-FILTER | (Q) | 29.42 |
| 40348 | 02/08/2008 | 0 | | | ( ) | .00 |
| 40332B | 09/05/2006 | 0 | 01 | RECALL 1245780 | (W) | .00 |
| 40332A | 09/05/2006 | 0 | 01 | LUBE OIL FILTER | (Q) | .00 |

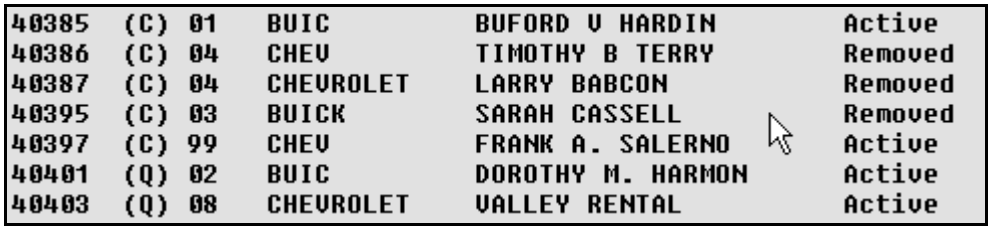
Comments

## View/Edit Working Data

Use this button to open the Edit Compiled List screen. This screen is used to view the list of closed repair orders in the current working list and to change the status of repair orders as needed.




Click a repair order to change its status from “Active” to “Removed” or from “Removed” to “Active.” You can only print followup sheets for active repair orders.



# Pull Marketing List

Use this button to generate a list of customers due for followup mailings. The list is based on the mailing date you specify. The system will also use the information you entered in the Followup Setup to generate the list. The system displays your parameters as it scans the files.

**Tip:** An inactive (I) status in the Customer Information file will prevent a customer from being pulled to this marketing list. If a customer has expressed he or she does not wish to be contacted by the dealership, you can use the customer's status to help prevent the customer from being pulled to this marketing list.

1. Click **Pull Marketing List**. The Scan Records screen appears.

2. Type the mailing date you want to use for the list (the date you want to send the mailers out). You are already filtering the list based on the minimum miles to pull, minimum days to pull, and maximum days to pull you entered in the Setup.

3. Click **OK** when prompted to verify you want to pull the working list. (If you click **Cancel**, the system will clear the date field, and you can enter a new date.)

4. The system will ask you if you want to perform a pre-scan fix. Click **OK** or **No** to indicate the option you want. The pre-scan fix helps verify the integrity of the files to ensure the system can successfully generate your list.

5. The system will scan the records. This may take several minutes depending on the number of service records in your system. The system will display the progress as it scans.

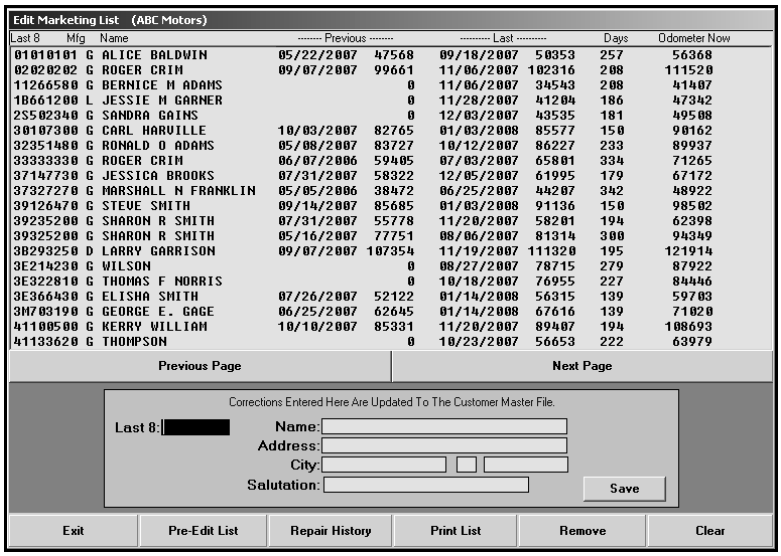
6. If a list already exists, the system will prompt you to indicate if you want to override the existing list. Click **OK**. (If you select to cancel the override, the system will discontinue generating the new list.)

7. When the system is done generating the list, it will display a message indicating the number of records in the new list. Click **OK** to acknowledge the message.

# Edit Marketing List

Use this button to edit the marketing list as needed before printing the mailers. You can remove customers from the marketing list and view customers' repair history. If you edit a customer's information on this screen, the changes will update to the customer's master file. Ensure you have permission to edit customer files before making changes on this screen.

1. The screen displays the customers on the list.




2. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.

3. Click the customer, and the customer's information appears in the fields at the bottom of the screen.

4. Edit the information as needed. Remember, the information you edit here will update the customer's record.

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 on the mailer.

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

7. Continue to view and edit customer information as needed.

8. Click **Exit** to return to the Service Followup menu.

## Viewing a Customer's Repair History

You can view the repair history for any customer on the list using the **Repair History** button. The screen will display the repair history. This information is for viewing only. You cannot edit any information on the screen.

1. Click the customer you want to select. The customer's information is displayed in the fields on the bottom of the screen.

2. Click **Repair History**.

3. The customer's repair history is displayed. The top part of the screen displays the vehicle's model year, make, and model. If the vehicle was purchased from the dealership, the top part of the screen also displays the delivery date.

   The bottom part of the screen displays the repair order history. It lists the repair order number, service date, mileage, technician ID, repair type (C for customer, W for warranty, I for internal, N for new car road ready, or Q for quick lube), a description of the service, and the totals for labor and parts for each service/condition.

4. Click **Back** to return to the List screen.

## Removing Customers from the List

You should always edit the list to remove any customer you do not want on the list. The system may include internals or dealer trades that have customer files in the system, so you should be sure to edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove their customer records from the system. There are two ways to remove customers from the list. You can use the **Pre-Edit List** button or the **Remove** button.

### Pre-Editing the List

The **Pre-Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

You can remove customers from the list as needed by changing a customer's status in the pre-edit list. There are two statuses. An "Active" status means the customer is currently displayed on the list screen. (Initially, all customers will have an "Active" status until the list is edited.) A "Remove" status means the customer does not appear on the list screen. The customer will only appear in the pre-edit list. You can only print mailers for customers with an "Active" status.

1. Click **Pre-Edit** List. A list of the customers on the list appears.

2. The third column displays the customer's status. Click a customer to change the customer's status. The status will change from "Active" to "Removed" or from "Removed" to "Active."

3. Click **Previous** and **Next** to maneuver through the additional pages of the list, and continue to edit the list as needed.

4. Click **Back** to return to the List screen. The customers with a status of "Removed" will no longer appear on the list on this screen.

### Removing Customers on the Edit screen

The **Remove** button allows you to remove customers from the list after viewing their information on the Edit Marketing List screen. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

1. Click **Previous Page** and **Next Page** to advance to the previous and next pages of the list.
2. Click the customer's name, and the customer's information fills in the fields on the bottom of the screen.
3. Click **Remove**.
4. Click **OK** when prompted to verify you want to delete the record. The system removes the customer from the list.

### Adding a Customer Back to the List

1. Click **Pre-Edit List**.
2. Click the customer you want to add back to the list. The customer's status changes from "Removed" to "Active."
3. Click **Close**. The customer appears on the Edit Marketing List screen again.

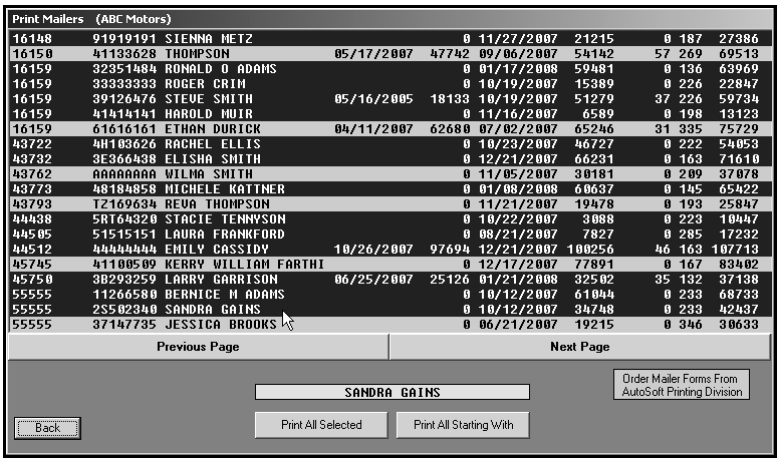
## Print Mailers

Use this button to print mailers for all or selected customers on the marketing list. You entered the mailer information in the Setup. You must use pre-printed forms to use this feature. Autosoft can print the forms, or another vendor can print the forms based on a form from Autosoft. The forms must match the Autosoft form exactly in order to work with this module.

## Printing Mailers for Selected Customers

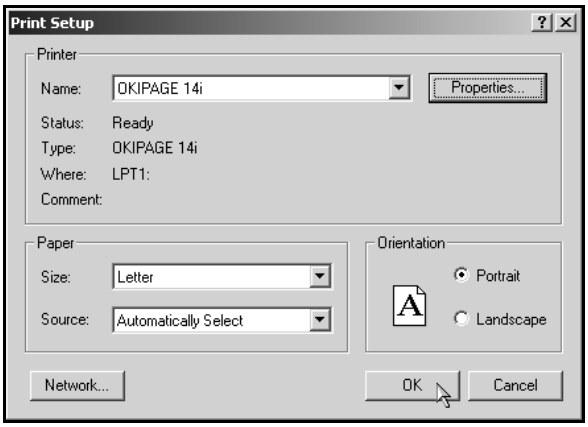
1. Click **Print Mailers**. The Print Mailers screen appears and displays the customers on the list.

2. Click the customers to highlight their names. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.




3. When you are finished selecting the customers, click **Print All Selected**. The Print Setup appears.

4. If necessary, use the **Name** drop-down list to select the printer you want to use to print the mailers, and click **OK**.




5. Click **Back** to return to the Service Followup menu.

### Printing Mailers for all of the Customers from a Certain Point on

1. Click **Print Mailers**. The Print Mailers screen appears and displays the customers on the list.
2. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.
3. Click the customer you want to use as the starting point. (If you wanted to print mailers for the entire list, you would select the first customer on the list.)
4. The field at the bottom of the screen displays the name of the selected customer for your reference.
5. Click **Print All Starting With**. The Print Setup appears.
6. If necessary, use the **Name** drop-down list to select the printer you want to use to print the mailers, and click **OK** to print the mailers.
7. The system will display a "That's All" message when it is done processing the print job. Click **OK** to acknowledge the message.
8. Click **Back** to return to the Service Followup menu.

## Print Labels

Use this button to print mailing labels for the customers on the marketing list. This feature requires 1x4 inch labels printed on a laser printer. The labels print in ZIP Code order. When prompted to verify your printer is ready, select your print criteria.

**Tip:** You can print the labels to screen to preview them, but do not print the labels from the viewing screen because the information will not line up correctly with the 1x4 inch labels. When you are ready to print the labels, print them directly to the laser printer.

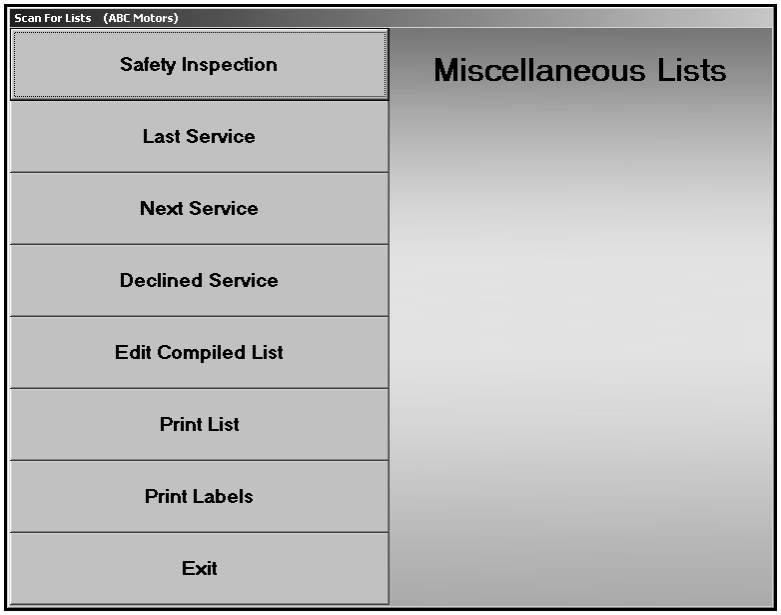
## Effectiveness Report

Use this button to print a report that identifies the effectiveness of your follow-up activities. The mailing list remains in the system for 60 days. Up to 30 days after a mailing, you can check the service records to see if a customer came in after receiving the mailer. If the customer returns within the 30-day period for any service, the system will count that visit as a hit.

1. Click **Effectiveness Report**.
2. Click the date for the mailing you want to view.
3. When prompted to verify your printer is ready, select your print criteria.

# Miscellaneous Lists

Use this button to advance to the Scan For Lists menu. Use the menu to generate a safety inspection list or a list based on the last service date or next service date. All of this information is based on the fields on the Customer Information screen. You can edit the lists and print mailing labels for the customers on the lists as needed.




1. Generate the list.
2. Edit the list.
3. Print the list and labels as needed.
4. Click **Exit** to return to the Service Followup menu.

## Safety Inspection

Use this button to generate the safety inspection list.

1. Click **Safety Inspection**.
2. Type the month when the inspection is due.
3. Type the service date you want to use to limit the list.
4. Click **OK** when prompted to verify you want to generate the list.
5. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

## Last Service Date

Use this button to generate a list based on the last service date.

1. Click **Last Service Date**.
2. Type the date you want to use to generate the list. You must type the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
3. Click **OK** when prompted to verify you want to scan for the list.
4. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

## Next Service Date

Use this button to generate a list based on the last next date.

1. Click **Next Service Date**.
2. Type the date you want to use to generate the list. You must type the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
3. Click **OK** when prompted to verify you want to scan for the list.
4. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

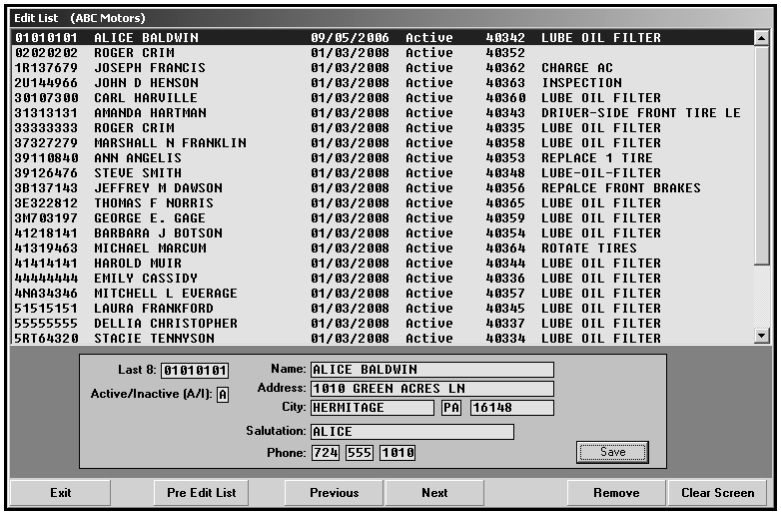
## Declined Service

Use this button to generate a list of declined services. This is based on the **Declined** box on the Close Service screen. The report uses the *R/O update date* to generate the list.

1. Click **Declined Service**.
2. Type the R/O update date you want to use to generate the list. You must type the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
3. Click **OK** when prompted to verify you want to scan for the list.
4. The system displays a message indicating the list has been generated and identifying the number of repairs on the list. Click **OK** to acknowledge the message.

## Edit Compiled List

Use this button to open the Edit List screen. This screen is used to edit the compiled safety inspection list. You can edit customer information or remove customers from the list. Labels will not print for customers you remove from the list. Any changes you make to the customer's information on this screen 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.




### Editing Customer Information

1. Click **Edit Compiled List**.
2. The generated list is displayed in the top part of the screen, and the information for the first customer on the list is displayed in the fields at the bottom of the screen.
3. Verify the information, and edit it as needed. (If you make changes, click **Save** to save the information. The next customer's information is automatically displayed.)
4. Click **Next** and **Previous** to work your way through the list.
5. Click **Exit** to return to the Scan For Lists menu.

### Removing Customers from the List

You should always edit the list to remove any customer you do not want on the list. The system may include internals or dealer trades that have customer files in the system, so you should be sure to edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove their customer records from the system. There are two ways to remove customers from the list. You can use the **Pre Edit List** button or the **Remove** button.

### Pre-editing the List

The **Pre Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

You can remove customers from the list as needed by changing a customer's status in the pre-edit list. There are two statuses. An "Active" status means the customer is currently displayed on the list screen. (Initially, all customers will have an "Active" status until the list is edited.) A "Removed" status means the customer does not appear on the list screen. The customer will only appear in the pre-edit list. You can only print mailers for customers with an "Active" status.

1. Click **Pre Edit List**. A list of the customers on the list appears.

2. Click a customer to change the customer's status. The status will change from "Active" to "Removed" or from "Removed" to "Active."

3. Click **Previous** and **Next** to maneuver through the additional pages of the list, and continue to edit the list as needed.

4. Click **Back** to return to the Edit List screen. The list will reflect the customers' status based on your edits.

### Removing Customers on the Edit screen

The **Remove** button allows you to remove customers from the list after viewing their information on the Edit List screen. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

1. Click **Previous** and **Next** to advance to the previous and next pages of the list.

2. Click the customer's name, and the customer's information fills in the fields on the bottom of the screen.

3. Click **Remove**. The customer's status changes from "Active" to "Removed."

### Adding a Customer Back to the List

1. Click **Next** and **Previous** to scroll through the list as needed.
2. Click the customer you want to add back to the list.
3. Click **Save**. The customer's status changes from "Removed" to "Active."

## Print List

Use this button to print the finished list. This list reflects any edits you made using the Edit Compiled List option.

1. Click **Print List**.
2. When prompted to verify your printer is ready, select your print criteria.

## Print Labels

Use this button to print labels for the customers on the list. This feature requires 1x4 inch labels printed on a laser printer. There should be two labels across the page and 10 labels down the page.

1. Click **Print Labels**.
2. When prompted to verify your printer is ready, select your print criteria.

**Tip:** You can print the labels to screen to preview them, but do not print the labels from the viewing screen because the information will not line up correctly with the 1x4 inch labels. When you are ready to print the labels, print them directly to the laser printer.