Release Notes Automation Premier Version 4.1.1

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Communications Centre

Overview

The communications centre has been developed to enable the automatic dispatch of various client communications via MMS. This includes Service Reminders, Registration Renewals, Booking Reminders, and RSA Expiry Notices. MMS stands out from SMS due to its ability to accommodate approximately 4,000 + characters along with a graphic, providing greater flexibility in crafting your messages. This enhancement aims to streamline client communications and improve overall the client engagement experience.

Client Benefits

- Stay on top of their vehicle's service schedule with Service Reminders via MMS.
- Receive timely notifications for Registration Renewals directly to their mobile device.
- Benefit from Booking Reminders to never miss an upcoming service appointment.
- Get notified about RSA Expiry Notices conveniently through MMS.

The messages sent via the communications centre are seamlessly integrated with various Automation features, enhancing the overall user experience. Updates in the task section of the client form plus booking generation and acceptance functions are now synchronised with MMS messages, providing a cohesive and efficient communication process.

User Benefits

- Messages sent via the Communications Centre are automatically recorded in the communications centre home page plus the task section of the client form for easy reference.
- Responding to messages triggers seamless booking generation and acceptance functions within Automation.
- Cost effective "set and forget" service resulting in increased work generation and reduced administration costs.

The communications centre works in conjunction with your service reminder management, please ensure before using the communications centre you are fully familiar with how to create, edit and apply service reminders both from the vehicle and service form. Below are a couple of links to service reminder topics that may assist you:

https://www.microbase.com.au/V4Help/CVS/topic.htm?rhtocid= 2#t=Clients%2C Vehicles Services.htm%23IX Adding Service Reminders

Marketing Function

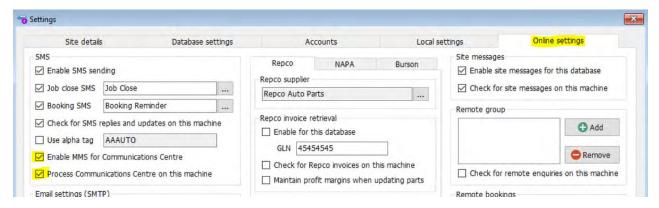
Please ensure you read the operating instructions so you fully understand how to deploy this marketing tool effectively into your service centre. Anything you are unsure about feel free to call our support personnel for advice.

Release Notes Version 4.1.0e: If you have not yet accessed the release notes for this version, they are available from this link:

http://www.microbase.com.au/resources/Release%20Notes%20V4.1.0e.pdf

Initializing the Communications Centre

Firstly, you need to go to File / Site Settings / Online > Enable MMS.

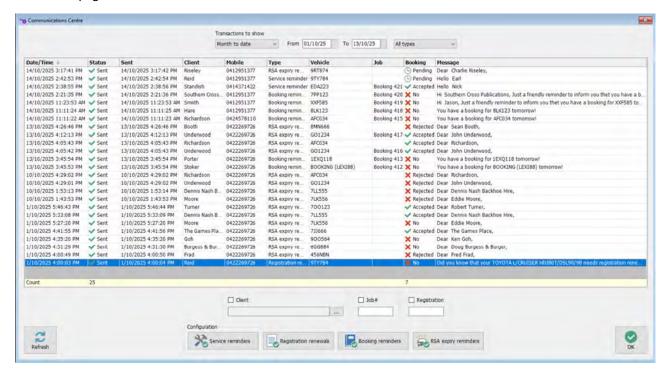


Select the Enable MMS option, the second option Process Communications Centre on this machine should only be selected on ONE machine within your network, this ensures that any replies from clients will only be received on what is normally the admin terminal.

Next, you need open the communications Centre home page by selecting the Comms Centre icon at the top of screen.



Your home page is now visible



Home page

Date / Time: The date and time the record was accessed

Status: Sent or fail

Sent: Date and time the message was actually dispatched

Client: Who received the message (Vehicle Owner)

Mobile: The mobile # the message was sent to.

Type: Communication ie: Service Reminder / Booking Reminder / RSA Expiry / Registration Renewal.

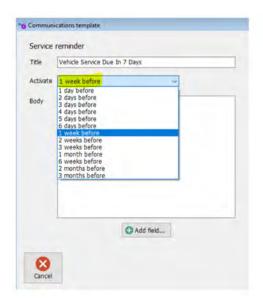
Vehicle: Registration #

Job: Only recorded when sending a booking reminder

Booking: This column indicates the current status of the communication. Pending indicates that a reply has been received but has not yet been actioned, pointing and clicking on the entry will display the online booking form, once you accept the booking the status will change to accepted. No, indicates no response at this time, Rejected relates to a booking being rejected by the user.

Composing A Message

The example displays MMS messages already sent, obviously when you first use the feature your screen will be blank so the next action you need to perform is setting up your messages. To do this select the message type at the bottom of the display ie: Service Reminder, you are presented with a blank form in the title field enter the header of the message ie: Vehicle Service Due In 1 month / Vehicle Service Due In 7 days etc. Next move down to the activate field click on the arrow to the right and select the time frame you wish your communication to be sent on. In the example we have chosen 1 week before (7 Days). The next stage is to compose your message; you have the ability to enter merge fields the same as when constructing an SMS message.





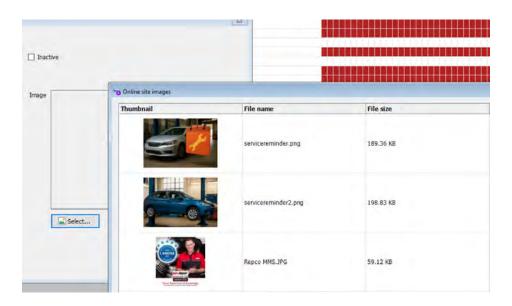
To merge a record, click on the Add Field option, you will see a drop-down list of merge fields, to insert simply point and double mouse click below is an example of a service reminder including the booking URL.



As you can see, we have inserted various merge fields so the message is totally customised, do not alter the merge field format, also be aware we automatically leave a space after each merged record. We also suggest that you use carriage returns when compiling a message as this prevents the message being delivered as one block of text.

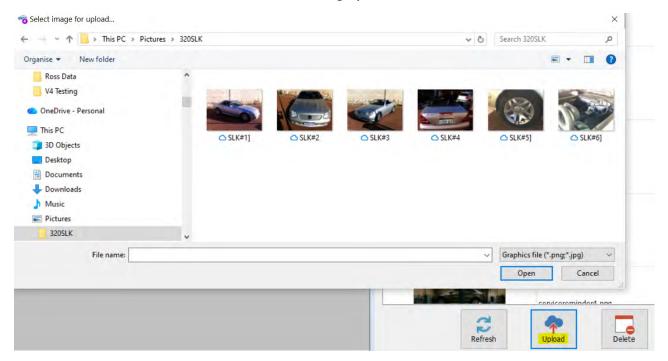
Inserting a Picture

On the right-hand side of the communications template form you will see you have the ability to add a graphic. Firstly, be aware you can only use Jpegs or Png files with a size of up to 400Kb. It is also suggested for rendition purposes that you use a portrait graphic rather than a landscape image. Clicking on the select option will take you to your personal image storage area on the Microbase cloud server. If you already have a file stored that you wish to use simply point and double click on the image and select insert to populate the template.

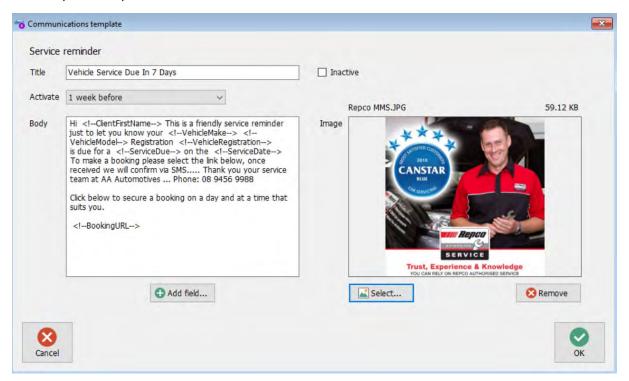


Uploading a Picture

From the bottom of the Communications Template click on the upload option, this opens Windows Explorer, you can navigate to the graphic required, point and double click this image is then uploaded to your graphic space on the cloud server. To insert follow the instructions: **inserting a picture**.



Your template now presents like this:

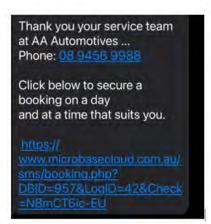


If you want to include a booking option (strongly recommended) select the booking URL option from the merge fields, it is suggested that you place this at the bottom of the message. Another option is your ability to create

multiple templates for the same communication type, possibly you send a service reminder message 2 weeks before and another 1 week before the service date.

Below is an example of what the client actually receives:

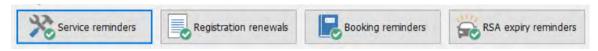


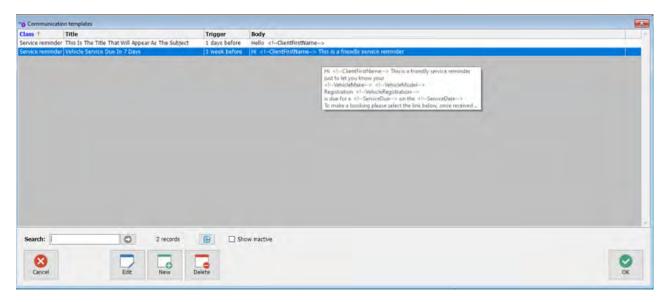


To achieve this format, it is suggested that you use carriage returns (enter key at the end of a line) and enter spaces between the text. Send a test message to yourself to check the layout and adjust as needed.

Communication Templates

Communication templates are stored for each communication type; to display these click on the communication icons at the bottom of the screen.

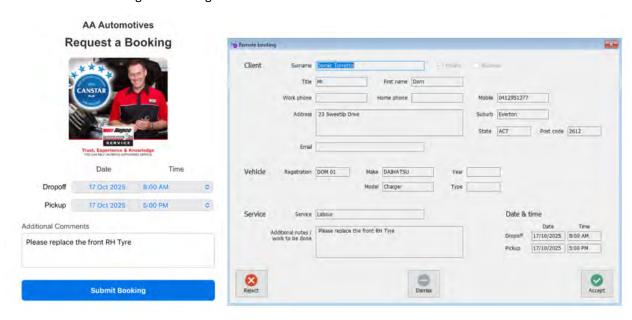




You will see in the above example that it is possible to hover over a message and see the full text, to view the full display it is essential that you use carriage returns and spaces in your message otherwise the message will appear as a long line of text that runs off the screen.

Service Reminders

It is suggested you send service reminders 14 and 7 days prior to service and ALWAYS place the booking URL at the bottom of all of your communications; this strategy ensures that your client has a quick and easy way to make a booking. When a booking is generated from a service reminder and accepted ALWAYS reply with a booking schedule SMS confirming the booking has been recorded.

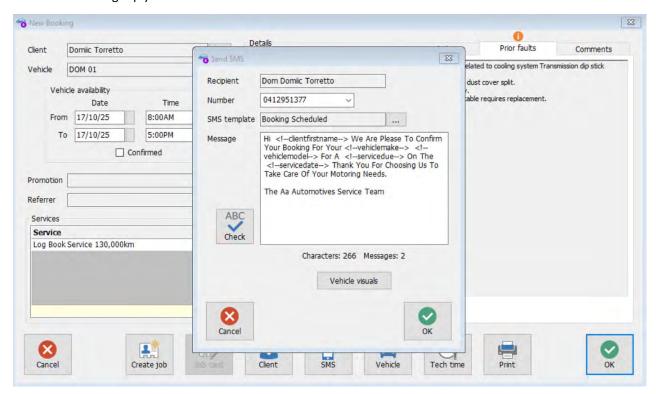


When your client selects the booking link they are presented with a simple booking form displaying your business name and the graphic you used in the communication they are replying to. The client can choose a day and time from the drop down options and make notes if required it is then submitted, the site receives the request on a remote booking form. There are 3 options on this form, Reject, which means you want to refuse the booking, Dismiss, will allow you to deal with the inquiry at a later time, Accept, on selection the standard diary booking

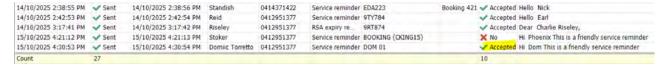
screen will be displayed with the details already inserted. To send a confirmation SMS automatically you will need to select the option in File / Site Settings / Online > SMS.



We suggest you set up an SMS titled Scheduled Booking so there is no confusion between a scheduled and confirmed booking reply via MMS.

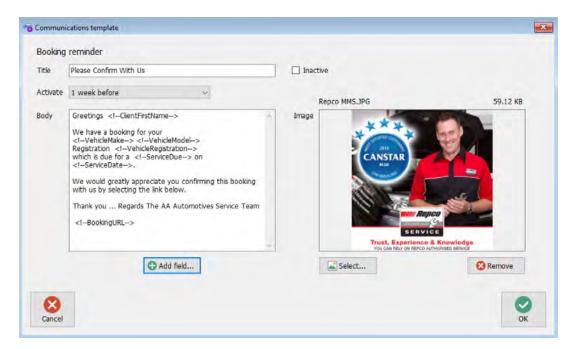


The accepted action will automatically update the communications center home page to accepted.



Booking Reminder

The communications centre allows you to have multiple templates for the same reminder classification ie: for booking reminders 1 day, 3 days. 1 week (7 days). Possibly you set booking reminders to be sent 7 days & 1 day prior to the service date, they can contain the same text but to distinguish the messages you will need to use a different title as an example Your vehicle is booked for service in 7 days and one titled Your vehicle is booked for service tomorrow (choose 1 day).



Booking reminder templates MUST contain the BOOKING URL, the recipient will click on this to confirm the booking, once a confirmation is received the booking in the diary screen will be confirmed.

After clicking the MMS link your client will see the following displays





The booking is now confirmed automatically by a tick on the relevant job nuKber



Registration Renewals

The next communication type we need to look at is registration renewals, we suggest you handle these in the same way as service reminders. Time frame, again would be 14 and 7 days, remeKber the communications centre is accessing services due directly from your vehicle records making it absolutely imperative that you manage the

services due either from the service or vehicle form or directly while closing a job by selecting the service reminder option.

Again, you will need to ensure your message contains the booking URL at the bottom of the text as an example your registration renewal template could present like this:



Note: We have used carriage returns and placed the booking link at the bottom of the text field.

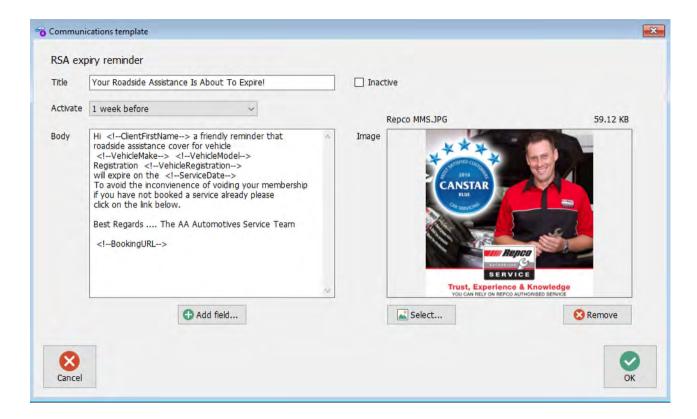
You could use the same text and image for your 7-day reminder (1 week) applying a different title, as a suggestion – Your Vehicle Roadworthy Is About To Expire!

RSA Expiry Reminders

If your location issues roadside assistance the communications centre can generate reminder messages when the cover is about to expire, again we suggest 14- and 7-day intervals. Roadside assistance reminders are differ from service reminders as cover is usually issued or renewed when a service is performed.

Bear in mind when sending RSA reminders that the client may have already made a booking for a service that will initialise cover renewal hence the reason for mentioning that a booking may already be in the system. Another point to consider with RSA renewals is the service (if one is booked) may not necessarily renew roadside assistance, we suggest if that is the case you discuss how to initialise renewal with the client on arrival.

Below is a suggest template:



Sample Templates

To assist you with setting up your templates we have provided examples that you can simply copy and paste into the text field and change any reference to the sample company to your own.

Service Reminder

Hi <!--ClientFirstName--> This is a friendly service reminder

just to let you know your

<!--VehicleMake--> <!--VehicleModel-->

Registration <!--VehicleRegistration-->

is due for a <!--ServiceDue--> on the <!--ServiceDate-->

To make a booking please select the link below, once received we will confirm via SMS.

Thank you your service team at AA Automotives ...

Phone: 08 9456 9988

Click below to secure a booking on a day

and at a time that suits you.

<!--BookingURL-->

Registration Renewal

Hi <!--ClientFirstName--> Just to let you know your vehicle inspection for <!--VehicleMake--> <!--VehicleModel--> Registration <!--VehicleRegistration--> is due on the <!--ServiceDate-->

To ensure your roadworthy does not expire please select the link below to make a booking prior to the due date.

<!--BookingURL-->

Booking Reminder

Greetings <!--ClientFirstName-->

We have a booking for your

<!--VehicleMake--> <!--VehicleModel-->

Registration <!--VehicleRegistration-->

which is due for a <!--ServiceDue--> on

<!--ServiceDate-->.

We would greatly appreciate you confirming this booking with us by selecting the link below.

Thank you ... Regards The AA Automotives Service Team

<!--BookingURL-->

RSA Renewal

Hi <!--ClientFirstName--> a friendly reminder that roadside assistance cover for vehicle

```
<!--VehicleMake--> <!--VehicleModel-->
Registration <!--VehicleRegistration-->
will expire on the <!--ServiceDate-->
```

To avoid the inconvenience of voiding your meKbership

if you have not booked a service already, please

click on the link below.

Best Regards The AA Automotives Service Team

<!--BookingURL-->

Frequently Asked Questions

If I send multiple reminders for the same service will the client receive duplicate reminders after a booking has been made?

No, your comms centre tracks bookings received and matches them against future messages, if a booking is present in the system, then no further service reminders will be sent to the client.

How do I track responses to the communications sent?

On the comms centre home page, you will see two values at the bottom of the sent and booking columns.

Can I view the message sent?

Yes, from the home page hover over the message column text and it will expand, the message stays visible for around 20 seconds.

Do I have to enter any service or vehicle information into the communications centre to be able to send MMS's to my clients?

No, the comms centre is linked to your client, vehicle and diary the utility scans these databases and sends the communications with no on-going input from the user

How much does the service cost?

MMS's cost a few cents more to send than SMS messages as they have the ability to send graphics and 4,000+ characters of text. Microbase charges 35 cents (inc) per MMS sent with a minimum monthly fee of \$10.00 for up to 30 messages, for example, if you send 20 messages you will be charged \$10.00, if you send 100 messages you will incur a bill of \$35.00. Fees are charged on a monthly basis and will be itemized separately to your SMS communications.

As a note, If you are currently using SMS for service reminders you maybe incurring a 2 x SMS charge for each communication which equals 44 cents, so sending an MMS for 35 cents with the ability to include 4,000+ characters a graphic and booking link would be more cost effective. Plus of course the communications center automates the whole process, potentially saving you administration costs.