

Communications – Customer Notifications
AV Ref # 674

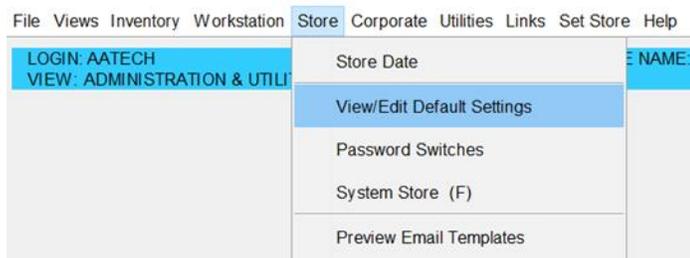
About:

Automated Customer Notifications can be turned on to optionally send:

- a. **Appointment Confirmations** : Sends when appointment is set to “Confirmed” and Saved.
- b. **Appointment Reminders** : Sends at 11:30am to all customers who have appointments scheduled and “Confirmed” for the next day.
- c. **Vehicle Status – In Shop** : Sends when Vehicle Status is set to “In-Shop”
- d. **Vehicle Status – Awaiting Parts** : Sends when Vehicle Status is set to “Awaiting Parts”
- e. **Vehicle Status– Awaiting Callback** : Send when Vehicle Status is set to “Awaiting Call-back”
- f. **Vehicle Status – Vehicle Ready** : Sends when Vehicle Status is set to “Ready”

1. At the **System-level**, defaults are set in the **View / Edit Default Settings**.

Views > Administration & Utilities > Store > View / Edit Default Settings



2. At the bottom of the screen, set the **Settings Shown** field to either Corporate or the Store you want to set up for Notifications.
3. Select the **Email / Communications** section
4. **SMTP Only Must = ON.** (You must have HITS Email – SMTP set up to use this feature.)

HITS Technical Support: Mon-Fri : 8:30am-4:30pm EST

Phone: (800) 422-2032 **Email:** tech@aasys.com

Note: For after-hours emergency support - Use the 24/7 number provided with your software

- Notification Modes** will determine if Notifications are turned ON. If turned ON, you can chose for notifications to go out via *Text*, via *Email*, or BOTH *Text & Email*. This will set the Notifications default at the system level.

(Customer's Notification defaults can still be edited, either turning them OFF for specific customers or changing how specific customers receive Notifications.)

- Notification Types** – If Notifications are turned ON, you can determine which Notifications will be sent.

- Make sure to **SAVE** any edits!

File Views Inventory Workstation Store Corporate Utilities Links Set Store Help

LOGIN: AATECH STORE NAME: MAVERICK TIRE & AUTO - VALLEY DEFAULT STORE: #5
VIEW: ADMINISTRATION & UTILITIES

View/Edit User Settings

Email/Communications		Name	Description	Value
SMTP Only		SMTP Only	If true, all email uses SMTP protocol rather than legacy methods	Yes
SMTP Email BCC		SMTP Email BCC	If set, this email address will be BCC'd on all SMTP emails	System Default
Security Email		Security Email	If set, this email address will be used on security alerts	User Defined DAVE@ANDREOLI@GMAIL.COM
SMTP Server		SMTP Server	SMTP server url.	User Defined smtp.gmail.com
SMTP Port		SMTP Port	SMTP server port#	User Defined 465
SMTP Send Mode		SMTP Send Mode	Type of security used in sending.	SSL
SMTP Use Authorization		SMTP Use Authorization	If true, SMTP Server requires login and password.	Yes
SMTP User Name		SMTP User Name	Readable name, e.g., John Smith.	User Defined AA Sales
SMTP Email Login		SMTP Email Login	Username for SMTP server, e.g. xyz@gmail.com.	User Defined tech@aaSYS.com
SMTP Email Password		SMTP Email Password	Password for SMTP server.	User Defined Twn(4W8-
Notification Modes		Notification Modes	Method used to send event notifications.	Default - No Notifications
Appt Confirmation		Appt Confirmation	Notify upon appt confirmation.	Default - Yes
Appt Reminders		Appt Reminders	Notify appt reminders.	Default - Yes
Vehicle In Shop		Vehicle In Shop	Notify when vehicle in shop.	Default - No
Vehicle Waiting Parts		Vehicle Waiting Parts	Notify when vehicle waiting parts.	Default - No
Vehicle Waiting Call		Vehicle Waiting Call	Notify when vehicle waiting call.	Default - No
Vehicle Ready		Vehicle Ready	Notify when vehicle ready.	Default - Yes

Settings Shown Corporate Toggle Screen Display Save Clear All Help

The settings we've set above are the *defaults* for the system, but you may want to turn OFF or change the delivery method of Notifications to *specific* customers.

- To edit a customer's Notification settings, set **Notification Mode** in the customer's account. This can be done in an existing customer's account or when setting up a new customer. (see next page...)

Add Cash Customer

Customer Name JOHN SWIM
 Short Name SWIM
 Address
 Address2
 City State Zip

Primary Phone 704-999-9999 Ext Domain (Opt)
 Secondary Phone Ext Domain (Opt)
 Email

Sales Type Retail
 Route#

Track VSR Yes
 Send VSR Postcards Yes
 Notification Mode Default
 Notes

Save Cancel Help

When starting a ticket for a new or existing customer, this presents a great opportunity to tell the customer...

“Our shop sends out notifications to keep you up to date on the status of your vehicle. Do you have a preferred method of us notifying you of appointments and when your vehicle is ready for pick up?”

If the customer gives the OK to text him or her, all you need to do is ask the customer’s mobile carrier, which can be set by click the **Domain** field...

This will allow the system to text customer; it will give your salesrep a visual que that this customer accepts text messages; and most importantly this texting tool is free to all HITS users! (*Some business texting apps charge as much as \$200 / month for text message capabilities!*)

Add Cash Customer

Customer Name JOHN SWIM
 Short Name SWIM
 Address
 Address2
 City State Zip

Primary Phone 704-999-9999 Ext Domain (Opt)
 Secondary Phone Ext Domain (Opt)
 Email

Sales Type Retail
 Route#

Track VSR Yes
 Send VSR Postcards Yes
 Notification Mode Default
 Notes

Save Cancel Help

Choose Domain

- Alltel
- Alltel
- AT&T
- Bell Mobility
- Boost Mobile
- Cellular One
- Cingular (Now AT&T)
- Comcast
- MCI