Pinnacle – HTML Messaging and Surveys Guide

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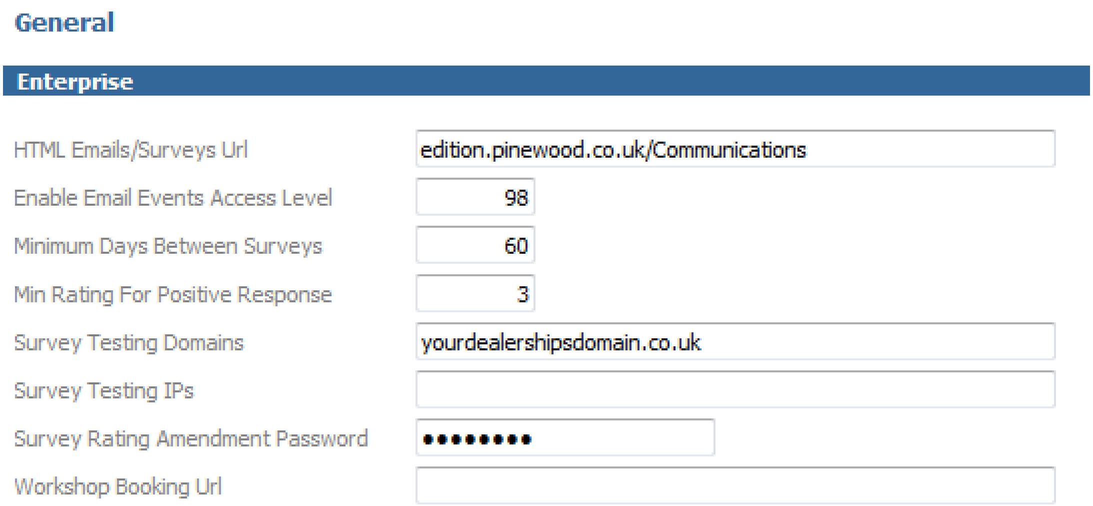
Introduction

The HTML messaging and survey functionality built into Pinnacle allows the creation and management of HTML emails and surveys, which can be sent as booking confirmations, CSI follow-ups for service work or defined as part of a vehicle contact plan, created following the invoicing of a vehicle. Survey results can also be comprehensively analysed and reported on. The below guide documents the setup, creation and usage of both email messages and email Surveys within Pinnacle and explains the reporting functionality for survey responses.

General

The general parameters page must be set before further action can be completed.



The parameters on this screen should be set up with regard to the following.

- **HTML Emails/Surveys URL -** Defines the location of the surveys and emails on the server. This will always be set to 'edition.pinewood.co.uk/communications'.
- **Enable Email Events Access Level –** Allows the user to specify a marketing access level that is needed to turn on particular email events.
- **Minimum Days Between Surveys –** This is the number in days within which the system will not send another survey if another workshop invoice is produced for a particular vehicle. This can be used to prevent second surveys being sent to users who have visited the service department again for rework.
- **Min Rating for positive response –** This sets the level (1-5) at which a response to a rating question within a survey should be regarded as positive, a lower number than that set will be regarded as a negative response.
- **Survey Testing Domains –** This allows internet domains to be specified that are to be used for testing purposes. When a survey is sent to an email at a domain in this field the results are marked as a test and are not included in the reporting figures. Multiple domains can be specified, separating them with a semi colon (;).
- **Survey Testing IPs –** This allows specific IPs or a range of IPs to be identified as those which are used for testing purposes. When a response is received from an IP set in this field, that result will be marked as a test. A range of IPs can be specified using an asterisk (*) as a wildcard.
- **Survey Rating Amendment Password –** If left blank this has no effect. If a password is specified, functionality is turned on within Pinnacle to allow a user who knows the Password entered here to amend the results of a submitted survey. The user attempting to do so will be prompted for the password before being allowed to amend a rating.

After completing these parameters the accept button should be pressed to save the value entered.

Emails

All emails sent from within Pinnacle as part of contact plans, surveys and other communications are defined within the CRM → Parameters → Communications → Emails menu item. Email messages can be created in HTML format and can then be used as part of the following pieces of functionality.

- Booking Confirmations
- Workshop CSI surveys
- Contact Plan CSI Surveys
- Aftersales Diary Contact Plan Communications
- Vehicles Contact Plan communications
- Customer Concern Survey

The Emails screen is split into three tabs - General Images, Vehicle Images and Contents. It is here that the emails themselves are written and this process is described below.

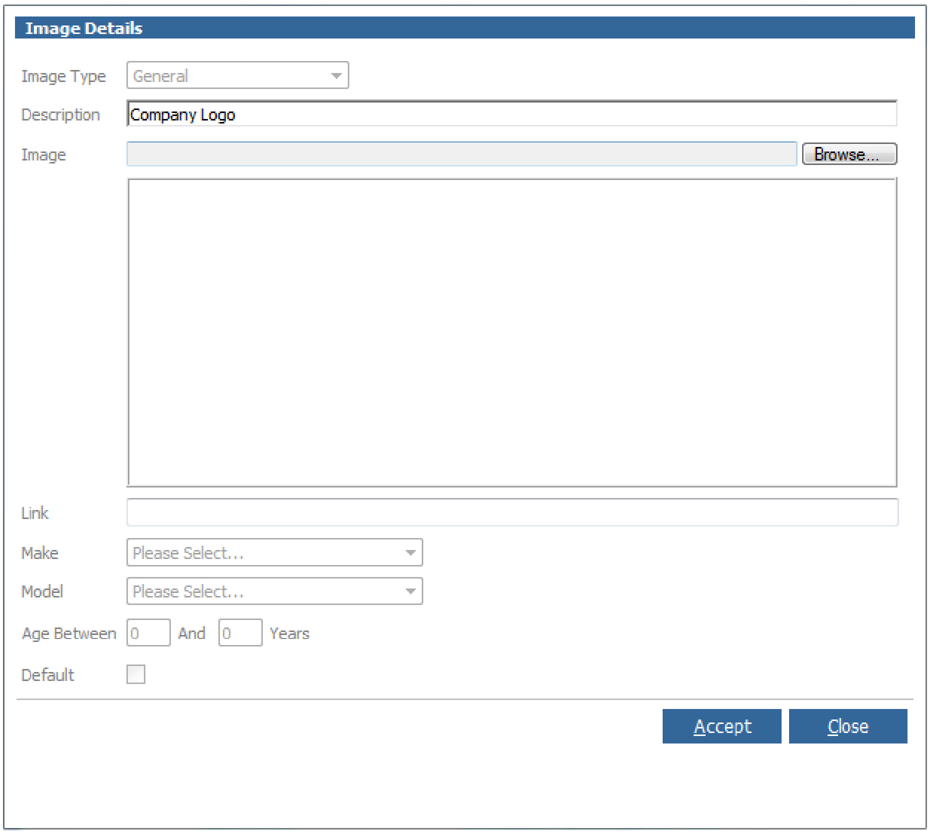
Images

If images are to be used in any of the e-mails they must first be uploaded to Pinnacle. Images are uploaded in two sections 'General' and 'Vehicle'. Each has a tab at the top of the Pinnacle window. The 'Vehicle' tab allows images of specific vehicles to be identified by make and model. These images can then be loaded dynamically depending on the make and model of vehicle specified on the customer record. Any other images should be uploaded to the General Tab.

CRM → Parameters → Communications → Emails

Select the 'General Images' tab

Click the Add button and the following pop up will be displayed:



Clicking the 'Browse' button will allow the user to search for an image stored on their PC or network. A description must be added which is used to identify the image when creating the e-mail (detailed below). Once the image has been chosen click 'Accept'

Entering a URL in the 'Link' field will make the image clickable when it is used in an email or survey. When clicking an image with a link attached, the users browser will open a new window with the page specified in the URL entered.

CRM → Parameters → Communications → Emails
Select the 'Vehicle Images' tab

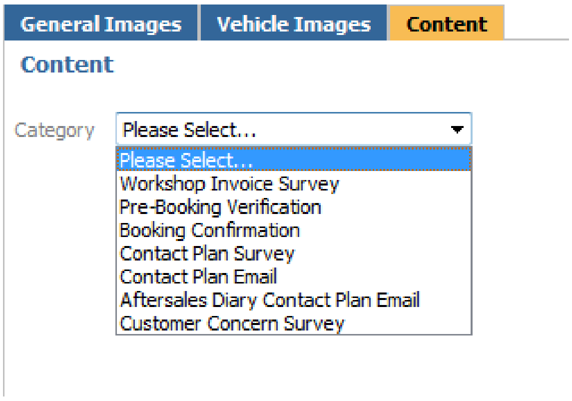
Click the Add button and the above pop-up will be displayed the, the main difference is that the Make and Model fields will be selectable. These fields will be used to determine which image should be used on e-mails.

The 'Age Between' allows the user to specify different images of a vehicle depending on its age to accommodate model year revisions for a specific model.

Checking the 'Default' parameter makes that image the default to use when one matching the Make and Model of the vehicle in Pinnacle has not been uploaded.

Content

The content tab at the top of this screen is where the email messages themselves are created and managed. When selecting this tab, the user is first required to choose a category of email that is to be worked on/with.

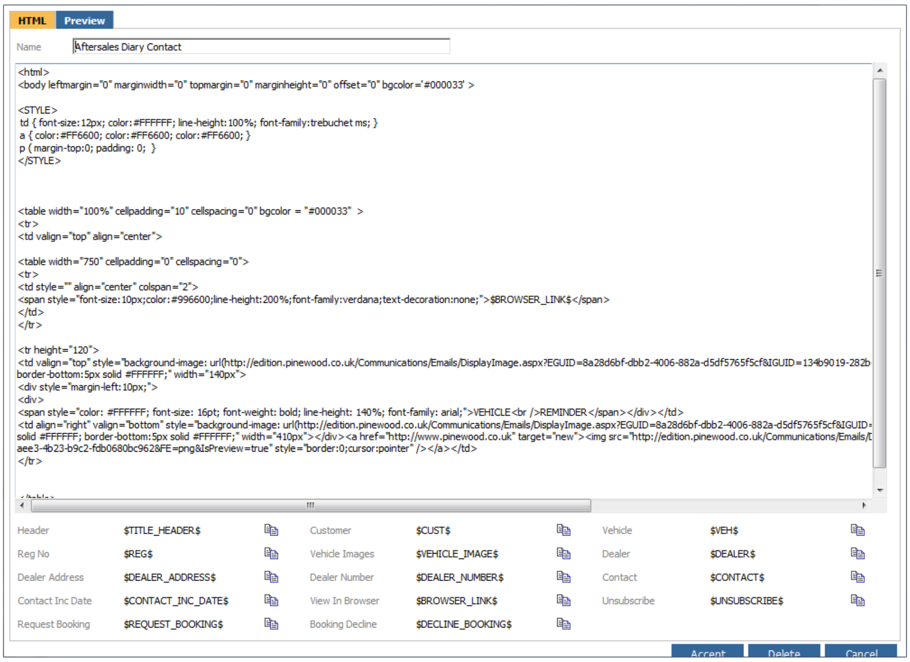


The user is able to choose from the following:-

- **Workshop Invoice Survey** – CSI surveys following Workshop jobs
- **Booking Confirmation** – Email confirmation following booking creation
- **Contact Plan Survey** – CSI survey as part of a vehicle contact plan
- **Contact Plan Email** – Email as part of a vehicle contact plan
- **Aftersales Diary Contact Plan Email** – Email reminder of workshop dates from the Aftersales Diary.
- **Customer Concern Survey –** CSI following closure of a Customer Concern

These categories define where the email attached to that category is available to select from, for example when creating a booking confirmation (described below), only those emails created with a category of 'Booking Confirmation' will be available to select.

Once an appropriate category has been selected the user is presented with a list of existing emails within that category. The Add button also becomes available in the bottom right hand corner of the screen. After clicking the Add button the user will see the following page:



This page is divided into two tabs; the first, labelled HTML is where the email is composed. The HTML code can be composed within the above window or can be written in another program and pasted into the window above.

The second tab, 'Preview', allows a user to see a preview of how the email will look when it is sent to a customer.

A name for the template is required and should be entered into the 'name' field at the top of the page.

Constructing an HTML template

Email templates are then constructed in a similar way to a Mail-Merge letter template, except in place of the normal merge-fields, the user is given a set list of fields to use within their email. The fields available to choose from here are different, depending on the category that was chosen above. The fields available to the user are shown at the bottom of the page and appear as shown below.

Header	$TITLE_HEADER$	Customer	$CUST$	Vehicle	VEH
Reg No	REG	Vehicle Images	$VEHICLE_IMAGE$	Dealer	$DEALER$
Dealer Address	$DEALER_ADDRESS$	Dealer Number	$DEALER_NUMBER$	Contact	$CONTACT$
Contact Inc Date	$CONTACT_INC_DATE$	View In Browser	$BROWSER_LINK$	Unsubscribe	$UNSUBSCRIBE$
Request Booking	$REQUEST_BOOKING$	Booking Decline	$DECLINE_BOOKING$		

The Variable names can be typed directly into the HTML template or by clicking the Icon the field will be copied to the clipboard, the field name can then be pasted into the HTML by locating the position to insert the variable and clicking the right mouse button.

The below table describes which fields are available to select when working with a given category of email, a tick denotes that fields availability:-

		Category Available In					
Field Name	**Description**	**Workshop Invoice Survey**	**Booking Confirmation**	**Contact Plan Survey**	**Contact Plan Email**	**Aftersales Diary Contact Plan Email**	**Customer Concern Survey**
$CUST$	Customer Name in the format 'Title First name Surname'	✓	✓	✓	✓	✓	✓
VEH	Vehicle Make and Model and Spec ('Make Model Spec')	✓	✓	✓	✓	✓	
REG	Vehicle Registration Number	✓	✓	✓	✓	✓	
$DEALER$	Dealership / Department name.	✓	✓	✓	✓	✓	✓
$DEALER_ADDRESS$	Dealership Address		✓	✓	✓	✓	✓
$DEALER_NUMBER$	Dealership Telephone Number		✓	✓	✓	✓	✓
$BOOKED$	Booking Date	✓					
$BOOKING_DATE$	Booking Date ('Day, Day of month Month Year Time') December 2010 at 08:30		✓				
$COLLECTION_DATE$	Collection Date		✓				
$BOOKEDBY$	User who created the booking	✓					
$ADVISOR$	Service Advisor Allocated to booking	✓	✓				
$TEAM$	Service Team that carried work out	✓					
$COLLECT_DELIVER$	Customers address.		✓				
$CALENDAR_LINK$	Provides a link to add the booking date into the recipients Outlook calendar		✓				
$INVOICE_DATE$	Vehicle Invoice Date			✓	✓		
$SALESPERSON$	Original Sales Person			✓	✓		
$VEHICLE_IMAGE$	Image of vehicle	✓		✓	✓	✓	
$QUESTION$	First Question in a given survey	✓		✓			✓
$UNSUBSCRIBE$	Unsubscribe link – Removes 'Email' from allowed contact types	✓		✓		✓	✓
$BROWSER_LINK$	Hyper-Link to display the email in the customer's web browser	✓	✓	✓	✓	✓	✓
$TITLE_HEADER$	Displays the Title of the Email					✓	
$CONTACT$	Displays the Aftersales Diary Event title					✓	
$CONTACT_INC_DATE$	Displays the Aftersales Diary Event title and the due date					✓	
$INCIDENT_DESCRIPTION$	Displays the Incident Description from the Customer Concern						✓
$INCIDENT_REF$	Displays the incident ref number that is system generated						✓
$INCIDENT_TYPE$	The Incident type assigned to the Customer Concern						✓
$INCIDENT_GROUP$	The Incident Group assigned to the Customer Concern						✓
$FAULT_TYPE$	Displays the Fault Type assigned to the Customer Concern						✓

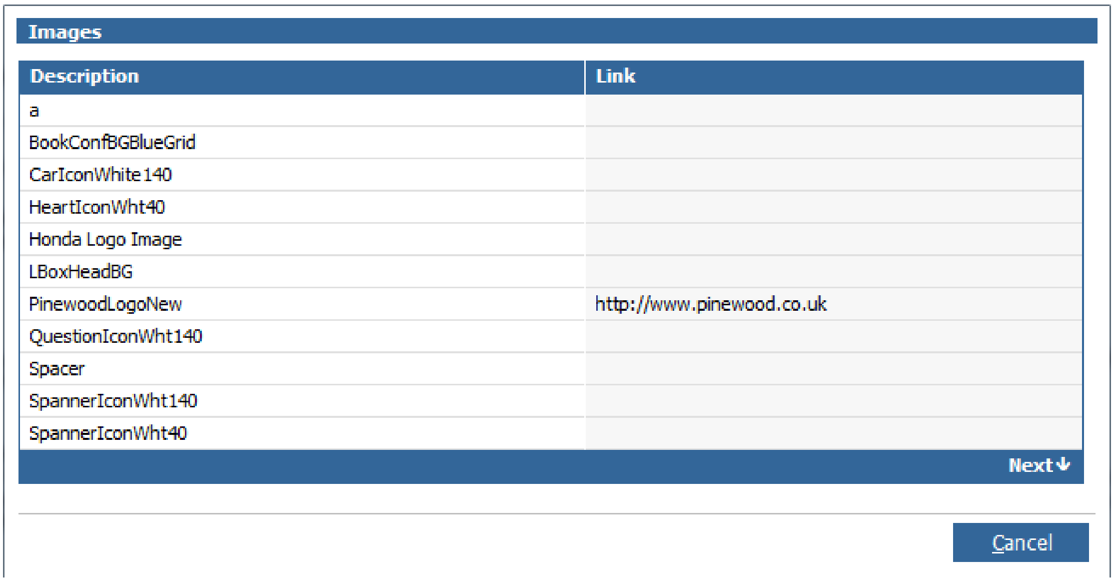
Whilst it is possible to manually enter the variable names above into a template for an email that is attached to a category for which that variable is not available, the value for that variable will not populate the email and the email will show only the name of the field that has been inserted.

For emails that are intended for use with Surveys, the **$Question$** variable should always be included. This presents the user with the first question of the survey and a response to this takes the user to the webpage for that survey to allow them to complete the remainder. Constructing surveys is detailed below.

Inserting Images into a HTML template

Images uploaded for use in emails sent from Pinnacle are stored on Pinnacle servers, in order to be displayed within emails a link to where they are stored must be entered into the HTML template.

Working within the HTML window, a user should **right-click** at the point in the HTML code that the image is to be inserted, this will produce the below window, which lists all images available to the user.



Images

Description	Link
a	
BookConfBGBlueGrid	
CarIconWhite140	
HeartIconWht40	
Honda Logo Image	
LBoxHeadBG	
PinewoodLogoNew	http://www.pinewood.co.uk
QuestionIconWht140	
Spacer	
SpannerIconWht140	
SpannerIconWht40	

Next

Cancel

Double-clicking name of the required image will result in the system inserting a HTML <img> tag at the point in the HTML the mouse was right clicked, the resulting text that is inserted may appear something like this:-

```
tr>
 <td>
    $VEH$
    <img src="http://publicweb.production.dev.pinewood.net/Communications/Emails/DisplayImage.aspx?EGUID=7383d6be-fcdd-4262-a887-07b08dc70949&IGUID=7aec6a13-db3d-44c4-8ae4-c8c
 </td>
/tr>
```

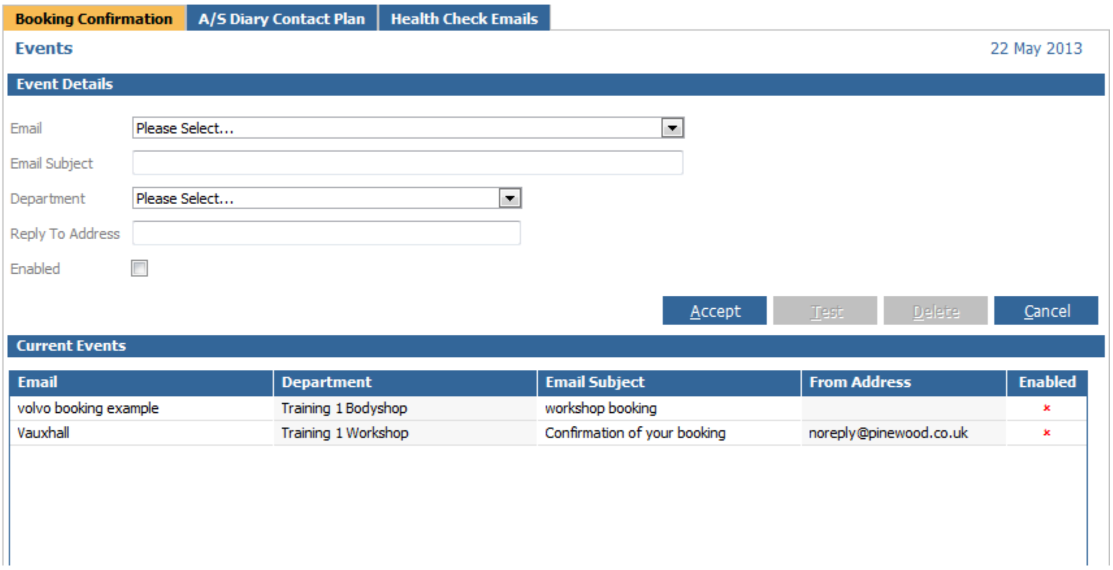
Once the link to the image has been added, clicking the accept button saves the document. (If a URL was added to the ‘link’ field when the images was uploaded, the <img /> tag will be wrapped in an anchor (<a>) tag, making the image clickable.

Booking Confirmations

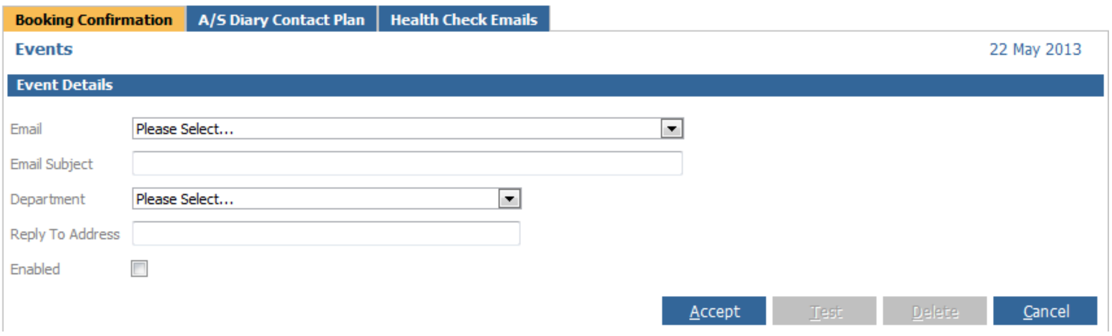
Booking confirmations should be created as described above, the whole confirmation message should be defined within the email and that email should be attached to the category of ‘Booking Confirmation’.

Once a booking confirmation email has been created and before the email will be sent (after a booking is created) it must be made active. Confirmation emails are made active in CRM → Parameters → Communications → Workshop.

When accessing this page, the user is presented with the below screen.



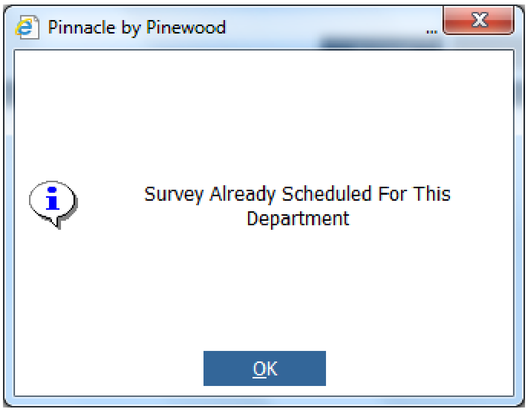
The sending of a Booking Confirmation is referred to here as an ‘Event’. When first loaded the screen shows the current ‘events’ in the bottom half of the screen. New events can then be defined using the fields in the top half of the screen.



In order to add an event, the user must first select an email they wish to send as the Booking Confirmation Message. A Subject that will appear in the email subject line must then be added. The event must be attached to a department and this should be selected from the Third drop down labelled ‘Department’.

A ‘Reply To Address’ must also be specified, this is the email address that any replies to the booking confirmation will be sent to. You may wish to specify this as a ‘no-reply’ type address, or the address of a specific user or team who will deal with booking enquiries.

Only one Booking confirmation event can be scheduled per department. If a second event, attached to the same department, when clicking the ‘Accept’ button, the user will receive the following message.

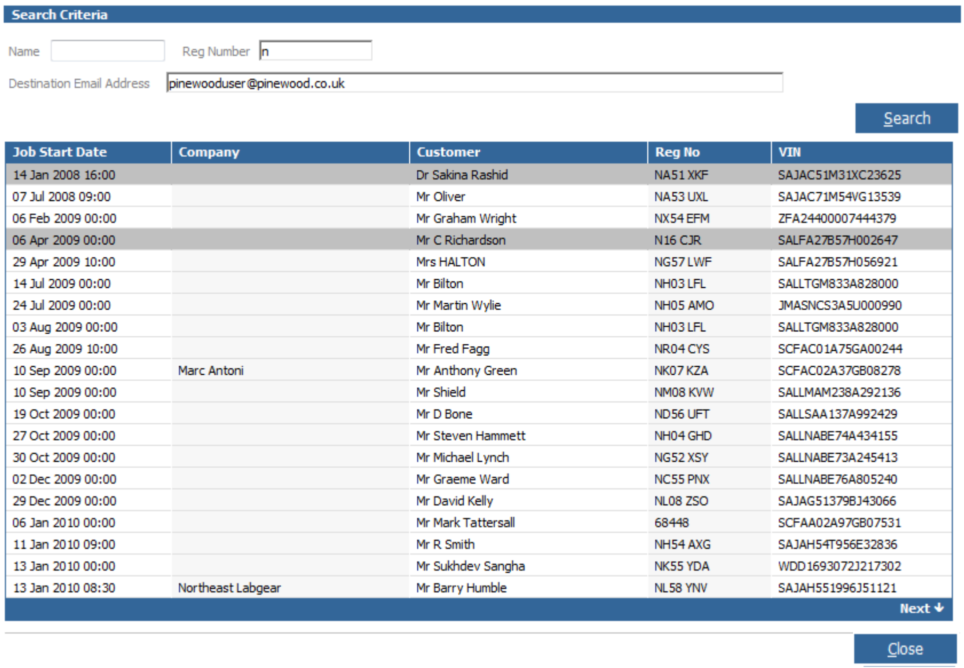


If this occurs, the existing event for that department can be made inactive by unchecking the 'Enabled' check box within the parameters for that event.

Once defined, the user should click 'Accept' to save the event details. The system will then populate the bottom half of the screen with the details of the event that was just added.

Once here, double-clicking the line detailing the event activates the 'Accept', 'Test', 'Delete' and 'Cancel' buttons. This also activates the event for editing, making the fields in the top half of the screen selectable again. The 'Delete' button allows a user to delete an event from the list.

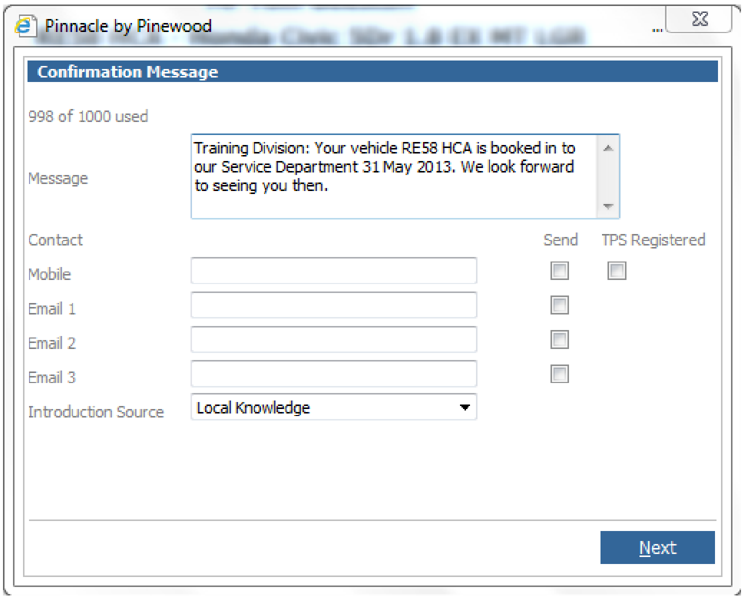
Clicking the 'Test' button allows the user to send a test message. The following window will appear:-



Job Start Date	Company	Customer	Reg No	VIN
14 Jan 2008 16:00		Dr Sakina Rashid	NA51 XKF	SAJAC51M31XC23625
07 Jul 2008 09:00		Mr Oliver	NA53 UXL	SAJAC71M54VG13539
06 Feb 2009 00:00		Mr Graham Wright	NX54 EFM	ZFA24400007444379
06 Apr 2009 00:00		Mr C Richardson	N16 CJR	SALFA27B57H002647
29 Apr 2009 10:00		Mrs HALTON	NG57 LWF	SALFA27B57H056921
14 Jul 2009 00:00		Mr Bilton	NH03 LFL	SALLTGM833A828000
24 Jul 2009 00:00		Mr Martin Wylie	NH05 AMO	JMASNCS3A5U000990
03 Aug 2009 00:00		Mr Bilton	NH03 LFL	SALLTGM833A828000
26 Aug 2009 10:00		Mr Fred Fagg	NR04 CYS	SCFAC01A75GA00244
10 Sep 2009 00:00	Marc Antoni	Mr Anthony Green	NK07 KZA	SCFAC02A37GB08278
10 Sep 2009 00:00		Mr Shield	NM08 KVW	SALLMAM238A292136
19 Oct 2009 00:00		Mr D Bone	ND56 UFT	SALLSAA137A992429
27 Oct 2009 00:00		Mr Steven Hammett	NH04 GHD	SALLNABE74A434155
30 Oct 2009 00:00		Mr Michael Lynch	NG52 XSY	SALLNABE73A245413
02 Dec 2009 00:00		Mr Graeme Ward	NC55 PNX	SALLNABE76A805240
29 Dec 2009 00:00		Mr David Kelly	NL08 ZSO	SAJAG51379BJ43066
06 Jan 2010 00:00		Mr Mark Tattersall	68448	SCFAA02A97GB07531
11 Jan 2010 09:00		Mr R Smith	NH54 AXG	SAJAH54T956E32836
13 Jan 2010 00:00		Mr Sukhdev Sangha	NK55 YDA	WDD1693072J217302
13 Jan 2010 08:30	Northeast Labgear	Mr Barry Humble	NL58 YNV	SAJAH551996J51121

This allows the user to search for a booking using the vehicle Reg Number or Customer Name. An email address should be entered into the 'Destination Email Address' field, this is the address the test will be sent to. Double clicking a customer record prompts the user to confirm the sending of the test message. Clicking OK sends the test. A confirmation that the message has been sent will appear and the email account that was specified above will receive the email as it would appear if the selected customer were to receive it.

Now when a user creates a booking for a customer whose record features an email address, the user will have the option to send this booking confirmation email to that customer. The email specified here will override any confirmation text that is entered into the booking confirmation message window at the point of generating the booking (shown below).

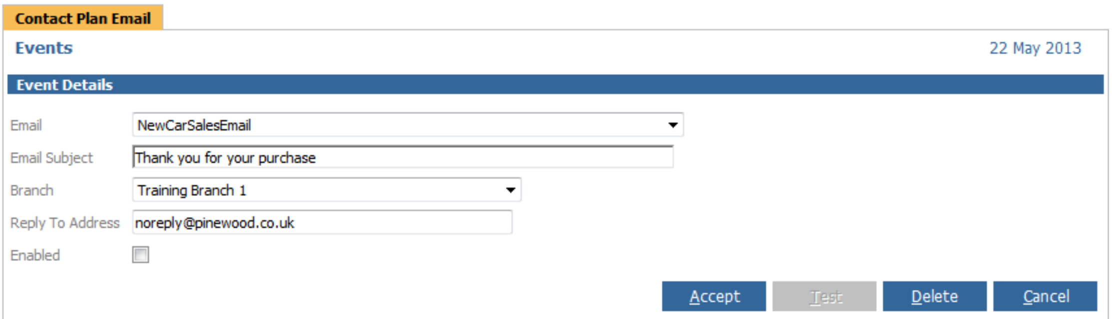


When the 'Next' button is clicked the booking confirmation is sent as configured and a line is written to the contact history for the customer with the title in the format 'Outbound Email - <department sent from>' and the content of the contact displays 'Booking confirmation Email Sent To <customers email address>'.

Contact Plan Email

Much like the Booking Confirmations described above, contact plan emails are created within CRM → Parameters → Communications → Email and are defined by selecting the category 'Contact Plan Email'. Emails created under this category will then be available for selection when adding an email event as part of a contact plan.

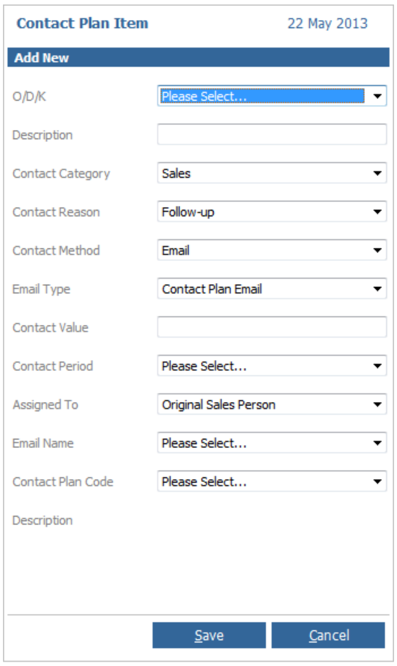
Once the email has been created, it can be activated via CRM → Parameters → Communications → Vehicle Emails. The process for activating a message is the same as that for the Booking Confirmation discussed above.



The Email to be sent should be selected in the first drop down. Emails attached to the 'contact plan email' category are listed alphabetically. A subject line to appear on the email needs to be set here, along with the branch in which the email is to be available. A Reply-To Address should be set to define the address to which replies to this email will be directed. Finally a tick should be placed in the 'Enabled' checkbox.
Once this has been set the email is then available to select when defining a vehicle contact plan item.

Contact plans are managed within Vehicle → Parameters → Contact Plans. When a contact plan is added and the contact method 'Email' is selected, the user is then presented with a list of active emails within that branch.

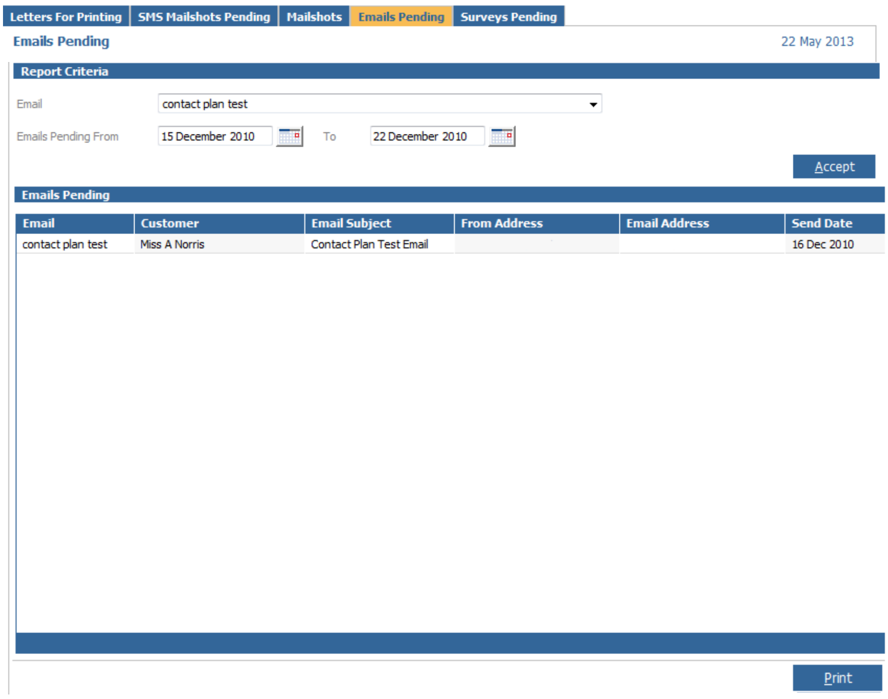
Providing that the 'Contact Method' is set to email and the 'Email Type' is set to 'Contact Plan Email', then any emails created for this department will be available to select in the 'Email Name' field.



Active Contact Plan CSI Surveys must also be added here by setting the 'Email Type' field to 'Contact Plan Survey'. The appropriate survey can then be selected in the 'Email Name' field. Setting this will cause the email associated with the survey you have chosen to be sent to the customer at the point in time defined here.

For full details on creating a vehicle contact plan, please see the Vehicles guide.

When a contact plan email is generated it will appear within the 'Emails Pending' tab of the CRM → Processing → Letters Screen as shown below.



You are able to report on a particular email by selecting it from the 'Email' drop down at the top of the page or leaving this set to 'Please Select' will return results for all emails currently pending.

You can narrow the results by the date that the email is due to be sent which will be calculated from the contact plan generated at the point of invoice, using the invoice date as the starting point.

The ‘From Address’ field will populate with the ‘Reply-To’ address set in the email event parameters and the ‘Email Address’ field will populate with the email address attached to the customer record. The final column on the right hand side shows the date on which the email will be sent.

Aftersales Diary Contact Plan Email

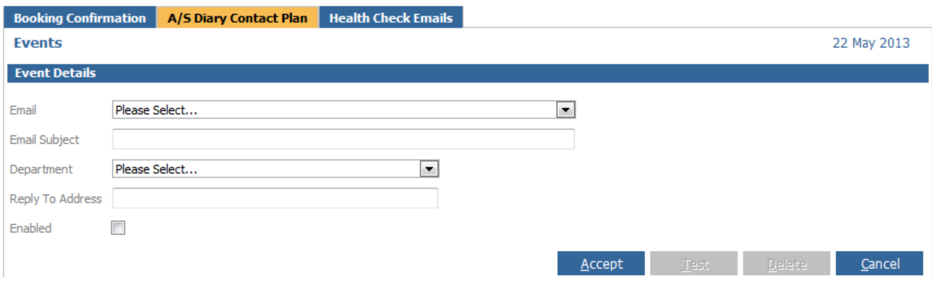
It is possible to set up Contact Plans and associate them to dates from the Aftersales Diary. The Aftersales Diary Contact Plans must first be enabled with CRM Parameters. Once enabled, Contact Plans can be created and HTML emails can be associated to those Contact Plans.

The Aftersales Diary Contact Plans are set up in CRM → Communications → Emails. From the Content page, ensure that the category selected is **Aftersales Diary Contact Plan Email**.

To Add a new email template, click Add. The template will use the same images as the other HTML templates.

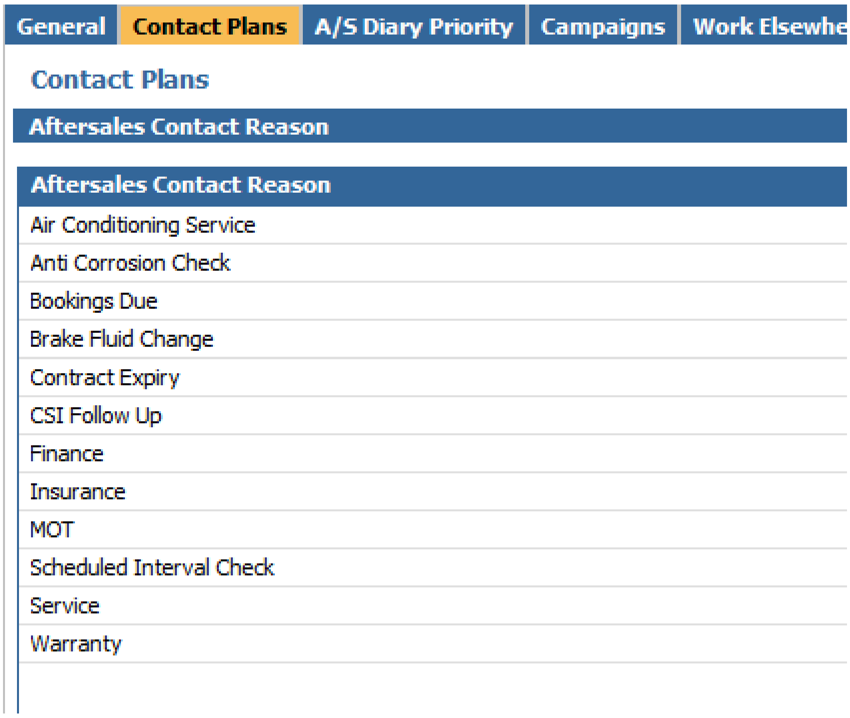
The emails are constructed in the same way as other emails but the Aftersales Diary dates are populated on the email by using the **$CONTACT_INC_DATES$** variable, this puts all of the dates on to the email that the customer needs reminding about.

After the template has been completed, it can be activated via CRM → Parameters → Communications → Workshop → A/S Diary Contact Plan.



Select the Email that needs to be enabled; the Email Subject will be Subject of the Email when it is sent to the customer. Attach to a Department and enter a Reply To Address. If the Enabled tick box is selected then this email will be sent if the stage on the Contact Plan is Email. Once complete, click Accept.

Once the Aftersales Diary Contact Plans are active, a new tab is available to configure the required plans. In CRM → Parameters →Aftersales Parameters → Contact Plans, first select the Aftersales Contact Reason that requires the Contact Plan.



It is then possible to add as many contacts as necessary against the Contact Reason by clicking Add.

The Contact Method of Email must be chosen in order to utilise the HTML emails set up. Any emails sent from here will also appear in Emails Pending as per the Vehicle Contact Plans.

For full details on creating an Aftersales Diary Contact Plan, please see the CRM Guide.

Surveys

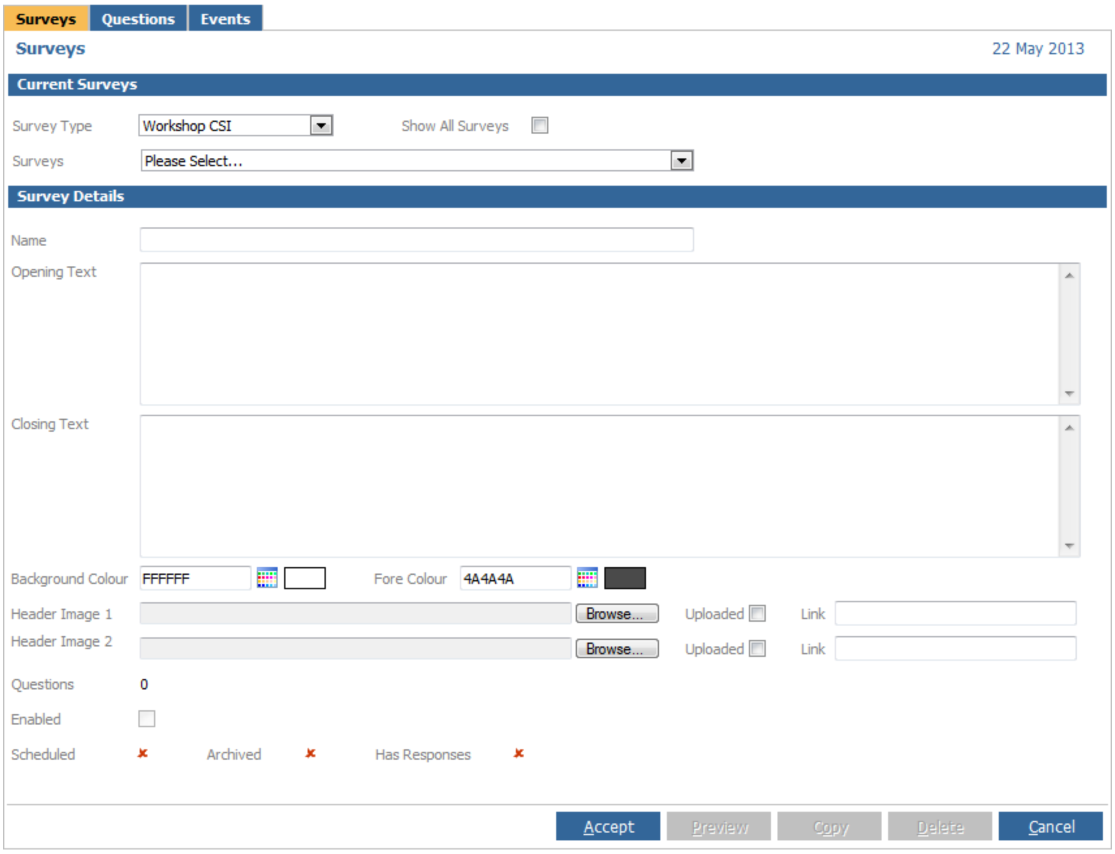
The surveys functionality within Pinnacle provides for the creation and distribution of customer satisfaction surveys to customers who have either visited a workshop department or who have purchased a vehicle. Each type of survey and the setup is described below.

Surveys are constructed in two parts, the email (that gets sent to the customer) and the survey content itself (which the user is taken to after providing an answer to the question featured in the email). The two are linked together when scheduling a survey event.

Constructing an email for use with a survey utilises the same process described above for creating Contact Plan and Booking Confirmation emails. When constructing such an email, it is important to include the **$Question$** variable as this outputs the first question of the survey in the email that is sent to the customer. Providing an answer to the first question of the survey in the email takes the user to the remainder of the survey to finish it.

Creating a Survey

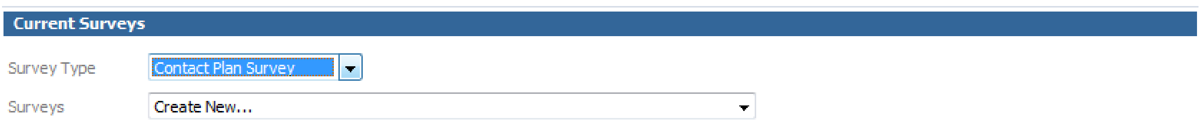
Surveys are created within the CRM → Parameters → Communications → Surveys screen. This screen is split into 3 tabs, 'Surveys' , 'Questions' and 'Events' and appears as shown in the screen shot below.



Surveys

The first tab 'Surveys' allows the user to add new surveys, define the type, colours, and images used in a survey and to amend existing surveys.

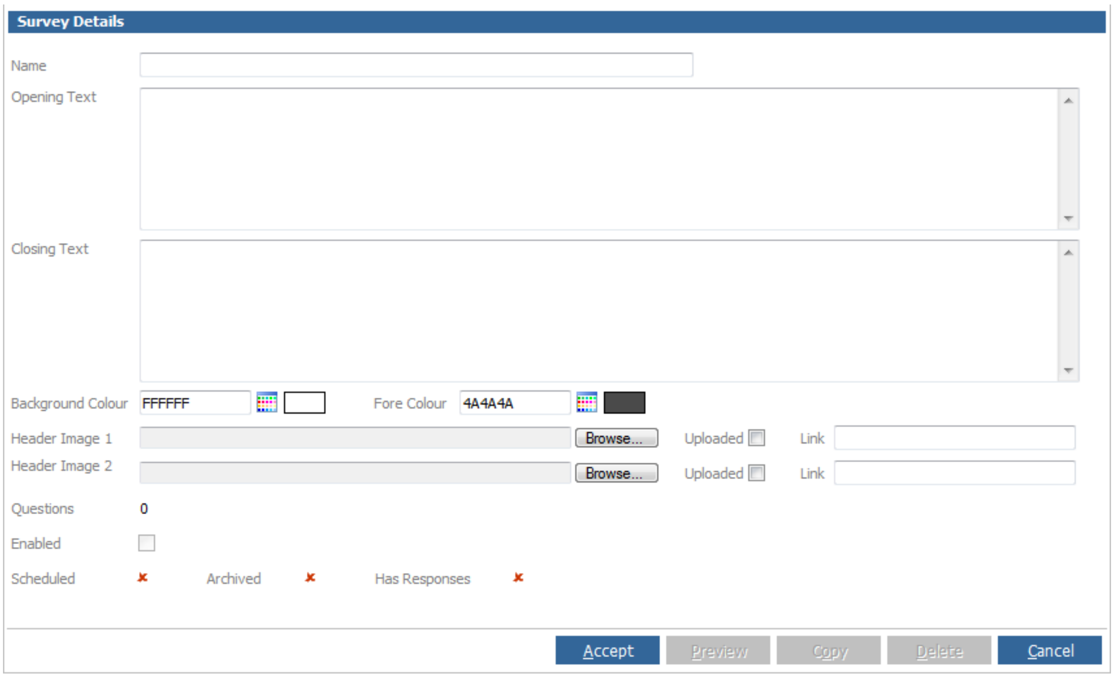
The Surveys are split into 2 categories, one of which must be set when creating a survey.



The current surveys section of this tab allows a user to find an existing survey that has been created within either the 'Contact Plan Survey' category or the 'Workshop CSI' category. The surveys drop down will change to show all those surveys attached to the currently selected category.

If the user wishes to create a new survey the type must first be selected and the 'Surveys' drop down field should be left set to 'Create New…'

The Survey Details section is then available for the user to work on, this appears as shown below.

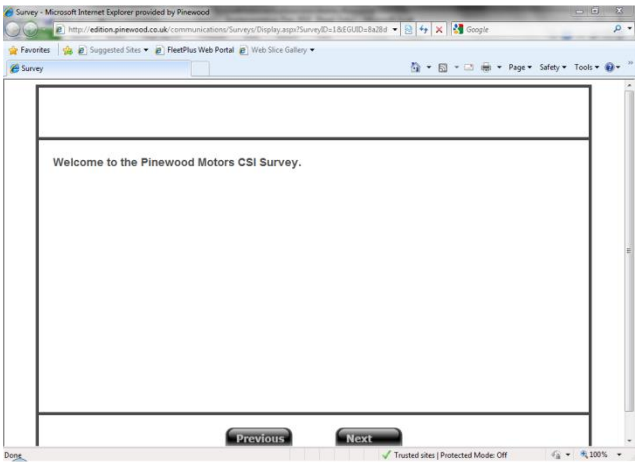


A name for the survey must be provided at this point. This will allow the user to identify that bsurvey later when scheduling events that use this survey.

The next two fields concern the opening and closing text that appear within the survey. The opening text is that which will appear on the first page of the survey, for use as an introduction.   The ‘Closing text’ field allows the input of a closing statement, which could be used as a confirmation of submission of the survey or as a thank you to the customer for completing the survey.

At any point after entering a name for the survey the ‘Accept’ button can be pressed to save the survey in its present state. This will also add ‘- Version 1’ to the end of the survey name that was initially input. Having done this the ‘Preview’ button will become available. Clicking ‘Preview’ will launch the user’s web browser and load a preview of the survey in its current state.

Clicking the Preview button at this point outputs the following:

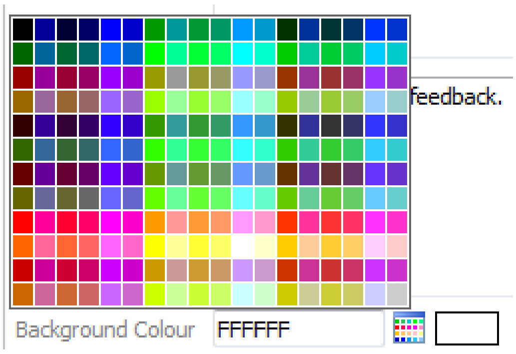


This simply shows the opening Text entered above along with the ‘Previous’ and ‘Next’ Buttons at the bottom of the screen.

The next set of parameters relate to the colour scheme of the survey. Colour selection is handled via the following field

The first box shows the hexadecimal value for the colour that will be output. If the hex Value of the colour to be used is known, it can be entered here.

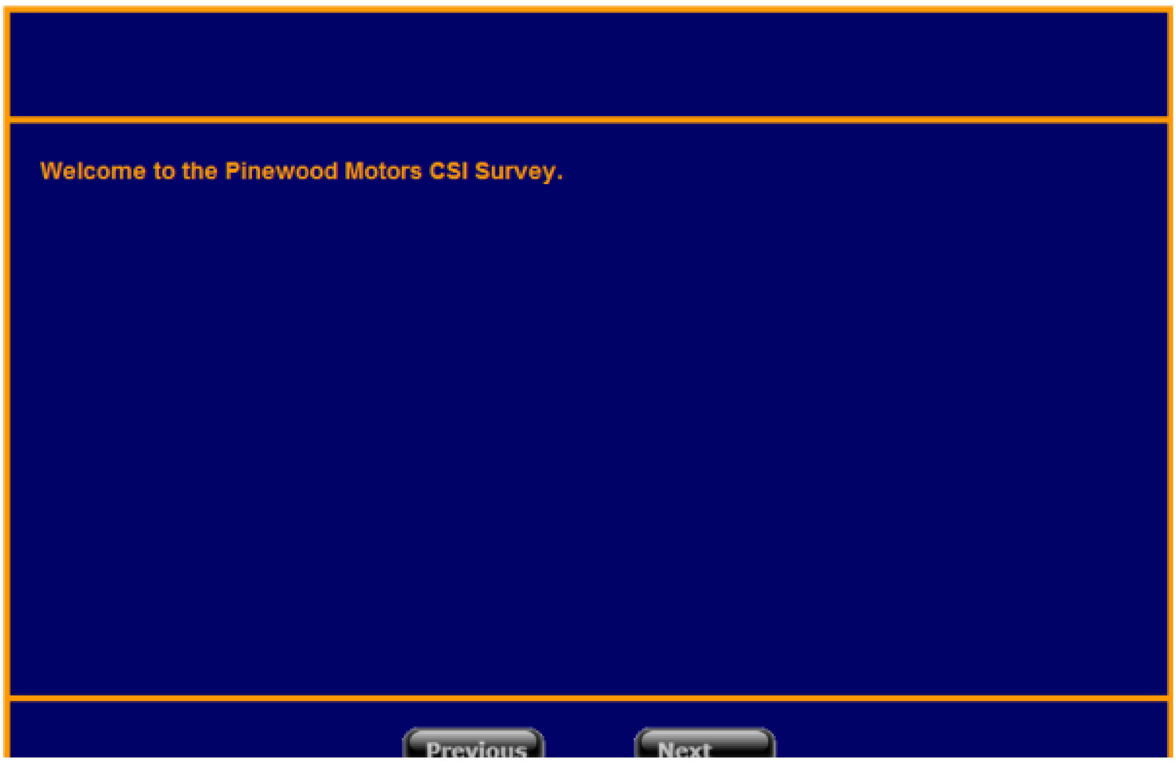
If the Hex value is not known the colour picker tool can be used by clicking the  Icon. This loads the following popup which allows the desired colour to be selected from the palette.



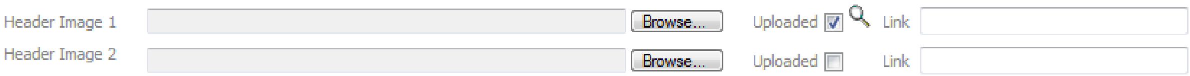
The chosen colour will then be previewed in the box to the right of the colour picker Icon (currently white).

'Background', 'Fore' and 'Title' colours can be specified. Background specifies the background colour, Foreground species the border and text colour. Title colour is not currently used.

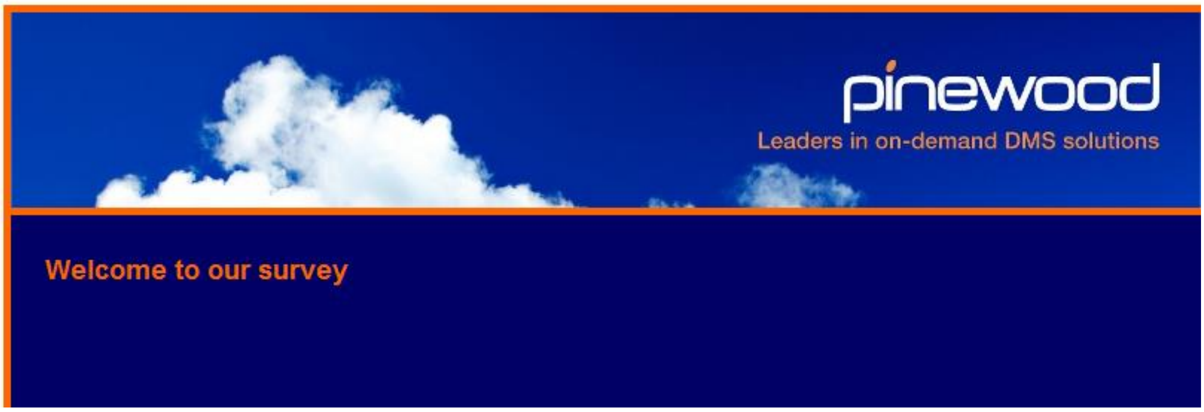
Having selected the above colours the preview now looks like this.



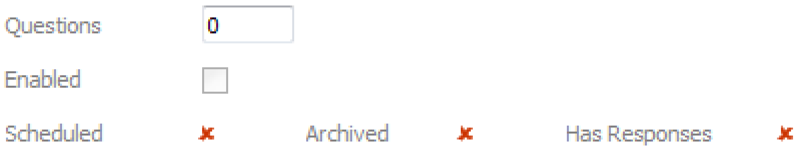
The section at the top of the survey window gives provision for adding a header image. The next section of the parameters screen allows the user to specify one or two header images. The image added in the 'Header Image 1' field below will be place in the top left of the survey window, with any image added to the 'Header Image 2' field appearing to the right of the first one.



The link field to the right of the header image lines can be used to make the image clickable. The URL entered here will be the destination the customer is taken to when clicking the image in the survey. After adding a header image the preview of the survey will now look like the image below.



The remaining section of this screen is for information, with the exception of the 'Enabled' field which turns this survey template on or off.

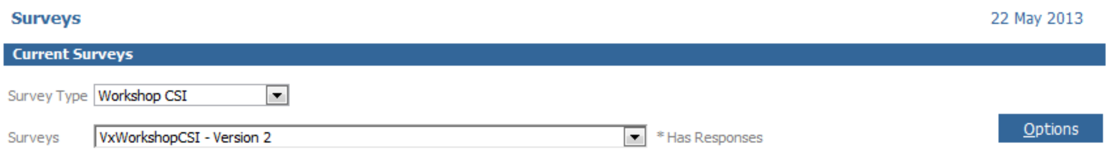


- **Questions** – Displays a count of how many questions are attached to this survey.
- **Enabled** – Makes the survey available for selection when scheduling a survey event. This can only be checked once at least one question with a type of 'Rating' has been added to the survey.
- **Scheduled** – Denotes whether the survey is attached to a currently scheduled event.
- **Archived** – Denotes that a survey has responses recorded against it but has also been deleted. An entry for the survey is stored for reporting purposes.
- **Has Responses** – Denotes whether any responses to this survey template have been recorded or not.

The 'Copy' button at the bottom of the screen, when pressed, creates a copy of the current survey, incrementing the 'version number' which appears after the name given to the survey when it was first created. This allows the user to quickly create multiple versions of the same survey, where only small changes to the survey detail are required.

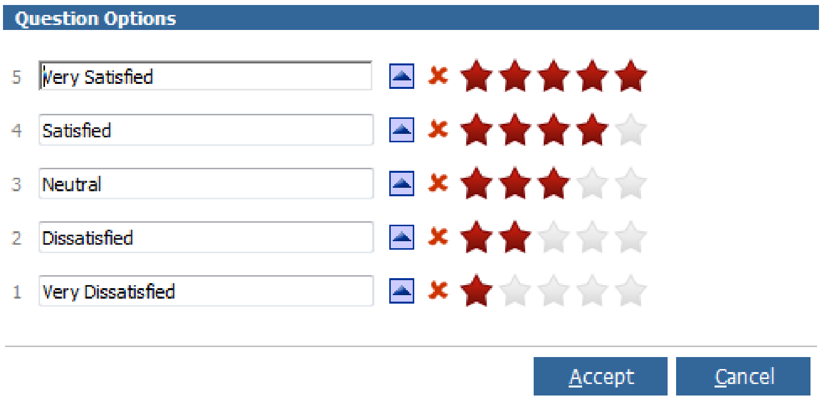
Questions

Questions included in a given survey are created in the questions tab. The first section of the tab allows the user to select the survey they wish to attach.



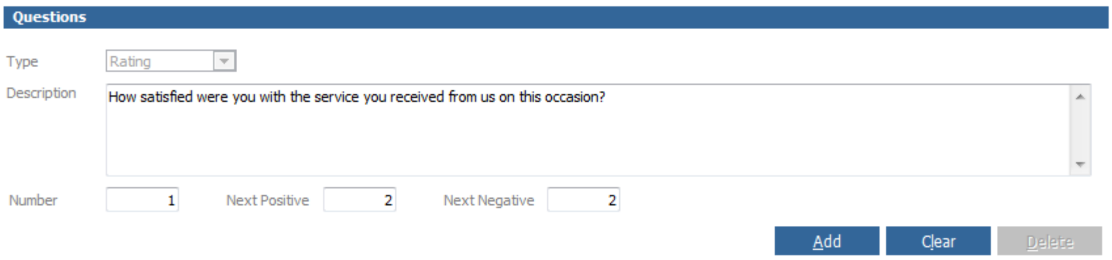
The Survey type must first be selected, this narrows the list of surveys available in the ‘Surveys’ drop down. Selecting the survey to be worked on activates the fields lower down on the page.

The ‘Options’ button allows a user to change the labels for the available responses to ratings questions. Clicking the options button produces the following popup window:



The default response options are displayed and are shown above. These labels can be changed. Clicking the triangular Icon to the right of each rating allows an image to be uploaded against each response type. The default image for these questions is a star and will appear in the email sent to the customer.

Questions are added to the selected survey via the ‘Questions’ section of this screen. When adding a question, the question type must first be chosen.



There are two options, ‘Rating’ and ‘Yes/No’. The first question in any survey must be a ‘Rating’ question. A rating question allows a user to provide one of 5 responses as set out in the ’Question Options’ box above. A Yes/No question allows for a response of yes or no.

The description field is where the actual question should be typed.

The remaining 3 fields relate to the order in which questions in the survey appear.

- **Number** – This is the question number, 1 will appear first, 2 second, 3 third etc.
- **Next Positive** – This is the next question to go to if the answer to the current question is a positive one (Yes if Yes/No and at or above the figure set in enterprise parameters if a ratings question).

- **Next Negative** – This is the next question the user is taken to if the response to the current question is a negative one

The number entered in the Next Positive and Next Negative fields must by greater than the current question number.
Clicking the add button attaches that question to the survey being worked on.

Description	Type	Number	Next Positive	Next Negative
How satisfied were you with your service?	Rating	1	2	3
Would you have your car serviced by Pinewood again?	Yes/No	2	3	3
Compared to another main dealer how would you rate the service you received?	Rating	3	0	0

Any questions that have been added will appear in the section whose first column is headed description (pictured above).

To amend a question, double click the question in the table listing all the questions. This populates the question section with the details of the question to be amended. When happy, click the Add button again to update the question and save it.

The last question in a survey should have a 'Next Positive' and 'Next Negative' value of '0'.

The preview button will load the preview as it currently appears and allows the user to give responses as if they were answering the survey themselves so that the ordering of questions can be checked.

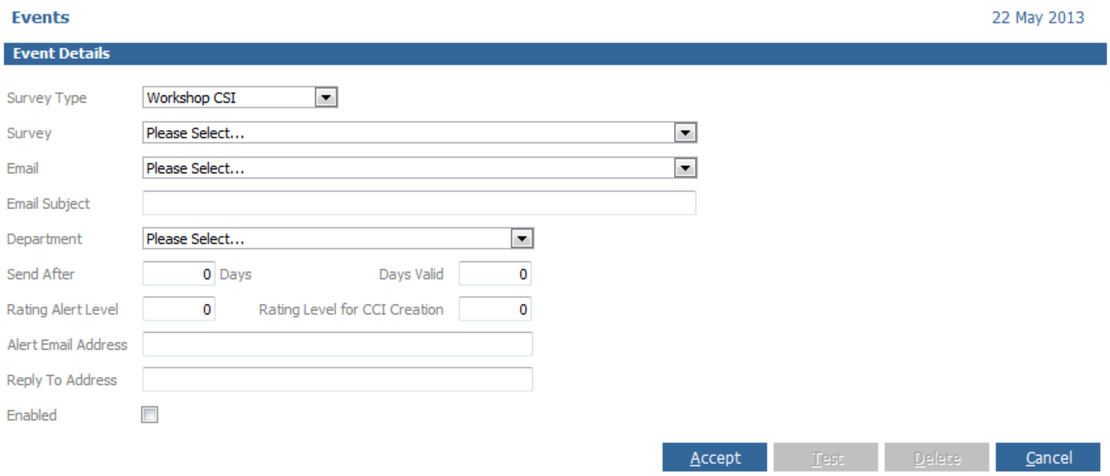
After the user has answered the last question specified, the user will always be presented with the opportunity to leave a comment, this page will appear as shown below:

Once a comment has been added and the 'Send' button is clicked, the customer is taken to the last page of the survey which displays the 'Closing Text', specified on the Surveys tab, described above:

Events

Surveys are activated and scheduled via this tab. The screen is split into two sections, 'Event details' at the top and 'Current Events' at the bottom.

The Event Details section presents as below:



- **Survey Type** - In order to schedule a survey, the survey itself must first be selected. The 'Survey Type' must be selected. This will narrow the list of available surveys.
- **Survey** – from this list the user should select the relevant survey to work with from the 'Survey' drop down. Only enabled surveys will be available in this list.
- **Email** - The Email field will populate based on the survey type selected at the top of the screen, listing all the emails that have been created, with a type relevant to the type of survey being scheduled (Workshop CSI Survey or Contact Plan Survey).
- **Email Subject** – This is the subject you wish to appear on the email that is sent to the customer.
- **Department (Branch)** – This is the department that the survey is attached to and will be sent from after a workshop invoice is generated (Only one survey can be attached to a workshop department and be active at the same time). If the survey being created is a Contact Plan Survey, the user will be asked for a VM branch rather than a department.
- **Send After** – This is the period in days after a workshop invoice is produced that the survey will be sent (this is not available for Contact Plan surveys, which must be added to a Vehicle Contact Plan).
- **Days Valid** – The time in days from the point at which a survey is sent that the survey remains valid, after this time, responses will not be accepted.
- **Rating Alert Level** – The level of response to the first question of a survey which is deemed so low that it warrants particular attention. If a response is given which is the same as or lower than the figure entered here (1-5), an email will be sent to the 'Alert Email Address', specified on this screen.
- **Reply To Address** – The email address that the survey will appear to have come from as well as the address to which email replies will be directed.

- **Alert Email Address** – If a response is received with a rating on the first question that is lower than the Rating Alert Level then an email is sent to the email address entered here.
- **Enabled** – This turns this particular event on or off.

Once created and enabled, clicking the 'Accept' button places the survey event in the 'Current Events' section at the bottom of the screen.

Current Events

Survey	Email	Department	Send After(Days)	Days Valid	From Address	Enabled
Workshop CSI Survey - Version 1	Service Satisfac...	Training 1 Workshop	1	28	surveys@pinewood.c...	✓

As it is enabled, this survey will now be sent 1 day after each invoice is generated from the workshop department listed against the event. Different surveys can be scheduled for different departments (and or branches if the survey is a Contact Plan Survey).

Once created and activated the survey will be sent after the time specified in the event schedule (if a Workshop CSI Survey) or at the time specified in the Vehicle Contact plan the survey is attached to. If a contact plan Survey has been scheduled after the vehicle has been invoiced, the processing section of the CRM module can be used to report on those surveys due to be sent:

Surveys Pending 22 May 2013

Report Criteria

Email: Please Select...

Emails Pending From: 17 December 2010 To 24 December 2010

Accept

Surveys Pending

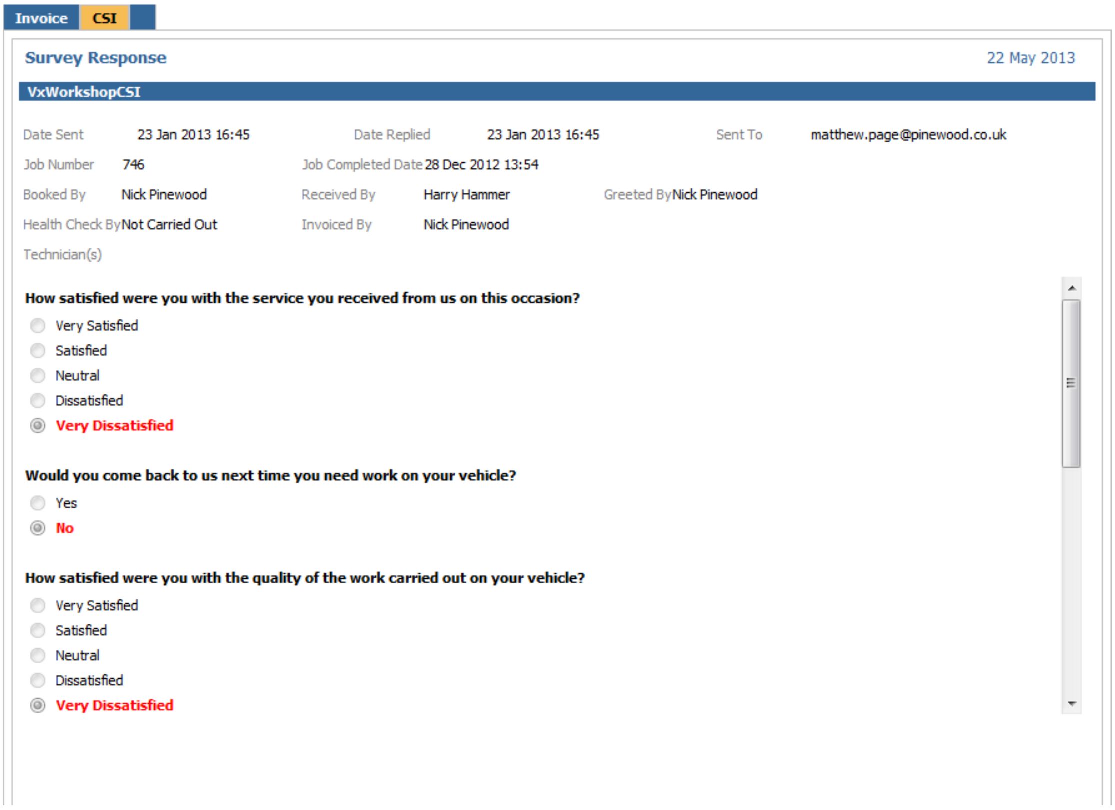
Email	Customer	Email Subject	From Address	Email Address	Send Date
Contact Plan Satis...	Mr D Simons	New car satisfaction Sur...	surveys@pinewood.co.uk	training@pinewood.co.uk	18 Dec 2010

This is found in CRM → Processing → Letters → Surveys Pending Tab. The report can be filtered by the particular survey to be sent or by the date on which it is due. Like the contact plan Emails, this page displays the email that is to be sent, the customer to whom it will be sent and at what address, along with the address the email will come from and the date the message is due.

When sent, the customer will receive the email attached to the survey which contains the first question, which the customer can answer from within the email. Providing an answer to this first question records the user's response and takes the user to the URL for the rest of the survey. Once the survey has been submitted (or a response recorded to the first question), the reports provided within the survey reporting suite are updated. If the survey which a response has been recorded for is a workshop invoice survey, the customer record is also updated. The Service Details tab of the customer history will show the rating response recorded for the first question of the survey against the line of service history for which the survey was generated.

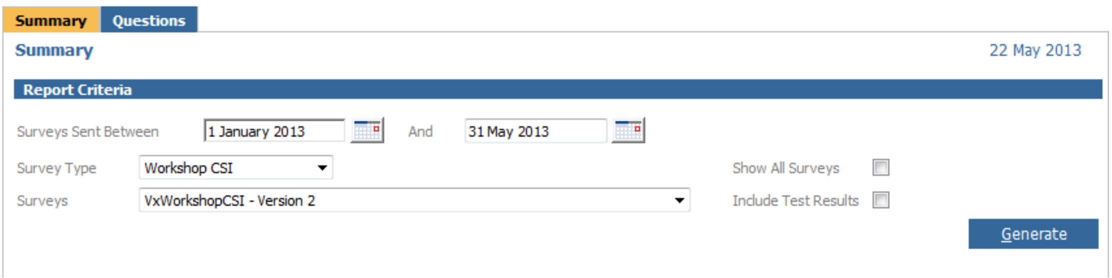
Date	Reference	Miles	Cost	Work	Service	Follow Up	CSI Rating
28 Dec 2012	5249	9,800	593.06	10smot w/screen	✓	×	1
31 Jul 2012	5205	2,000	62.75	pdi	✓	×	
11 Jun 2012	VehicleCreate	1,788	0.00	Internal Vehicle Creation Entry	✓	×	

The user can drill into this line of service history to see a copy of the invoice, and when the popup window loads, a tab labelled ‘CSI’ shows at the top of the screen. Clicking this tab displays the content of the survey response, providing the detail of responses given to all the questions in the survey.



Survey Reporting

Once a survey has been sent and a response has been received, the results can be reported on and interrogated. All the information the user provided in responses is available to be viewed.   Reporting on surveys is found in CRM → Reporting → Surveys.
The report is split into two section ‘Summary’ and ‘Questions’:



Summary

The summary tab provides the user with overview information on the surveys sent and the responses received for a particular department. The report provides filters to narrow results by the date the survey was sent, the survey type and the particular survey within that type. An individual survey must be selected as entire survey types cannot be queried. The 'Include Test Results' checkbox determines whether emails sent to domains in the 'test domains' list in the General parameters page are included in the results returned. The default behaviour is to exclude these results.

Results are displayed as below:

Department	Sent	Sent %	Completed	Completed %	Overall %	Avg Rating	% 5 Star
Training 1 Workshop	2	5.71	2	100.00	5.71	1.00	0.00
Totals	**2**	**5.71**	**2**	**100.00**	**5.71**	**1.00**	**0.00**

Statistics for each department returned include:

- **Invoices** – The number of invoices generated in the period.
- **Sent** – The number of Surveys sent in the queried period.
- **Sent %** - The number of Surveys sent expressed as a percentage of the total number of invoices generated.
- **Completed** – The total number of surveys that were completed by customers
- **Completed %** - The total number of surveys that were completed by customers expressed as a percentage of the total number of surveys sent.
- **Overall %** - The total number of surveys completed expressed as a percentage of the total number of invoices generated in the period.
- **Avg Rating** – The departmental average score based on the results of the first question in the Survey (the question that appears in the email and links to the rest of the survey).

Totals are provided at the bottom and give the same information as the columns listed above but for every department reported on.

From here the results for each department can be drilled into by double clicking the result line for the department to be examined. When drilled in the results appear as shown below.

Summary - Training 1 Workshop

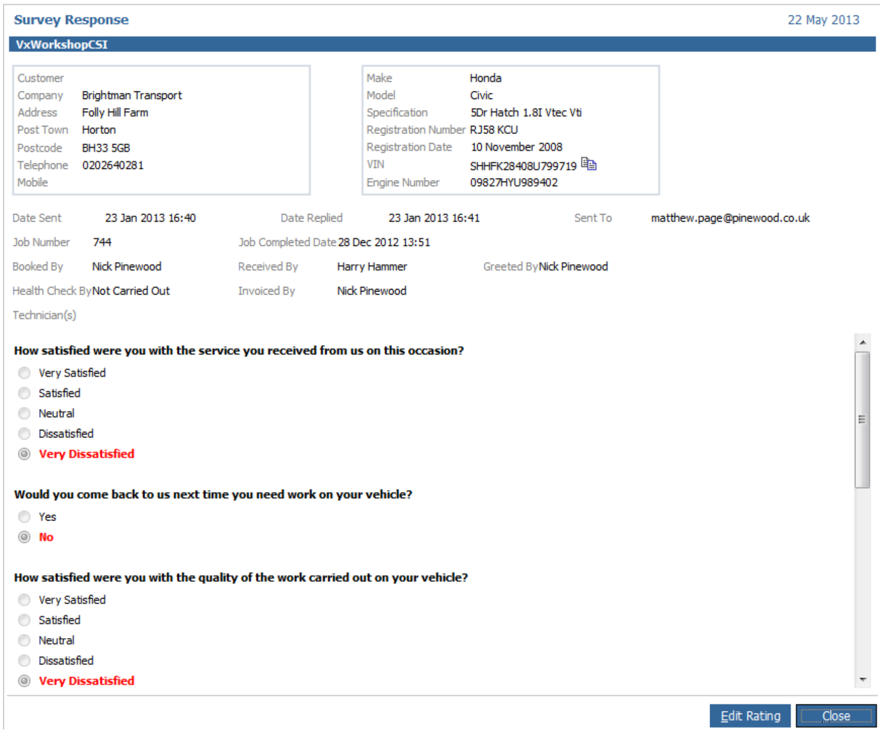
Job No	Customer	Vehicle	Date Sent	Response Date	Rating	Finished	Comments	Test
744	Brightman Transport	Honda Civic 5Dr Hatch 1.8I Vtec Vti	23 Jan 2013 16:40	23 Jan 2013 16:41	1	✓	✓	✓
746	Mr Dick Grayson	VAUXHALL Agila Club	23 Jan 2013 16:45	23 Jan 2013 16:45	1	✓	✓	✓

If the Survey being reported on is a contact plan Survey, the 'Job No.' column is replaced by 'Stock no.'

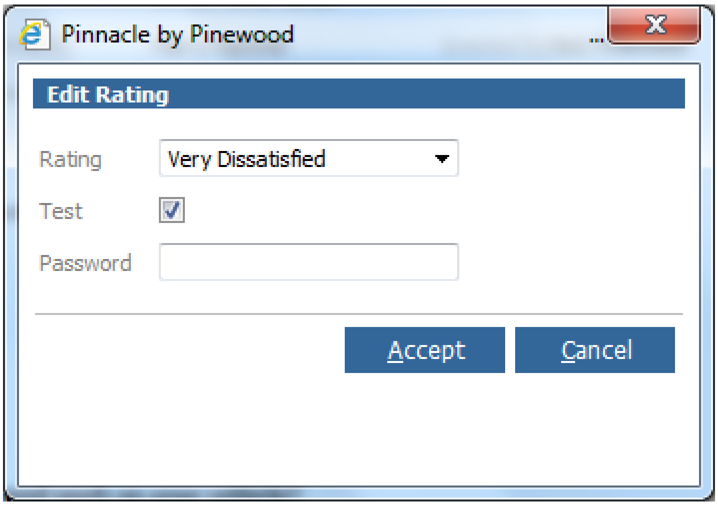
The departmental drill down provides the following information:

- **Job No. / Stock No.** – The job number or stock number against which the survey was raised.
- **Customer –** The title and Surname or Company name of the customer to whom the survey was sent.
- **Vehicle –** The vehicle that was serviced / invoiced.
- **Date Sent –** The date on which the Survey was sent.
- **Response Date –** The date a response to the survey was recorded.
- **Rating –** The rating response to the first question of the Survey (this may be captured even if the rest of the survey was not completed).
- **Finished –** Whether or not the survey was completed.
- **Comments –** Whether comments were left by the customer on the last page of the survey.
- **Test –** Whether the survey response is the result of a test or a response from a test domain, entered in the general parameter page.

Results can be further examined by drilling into the particular result, double clicking the line that is of interest produces a window which contains the detail of that specific response, detailing the answers to all questions on the survey along with any comments left by the customer. Customer and vehicle detail is included at the top of the report and the customer and vehicle records can be drilled into by clicking on the respective box at the top of the window.



If activated in the general parameters screen (by providing a password). The user is presented with a button labelled ‘Edit Rating’. This allows the user to amend the rating given to the first question of the survey. When the button is clicked the below window is displayed. In order to amend the rating, the user must provide the password specified in the general parameters screen.



This provides the user with the ability to ‘correct’ any responses when the one provided appears as a genuine mistake, such as those where the initial response is incongruous with the responses given to the remaining questions within the survey.

From the main summary screen, the user also has the ability to ‘Delete Test Data’. This button appears at the bottom of the main window and when clicked will remove the results for surveys sent to domains listed in the general Parameters screen, discussed above.

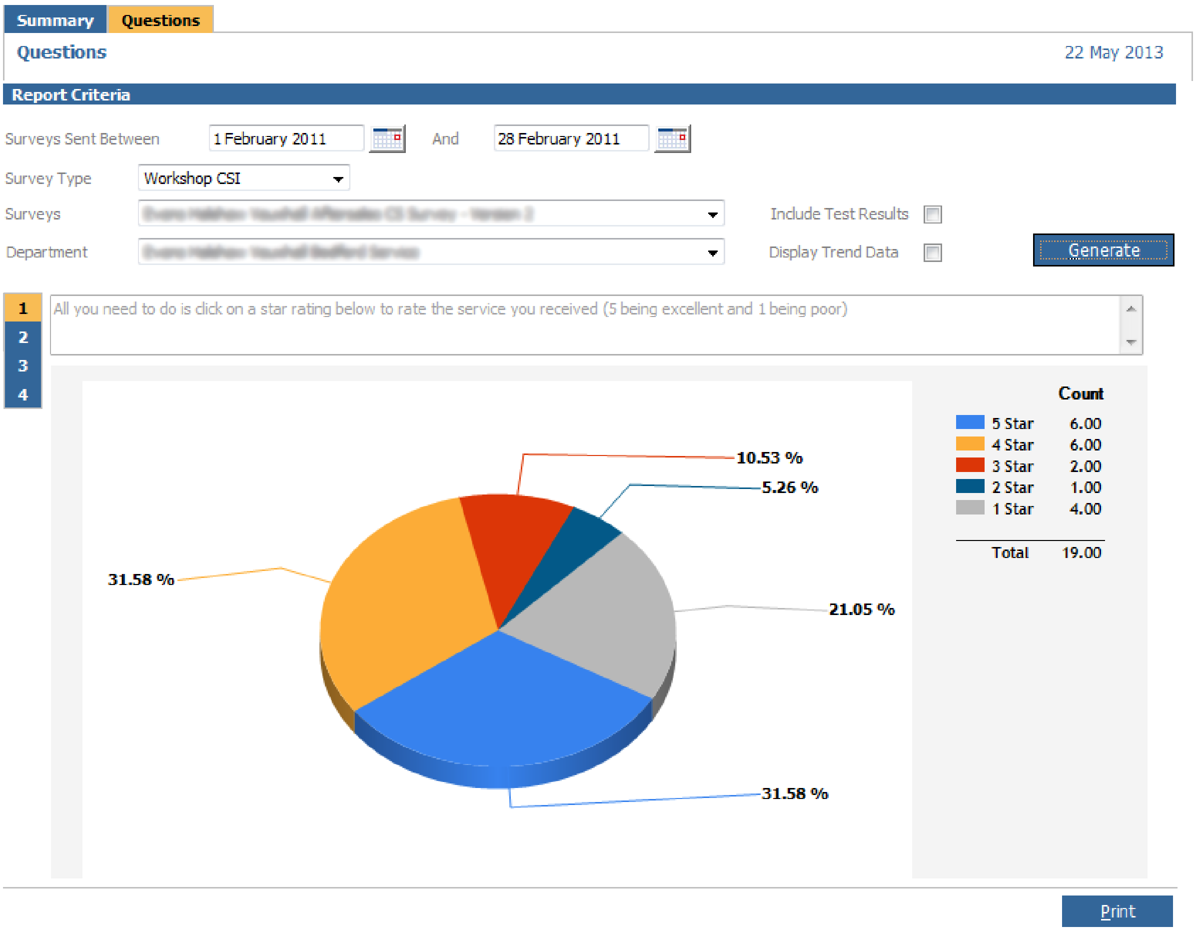
Questions

The second tab within the survey reporting functionality is the 'Questions' tab. This tab provides statistical analysis on the answers to specific questions within a survey. As with the summary tab, the user can generate results based on a specific survey and date range.

Whilst the user can filter the report by Department or Branch, using the drop down at the top of the report screen, the default behaviour is to return results for all Departments (If a workshop CSI survey) or Branches (if a Contract Plan Survey).

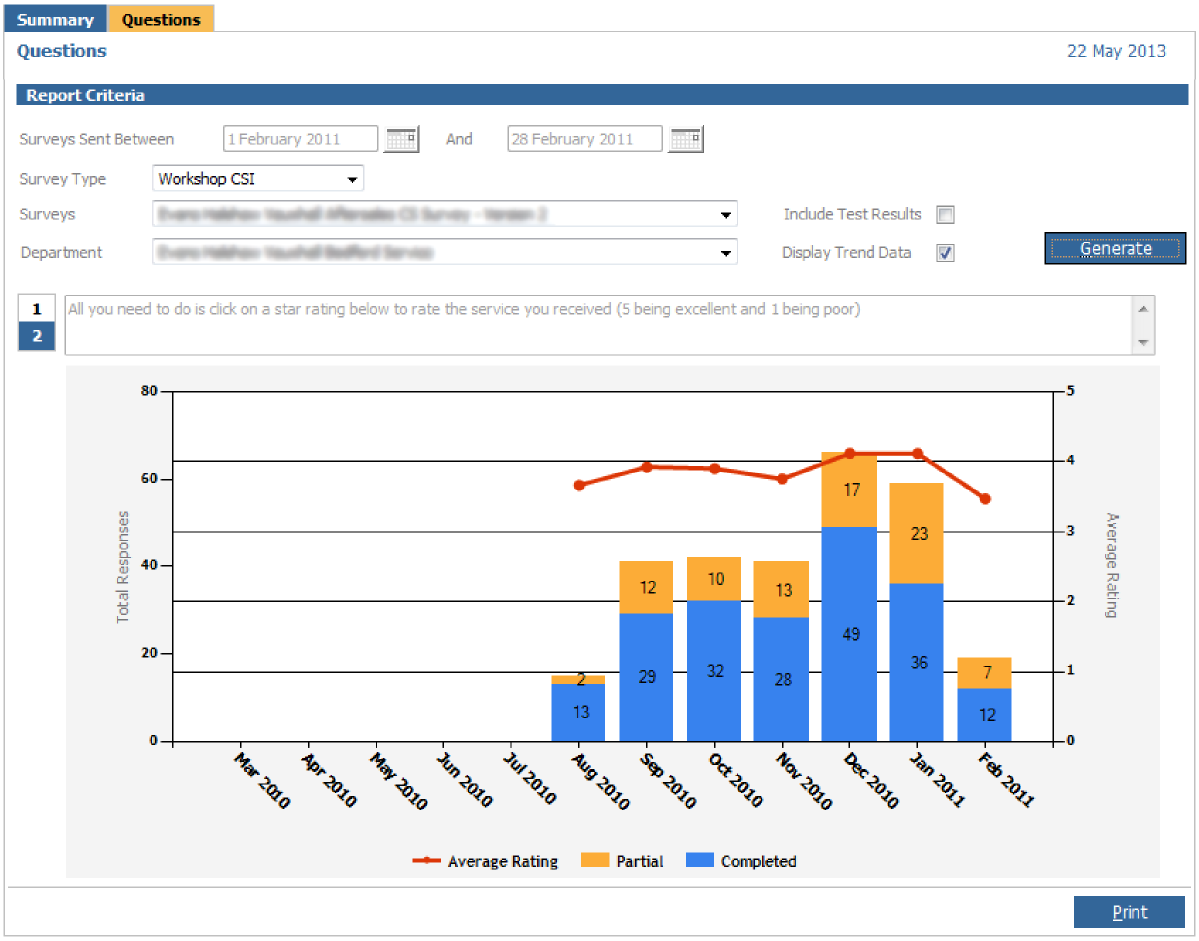
The user can also choose to include test results, although the default is to exclude this information.

When the report is generated, the user is presented with a Pie Chart detailing the received responses to the first question of the survey. The question number is listed above the chart, along with the text of the question itself and a list of the other questions in the survey is shown in this section. The number of responses received for the question being viewed is shown to the right of the screen. These values are expressed as a percentage on the pie chart itself.



Each section of the pie chart can be drilled into to produce a list of just those customers giving a specific response. This displays in the same format as the departmental report in the summary section.

If the 'Display Trend Data' option is selected when the 'Generate' button is clicked, the system will produce a graph showing the trend in responses for the selected question over a rolling twelve month period. This allows a dealer to track the change in responses given over this period in time.

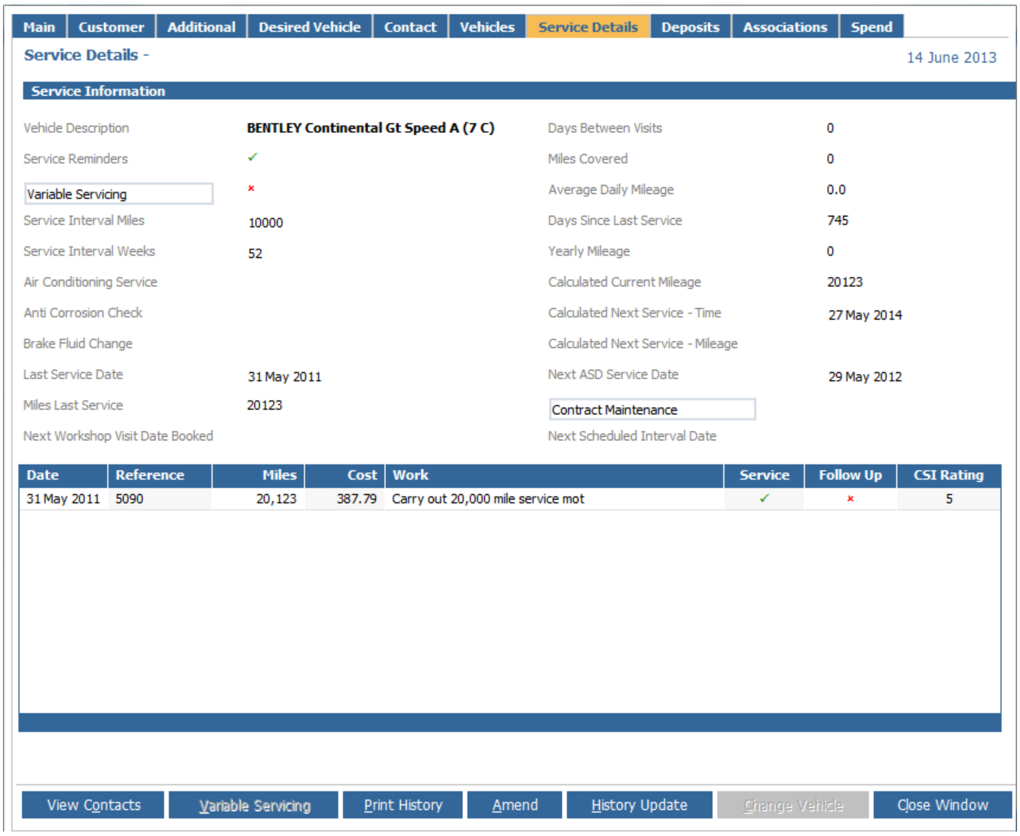


The average rating is denoted by the red line. Counts of the number of responses received are displayed with the number of completed surveys shown in blue and the number of partial responses shown in orange.

Service History

Once a CSI questionnaire has been sent to a customer it is stored against within the Service History.

From within customer enquiry click on service details tab to view the service history.



If a customer questionnaire has been sent out and returned, a CSI Rating will be displayed at the far right hand side of the service history line as above. The CSI Rating is the rating given for the first question and even if the questionnaire isn't completed this will display.

Double click on the service history line to view the CSI questionnaire by clicking on the tab called CSI.