



CitNOW Workshop:

Amber Follow Up 'How to' Guide



Introduction

Amber Follow Up is an optional extra for CitNOW Workshop. Service Advisors simply schedule an automated reminder for Amber work that has been identified in the eVHC. The customer automatically receives a reminder of the Amber work identified along with the original CitNOW video when the work is due.

The time period between the customers visit and the follow up call is variable, but is likely to be in the region of three to six months. The mileage the customer plans to drive over the coming months is the main factor determining how long the period should be.

The Service Advisor may not know this until they speak to the customer e.g. the customer may be about to go on holiday and cover more miles than they would normally.

The success of Amber Follow Up is from the one-step reminder set-up which is completed when the customer picks up their vehicle from the Workshop. The Service Advisor simply adds in the date for follow up and a personalised email along with the video created is automatically sent to the customer at the agreed time. The Service Advisor receives a notification when the email has sent and again when it has been watched meaning a follow up call can be made and the customer more likely to book work in.

Whether you are using or thinking of using Amber Follow Up and have a question, please contact our Customer Service team at help@citnow.com.

Getting Started with Amber Follow Up

For non-integrated and most integrated CitNOW and eVHC systems.

1. The Technician takes a CitNOW video and enters any details when prompted. An email is then sent to the Service Advisor alerting them that a video has been made and is waiting for their approval.
2. The Service Advisor enters pricing data for the eVHC and sends the email to the customer.
3. The customer receives the email, watches the video and approves the work that has been reported.
4. The Service Advisor receives an email confirming the work approved by the customer.
5. The Service Advisor can then edit the eVHC and add an Amber Follow Up date where necessary.

The screenshot displays the CitNOW Video Library interface. The top navigation bar is blue with a yellow play button icon and the text 'Video -'. Below the navigation bar, there is a sidebar on the left with menu items: Overview, Video Library, Presenters, Checked-In (16), Authenticate the App, Configuration, Reporting, Academy, Support, and Account. The main content area shows a video player with a play button in the center. To the right of the video player is a list of events:

- Customer**: The video, [redacted] has been watched. Wednesday, 15 August 2018 11:29 - 100% Watched
- System**: An e-mail for the video, [redacted] has been sent to the customer. Wednesday, 15 August 2018 08:43
- System**: An SMS for the video [redacted] has been sent to the customer. Wednesday, 15 August 2018 08:43
- System**: An e-mail for this video has been queued to send. Wednesday, 15 August 2018 08:42
- Ben**: The video, [redacted] has been created. Tuesday, 14 August 2018 16:14

Below the list of events, there are several action buttons: Nominate for Video Award, Keep Video Forever, Delete Video, Download Video, and Resend. At the bottom, there is a section titled 'Amber Follow Up' with the text: 'By providing an amber follow up date, we will automatically schedule a reminder e-mail to be sent to the customer reminding them of any items identified during this video.' Below this text is a dropdown menu labeled 'Select a Follow Up Date' with a button that says 'Select a Follow Up Date'.

Set the Date

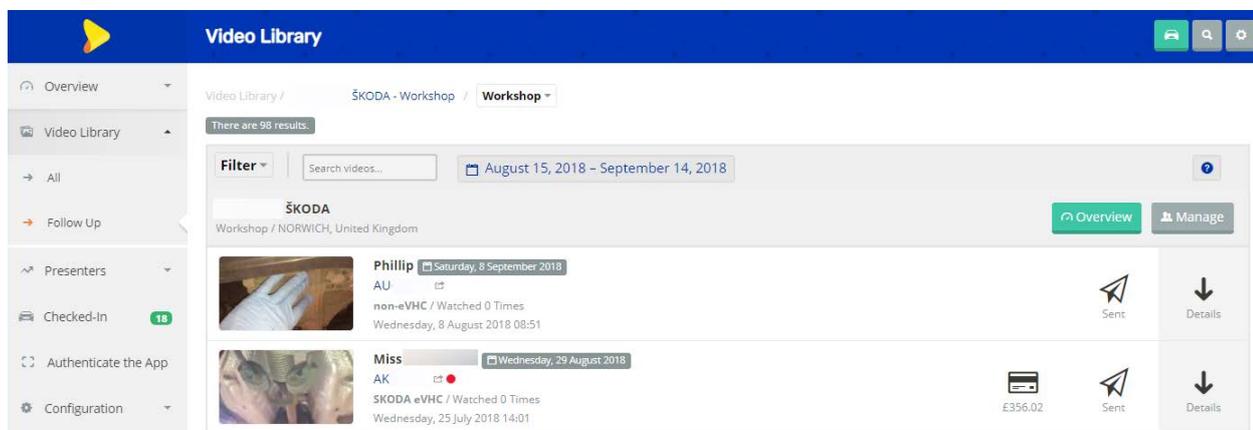
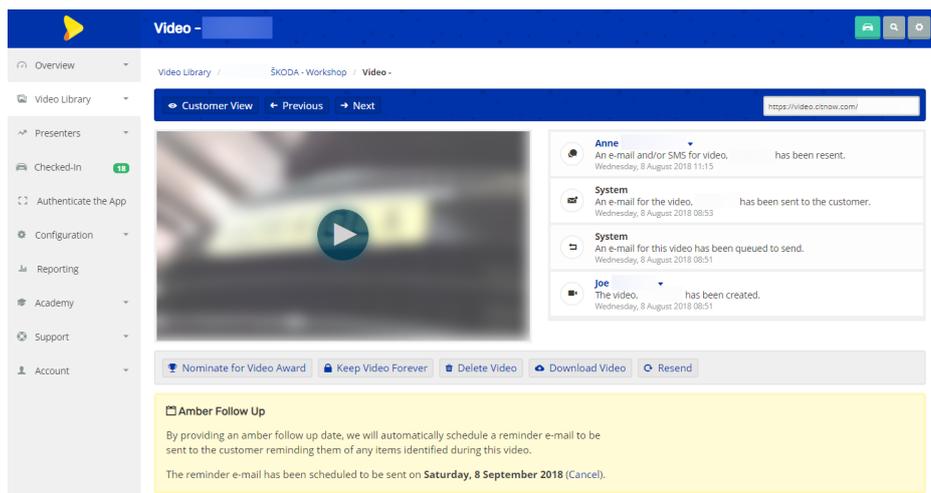
The date can only be set in the future with a six month maximum as standard.

If the Service Advisor doesn't know the Amber Follow Up date at the time of approving the video, they can revisit the dashboard to update the details later.

The dashboard also has a Follow Up tab on the left hand side. Selecting this will display a list of videos where a Follow Up date has been set.

When the video is watched by the customer, there will be a link in the notify email, allowing the Service Advisor to go straight to the correct video in the dashboard, see the video details, and edit the follow-up date if required.

On the date of the Amber Follow Up, if a video still has the Amber Follow Up flag enabled, an email is automatically sent to the customer with a link to the video.



Example Email Text sent To Customer

Subject: A reminder of work to be carried out on your vehicle

From: retailer.email@address.com

To: customer.email@address.com

Dear Customer Name,

This is a reminder email about outstanding details from your last vehicle health check.

We previously identified work for your vehicle which has now triggered an update for this work to be carried out.

View the outstanding items by clicking this [link](#).

If you would like these items corrected on your vehicle please contact us to confirm.

Kind regards,

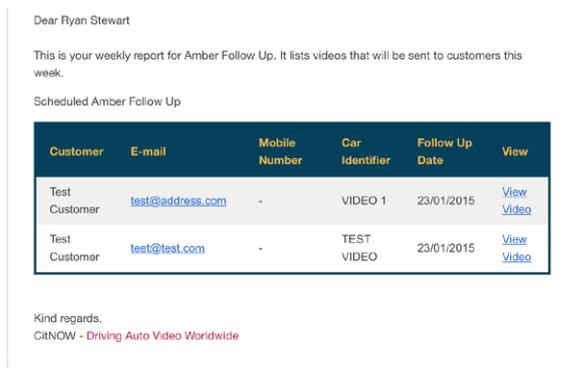
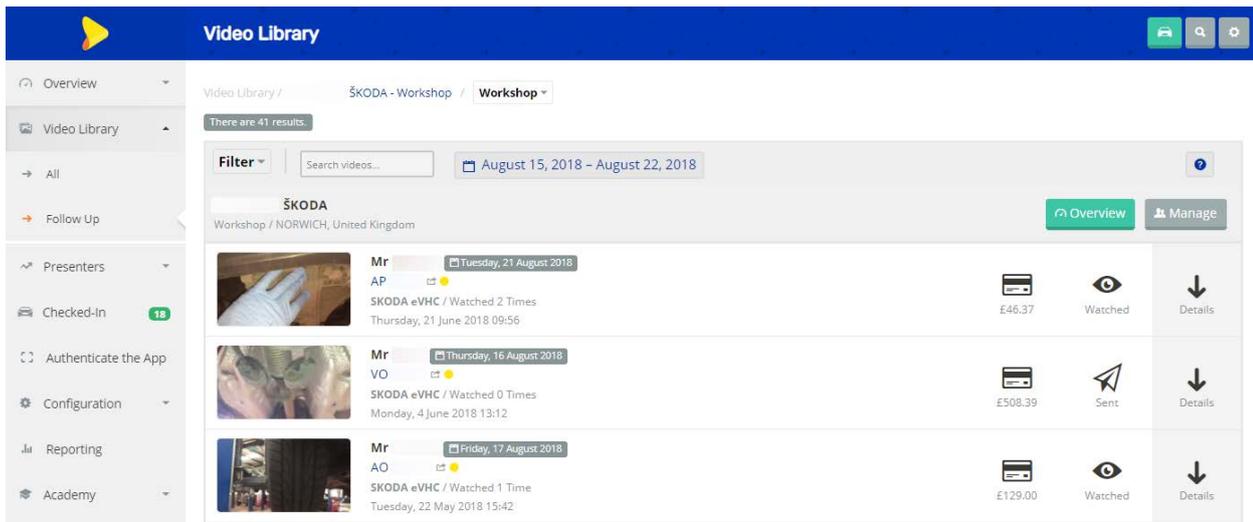
Retailer Contact

Phone: 01234 567 890

Email: retailer.email@address.com

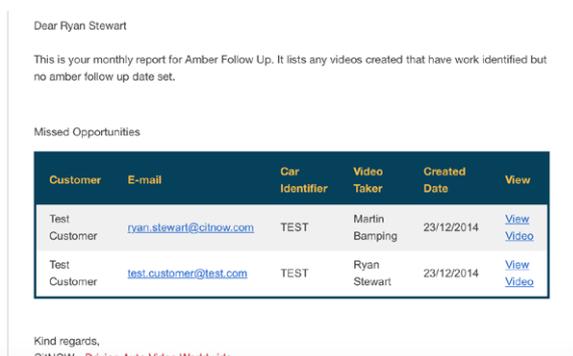
Reporting

A weekly report has been created that goes out on a Friday morning to the Service Team with a list of the videos marked for 'follow up' in the next week.



A link in the report takes the Service Advisor to a filtered list of the same videos in the dashboard.

The Service Advisor can then work through each video one by one, removing the Amber Follow Up flag where required. As above, any video that still has the Amber Follow Up flag set on the follow up day will be sent to the customer.



An additional management report has been created. Sent monthly to show videos that were made that month that did not have a follow up date set, but were marked Amber in the app by the Technician.