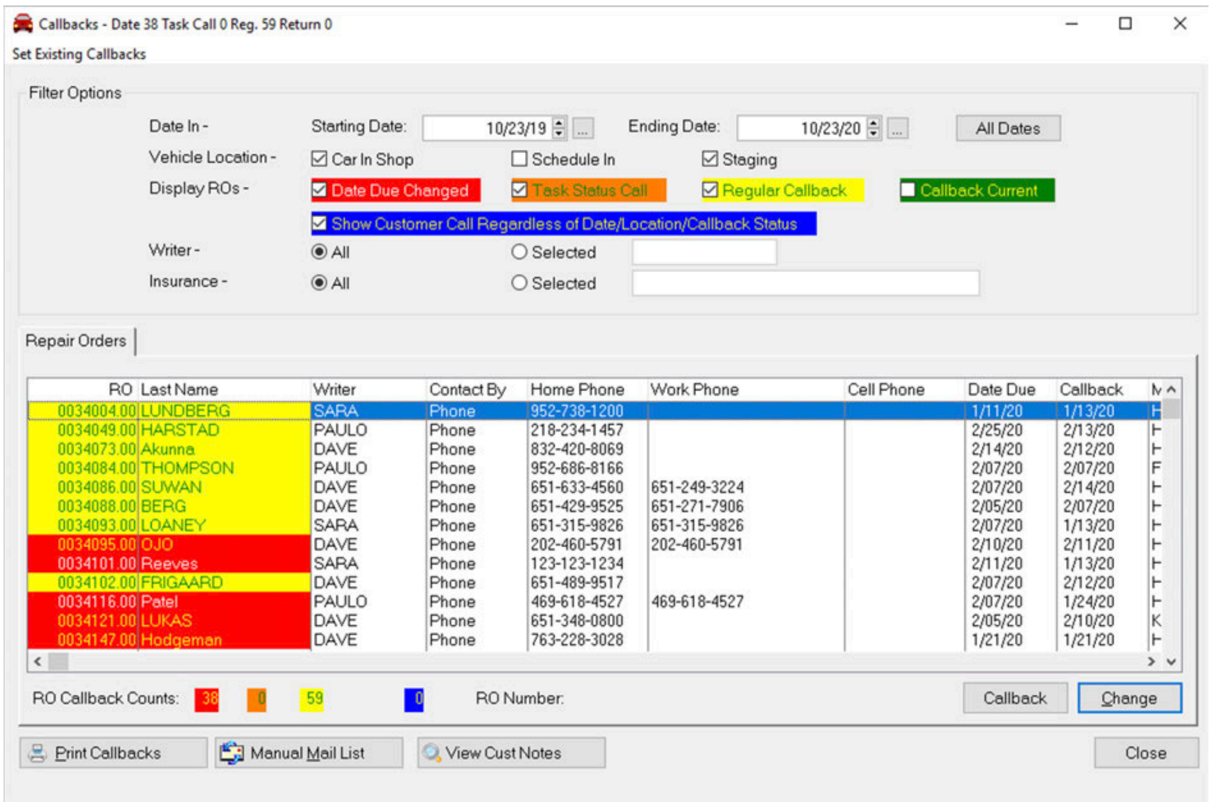
CUSTOMER SERVICE

ROME MANAGEMENT USER GUIDE

CUSTOMER SERVICE

The Rome Management Customer Service module is designed to let the CSRs know which customers they need to call to give a status to or inform them and a change in the delivery date. Like the other status gauges it will only show ROs that need to have action taken so when the screen is clear of ROs the CSR knows all of the customers have been called.



At the top is the Date In date range. It defaults to the past year so any RO that was created in the past year would be on here. The All Dates button will change the dates to 1/1/80 and 1/1/12, in case someone accidentally set the date outside the default range.

The next setting is the vehicles location. Car In Shop will look for ROs that have the In Shop box checked. Not in Shop will list ROs where the In Shop box is Not checked. We recommend leaving Not in Shop unchecked otherwise you may be calling people who haven't dropped off the car yet. At the same time you may be missing ROs where the In Shop has not been checked and should be.

Display ROs will display ROs under the following criteria:

Date Due Changed - ROs that have had the Date Due changed will be displayed in the list in red. These cars will not be ready on the date you told the customer and they need to be called and updated. We rec om mend keeping this box checked so you are notified when a Date Due changes.

Regular Callback - Ros that have a regular callback scheduled will show in the list in yellow if this box is checked. We recommend you keep this box checked so you are notified when you need to call a customer for a regular update.

Callback Current - This will display ROs where the Callback has been done. We recommend you do not check this box if you are looking for ROs that need to be called.

Customer Callback Requested - When this is checked the Customer requested a callback, this will show up as a blue line in the callback screen, this function is available when the "Call Customer" box is checked in the customer info screen.

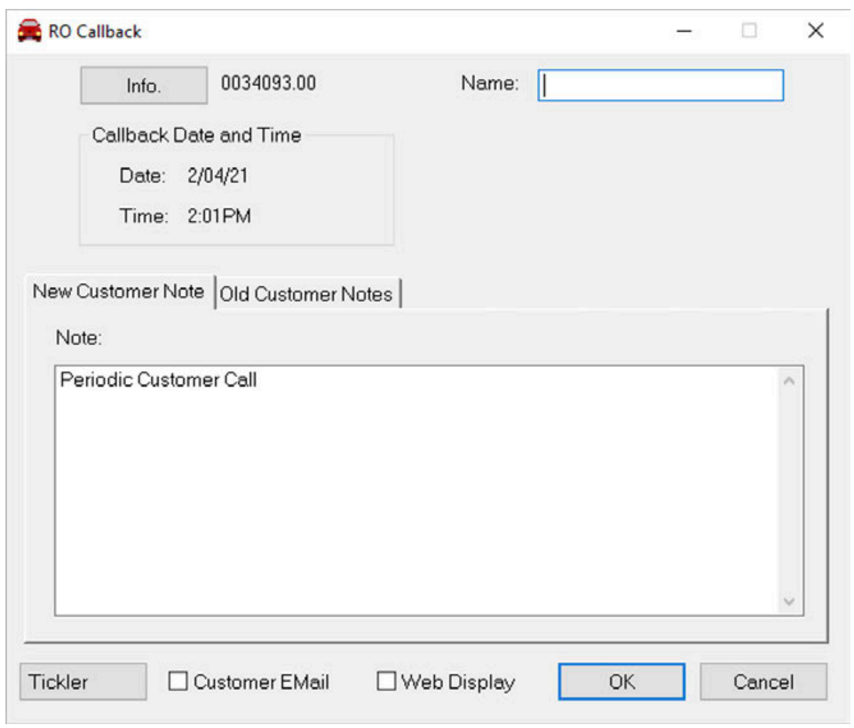
Writer - You can select a specific writer and it will only display ROs where his name appears in one of the writer fields.

Insurance - You can select a specific insurance company and it will only list ROs for that company.

Callback button is for confirming the call has been made and optionally entering a note.
Change button will open the RO for editing.

Making Callbacks

When you are finished calling the customer, highlight that RO and press the Callback button. You will be given an opportunity to write a note about the call. Press OK and the note will be created and the Callback will be completed. That RO should disappear from the Callback list and will not show up again until it is time to call them again. The customer service department should keep this screen open all the time and when they have made callbacks on all ROs the list will be empty. When an RO appears on the list they make the call and then they are finished. The customer service department's goal is to keep the screen as empty as possible to ensure that customers are made aware of changes in the Due Date and kept up to date so the customer does not have to call in.



ROME

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