GETTING STARTED GUIDE

To get started, access the survey solution from your landing page or start screen.

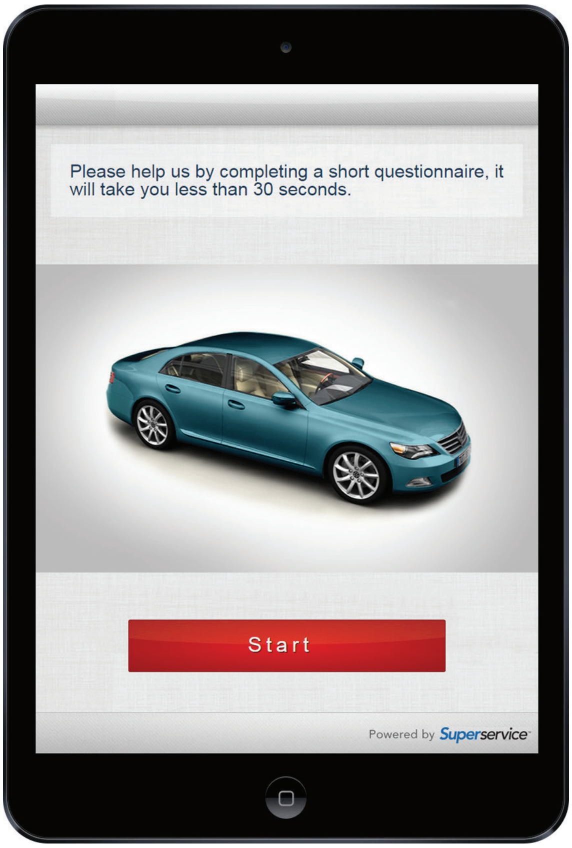
INTRODUCTION

The user-friendly, tablet-based survey solution provides instant feedback on the customer's experience, while they are still in the dealership. You can easily measure and maintain customer satisfaction, while also gaining a competitive edge for your service business.

The real-time survey results give management the ability to immediately resolve any issues directly with the customer, resulting in higher CSI scores.

To get started use the following steps:

- Configure your survey settings
- Create and edit survey templates
- Complete a professional customer survey
- View and track your completed surveys
- Access survey analytics and reports



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CONFIGURE SURVEY SETTINGS

To ensure the application delivers the maximum benefits to your dealership you need to configure the settings for your surveys. When you set the threshold percentage a message will be sent to the manager if the customer's satisfaction rating falls below the threshold.

To access the survey settings, click **Admin** and select **Settings**.

To customise the general settings:

1. Confirm or select your manufacturer theme from the **CSS Style** drop-down list.
2. Select the **Show Star Rating** option to include the star rating page in the survey.
3. Select the **Display rating override screen** option to add the overall rating page.
4. If available, select **Display customer list from Triage** to add a list of customer names.
5. Enter the satisfaction threshold percentage into the **Mail manager Threshold in %** field.
6. Enter the email address of the manager.
7. Select the **Send Message to Manager** option, and enter the mobile number (if applicable).
8. Click **Save**.

To configure the survey templates:

1. Click the **Survey Template** tab.
2. Confirm or select the default template from the drop-down list.
3. View the survey template name in the **Survey Template** box. For example, Service.
   If you want to set up additional templates, enter the names in the **Survey Template** box.
4. If you want to customise the survey you can enter HTML into these boxes:
   - **Survey Welcome Message**: You can enter a welcome message. For example, <p>Please take a few moments and complete our survey.</p>
   - **Branch Page HTML**: You can add an initial selection page for the survey type or language type at the start of the survey.
5. Click **Save**.

CREATE SURVEY TEMPLATES

Once you have completed the settings, you can review the default survey template and edit the pre-defined survey questions. There is also ability to create additional customised survey templates. To access and create survey templates, click **Survey Templates**.

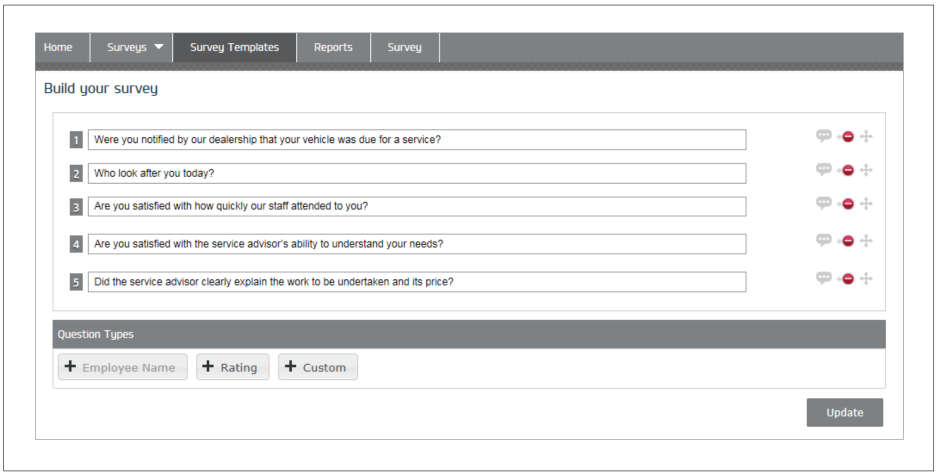
To create a new survey template:

1. Click **Create Survey**.
2. Confirm or select the type of survey from the **Survey Template** drop-down list.
3. Click a Question Type:
   - **Employee Name:** Enter the question and people's names for the answers. You can only enter one Employee Name question for each survey.
   - **Rating:** Enter the question only, as the answers are entered automatically.
   - **Custom:** Enter the question, and the answers with the numeric values.
4. Type your question and click the icon to view or enter the answers.
5. Add as many questions as you need for the survey, and click **Update**.

   The survey will be added to the list and will override any existing template.

To edit a survey template:

1. Select a survey template from the list.
2. If you want to change the existing questions or answers:
   - Click to change the survey question or answers.
   - Click to delete a survey question.
   - Click to re-sequence the questions within the survey.
3. If you want to add new questions use the Question Type buttons.
4. Click **Update**.

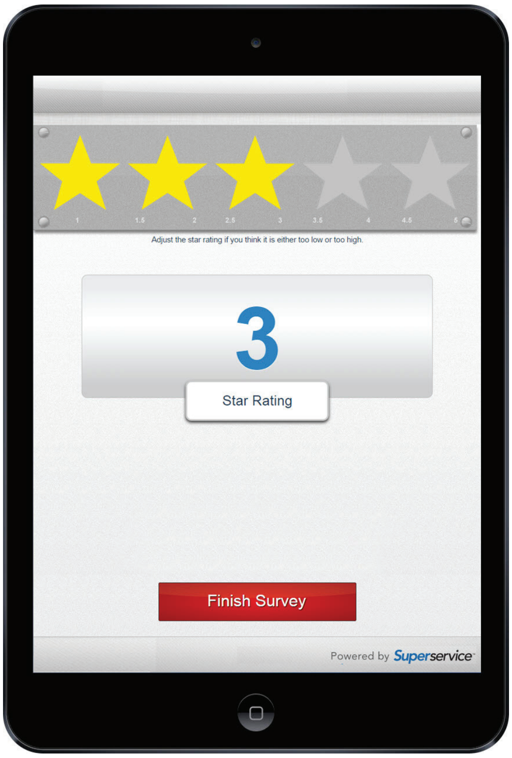


COMPLETE CUSTOMER SURVEYS

The professional-looking survey is launched on a tablet device and the customer conveniently completes the survey at the time they collect their vehicle. The survey data is processed in real-time and this allows management to address any issues with the customer before they leave the dealership.

To open and complete a survey:

1. Login to the application.
   You can add a shortcut to the application on your tablet home screen.
2. Tap **Survey** and then tap **Start**.
3. Fill out personal details such as the name and licence plate number, and tap **Next**.
   If available, select a customer name from the list, or click **New Customer**.
4. Select an answer to each question, and tap **Next**.
5. Adjust the overall percentage to override the satisfaction rating (if applicable).
   A message is automatically sent to management if the percentage falls below the satisfaction threshold that has been set for the dealership.
6. Adjust the star rating for your customer experience (if applicable).
7. Tap **Finish Survey**.



VIEW CUSTOMER SURVEYS

View, track and monitor all the surveys that have been completed by customers on a specific day or over an entire month. You can also search for a survey.

To view completed surveys for the current day:

1. Click **Surveys** and select **Survey List**.
2. View the list of customer surveys.
3. Select a survey to view the customer and survey details.

To view completed surveys for an entire month:

1. Click **Surveys** and select **Survey Calendar**.
2. Select the month and year from the drop-down lists.
3. Click a day on the calendar to view the list of surveys completed on that day.
4. Select a survey to view the customer and survey details.
5. Enter a note in the **Customer** or **Manager Comments** box (if required), and click **Save**.

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Survey List

Date & Time	Customer	Registration Number	Email	Survey Template	Employee Name	Initial Rating	Adjusted Rating	Star Rating
19/08/2015 10:32	John Doyle	AAA212	john@gmail.com	Service	Bryan Gillett	80.0%	80.0%	★★★★☆
19/08/2015 10:33	Josie	J0123	josie@gmail.com	Service	Bryan Gillett	60.0%	60.0%	★★★☆☆
19/08/2015 11:24	Maria	MDP555	maria@yahoo.com	Service	Warren Head	76.0%	81.0%	★★★★☆
19/08/2015 11:26	Wadim	WM887	wadim@gmail.com	Service	Bryan Gillett	80.0%	80.0%	★★★★☆
19/08/2015 11:29	Clay	CD676	cd@infomedia.com	Service	Michael Johnson	80.0%	80.0%	★★★★☆
19/08/2015 11:51	Sarah	SAF321	sarah@infomedia.com	Service	Warren Head	92.0%	92.0%	★★★★★
19/08/2015 11:53	Jen	JEN111	jen@hotmail.com	Service	Michael Johnson	100.0%	95.0%	★★★★★
Totals						81.1%	81.1%	

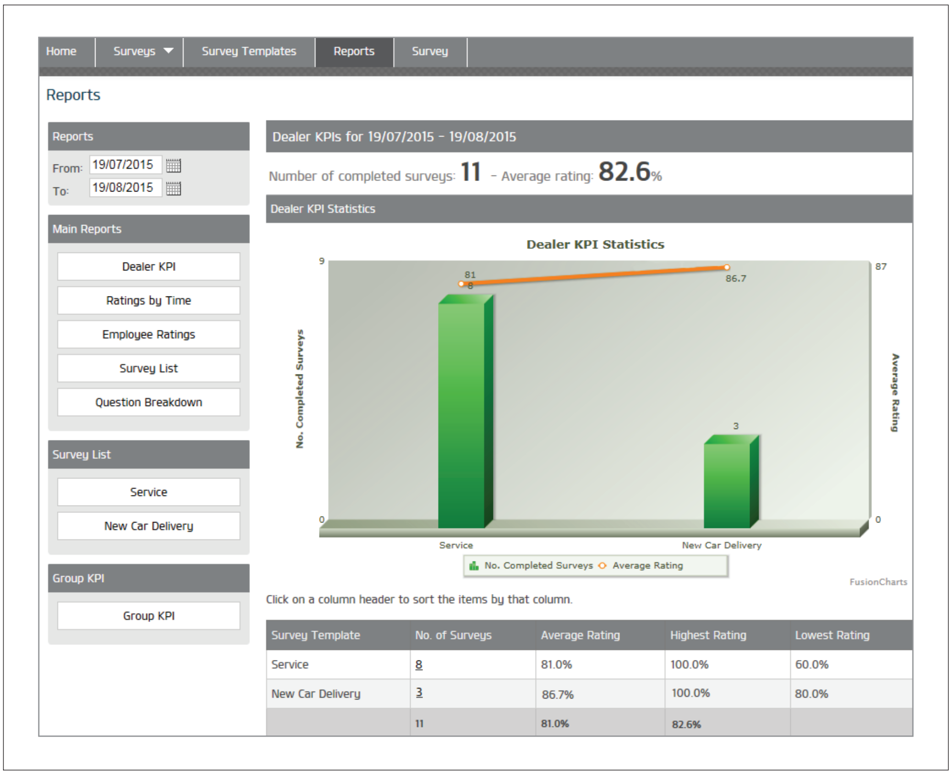
ACCESS REAL TIME REPORTS

The Reports screen allows you to view a range of real-time reports and CSI analytics to help you monitor customer satisfaction ratings and employee performance at your dealership. This supports your business planning and future improvements.

One of the most useful reports is the Dealer KPI report which shows the number of completed surveys and the average survey result. There are also detailed reports, such as the Question Breakdown Report.

Use the following reporting features:

- Specify the date range
- View the Main Reports
- View the Survey List reports
- View the Group KPI report



If you need assistance or have any questions, please contact Customer Service.