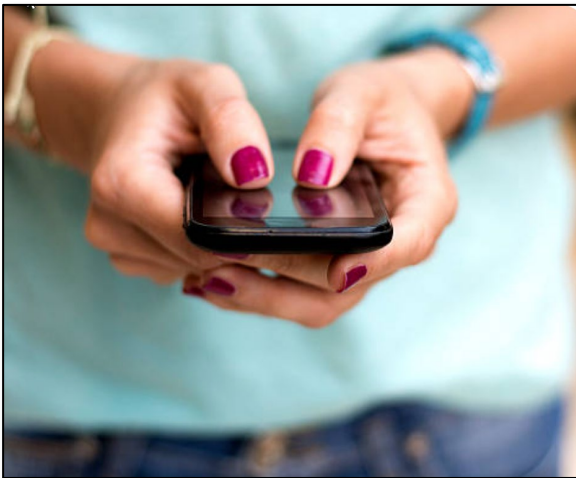# Coming Soon - Sales Appointment Reminders and Notifications

Save time, reduce no-shows, and keep customers informed with automated text messaging for Sales appointments.

Approximately 60% of all Sales appointments are confirmed through text messaging. Unlike a phone call that a customer may not answer or an email they may not open, an automated text message is the best way to remind customers to confirm, reschedule, or contact you about their Sales appointment.

Making life easier for dealers and customers

Now we provide you with the following capabilities for Sales customers who have opted into texting:

- **Confirm or reschedule upcoming sales appointments** – Customers confirm their appointments with a single response to a text reminder, reducing no-shows and late arrivals that inconvenience your dealership and other customers. Customers can also quickly reschedule for the date and time of their choice from the same text.

- **Notify customers if their vehicle of interest has been sold** – Keep customers in the loop with a short message and a link to call the dealership.

- **Customizable.** Managers can turn Sales and Missed Appointment Notifications and Vehicle Sold notifications on and off at the dealership as well as customize the messages.

Dive in to see exciting details

- How it works – Sales Appointment Confirmation
- Sales Appointment Management
  - Confirm or Cancel
  - Reschedule
- Vehicle Sold Notification
- Turn automatic notifications on and off (Dealership Managers/Admin only)
- Customize the Sales Appointment Reminders and Vehicle Sold Messages
  - Appointment Confirmation setup
  - Missed Appointment notifications setup
  - Sold Vehicle Appointment Notifications setup

How it works – Sales Appointment Confirmation

When a customer has a sales appointment scheduled, automatic text notifications are sent to the customer at the following intervals:

- **Day Before Reminder:** Customers receive a reminder at approximately 5:00 p.m. on the day before the appointment asking for confirmation of the appointment.

- **Next Day Reminder:** If there is no response to the reminder, they will receive another reminder at approximately 9:00 a.m. on the following day requesting confirmation.

- **Final Reminder:** If still no response, customers receive a final reminder approximately 1.5 hours before the appointment with the same confirmation, cancel or reschedule options.

Note: The timing of notifications may vary slightly, typically within a range of +/- 15 minutes for each notification.

EXAMPLE: SALES APPOINTMENT MANAGEMENT FROM SALES PERSPECTIVE

Figure 1: Confirm Appointment View – Scheduled Activities

Sales Appointment Management

Customers with upcoming Sales appointments can now receive automated text reminders with an added reschedule option for enhanced flexibility. Customers simply text "C" to confirm their appointment on the specified date and time. In addition, the text empowers them to text "X" to cancel or click the link to reschedule, providing a more adaptable and user-friendly approach to Sales Appointment Management.

Confirm or Cancel

The appointment reminder provided to the customer offers text options for Confirm or Cancel which are similar to the options we all use to respond to our doctor appointments.

> Note about the company feature 'Require Opt-In' (see Turn Automatic Notification On and Off):
> This looks for a previous text opt-in from the customer before it will send an Appointment Confirmation, Missed Appointments or Vehicle Sold notifications.
>
> If the dealer enables 'Require Opt-In', the system must confirm that the customer has previously opted into receiving text messages before the system will send the automatic Appointment Confirmation message
>
> If the dealer does not require the opt-in feature, the system does not look for a previous opt-in from the customer and so Appointment Confirmations and Vehicle Sold notifications are sent to any customers that have not previously opted out of receiving text messages.
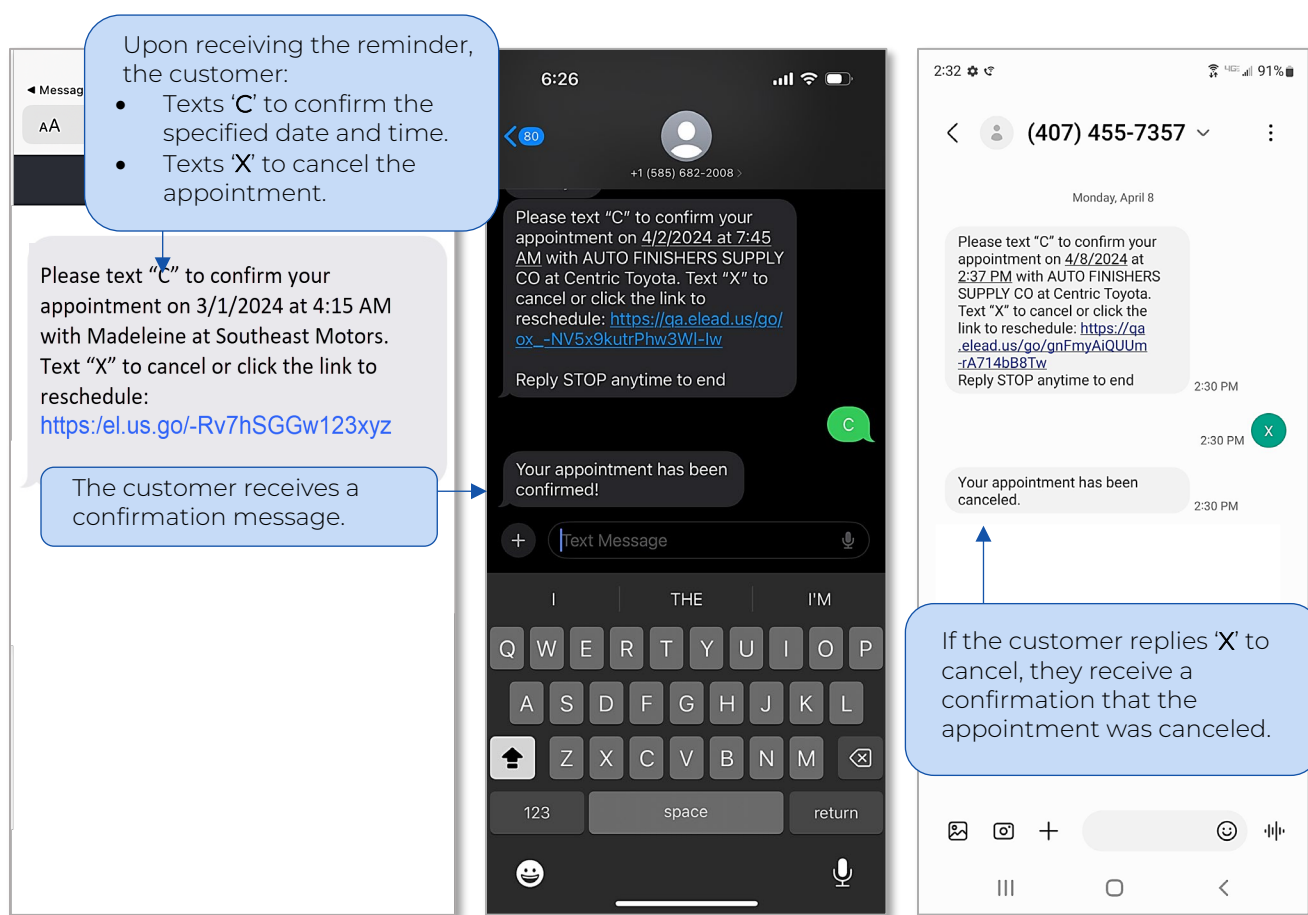

Figure 2: Sales Appointment Confirmation

Sales_Appointment_Confirmation_Suite_FA_R01

Sales Appointment Management cont'd
Reschedule

Customers can press the link to reschedule the sales appointment, providing a more adaptable and user-friendly approach to Sales Appointment Management.
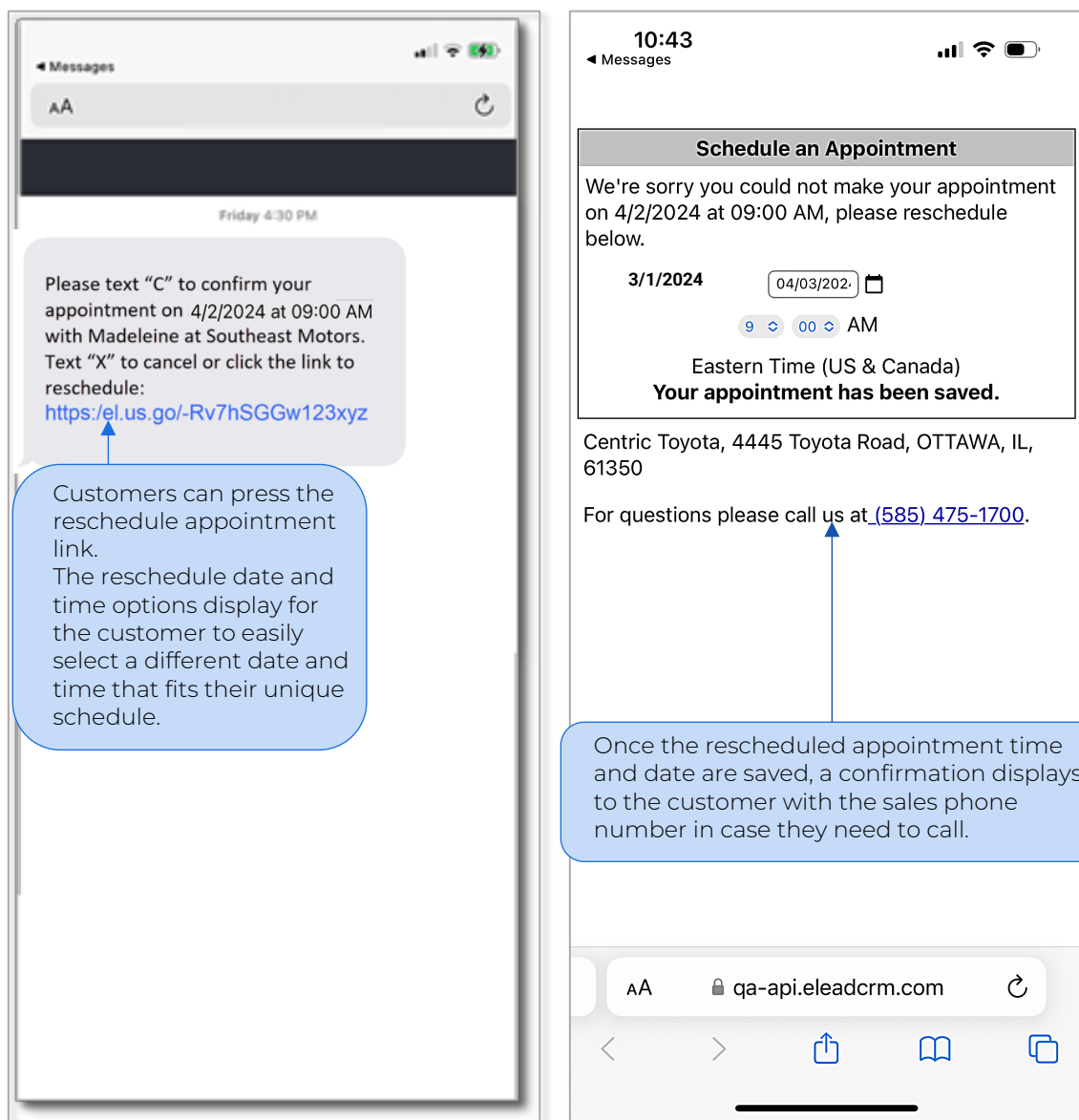

Figure 3: Reschedule Sales Appointment

Vehicle Sold notification

If a customer's vehicle of interest is sold before their confirmed sales appointment, the customer receives a text notification to contact the dealership.

This notification is initiated when the vehicle's Sales Status is marked 'Sold' on the Opportunity Details, indicating that a customer has purchased the vehicle. Here's how it works:

1. **Sales Status Updated:** The dealership updates the Sales Status dropdown list to 'Sold' in the Opportunity Details when the vehicle is sold to another customer.

2. **Notification Sent:** Once the Sales Status is updated, the customer who had scheduled the appointment to see that same vehicle receives a text message with a phone link to contact the dealership. This notification alerts them that there is new information regarding their vehicle of interest.

Figure 4: Vehicle Sold Notification

Admin settings begin on next page

or

Back to top

Turn automatic notifications On and Off (Dealership Managers/Admin only)

Save time and skip the Support call! This feature is accessible to all dealers and requires manager permissions, allowing them to control the notifications they want to send by toggling them on or off at any time.

The default settings are as follows but can be changed by the dealer:

- Sales confirmations and Missed Appointment (reschedule) notifications = OFF
- Vehicle Sold notifications = OFF

Note: After turning a notification on or off, allow at least one hour for background processing and the new settings to take effect.

From the CRM menu, navigate to **Admin > CRM Setup > Opportunity Management > Text Messaging Administration**.

1 Press **Company Features**.

2 Select a check box to turn a notification(s) ON.

Note: Sales confirmations and Missed Appointment (reschedule) notifications are grouped into one checkbox and are turned on/off together.

3 Deselect a check box to turn a feature(s) OFF.

Company Features 🔧

☐ Use only Forward Number for inbound calls
☐ Do not show default templates
☑ Display emoji picker on desktop client
☐ Bypass Opt-in requests
☑ Enable Gif Dialog
☑ Sales & Missed Appointment Notification
☑ Vehicle Sold Notification
☐ Require Opt-In for Appointment Notifications

The **default** settings for notifications are as shown below but can be changed at the dealership:
- Sales Confirmation and Missed Appointments = OFF.
- Vehicle Sold notifications = OFF.

Save

4 Press **Save** to retain the changes.

Figure 5: Turn Notifications On and Off

Note about the company feature 'Require Opt-In' (see Turn Automatic Notification On and Off):
This looks for a previous text opt-in from the customer before it will send an Appointment Confirmation, Missed Appointments or Vehicle Sold notifications.

If the dealer enables 'Require Opt-In', the system must confirm that the customer has previously opted into receiving text messages before the system will send the automatic Appointment Confirmation message

If the dealer does not require the opt-in feature, the system does not look for a previous opt-in from the customer and so Appointment Confirmations and Vehicle Sold notifications are sent to any customers that have not previously opted out of receiving text messages.

Customize the Sales Appointment reminders and Vehicle Sold messages

Default templates for Appointment Confirmation, Missed Appointment and Vehicle Sold are provided but you can present your customers with a customized text message to enhance their trust and show that you value their business.

Create a new, or customize an existing, message with the Text Message Template Editor. Navigate to **CRM > Admin > CRM Setup > Text Messaging Administration** and open **Text Message Template Editor**.

Appointment Confirmation setup

Figure 6: Template Type and Template

Customize the Sales Appointment reminders and Vehicle Sold messages cont'd

Appointment Confirmation setup cont'd

Text Message Template Editor

Template Type:
Appointment Confirmation ▾

1 Use the default template or create a New template.

Selected Template:
Appointment Confirmation Automated ▾

Active: ☑

3 Mark this template as **Active** with a checkmark.

Name:
Appointment Confirmation Automated

Template Tags: Sales Appointment Schedule Link ▾ [Insert]

Sought Vehicle Id
PersonId
Dealer Inventory Vehicle Id
Dealer Vendor Id
Email Opt In
Sales Appointment Schedule Link
Appraisal Appt Date
Appraisal Appt Time
Credit App Link
Suggested Vehicle Year
Suggested Vehicle Make
Suggested Vehicle Model
Suggested Vehicle Trim
Suggested Vehicle Stock
Suggested Vehicle VIN
Suggested Vehicle Price
Suggested Vehicle Loan Payment
Suggested Vehicle Loan Cash Down
Suggested Vehicle Loan Term
Suggested Vehicle Lease Payment

Message:
Hi <{TitleCase}><{CustFirstName}><{/TitleCase}>! Please confirm your appointment at <{TitleCase}><{DealershipName}><{/TitleCase}> with <{SalesPersonFirstName}> on <{NextSalesApptDate}> at <{NextSalesApptTime}> located at: <{TitleCase}><{DealershipStreetAddress}><{/TitleCase}> <{TitleCase}><{DealershipCity}><{/TitleCase}>, <{TitleCase}><{DealershipState}><{/TitleCase}> <{DealershipZip}>. Text 'C' to confirm, text 'X' to cancel or press the link to reschedule. <{SalesApptSchLink}>

[Save]

2 If creating a new customized message, enter the message text and Template Tags for the customized message.
NOTE: Press **Insert** once a Template Tag is selected to place it into the message.

Make sure to include the instructions "*Text 'C' to confirm, text 'X' to cancel or press the link to reschedule*" and include the **SalesApptSchLink** Template Tag in the message. These are the recognized commands for the automated text message to perform the associated tasks.

4 Press **Save**.

Figure 7: Existing Appointment Confirmation Template

Note about the company feature 'Require Opt-In' (see Turn Automatic Notification On and Off):
This looks for a previous text opt-in from the customer before it will send an Appointment Confirmation, Missed Appointments or Vehicle Sold notifications.

If the dealer enables 'Require Opt-In', the system must confirm that the customer has previously opted into receiving text messages before the system will send the automatic Appointment Confirmation message

If the dealer does not require the opt-in feature, the system does not look for a previous opt-in from the customer and so Appointment Confirmations and Vehicle Sold notifications are sent to any customers that have not previously opted out of receiving text messages.

Note 2: The system automatically uses the **Active** template. Deactivate any other templates that are not in use so that there is only one template for the system to identify and automatically send.

Customize the Sales Appointment reminders and Vehicle Sold messages cont'd

Missed Appointment Notifications setup

Create a new, or customize an existing, message for Missed Appointment Notifications.

Text Message Template Editor

Template Type:
Missed Appointment

1 Expand the Template Type dropdown and select **Missed Appointment**.

Selected Template:
New

Active: ☑

5 Mark this template as **Active** with a checkmark.

2 Expand the **Select Template** dropdown and select an existing default template or create a New one.

Name:
Missed Sales Appointment Template

3 If **New** is selected, give the new template a **Name**.

Message:

Template Tags: Dealership Address [Insert]

(dropdown list: ...nt Vehicle Id / ...onId / Dealer Inventory Vehicle Id / Dealer Vendor Id / Email Opt In / Sales Appointment Schedule Link / Appraisal Appt Date / Appraisal Appt Time / Credit App Link / Suggested Vehicle Year / Suggested Vehicle Make / Suggested Vehicle Model / Suggested Vehicle Trim / Suggested Vehicle Stock / Suggested Vehicle VIN / Suggested Vehicle Price / Suggested Vehicle Loan Payment / Suggested Vehicle Loan Cash Down / Suggested Vehicle Loan Term / Suggested Vehicle Lease Payment)

Hello <{TitleCase}><{CustFirstName}><{/TitleCase}>, you have missed your appointment on <{NextSalesApptDate}><{NextSalesApptTime}> with <{TitleCase}><{SalesPersonFirstName}><{/TitleCase}>. We would still like to show you how you can trade-in your <(CurrentVehicleYear)><(CurrentVehicleMake)><(CurrentVehicleModel)> and drive home in a new <{SuggestedVehicleYear}><{SuggestedVehicleMake}><{SuggestedVehicleModel}>. Please reschedule your appointment using the link below or call us at <{DealershipPhone}>. We are located at <{DealershipAddress}>.|<{SalesApptSchLink}>

32/600

[Save]

6 Press **Save**.

4 If **New** is selected, enter the message text and **Template Tags** for the customized message.
NOTE: Press **Insert** once a Template Tag is selected to place it into the message.

Figure 8: Missed Appointment Template

Note: The system automatically uses the **Active** template. Deactivate any other templates that are not in use so that there is only one template for the system to identify and automatically send.

Customize the Sales Appointment reminders and Vehicle Sold messages cont'd

Sold Vehicle Appointment Notifications setup

Create a new, or customize an existing, message for Sold Vehicle Appointment Notifications.

Text Message Template Editor

Template Type:
Sold Vehicle Appointment Notification

1 Expand the Template Type dropdown and select **Missed Appointment**.

Sought Vehicle Id
PersonId
Dealer Inventory Vehicle Id
Dealer Vendor Id
Email Opt In
Sales Appointment Schedule Link
Appraisal Appt Date
Appraisal Appt Time
Credit App Link
Suggested Vehicle Year
Suggested Vehicle Make
Suggested Vehicle Model
Suggested Vehicle Trim
Suggested Vehicle Stock
Suggested Vehicle VIN
Suggested Vehicle Price
Suggested Vehicle Loan Payment
Suggested Vehicle Loan Cash Down
Suggested Vehicle Loan Term
Suggested Vehicle Lease Payment

Selected Template:
New

Active:
☑

5 Mark this template as **Active** with a checkmark.

2 Expand the **Select Template** dropdown and select an existing default template or create a New one.

Name:
Sold Vehicle Notification

3 If **New** is selected, Give the new template a **Name**.

Message:

Template Tags: Next Sales Appt Time   Insert

Hi <{TitleCase}><{CustFirstName}><{/TitleCase}>. This is <{TitleCase}><{SalesPersonName}><{/TitleCase}> from <{TitleCase}><{DealershipName}><{/TitleCase}>. I have important information to share with you about the <{SoughtYear}><{SoughtMake}><{SoughtModel}> that you are interested in. Please call me at <{DealershipPhone}> before your appointment scheduled on <{NextSalesApptDate}> at <{NextSalesApptTime}>. I look forward to hearing from you.

157/600

Save

6 Press **Save**.

4 If **New** is selected, enter the message text and **Template Tags** for the customized message.
NOTE: Press **Insert** once a Template Tag is selected to place it into the message.

Figure 9: Sold Vehicle Notifications

Note: The system automatically uses the **Active** template. Deactivate any other templates that are not in use so that there is only one template for the system to identify and automatically send.

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