Telosa Service Reminder Document

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# Multiple Service/Visit Reminders:

## Validating Factor to send the reminders:

1. Service reminders will be sent based on the visit update of the customer irrespective of any service taken by the customer. Visit Update = When a record is added via QR, NFC, Add Customer Form, Import Customer data, or Visit is added via Add Visit Button to an existing record.
2. Those customers will only be eligible for service reminders who are added by business owner and the service reminder Interval (Send After Days) is set.
3. The reminder will be triggered to customer until and unless the customer gets deactivated/unsubscribed.
4. Once the customer is deactivated the reminder will not be sent to him until the customers get activated again.
5. The business owner can update the visit reminder in two different ways.
   1. First, BO (Business Owner) can do it from the customer list action item, once click on 3 dot multiple option will be shown, BO (Business Owner) needs to select the add visit option.
   2. Second, It can be done via Existing customer form, where BO (Business Owner) checks the "is the customer visiting for new service?" checkbox and then fills in the details.
   3. In both scenarios, the visit for the existing customer will be updated.
6. If a customer takes one service and comes for another service before the service reminder is triggered for the first service, the business owner will update the customer visit for the second service, the service reminder will be triggered based on the latest updated visit date of the second service.
   1. If BO (Business Owner) does not update the latest visit for second service, Service reminder will be triggered for first service. (i.e; Latest Visit = First Service).
7. If BO (Business Owner) edit service reminder Interval (Send After Days) then all previously set dates to trigger the service reminder would be reset and dates to trigger SR will be based on new Interval (Send After Days).
   1. For the customers who were added before the SR interval was updated, will be receiving the upcoming SR reminder based on the previous SR interval period and for next SR in cycle will be based on the updated SR interval.
   2. For example:
      1. If, Customer visit date is: 15th Jan
      2. and SR Interval set for: 5 Days
      3. Upcoming SR Schedule Date: 20th Jan
      4. Next SR scheduled Date: 25th Jan
      5. Now, BO updates the interval to 2 days on 17th Jan then,
      6. The upcoming SR will be triggered on 20th Jan and the next SR will triggered on the 22nd Jan.
   3. For the customers who are added when the SR Interval (Send After Days) is changed will be receiving the SR based on the latest Interval (Send After Days) of SR is set. There is always before and after not \*WHEN\*
   4. For the customers who are added after the SR Interval (Send After Days) is changed will be receiving the SR based on the latest Interval (Send After Days) of SR is set.
8. In case, if the balance (i.e; Main Bal + Top-up) is low to trigger the SR irrespective of MOC then the upcoming cycles will get skipped until the BO (Business Owner) recharges the balances.

## 

## First Trigger of Service Reminder

1. The first trigger will be initiated based on the recent visit date of the customer and the reminder Interval (Send After Day's) set by the business owner's.
2. For example:
   1. Customer Addition Date: 12 December.
   2. SR Interval (Send After Days): 10 days post-customer addition.
   3. Date of First Service Reminder Triggered: 22nd December.
   4. Date of Second Service Reminder Triggered: 1 Jan and so on.

## Customer Visits Before the Scheduled Visit Reminder This is same as Bullet 6

Is there option to change the date if the user forgets to add visit

1. If the customer visits the store before the first service reminder is triggered for a new visit, then the business owner or respective person should update the last visit date of that customer as per the new visit which can be added from action button add visit tab. (Add visit)
2. If the visit gets updated, the SR will be triggered based on the updated visit date (latest)
3. For example:
   1. SR set on - 10 Dec || Customer Visit Date - 10 Dec
   2. SR Interval (Send After Days): 10 days. (First Reminder to be triggered on 20 Dec)
   3. A customer visits before the first service reminder triggered : 15 Dec (Latest Visit)
   4. The first service reminder will be triggered on 25 Dec based on the latest visit date and given time interval of SR.

## Deactivation or Reactivation Mechanism for Customer

1. When it comes to deactivate and reactivate the customer, it constructs different scenarios mentioned below:
2. Suppose the business owners deactivated the customer, then the scenarios of reactivating the customer will be:
3. Scenario 1:
   1. If customer reactivation occurs on (before 11 am IST, along with date – Please check here!!) or before the upcoming SR scheduled date, then the SR will be triggered on the upcoming SR scheduled date. i.e; No change change will occur in SR scheduled date.
   2. For example: let us suppose
      1. Customer Visit date: 15th December
      2. SR Interval (Send After Days): 10 days
      3. Upcoming SR Scheduled Date: 25th December
      4. Now, Deactivation Date: 16th December
      5. Reactivation Date: 20th December
      6. If customer reactivation occurs on 20th Dec, then the subsequent SR will be triggered on 25th December.
4. Scenario 2:
   1. If customer reactivation occurs on or before the upcoming SR scheduled date and SR Interval (Send After Days) is edited then, The upcoming SR will be triggered based on previous SR Interval (Send After Days) and the next SR will be triggered as per the Latest/updated SR Interval (Send After Days) which will be based on the upcoming SR scheduled date.
   2. For example: let us suppose
      1. Customer Visit date: 15th December
      2. SR Interval (Send After Days): 10 days
      3. Upcoming SR Scheduled Date: 25th December
      4. Now, Deactivation Date: 16th December
      5. Reactivation Date: 20th December
      6. Edited SR Interval (Send After Days): 20 days, after the customer was reactivated
      7. If customer reactivation occurs on 20th Dec and SR Interval (Send After Days) gets edited by 20 days then, the upcoming SR will be triggered on 25th Dec but the next SR in cycle will be triggered on 14th Jan.
5. Scenario 3:
   1. If customer reactivation occurs after the upcoming SR scheduled date and SR Interval (Send After Days) gets edited then, the next SR will be triggered based on the previous SR Interval (Send After Days) and the next SR in cycle will be triggered as per the Latest/updated SR Interval (Send After Days) based on the next SR scheduled date.
   2. For Example:
      1. If, Customer Visit date: 15th December
      2. SR Interval (Send After Days): 10 Days
      3. Upcoming SR Scheduled Date: 25th December
      4. Next SR Scheduled Date: 5th Jan
      5. Now, Deactivation Date: 16th December
      6. Reactivation Date: 26th December (First SR was skipped dates 25 Dec)
      7. Edited SR Interval (Send After Days): 20 Days after the reactivation of the customer
      8. If customer reactivation occurs on 26th Dec and SR Interval (Send After Days) gets edited by 20 days after the reactivation of the customer then, the next SR will be triggered on 5th Jan and the subsequent SR in cycle will be triggered on 25th Jan.
6. Scenario 4:
   1. If customer reactivation occurs after the scheduled SR which is upcoming, then SR will be skipped for that immediate upcoming cycle but will be triggered for the next SR scheduled cycle.
   2. For example:
      1. If, Customer Visit date: 15th December
      2. SR Interval (Send After Days): 10 Days
      3. Upcoming SR Scheduled Date: 25th December
      4. Next SR Scheduled Date: 5th Jan
      5. Now, Deactivation Date: 16th December
      6. Reactivation Date: 26th December
      7. If customer reactivation occurs on 26th of December, then the SR will be triggered on 5th January and the SR for 25th Dec is skipped.

## Pause and Resume Mechanism for Service Reminder:

1. If Pause and Resume Occur before the Upcoming SR Scheduled Date i.e;
   1. If the service reminder is paused and subsequently resumed before the Upcoming SR Scheduled Date from the last reminder or visit and there is no change in the SR Interval (Send After Days), then there will be no effect in the SR triggered.
2. If Pause and Resume Occur before the Upcoming SR Scheduled Date and the SR Interval (Send After Days) is been edited on resume then,
   1. The upcoming SR in the cycle will be triggered based on previous SR Interval and the subsequent SR in the cycle will be triggered as per the updated SR Interval.
3. If SR is Resumed after the Upcoming SR cycle i.e;
   1. If the service reminder is resumed after the Upcoming SR cycle and the SR Interval (Send After Days) is not changed then, then the subsequent SR will be triggered on the next SR scheduled date and the upcoming SR cycle will be skipped. (The SR was in paused state for the upcoming cycle)
4. If SR is Resumed after the Upcoming SR Scheduled Date and SR Interval (Send After Days) is being edited then,
   1. The next SR will be triggered based on the previous SR Interval (Send After Days) and the subsequent SR in cycle will be triggered as per the updated SR Interval (Send After Days).

# Un-subscription Module

## Un-subscription Action:

1. When a customer chooses to unsubscribe from any Mode of Communication (MOC), the system shall immediately acknowledge this action.
2. For present there is provision of un-subscribe for email only.
3. In case, if customer un-subscribe the email, he/she will not receive the mail for any of the services. (for ex. service reminder and review reminder)
4. Customer will also have a provision of un-subscribe for whatsapp reminder.
5. The system must deactivate the reminder triggers associated with the unsubscribed MOC for that specific customer.
6. If customer opt-out/unsubscribe from any one of the MOC he/she will be opted-out/unsubscribe for all MOC, also same will be applicable vice-versa.

## Notification and Feedback:

1. Whenever a customer attempts to unsubscribe, the system should provide clear notifications confirming the action.
2. Any change in the subscription status (unsubscribe) should be reflected in the customer list.

Where it should reflect ????

## Communication Protocol for International Customers:

1. International customers will receive service reminders via their preferred mode of communication.

# Impact Analysis

## Side Bar Menu Delete this section, it not needed

1. Setup reminder Request
2. Setup reminder Service

## Add Customer Form

1. When customer is added in application it will be considered as first visit, recorded via form
   1. Add Customer & Send review request
   2. Add New Customer
   3. Excel Import.
   4. Widget

## Customer list

1. In the Customer list action tab will have one more option added as “Add Visit”.
2. If business owner updates any visit, then in customer record add date and Update date will be captured in DB.
3. Employees will be able to view the last visit of the customer in the add visit form. Before developing these please showcase the form
4. On Add Visit Last visit is reset (Form will be open having fields Customer Name, Servicer Taken & service Provider and provision to update Service Taken & Service Provider (Service & Service Provider is non mandatory) and if service is added, date & latest Service will be updated and if not then only date is updated

## Template Creation :

1. For service reminder the template will be customizable only.
2. There are three types of template creation.
   1. Email Templates :
      1. To create an email template for service reminder, business owner needs to select “Follow-Up Email” type.
      2. Business owner will have a provision of checkbox which will state “Is this is service reminder template”.
      3. If business owner ticks on that mentioned above checkbox then only an email template will be created for service reminder.
      4. Provision to select url will be added (on check of above mention pointer)
      5. The business owner can view their created templates on a table named as “Created Template”.
      6. In table business owner can differentiate the type of template from table column template type.
      7. The column template type will also have provision to filter according to their need.
      8. NOTE: If Service reminder is to be sold as a feature, and customer does not have permission then checkbox remains disabled. Checkbox will be enabled only if the customer has permission for the service reminder feature.
   2. SMS Template :
      1. To create an email template for service reminder, business owner needs to select “Request Feedback SMS” type.
      2. If business owner ticks on that mentioned above check Box then only SMS template will be created for service reminder.
      3. Business owner will have a provision to select url will be added. (When box is checked as mentioned in the above pointer)
      4. The business owner can view their created templates on a table named as “Created Template”.
      5. In table business owner can differentiate the type of template from table column template type.
      6. The column template type will also have provision to filter according to their need.
      7. Links will not go if the checkbox is checked : flag to be set at backend, sms\_type column to be added in table sms\_template
   3. WhatsApp Template :
      1. To create whatsapp template for service reminder, business owner needs to select “Request Feedback WhatsApp” type.
      2. After, the business owner has to select “Service Reminder” in the “Template Type” field (work flow will be as Direct template)
      3. The business owner can view their created templates on a table named as “Created Template”.
      4. In table business owner can differentiate the type of template from table column template type.
      5. The column template type will also have provision to filter according to their need.
      6. Flag to be set at backend, whatsapp\_type column to be added in table whatsapp\_template.

## Request History

1. The business owner can view the history of the service reminder sent to customers which includes the visit date, service taken and service provided, mentioned information will be shown to the business owner.
2. Two Tab views will be shown
   1. Service Reminder History (same as Request Review History )
   2. Request Review History

## Dashboard Generation

1. A dedicated space will be allotted on dashboard to showcase the graph which will be as per moderation “average response” graph in accordance to UI design.
   1. The details for the graph are as follows, the graph will have a x-axis as month and y-axis as SR count, it will be a line graph and also there will be a yearly filter.

## My profile (Roles & permission need to update )

1. Roles and permission will be required to update as per selected plan, when permission is added for a particular role, then new permission for Service Reminder needs to be added for selection.

## Admin Tool

1. Provision is required to add features in plan
   1. Add plan & edit plan
   2. Assign plan and edit Assigned plan
   3. Top up count: Service Reminder will use top up balance (if balance is Low Email will be shared to business location Owner)
   4. If the balance is low irrespective of any MOC the business owner will receive the 1 day before prior notice via mail stating there balance is low.