Customers

The **Customers** screen is an easy place to look up existing **Customer** records, regardless of whether they were added in TargetCRM/Notify360, or in your DMS (Dealer Management System).

Viewing Customer Records

1. Open the **Customers** screen using the menu on the left side of the screen.
    a. By default, the most recent **Customer** records display.
2. Use the *Search Customers* field at the top of the screen to search by cell phone or name.
    a. The results grid displays the name, cell phone, email, and address for each **Customer** record.
    b. The Opt In column displays a toggle that indicates whether a **Customer** is eligible to receive marketing text messages and emails.
3. Select the **Customer** name from the results grid to open the Customer Details drawer.
    a. The default display includes editable fields for the **Customer** name, preferred *Salesperson*, *Birthday*, *Category*, *Address*, *Phone*, *Email*, *Notes*, and *Tags*.
        i. Tags are custom entries you can use to organize your customers, and can be used to create **Customer Groups**.
4. Along the top of the Customer Details drawer there are four tabs:
    a. Summary: A summary of all **Customer** business with your dealership, recent text messages, and outstanding **Tasks**.
    b. Contacts: Add and view additional customer contacts, most often used for business customers with multiple employees.
    c. Orders: Displays customer order history.
    d. Text: View and send messages to this customer, just like the **Messenger** screen.

Adding Customer Records – IDEAL/INFINITY/ASPEN ONLY

1. Open the **Customers** screen using the menu on the left side of the screen.
2. Select the blue <u>Plus Sign</u> button in the top left corner of the screen.
    a. The Add Customer drawer opens.
3. Add customer details, such as *Customer* name, *Birthday*, *Category*, *Salesperson*, *Job Title* (if applicable), *Address*, *Phone*, *Email*, *Notes*, and *Tags*.
    a. We recommend entering at least the **Customer** name, and a contact method (*Phone* or *Email*). Minimum required entries may vary from business to business.
    b. When entering a cell *Phone* or *Email*, use the *Opt In* toggles to allow marketing messages.
4. Select the blue <u>Save</u> button to save your changes.

Messenger

The **Messenger** screen is where you can read messages from your customers, and communicate with them one-on-one.

How to Message a Customer

1. Open the **Messenger** screen using the menu on the left side of the screen.
   a. The **Messenger** screen displays according to your most recent view settings.
2. Locate the correct message conversation.
   a. Using the Magnifying Glass button will allow you to search all messages.
   b. The Unread radio button will let you view only unread messages, instead of All.
   c. The *Filters* drop-down menu will allow you to view only *My Conversations* or *Unassigned* messages.
   d. By default you will only see messages tied to the locations/departments to which your user id has been granted access.
3. Select the correct message conversation along the left side of the screen.
   a. The conversation pane displays along the right side of the **Messenger** screen.
4. View conversation details:
   a. Along the left side of the screen displays the customer name, most recent timestamp, department, location, and assignment.
   b. Along the conversation pane you can view the customer name, phone number, department, and location.
5. Messages from the customer display along the left side of the customer pane, dealership messages along the right.
   a. Website leads will appear in bright green and clearly labeled. **Broadcasts** will display in purple and clearly labeled. If enabled, you may see auto-responder messages appear in the conversation automatically.
6. Message the customer using available tools.
   a. The *Type a new message* field allows typing messages, press the enter key or select the Right Arrow button to send.
   b. The Paperclip button allows attaching files from your device storage.
   c. The Capsule button opens the URL Shortener, which allows you to enter a web address, and shorten it into a format that more easily fits into a message.
   d. The Smile button allows the addition of emoji.
   e. The Mountain Photo button allows attaching images from recently used files.
   f. The Speech Bubble button allows adding quick messages.
      i. Quick messages are customizable phrases that you may enter frequently.
   g. The Star button allows you to send the customer links to review your business.
   h. The Camera button allows you to send the customer an invitation to a video call.
      i. Customers can video chat using their phone camera. To be seen and heard, you need a camera and mic—or use the TargetCRM/Notify360 mobile app.