

## QuickTouch: Customer Management

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**Customer Management** provides various functions for maintaining and accessing your customer database. These functions include the following:

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## Customer Maintenance

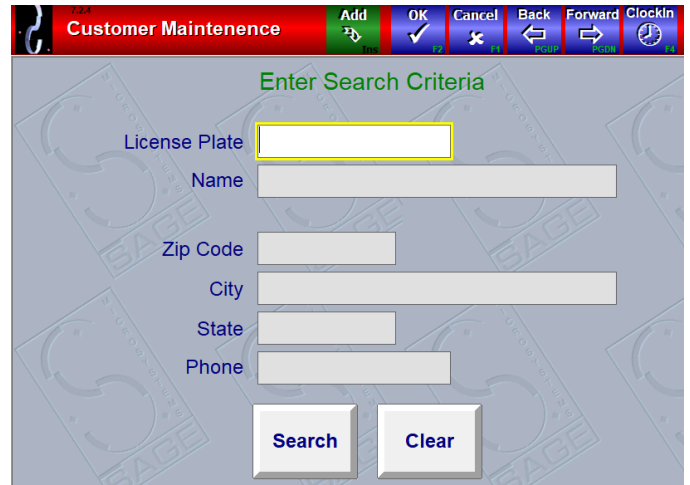
Customer Maintenance allows you to search your customer database for a particular customer based on various criteria. This function can also be used for updating contact information, viewing history, changing a reminder card date, changing promotion credits, or deleting the customer entirely.

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From the Main Menu, choose Customer Management and then Customer Maintenance.

Enter your search criteria and press Search.

If more than one customer fitting the criteria is found, you will be prompted with a list of customers. Choose the appropriate customer. If only one customer was found, the Customer Maintenance screen will be displayed.



### Customer Page

**Name, Address, City, State, Zip** These fields will be printed on the reminder card, and are also required fields on the Bay Screen when creating an invoice for a customer. Thus, this information should always be filled in.

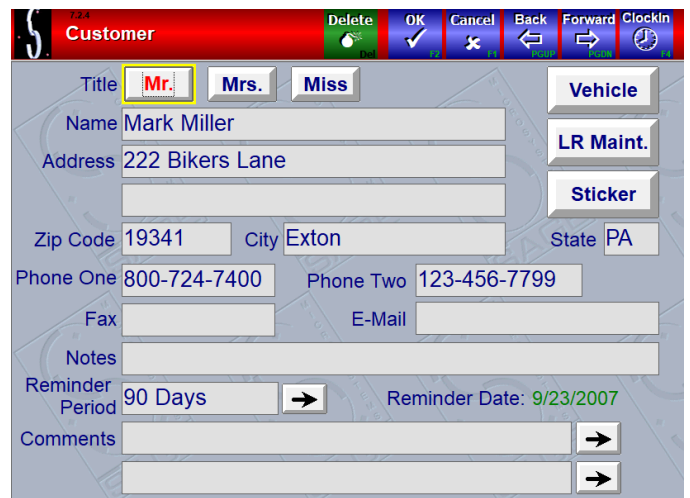
If a customer is unwilling to provide address information, or if this information is unavailable, you should populate these fields with a "1" in each. This will satisfy the requirements for creating an invoice, and will also allow for easy sorting in case any "junk" addresses are printed on reminder cards, thus saving postage.

**Title** You can choose an appropriate title but this has no functionality.

**Phone, Fax, Email** These fields are optional.

**Notes** This field simply provides an area for customer notes. It appears on the "Extended Customer Information" screen when you are checking in a customer, and thus is not as useful as the two Customer Comments fields below this.

**Reminder Period** When an invoice is generated for a customer from the Bay Screen, that is when the reminder period is selected (90 days, etc). If you wish to change the reminder period AFTER the invoice had been generated, press the arrow and select the



appropriate reminder period. The next reminder date will be updated immediately.

**Comments** These comments fields that will appear on the Customer Information screen when checking in a vehicle.

**Vehicle Button** This will display the Vehicle Information screen, as described in the next section.

**LR Maint** This button allows you to reset the Visit Counter for the “Buy X Get 1 Free” promotion.

**Sticker Button** This allows you to set the customer’s custom sticker month and mileage recommendations.

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## Vehicle Maintenance

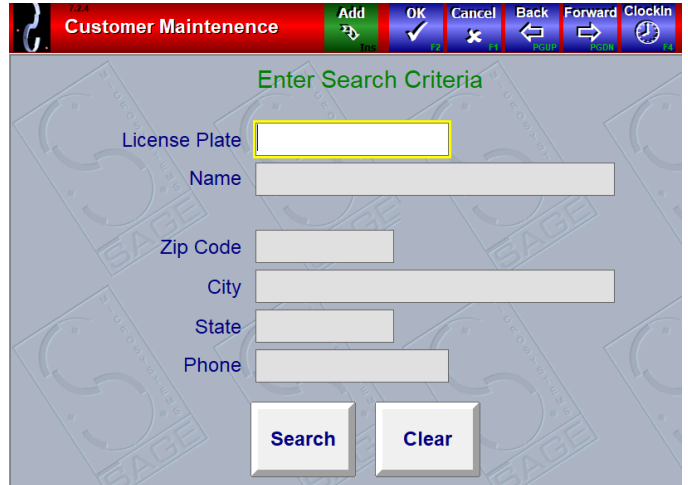
This will display the Vehicle Information screen, from which you can view History, or assign the vehicle to a Fleet Account.

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From the Main Menu, choose Customer Management and then Vehicle Maintenance.

Enter your search criteria and press Search.

If more than one vehicle fitting the criteria is found, you will be prompted with a list of vehicles. Choose the appropriate vehicle. If only one vehicle was found, the Vehicle Maintenance screen will be displayed.



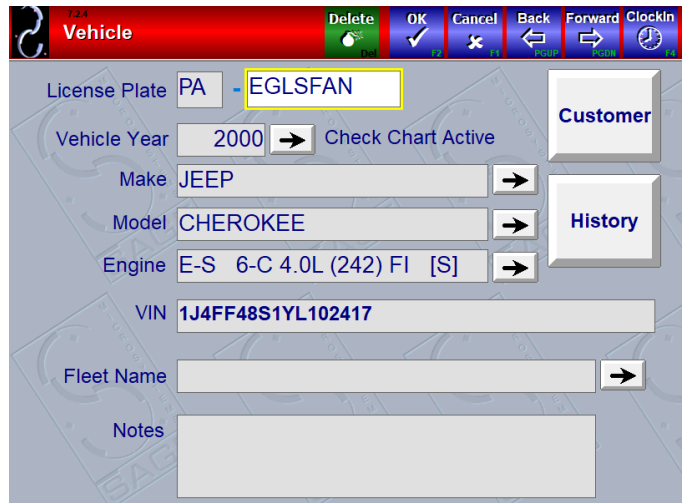
The screenshot shows the 'Customer Maintenance' screen with a red header bar containing the title and navigation icons (Add, OK, Cancel, Back, Forward, ClockIn). Below the header, the text 'Enter Search Criteria' is displayed. The form includes several input fields: License Plate (highlighted with a yellow border), Name, Zip Code, City, State, and Phone. At the bottom of the form are two buttons: 'Search' and 'Clear'.

### Vehicle Page

Note the "Check Chart Active" message in blue next to the vehicle year. This indicates that the Year, Make, Model, and Engine choices were selected correctly from the menus. Thus, Chek-Chart data for this vehicle will be available. Otherwise, it will say "Chek-Chart Not Active".

You can also assign the vehicle to a fleet account at this time by pressing the arrow next to the Fleet Name field.

The Vehicle Notes field has no functionality beyond this screen.



The screenshot shows the 'Vehicle' screen with a red header bar containing the title and navigation icons (Delete, OK, Cancel, Back, Forward, ClockIn). The form displays the following information: License Plate (PA - EGLSFAN), Vehicle Year (2000) with a blue 'Check Chart Active' message and an arrow, Make (JEEP), Model (CHEROKEE), Engine (E-S 6-C 4.0L (242) FI [S]), VIN (1J4FF48S1YL102417), Fleet Name (with an arrow), and Notes. On the right side of the form are two buttons: 'Customer' and 'History'.

## Reminder Cards

The Reminder Cards function allows you to print your reminder cards.

In short, using reminder cards is a strategy to remind your current customers of the service that they received at your location, and that it is time for their next scheduled service.

The best practices are to print your reminder cards on a very regular basis, such as every week – you want to print your cards often enough so that the volume of returning customers are spread evenly throughout the month.

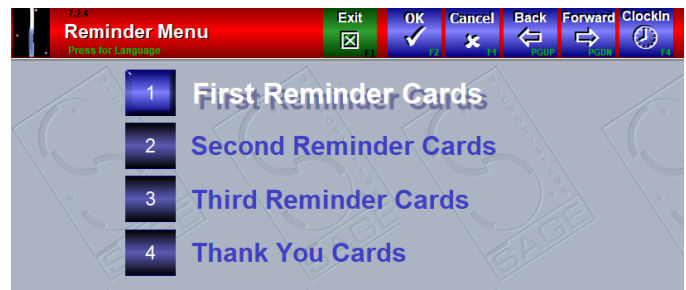
For larger volumes of reminders (200+ per mailing), there are various discount programs available from the United States Postal Service (USPS). These generally provide a cheaper postage rate, in return for an annual fee and having the permit preprinted on the post card. Other requirements, such as presorting by zip code, may also apply. The USPS can best provide the information as to which program is best for your business.

The reminder date for a customer is actually generated at the time of the last sale. You will either be prompted with a reminder period, or it will default to a fixed reminder period (say, 90 days).

If you have never printed a reminder card, and are considering using this feature, please contact Sage Support for assistance in purchasing the correct size and format of reminder cards. QuickTouch supports many different types and formats of reminder cards, but certain types for certain printers may not be supported. Before ordering a large batch of cards, make sure Sage says that QuickTouch will support them.

### Reminder Menu

From the Main Menu, go to Customer Management then Reminder Cards. All cards have the same configuration options.

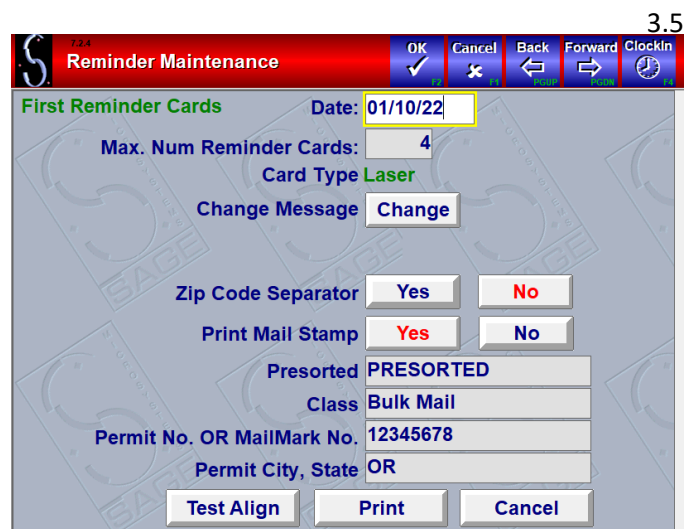


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**First, Second, Third Reminder Cards** By default first reminder cards will go out 90 days after the service was performed. This can be changed to either ask for a date range or set to default by going to System Management, General Setup, Reminder Card Setup. Second and Third reminders time frames can't be changed and are sent 120 and 150 days after service was performed and will only print if the customer has not returned.

**Selection Date** This is the RETURN date of the customers. So, in this example, it's nearing the end of August. We want to print and mail the reminder cards for the first two weeks of September. This is the date we typed in here. Note that any customer who has a return date prior to this date, and who has not received a reminder card, will be printed.

**Max. Num Reminder Cards** This prevents the computer from churning out too many cards in one batch. On older systems with pin printers, if too many cards printed at



once the printer would go out of alignment. This is not an issue with Laser printers.

**Card Type** This is set from the System Management, General Setup Options, Reminder Cards section – please call Sage Support for assistance in setting the card type.

**Change Message** This will allow you to view or change the message that will print on the cards. Click OK when done

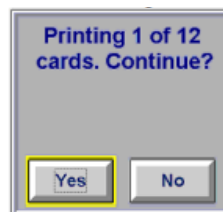
**Zip Code Separator** This will sort the cards by zip code and print a blank sheet between them. This is useful to separate out any “junk” zip code customers who are from out of town. Zip codes of “1” will not print in either case.

**Print Mail Stamp** Choose Yes here if you have a “Permit Imprint Advance Deposit Account” assigned from the USPS, and fill in the appropriate fields.

**Test Align** Perform a Test Align to make sure the cards are inserted and lined up correctly. This is especially important for pin-fed reminder cards. Use this as many times as necessary to ensure that the cards will print correctly the first time.

**Print** When you’re ready to print your cards, press Print. QuickTouch will lead you through a series of steps to make sure that all of your cards print correctly, and if they didn’t, which ones to reprint

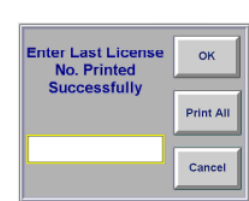
After clicking Print, you will be prompted with how many cards will be printed. Click Yes to print the cards.



The cards will print. WAIT UNTIL THE PRINTING COMPLETES. When complete, you will be asked if the cards all printed successfully. If they did, press Yes. Please Note: Once you indicate that they printed successfully, you will be unable to reprint them.



If the cards jammed or did not finish, say NO. You will be led through a series of screens to print the remaining cards. Say YES to reprint, press Continue, and then enter which license plate last printed successfully. The rest of the cards will print, and you will be asked if it successfully completed this time. Continue until you are finished.



**Thank You Cards** Thank You Cards are sent to customers 45 days after their visit. This number cannot be changed, however you can change the date of the computer to print the cards sooner. Please contact Sage Technical Support if you are interested in doing this.

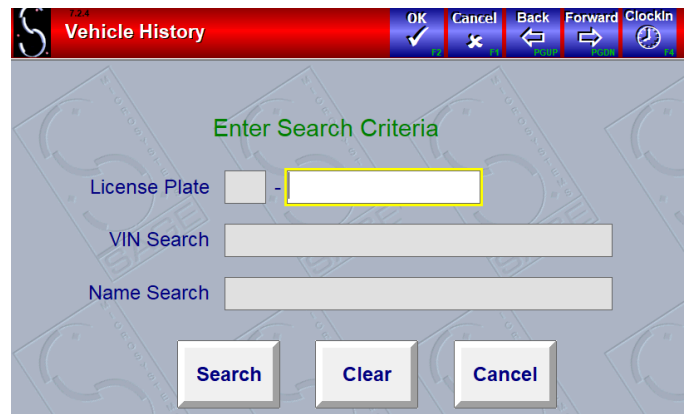
## Vehicle History

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From the Main Menu, choose Customer Management and then Vehicle History.

Enter your search criteria and press Search.

If more than one vehicle fitting the criteria is found, you will be prompted with a list of vehicles. Choose the appropriate vehicle. If only one vehicle was found, the Vehicle History screen will be displayed.



### Vehicle History Page

This will display the Vehicle History screen, from which you can view the complete customer history, parts and services, statistics, and reprint invoices. You can search by License Plate or Name.

Note that you can also access vehicle history through the Customer Maintenance and Bay Screen areas. These other areas will provide more search criteria to widen or narrow your searches.

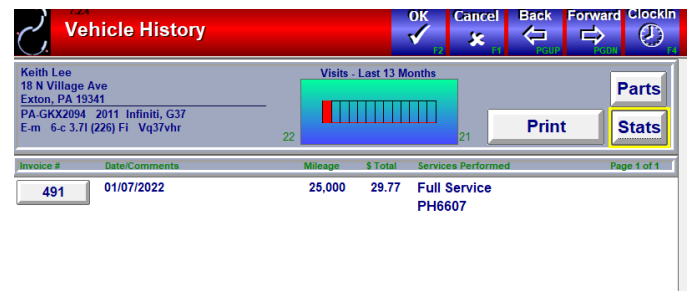
**Parts** Press the Parts button to view parts details under each service. This will indicate information such as the quantity used, as well as any parts that were sold outside of a service.

**Print** This will print the entire service history for the vehicle.

**Stats** This will display service and visit statistics for the vehicle.

**Reprint Invoice** You can reprint a particular invoice by pressing on the Invoice # button for the appropriate invoice. Pressing the button will display more detailed information on the screen, from which you can reprint the entire invoice.

**Note:** Converted invoices from the DOS or other systems cannot be reprinted. You are only able to reprint converted service history.



Invoice #	Date/Comments	Mileage	\$ Total	Services Performed	Page 1 of 1
491	01/07/2022	25,000	29.77	Full Service PH6607	

## Sage Service Manual

This will display the Sage Service Manual (SSM), which lists all Chek-Chart lubrication guides, and chassis and engine graphics if available (requires subscription).

You will be required to select the proper year, make, model, and engine from the lists.

### SSM Search Screen

From the Main Menu, choose Customer Management, then Sage Service Manual. You will immediately be prompted to select the year for your vehicle followed by selection windows for the rest of the vehicle details

**Search** Will open service information for your vehicle.

SSM Search

Change Year 2007

Change Make FORD

Change Model TAURUS

Change Engine E-U 6-C 3.0L (182) FI [U]

VIN

Search Cancel

**Selection Buttons** Allows you to select specific section of the manual to view.

**Print** All of the currently selected pages will print. In the screenshot example, "Full Report" has been selected and there are 11 pages to print, indicated by the bottom right-hand corner of the screen.

**Key Menu Item** Opens a window containing a key to all the codes used in the SSM with the option to print.

Motor

Customer Independent

2007 FORD TAURUS E-U  
6-C 3.0L (182) FI [U]

Maint.Schedule

Full Report

Parts

Chassis/Engine

Recommendations

Cautions

Lubricants

Capacities

Oil Reset

Tires/Torques

Procedures

Oil FILTER OR PZ19, OR PH3600  
NOTE:(PZ19) Synthetic Oil Application. Premium filter recommended  
NOTE:(PH3600) Spin-on Oil Filter

AIR FILTER OR A1696, OR MA5323  
NOTE:(MA5323) Main (Position)

PCV VALVE N/A

BREATHER N/A

CABIN AIR FILTER C25082, MC25082  
NOTE:(MC25082) Filter Media Particulate; Under Hood; Tools not Req.; 5 Mins or less  
NOTE:(MC25082) Front (Position)

BELTS 850KS.

CAPS N/A

FUEL FILTER FG1060, SPFG1060 OR SPFG800  
NOTE:(SPFG1060) Available until inventory is depleted  
NOTE:(SPFG800) Replaces SPFG1060  
NOTE:(SPFG1060) In-Line (Position)  
NOTE:(SPFG800) In-Line (Position)

LIGHT S - Back Up Light 921.  
NOTE:Compare to Original; Boxed

Back Up Light 921BP.  
NOTE:Compare to Original; Blister Pack

Brake Light 3157.  
NOTE:Compare to Original; Boxed

Brake Light 3157BP.  
NOTE:Compare to Original; Blister Pack

Dome Light 578.

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# Delete City Function

QuickTouch allows you to assign more than one city to a particular zip code. QuickTouch already includes a complete listing of zip codes in the USA. In addition, you can add zip codes into the system from other areas of QuickTouch.

Sometimes, however, a zip code will be entered incorrectly. Use this function to delete an incorrect City/State/Zip from the system.

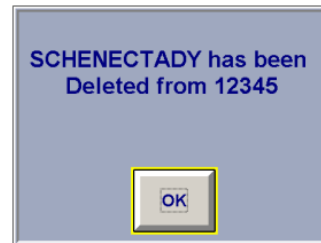
### Page 1 of 1

From the Main Menu, choose Customer Management, then Delete City Function.

Type in the zip code effected and press the arrow.

If more than one city for the zip code is found, you will be presented a list. You can choose which city to delete.

Once deleted, the zip code can be re-entered through any customer maintenance screen.



# History Merge

Maintaining your customer and history databases is important to correctly recommend services and ensure that loyalty rewards are assigned correctly.

Occasionally, a mistake will be made entering a customer into QuickTouch. This may happen when a customer receives a new license plate, or if a technician types the license plate into QuickTouch incorrectly and thinks it's a new customer.

To fix either of these occurrences, you can do a History Merge.

First, you will need to decide which is the GOOD license plate, and which is the BAD one. You will want to merge FROM the bad INTO the good.

This process will move all history and loyalty information into the "good" license and remove it completely from the "bad" license.

From the Main Menu, choose Customer Management, More Customer Management and then History Merge.

You have the option to delete the "bad" license, which you will usually want to do. You also have the option to merge the loyalty reward information, this will also usually be done.

Press Merge History when you're ready and the merge and deletion of the bad license will occur immediately.

In this example, a technician checked a customer in with the incorrect license plate, ABC132, and you want to delete this and merge the visit into the correct license plate, ABC123.

**LR Only** Use the LR Only button if you want to keep both vehicles in the system but want to ONLY merge the loyalty rewards. An example of when you will use this is if a family owns several cars but wants to merge the loyalty rewards all into one car (say, a kid taking a car to college).

The screenshot shows the 'Merge History' interface. At the top, there is a red header bar with the text 'Merge History' and several navigation icons: a checkmark (OK), a crossed-out 'X' (Cancel), a left arrow (Back), a right arrow (Forward), and a clock (ClockIn). Below the header, there are two rows of input fields. The first row is labeled 'Merge from PA' and the second row is labeled 'Into PA'. Both rows have a small 'PA' label and a larger empty text box. Below these input fields, there is a 'Merge History' button. At the bottom of the screen, there are two buttons: 'LR Only' and 'Cancel'. In the background, there are two dialog boxes with 'Yes' and 'No' buttons. The first dialog box says 'Delete the Vehicle that the history was moved from' and the second says 'Merge Loyalty Reward Information'.

# MailMark Export

MailMark is a third-party vendor specializing in customer mailings.

From the Main Menu, choose Customer Management, More Customer Management and then MailMark Export.

**Export** This will create a MailMark.txt text document in the C:\MailMark folder.

To configure the MailMark interface in QuickTouch:

- Go into each service that MailMark will use. In Service Maintenance, go forward to page 5 and look for the MailMark option. Select the appropriate code. (i.e., Full Service = FS)
- Go into General Setup, Export Setup and enter the MailMark information that MailMark provides.
- Create a Security Group called MailMark that has security access to the export function only and an employee named MailMark, code 99, password 9999999, and assign this employee to the MailMark security group.

The screenshot shows the 'MailMark Export Date Range Selection' screen. At the top, there is a red header bar with the text 'MailMark Export' and several navigation buttons: 'OK', 'Cancel', 'Back', 'Forward', and 'Clockin'. Below the header, the screen has a light blue background with a faint watermark pattern. The main content area contains two date input fields: 'Start Date' and 'End Date', both of which are set to '01/10/22'. Below these fields is a button labeled 'Export'.