

Marketing - Booking Reminders

This document has been put together to assist in implementing booking reminders in your business, it outlines the best way to setup and process booking Reminders on a regular basis so you have the best opportunity to get the best return on client bookings.

Booking reminders provide the best return in conjunction with service reminders.

Although SMS is immediate in its delivery as email it has two disadvantages over email, one is no ability for online bookings and second there is a cost to sending SMS's. SMS is normally the **domain of Booking Reminders**.

SMS booking reminders come in two versions.

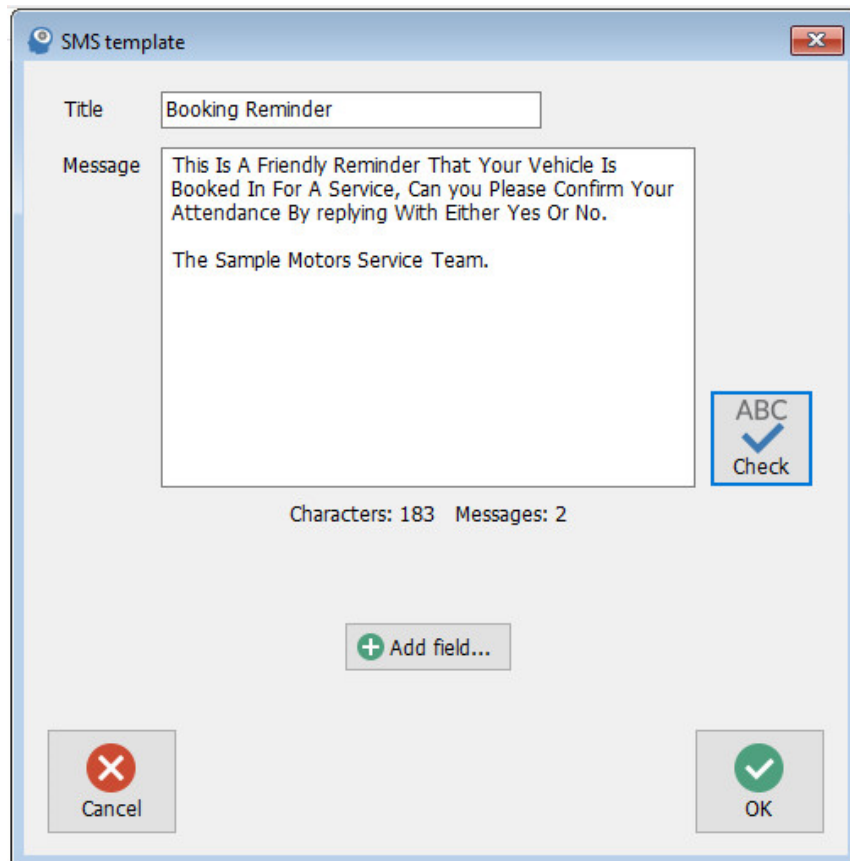
1. Plain text incorporating **generic** message.
2. Plain text incorporating **custom** message.

Implementing SMS for Booking Reminders.

To start sending booking reminders by SMS you will need to be creating bookings that will appear on the diary screen in **blue**, also you will need to create your SMS message in either of the formats previously described.

Go to Lists – SMS messages.

Generic message containing set text to be sent to all clients within the booking date range.



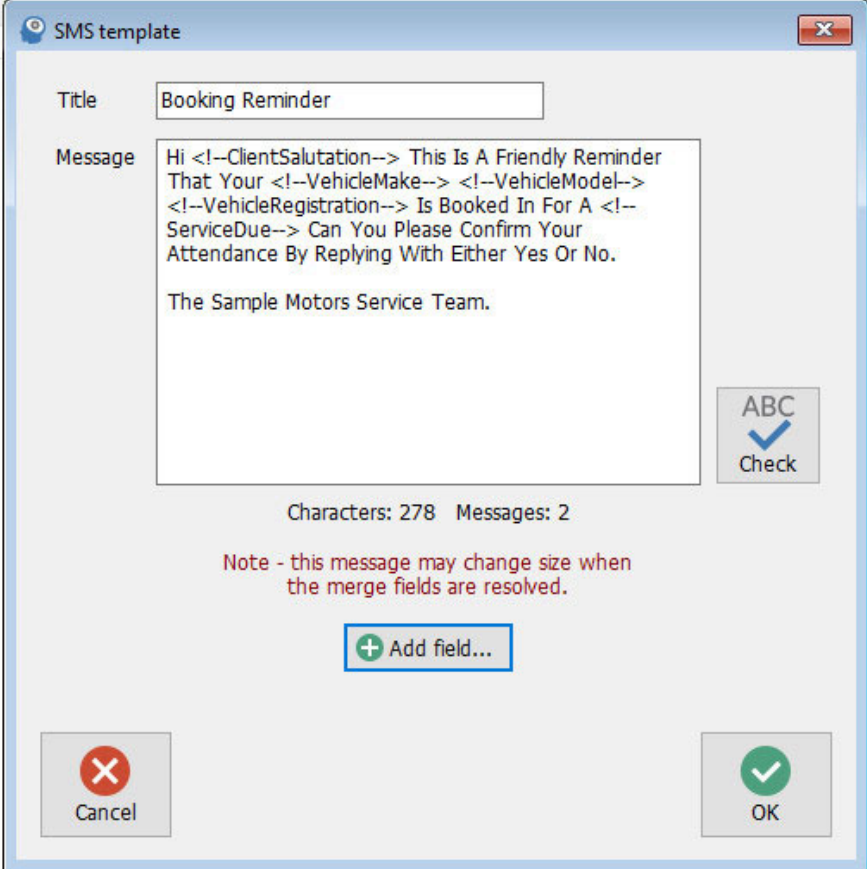
The screenshot shows a dialog box titled "SMS template" with a close button (X) in the top right corner. Inside the dialog, there is a "Title" field containing "Booking Reminder" and a "Message" text area containing the text: "This Is A Friendly Reminder That Your Vehicle Is Booked In For A Service, Can you Please Confirm Your Attendance By replying With Either Yes Or No. The Sample Motors Service Team." To the right of the message text area is a button labeled "ABC Check" with a checkmark icon. Below the message text area, it says "Characters: 183 Messages: 2". At the bottom center is a button labeled "+ Add field...". At the bottom left is a "Cancel" button with a red X icon, and at the bottom right is an "OK" button with a green checkmark icon.

Note:

If the message you create contains more than 160 characters including spaces you will be charged for two SMS's i.e., 160 characters Inc. spaces = .22 cents + 19 characters Inc. spaces = .44 cents etc.

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Custom message includes client/vehicle details using the Add field button to be sent to all clients within the booking date range.



The screenshot shows a window titled "SMS template" with a close button in the top right corner. Inside the window, there is a "Title" field containing the text "Booking Reminder". Below this is a "Message" field containing the following text: "Hi <!--ClientSalutation--> This Is A Friendly Reminder That Your <!--VehicleMake--> <!--VehicleModel--> <!--VehicleRegistration--> Is Booked In For A <!--ServiceDue--> Can You Please Confirm Your Attendance By Replying With Either Yes Or No. The Sample Motors Service Team." To the right of the message field is a "Check" button with an "ABC" icon. Below the message field, it says "Characters: 278 Messages: 2". Below that is a red note: "Note - this message may change size when the merge fields are resolved." At the bottom center is a button with a plus icon and the text "Add field...". At the bottom left is a "Cancel" button with a red "X" icon, and at the bottom right is an "OK" button with a green checkmark icon.

Title: Booking Reminder

Message: Hi <!--ClientSalutation--> This Is A Friendly Reminder That Your <!--VehicleMake--> <!--VehicleModel--> <!--VehicleRegistration--> Is Booked In For A <!--ServiceDue--> Can You Please Confirm Your Attendance By Replying With Either Yes Or No. The Sample Motors Service Team.

Characters: 278 Messages: 2

Note - this message may change size when the merge fields are resolved.

+ Add field...

Cancel OK

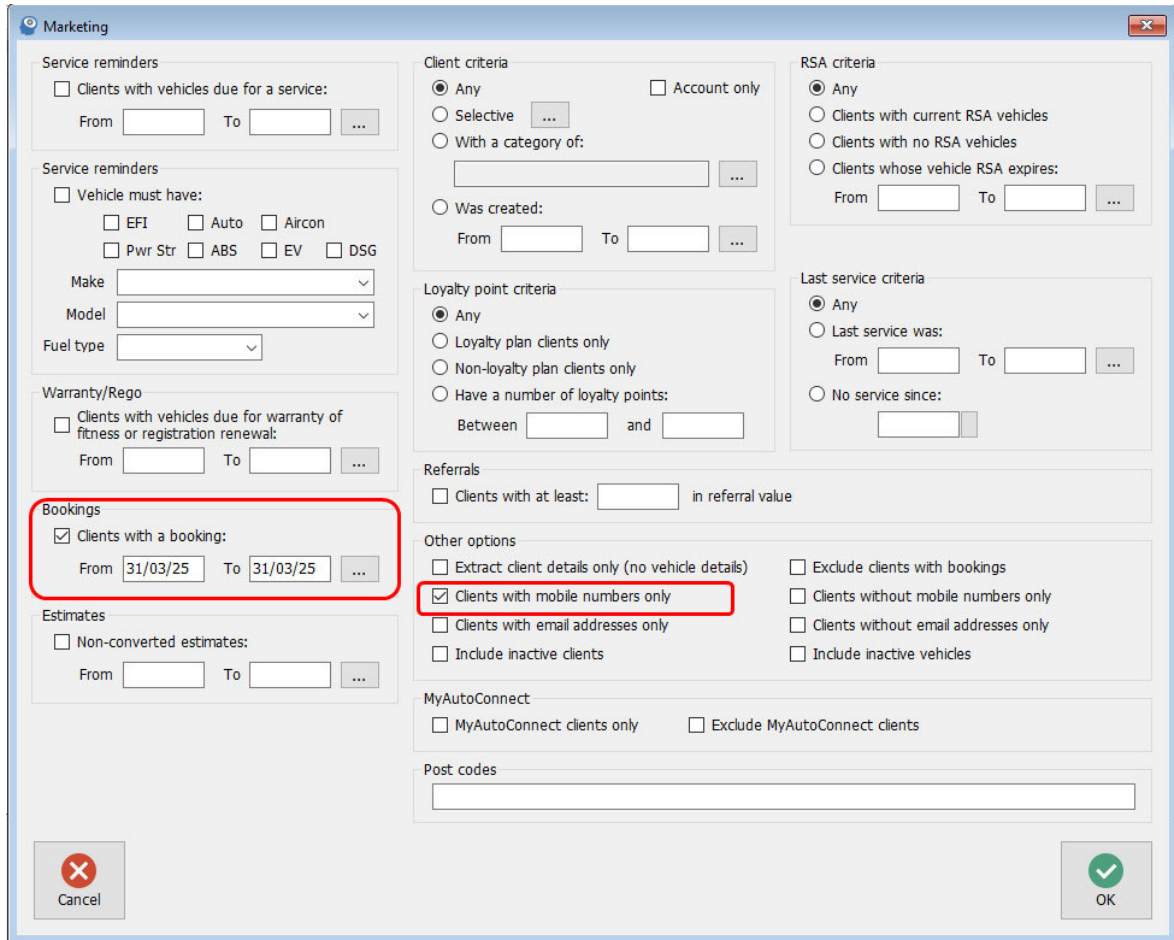
Setup Complete.

SMS: Process Date:

Suggest the sending of all SMS booking reminders be done on either one or two days prior to the actual booking i.e. booking date Tuesday 31/3/25 reminder to be sent on Monday 30/3/25.

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SMS Sending: Marketing.



The Marketing dialog box is used to configure SMS sending criteria. It includes sections for Service reminders, Client criteria, RSA criteria, Loyalty point criteria, Last service criteria, Referrals, Other options, MyAutoConnect, and Post codes. The 'Bookings' section is highlighted with a red box, showing the 'Clients with a booking' checkbox checked and the date range set to 31/03/25. The 'Other options' section also has a red box around the 'Clients with mobile numbers only' checkbox, which is checked.

Service reminders

☐ Clients with vehicles due for a service:
From To ...

Service reminders

☐ Vehicle must have:

☐ EFI ☐ Auto ☐ Aircon
☐ Pwr Str ☐ ABS ☐ EV ☐ DSG

Make
Model
Fuel type

Warranty/Rego

☐ Clients with vehicles due for warranty of fitness or registration renewal:
From To ...

Bookings

☒ Clients with a booking:
From 31/03/25 To 31/03/25 ...

Estimates

☐ Non-converted estimates:
From To ...

Client criteria

☒ Any ☐ Account only
☐ Selective ...
☐ With a category of: ...
☐ Was created:
From To ...

Loyalty point criteria

☒ Any
☐ Loyalty plan clients only
☐ Non-loyalty plan clients only
☐ Have a number of loyalty points:
Between and

RSA criteria

☒ Any
☐ Clients with current RSA vehicles
☐ Clients with no RSA vehicles
☐ Clients whose vehicle RSA expires:
From To ...

Last service criteria

☒ Any
☐ Last service was:
From To ...
☐ No service since:

Referrals

☐ Clients with at least: in referral value

Other options

☐ Extract client details only (no vehicle details) ☐ Exclude clients with bookings
☒ Clients with mobile numbers only ☐ Clients without mobile numbers only
☐ Clients with email addresses only ☐ Clients without email addresses only
☐ Include inactive clients ☐ Include inactive vehicles

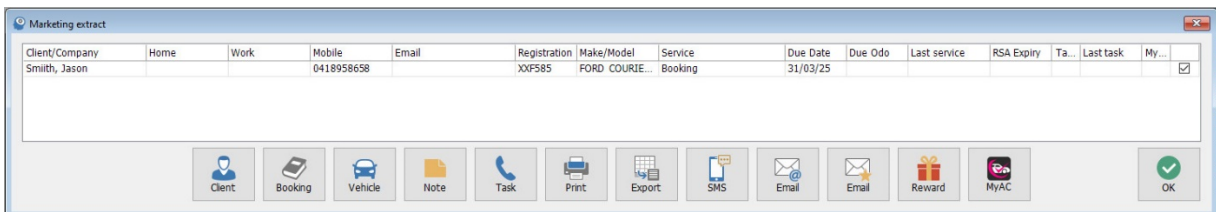
MyAutoConnect

☐ MyAutoConnect clients only ☐ Exclude MyAutoConnect clients

Post codes

1. Enter date range of diary booking i.e., 31/3/2025 in both fields.
2. Tick checkbox against Clients with mobile numbers only.
3. Click OK to go to results screen.

Results:



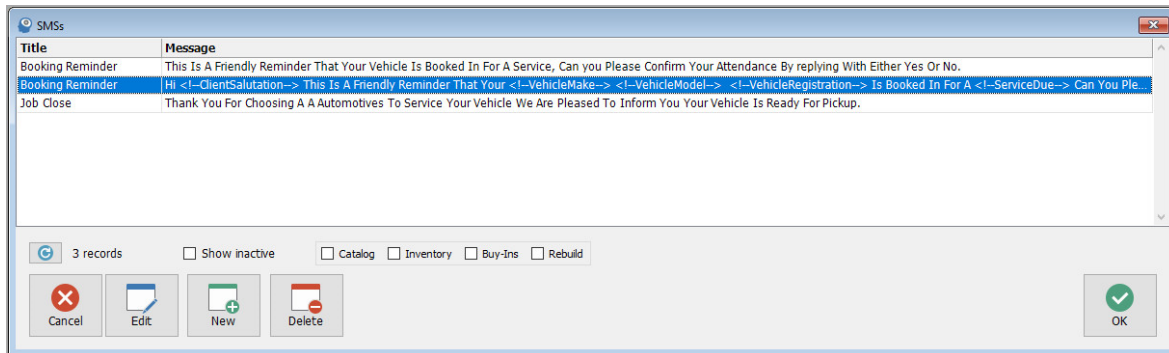
The Marketing extract results table displays a list of clients with their details and a 'My...' column. The table has columns for Client/Company, Home, Work, Mobile, Email, Registration, Make/Model, Service, Due Date, Due Odo, Last service, RSA Expiry, Ta..., Last task, and My... The first row shows data for Jason Smith.

Client/Company	Home	Work	Mobile	Email	Registration	Make/Model	Service	Due Date	Due Odo	Last service	RSA Expiry	Ta...	Last task	My...
Smith, Jason			0418958658		XXF585	FORD COURIE...	Booking	31/03/25						☒

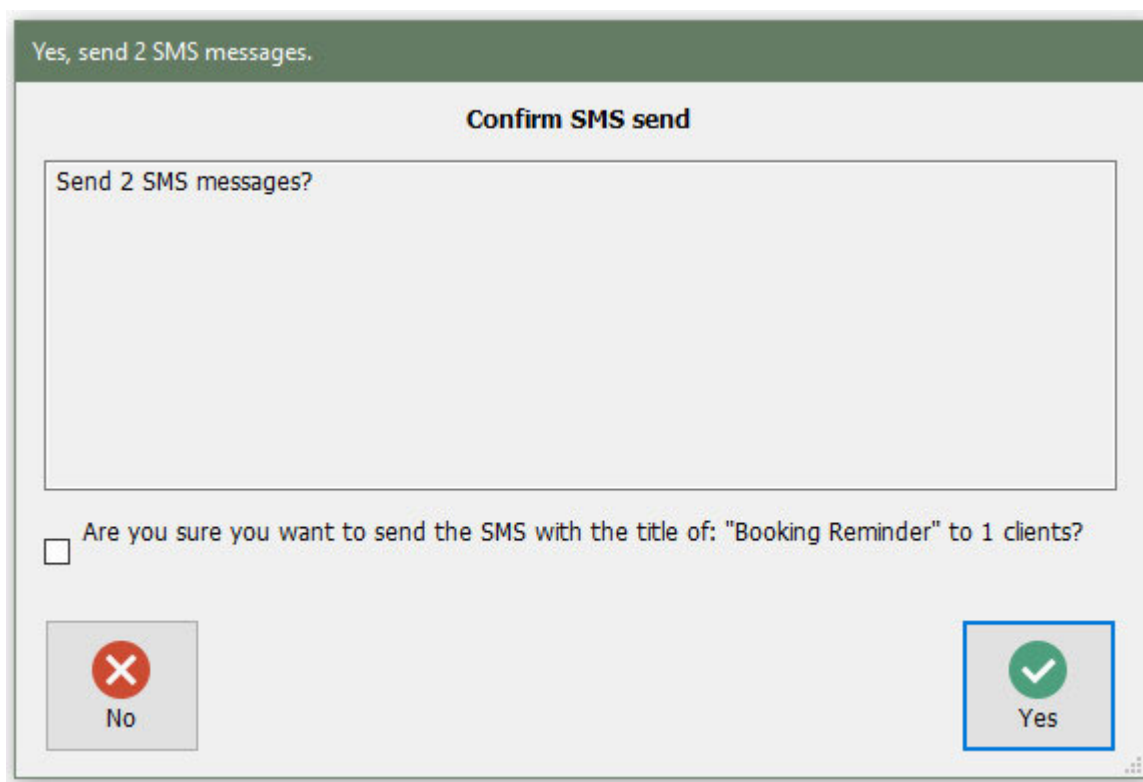
Below the table is a toolbar with icons for Client, Booking, Vehicle, Note, Task, Print, Export, SMS, Email, Email, Reward, MyAC, and OK.

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1. Click on the SMS button.



2. Highlight your message then click OK.

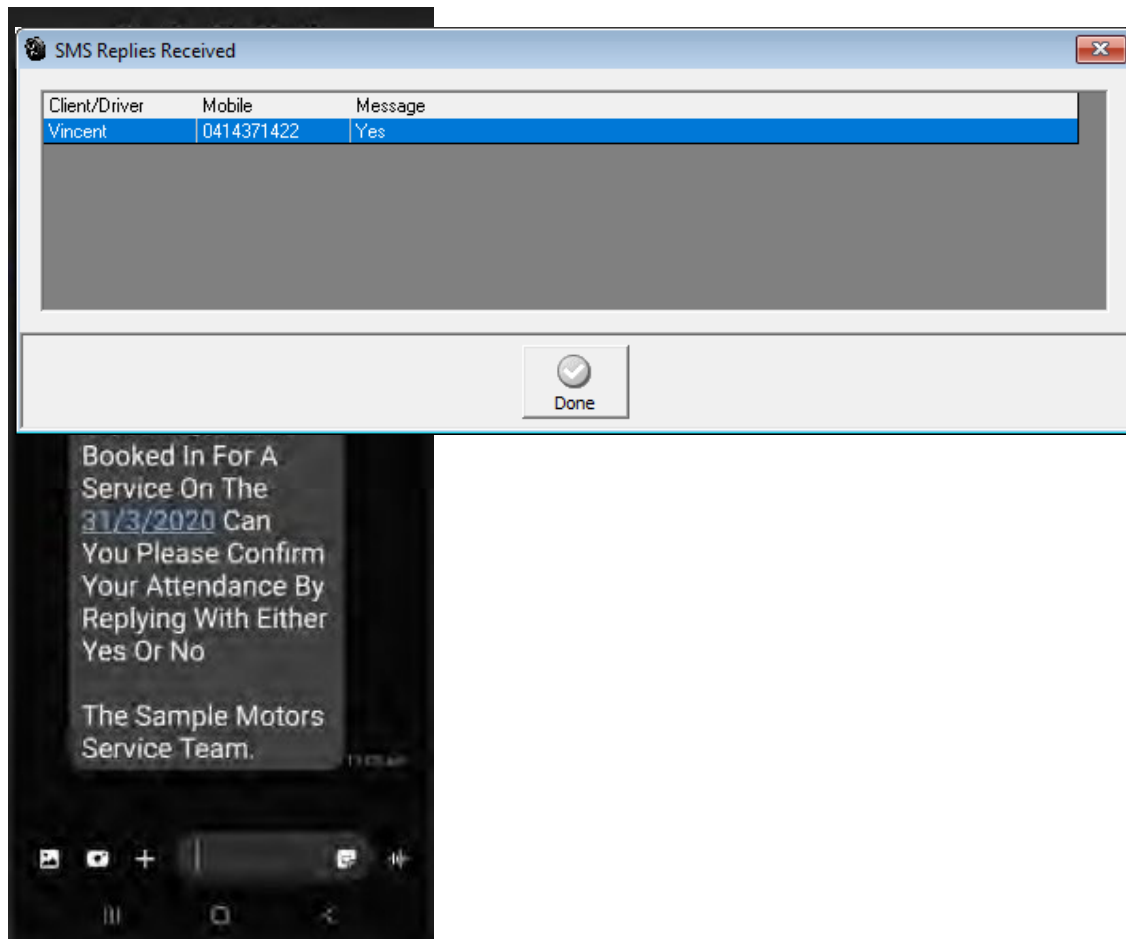


3. At confirmation screen tick the checkbox agreeing to the sending of the SMS message then OK to send.

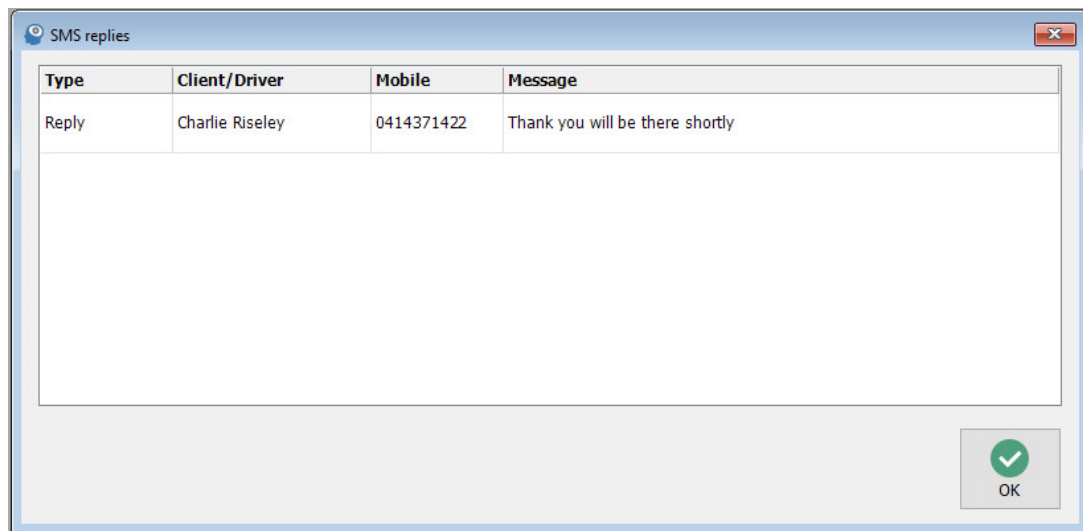
SMS sending completed.

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SMS Client Receiving.



SMS Client reply.



Optional:

If the client confirms their booking, you have the option to go to that booking and enter a note that the client has confirmed their booking.

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Diary - 6:27PM Thursday 14 November 2024

Day Week Jobs Tech Tasks 15/11/24

Booking Loan car Print Note

Tech Time Avail. 23.2 Alloc. 0 Rem. 23.2

Booking Closed Loan/aval Open Closure Loan/alloc Overdue On hold Loan/over

Client	Rego	Make/Model	Job#	D.C.	Col.	Note	Service	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	Hours
Edment Salvage Yard	SP0554	HOLDSUN BRUNA	139																								
n/a	859KGF	HYUNDAI EXCEL 1.5L																									
n/a	CPP932	TOYOTA COROLLA A...																									

Booking comments

Client Confirmed Booking

☐ To be closed ☐ On hold

Cancel OK

Click OK to save the note.

Client Form

Client: Riseley ☒ Private ☐ Business Parent: (None)

Contact details Profile History Tasks Comments Referrals Drivers

Date/Time	Type	Done by	Item
14/11/2024 6:25:06 PM	SMS		SMS Reply Received
13/11/2024 9:36:40 AM	SMS		SMS Sent - Job Close
12/11/2024 2:33:52 PM	SMS		SMS Sent - Booking Reminder
5/11/2024 11:37:13 AM	Phone		The Amazing Reward
3/11/2024 9:50:40 AM	SMS		SMS Sent - Job Close
24/10/2024 2:02:05 PM	Email		Summary 89 emailed to client
24/10/2024 1:59:01 PM	Email		Summary 89 emailed to client
24/10/2024 8:44:05 AM	Email		Summary 82 emailed to client

☐ Show email communications only

Cancel Vehicles Estimate Print Note Email Task Delete OK

All SMS communications with your clients are recorded in the client's task manager within the client form, they are also recorded in the SMS log file accessed under Reports – Other Reports – SMS log.

Double click on each entry to read the message.

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SMS Log.

AA Automotives					
SMS log					
For the date 14/11/24.					
	Date	Name	Mobile	#	Message
➡	14/11/24	Jason Smith	0412951377	1	Hi Jason the link for your vehicle report https://tinyurl.com/25zvvwo7
➡	14/11/24	Jason Smith	0412951377	1	Hi Jason the link for your vehicle report https://tinyurl.com/25zvvwo7
➡	14/11/24	Belmont Salvage Yard	0414371422	2	Hi John This Is A Friendly Reminder That Your HOLDEN BARINA 7P0654 Is Booked In For A Booking Can You Please Confirm Your Attendance By Replying With Either Yes Or No.
					The Sample Motors Service Team.
➡	14/11/24	Mr Doug Burgess	0412951377	2	Hi Valued Client This Is A Friendly Reminder That Your Ford Falcon AU-Li4.0i 00/01 6GG884 Is Booked In For A Booking Can You Please Confirm Your Attendance By Replying With Either Yes Or No.
					The Sample Motors Service Team.
➡	14/11/24	Mr Harry Summers	0415259698	2	Hi Harry This Is A Friendly Reminder That Your DENZA 9XGT XX0123 Is Booked In For A Booking Can You Please Confirm Your Attendance By Replying With Either Yes Or No.
					The Sample Motors Service Team.
➡	14/11/24	Belmont Salvage Yard	0414371422	2	Hi John This Is A Friendly Reminder That Your HOLDEN BARINA 7P0654 Is Booked In For A Booking Can You Please Confirm Your Attendance By Replying With Either Yes Or No.
					The Sample Motors Service Team.
📧	14/11/24	Charlie Riseley	0414371422	1	Thank you will be there shortly
➡	Messages sent:			10	
📧	Replies received:			1	

SMS Message Alpha Tags.

Since version 3.7.2 Automation allows the ability to use an Alpha header for your message, however there are limitations when using this feature that you need to be aware of.

To read more about Alpha headers please click the link below.

[http://www.microbase.com.au/resources/release notes v3.7.2.pdf](http://www.microbase.com.au/resources/release%20notes%20v3.7.2.pdf)