

# Customer Update User Manual

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## **Chapter 1: Introduction**

In response to the evolving needs of our data consolidation system, we have developed an additional module designed to address crucial aspects of customer information management. This module serves a dual purpose: to update customer data and to determine the activity status of each customer within our system.

### **1.1 Purpose and Scope**

The primary objective of this module is twofold. Firstly, it aims to update and maintain accurate customer information, ensuring that our records reflect the most current details of our clients. Secondly, it seeks to identify the activity status of customers, distinguishing between those who remain actively engaged with our services and those who have ceased transactions or services in the company.

## **Chapter 2: Module Overview: Customer Information Update and Activity Status**

### **2.1 Purpose**

The primary objective of this module is to update and maintain accurate customer information within the system. It specifically targets customers who have not engaged in any transactions or services with the company for a certain period, with a focus on identifying the activity status of each customer.

### **2.2 Key Features**

#### **Customer Information Update:**

- The module facilitates the update of customer details stored within the system.
- It ensures that customer information remains current and relevant for business operations.

#### **Activity Status Identification:**

- The module identifies the activity status of each customer based on their transaction history.
- It distinguishes between active and inactive customers to streamline communication and marketing efforts.

#### **Historical Transaction Analysis:**

- The module conducts a thorough analysis of customer transaction history.
- It identifies customers who have not engaged in any transactions or services since 2020 or an earlier specified timeframe.

### **Data Consolidation and Management:**

- The module contributes to the overall data consolidation system by managing and updating customer data efficiently.
- It ensures data integrity and accuracy by regularly reviewing and updating customer information.

## **2.3 Work Flow**

### **Data Retrieval:**

- The module retrieves customer data from the centralized database or data warehouse.
- It includes details such as customer names, contact information, transaction history, and activity status.

### **Activity Status Determination:**

- Using predefined criteria, the module determines the activity status of each customer.
- Customers who have not engaged in any transactions since 2020 or an earlier specified period are flagged as inactive.

### **Information Update Process:**

- The module provides tools and interfaces for updating customer information.
- It allows users to edit contact details, preferences, and other relevant information as needed.

### **Activity Status Reporting:**

- The module generates reports highlighting the activity status of customers.
- It provides insights into the proportion of active and inactive customers within the database.

## **2.4 Benefits**

- **Data Accuracy:** Ensures that customer information is accurate and up-to-date, enhancing the reliability of business operations.
- **Targeted Communication:** Enables targeted communication and marketing strategies by identifying active and inactive customers.
- **Resource Optimization:** Helps optimize resources by focusing efforts on engaging with active customers and re-engaging with inactive ones.
- **Compliance:** Ensures compliance with data protection regulations by maintaining accurate customer records.

## 2.5 Conclusion

In summary, the additional module created within the data consolidation system serves as a vital tool for updating customer information and determining activity status. By analyzing historical transaction data and facilitating information updates, the module contributes to data integrity and enables strategic decision-making in customer engagement and communication efforts.

## Chapter 3: User Manual

### User type:

- System Administrator
- Sales Manager
- Sales Consultant

### 3.1 System Admin

**3.1.1 Inactive Customer** - List of all inactive customer who have not engaged in any transaction or service since 2020 or earlier within the company.


The screenshot shows the 'AutoHub Connect' interface. The left sidebar menu includes options like Dashboard, Data Management, Database Compliance, SMS Service, LTO Update, Employees, Reports, Configuration, and Customer update. The 'Inactive Customer' option under 'Customer update' is highlighted with a red circle. The main content area shows a 'Back | Inactive Customers' header. Below the header, there are summary statistics: Total (155,605), Incomplete (155,557), Updated (48), Active (41), and Inactive (5). A table lists inactive customers with columns for Name, Email, Mobile, Type, Date modified, and Customer status.

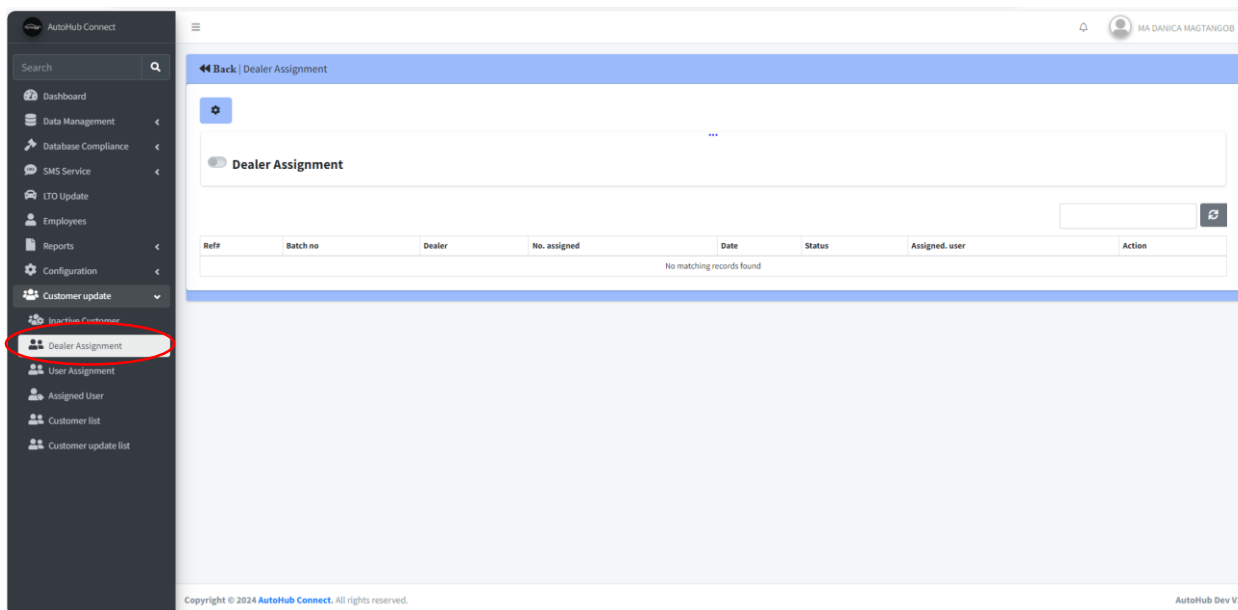
Name	Email	Mobile	Type	Date modified	Customer status
ULYSSES CO YOUNG	ULYOUNG09@GMAIL.COM	+639778998555	Individual	April 17, 2024 1 day ago	Active
FRANKLIN BENJAMIN YAZON TAPIA	TEST1@EMAIL.COM	+639089214235	Individual	April 17, 2024 1 day ago	Active
OSRIC TALPLACIDO TANTUCO	TESTEMAIL@EMAIL.COM	+63905231835	Individual	April 18, 2024 Today	Active
XIULI SHEN	SASD5DBD5B@GMAIL.COM	+639773620428	Individual	April 18, 2024 Today	Active
GILBERT TAVERA RODRIGUEZ	GILBERTTAVERARODRIGUEZ@GMAIL.COM	+639499493281	Individual	April 18, 2024 Today	Active

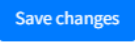
### 3.1.2 Dealer Assignment

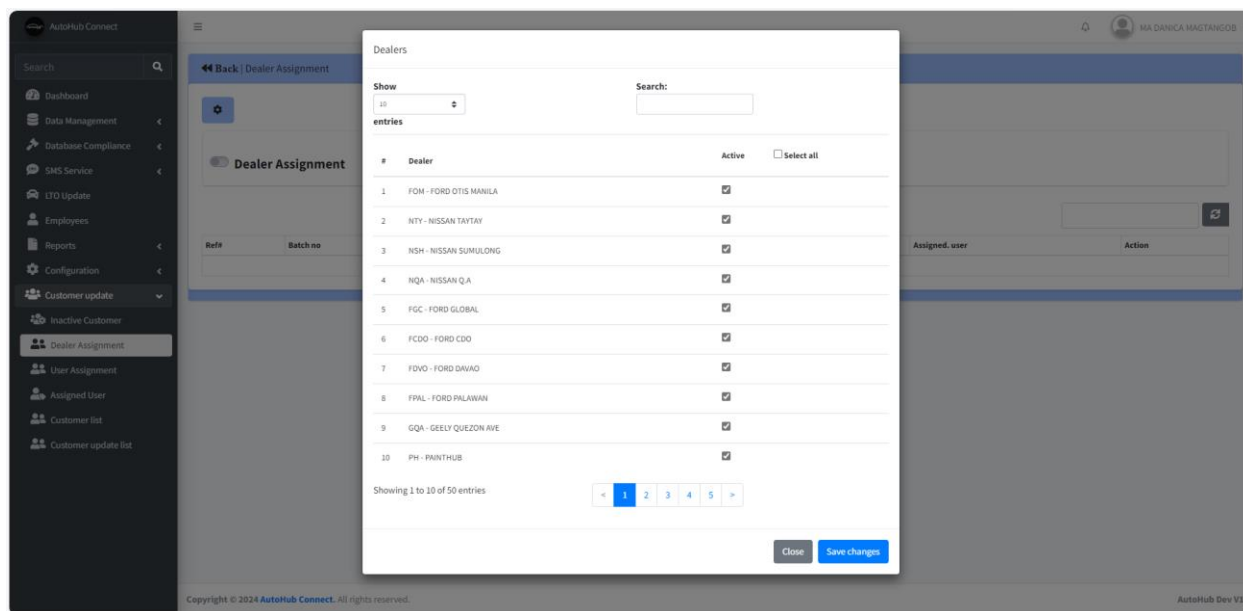
Involves distributing all inactive customers evenly among active dealership based on the total number of customers.

**Dealer Assignment settings** - Include / Exclude Dealer – this option serves to remove or exclude from dealer assignment/allocation of inactive customers by checked/unchecking the dealer.

- Click  icon, pop up box appear with list of active dealer for the above settings.

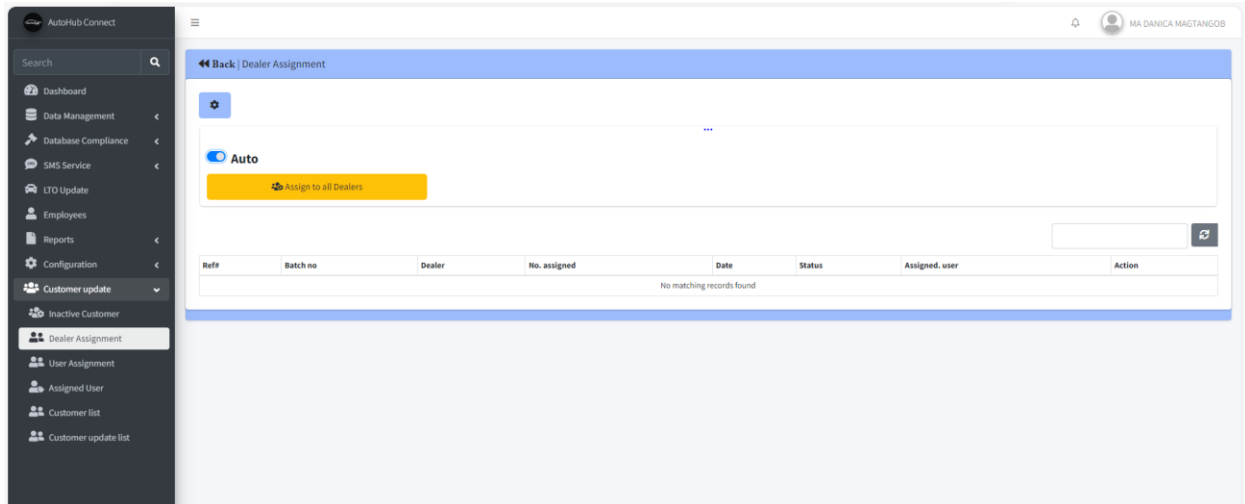


- Uncheck the box to exclude and checked to include in dealer assignment.
- Click  button to save.



### 3.1.3 Types of Dealer Assignment

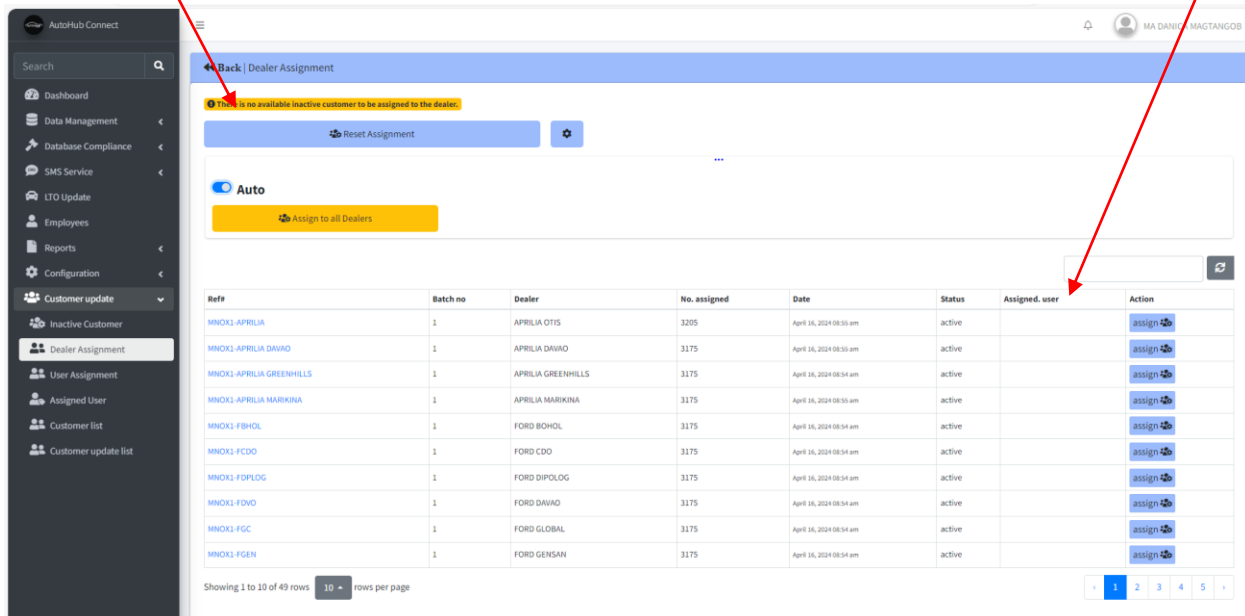
Auto - automatically assign to all active dealership evenly base on the number of inactive customers. Click  button.




Message indication that there is no inactive customer to be assign to dealership.

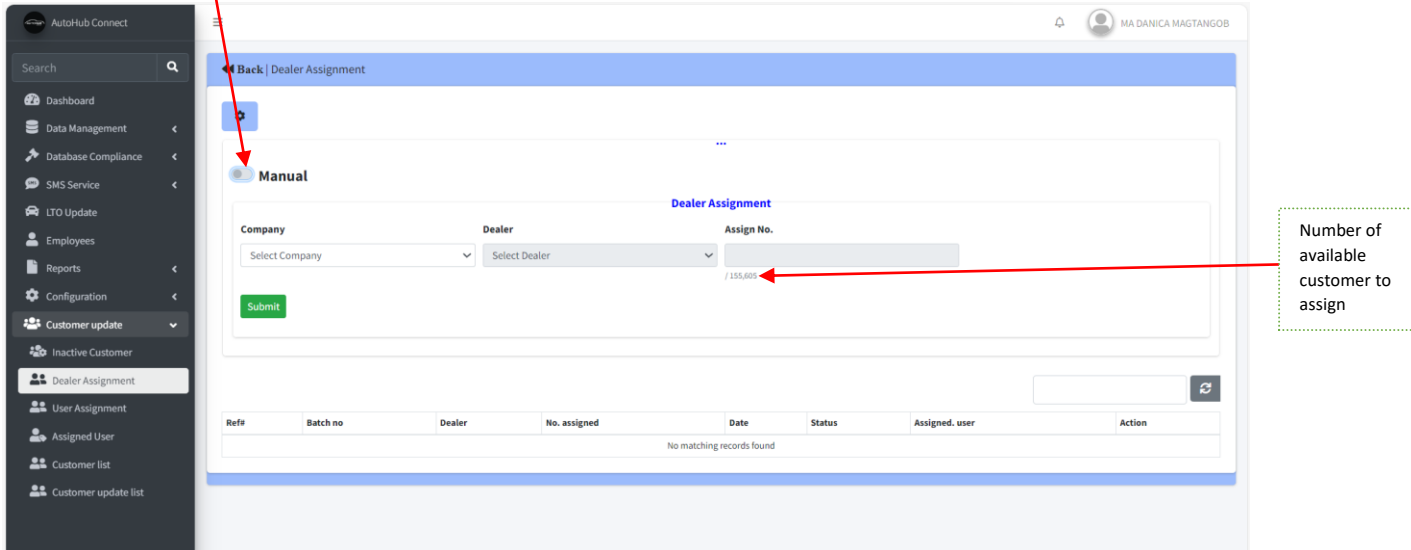
Table list of dealership, number of customer assigned, and the selection of Sales Manager.

**Reset Assignment** – remove all assigned inactive customers to all dealership. Click  button and wait for the message response.




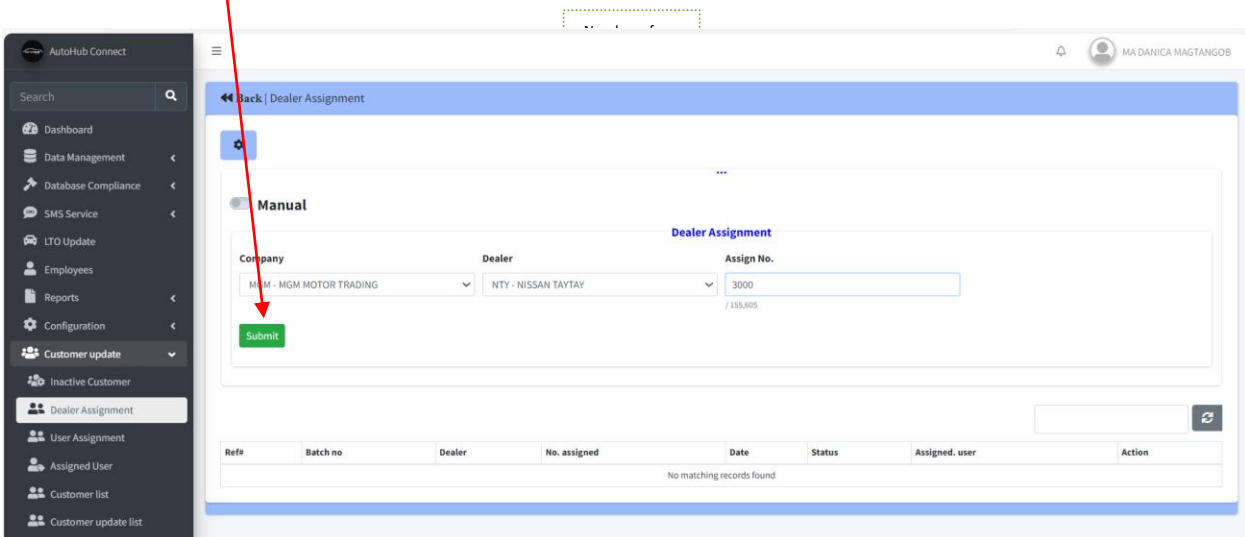
Manual – manually assignment for small number or selected dealers.

Click  this switch button until manually form assignment appear.




Number of available customer to assign

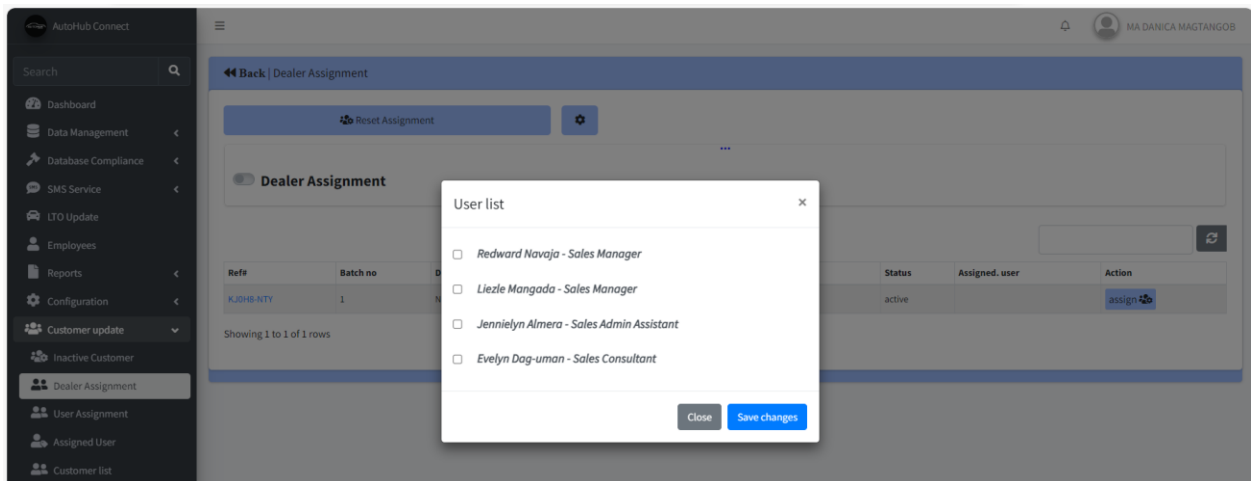
Click  button after completing the form and wait for the message response.



Once System administrator has successfully allocated all inactive customers to dealerships, The system admin must assign the delegated dealer databases per Sales Manager from each dealership. Sales Manager will then be responsible for distributing the customers to “Sales Team” within the same dealership. Their role including updating customer information and identifying whether customers are active or inactive.



Click  button and select the Sales Manager.



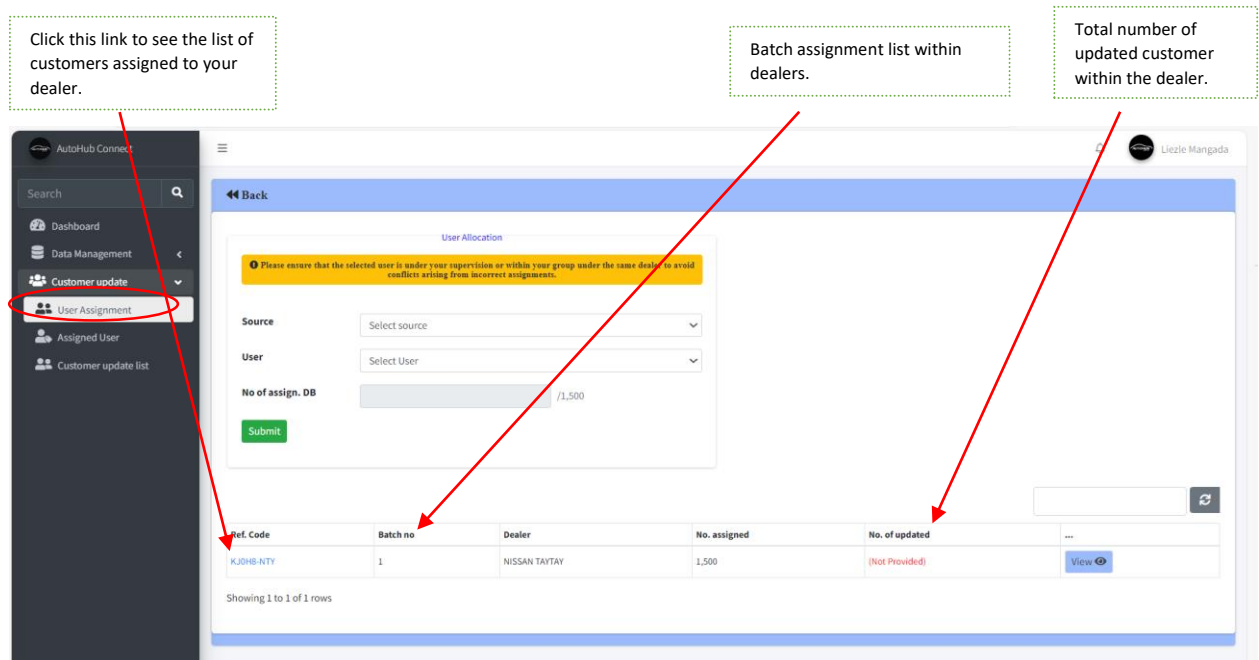
## 3.2 Sales Manager

Sales Manager will be responsible for updating or distributing the in-active customers to “Sales Team/Sale Consultant” within the same dealership. Their role including updating customer information and identifying whether customers are active or in active.

### 3.2.1 User Allocation

The assigned Sales Manager within each dealership is responsible for neither update nor distributing inactive customers to sales consultant / sales team for updates.

Sales Manager must sign up and go to the User assignment.



- Fill out all the information needed and click **Submit** button to complete user allocation form.

AutoHub Connect

Search

Dashboard

Data Management

Customer update

User Assignment

Assigned User

Customer list

Back

User Allocation

Source: 4QRZ0-NTY

User: Redward Navaja

No of assign.: 115 / 315

Submit

Ref#	Batch no	Dealer	No. assigned	No. of updated	...
4QRZ0-NTY	1	NISSAN TAYTAY	315	(Not Provided)	View

Showing 1 to 1 of 1 rows

- To view the list of user distribution within dealer, click **View** button.

The Sales Manager can view and remove the in-active customer to the assigned user/sales Consultant.

AutoHub Connect

Search

Dashboard

Data Management

Customer update

User Assignment

Assigned User

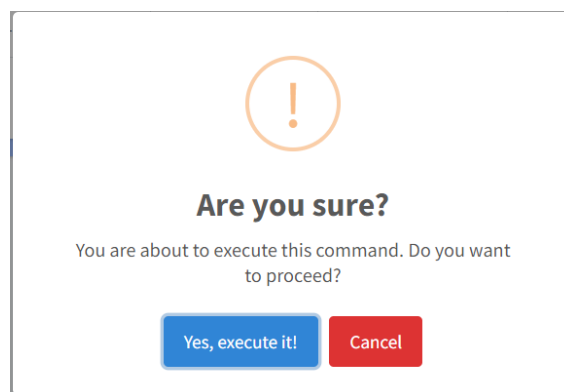
Customer update list

Back | User allocation

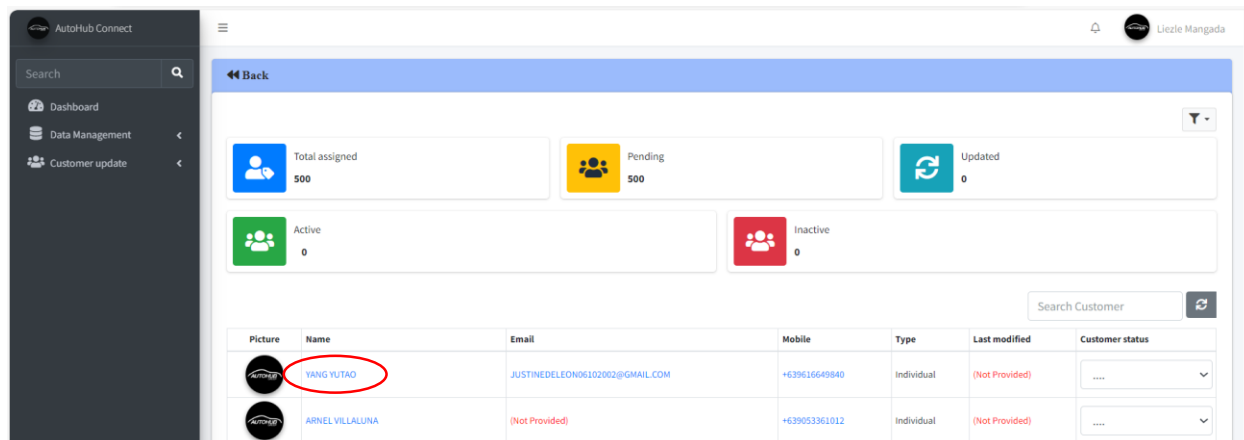
Ref. Code	Employee	No. assigned	No. of updated	Date assign.	Action
KJ0H6-NTY-A73P5-1	Evelyn Dag-uman	500	0	April 19, 2024 04:06:41 AM Assigned by: Lizzie Mangada	View Remove

Showing 1 to 1 of 1 rows

- A warning message will appear once the Sales Manager click remove.



Sales Manager can also update customer information, simply click customer's name this action will open the customer form, displaying the current information where you can make the necessary updates.



The screenshot shows the Customer Profile form for YANG YUTAO. The form is divided into two main sections: Information and Family. The Information section contains fields for Date of birth, Age, Gender, Religion, Marital Status, Nationality, Business/Company Name, Nature of Work/Business, Profession, Position, Source Company, and Source Dealer. The Family section contains fields for Category, Type, Status, AHA Status, Mode of Contact, Mobile, Landline, Other Mobile, Other Email, Home Phone, Business Phone, and Address 1.

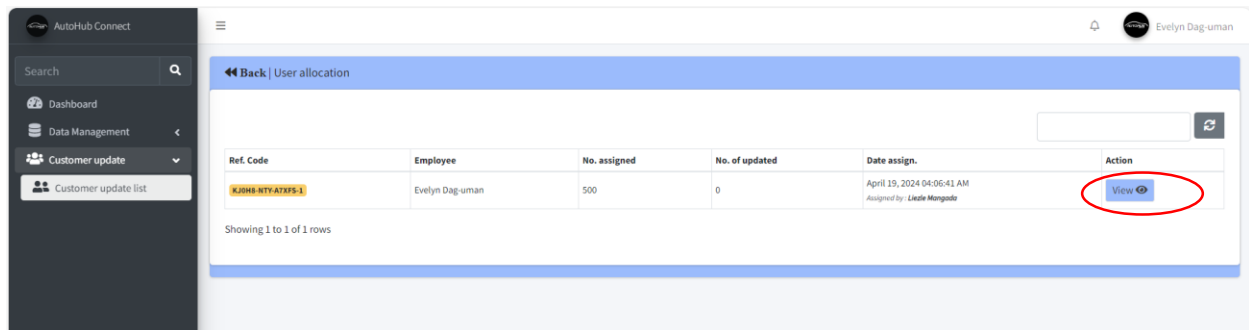
Field	Value
Date of birth	(Not Provided)
Age	(Not Provided)
Gender	Male
Religion	(Not Provided)
Marital Status	(Not Provided)
Nationality	(Not Provided)
Business/Company Name	(Not Provided)
Nature of Work/Business	CONSTRUCTION/UTILITIES/CONTRACTING
Profession	(Not Provided)
Position	(Not Provided)
Source Company	ZOOMHUB
Source Dealer	
Category	SVO
Type	Individual
Status	Inactive
AHA Status	Not Registered
Mode of Contact	(Not Provided)
Mobile	+639616649840
Landline	(Not Provided)
Other Mobile	(Not Provided)
Other Email	(Not Provided)
Home Phone	(Not Provided)
Business Phone	(Not Provided)
Address 1	(Not Provided)

### 3.3 Sales Consultant

#### 3.3.1 Customer Information Update

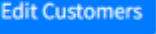
Users assigned to the task are responsible for updating customer information through their own process, which may include contacting customer via phone calls or any other means to determine their active or inactive

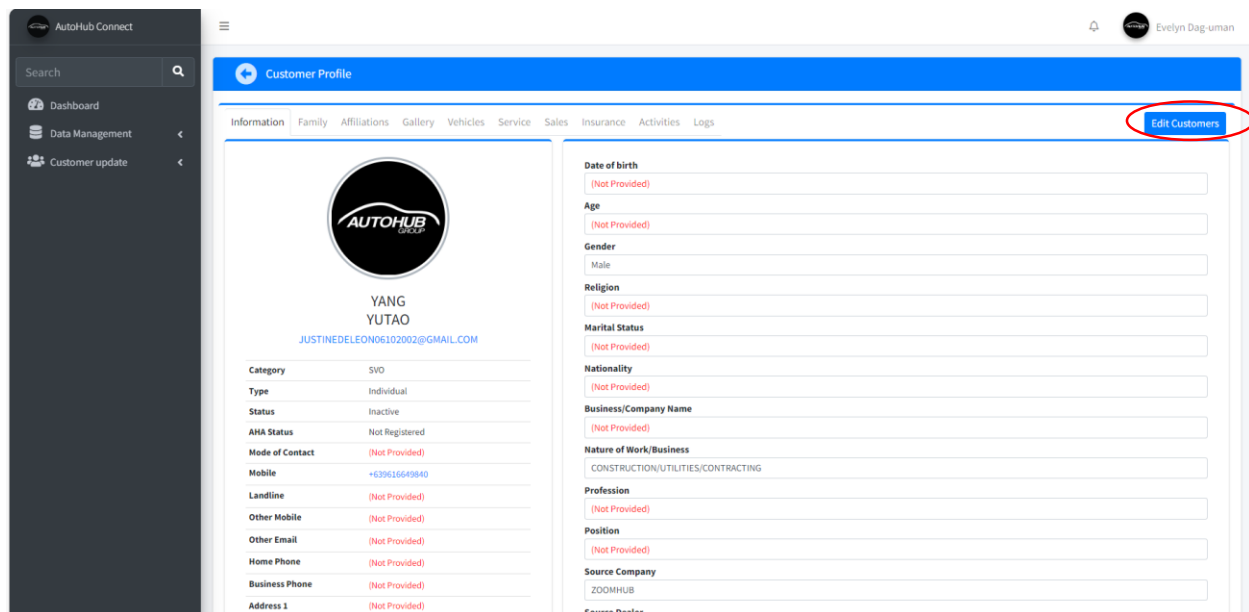
Click  button under Customer update list module



Click customer's name, this action will open the customer form, displaying the current information where you can make the necessary updates.

Name	Email	Mobile	Type	Last modified	Customer status
<a href="#">YANG YUTAO</a>	JUSTINEDELEON06102002@GMAIL.COM	+639616649840	Individual	(Not Provided)	....

Click  button to edit the customer information.



Updating customer information not limited to gender is automatically tag as active customer else, manually selection of customer status based on conducted information.

The screenshot displays the AutoHub Connect dashboard. On the left is a sidebar with navigation links: Dashboard, Data Management, and Customer update. The main area features a 'Back' button and a summary section with four status filters: Total assigned (500), Pending (499), Updated (1), and Active (1). Below these is a table of customers. The first row, for 'YANG YUTAO', has a dropdown menu for 'Customer status' with 'Active' selected and circled in red. The other rows show '(Not Provided)' for status. The table columns are Name, Email, Mobile, Type, Last modified, and Customer status.

Name	Email	Mobile	Type	Last modified	Customer status
YANG YUTAO	JUSTINEDELEON06102002@GMAIL.COM	+639616649840	Individual	April 19, 2024 Today	Active
ARNEL VILLALUNA	(Not Provided)	+639053361012	Individual	(Not Provided)	....
JOSEPH ANG TAN	JOVANISAN@YAHOO.COM	+639175120954	Individual	(Not Provided)	....
SHARMAINE RAVANCHO	SHARMAINERAVANCHO@YAHOO.COM	+639457262387	Individual	(Not Provided)	....
CHERRYL A MOLENO	(Not Provided)	+639152661775	Individual	(Not Provided)	....
RAYMOUND B MAPALAD	(Not Provided)	+639661326948	Individual	(Not Provided)	....
RICHARD SALVADOR MAKILAN	RSM_5301970@YAHOO.COM	+639178586416	Individual	(Not Provided)	....

Prepared by: App Dev