Set-up requirements for online self check-in

We have dedicated teams set aside to get you up and running as quickly as possible.

We just need you to provide a few details of the full configuration for your individual sites.

Set-up requirements for self check-in

1   We will need to engage with your IT department to inform them of the new software we will be installing on the RTC server. Please provide us with a name and contact details for our teams and make them aware we'll be in touch.

Name	
Phone Number	
Email address	

2   Please provide full terms and conditions to display on the self check-in site and the job card. These should reflect the T&Cs that you already have on your hard copy job card. Please ensure the content is typed into the box below so that we can copy and paste exactly as received to ensure there are no errors.

3   Please provide a description of any specific steps that a customer should take when dropping off their vehicle and keys so that these can be presented to the customer on completion of check-in. Please ensure the content is typed into the box below so that we can copy and paste exactly as received to ensure there are no errors.

4   Please provide a description of any specific steps that a courtesy car customer should take when dropping off their vehicle and keys so that these can be presented to the customer on completion of check-in. Please ensure the content is typed into the box below so that we can copy and paste exactly as received to ensure there are no errors.

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5   Please provide a description of any specific steps that a collection and delivery customer should take that will be presented to the customer on completion of check-in. Please ensure the content is typed into the box below so that we can copy and paste exactly as received to ensure there are no errors.

6   Please provide the SMS script that you would like to send to customers to accompany the encrypted link. Please confirm if you would like this to be set in addition to or instead of any reminder SMS you have in place. Please ensure the content is typed into the box below so that we can copy and paste exactly as received to ensure there are no errors. In order for this to be kept under 1 SMS the total character limit must be less than 130. Leave section blank if SMS template is not required.

☐ Send SMS **in addition to** the SMS reminder   ☐ Send SMS **instead of** the SMS reminder

7   Please provide the email script that you would like to send to customers to accompany the encrypted link. Please ensure the content is typed into the box below so that we can copy and paste exactly as received into our standard HTML to ensure there are no errors. If your own HTML is required, please supply us with the template. Leave section blank if email template is not required.

8   If you wish to send both an SMS and an email but based on priority e.g. send an SMS but if no mobile number exists send an email. Please confirm what the priority should be.

☐ Always send both   ☐ Send SMS first   ☐ Send email first

9   Do you require prices to be shown against labour?

☐ Show prices   ☐ Hide prices

10   The self check-in link will be sent two days prior to the booking date. If you require this to be sent one or three days prior, please indicate below.
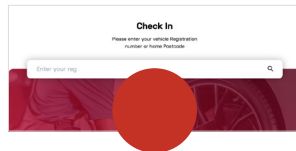
1 Day	
2 Days (Default)	
3 Days	

11   Please provide a copy of the company logo you wish to display on the self check-in site.
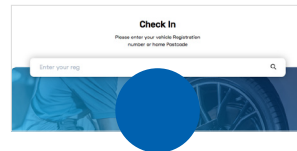**This should be in a .JPEG or .PNG format and must not exceed 1MB in size.**

12   Please indicate which of the following colour themes you would like us to apply:
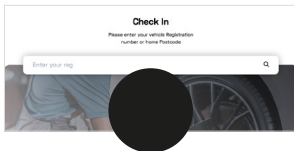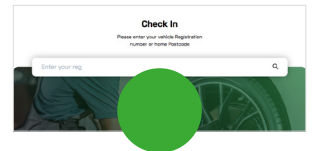

☐ Theme 1 – Black   ☐ Theme 2 – Red   ☐ Theme 3 – Blue   ☐ Theme 4 – Green

Notes

- We will set up and activate the RTC digital job card.
- We will extract dealer name, address, phone number and opening times from your existing RTC setup. You can confirm that this information is correct by accessing the information button in the bottom left hand corner of the main screen in RTC Link system.
- The description for the status of the job will be *"Customer Checked-In Online"*
- Jobs where the customer has booked in online will appear in **No Shows** in Workshop Management and will appear as **light yellow** with **red** text.
- When the customer arrives on site to drop the vehicle off, you will need to set the vehicle **'In on site'** as per the normal process.
- If you have requested that the self check-in SMS replaces the reminder booking SMS, please note your customers may receive both SMSs for a short period of time whilst any scheduled changes wash through.
- Customers will be able to download a copy of the signed job card following completion of the self check-in process.