The Autosoft DMS's Service Schedule application is a quick scheduler that allows you to schedule appointments from any repair order screen. Service Schedule also enables dealerships to allow OEMs and third-party integrations to automatically place Web appointments onto the schedule.

This document details the setup necessary to allow for automatic Web appointment placement on your Autosoft Service Schedule. To use automatic scheduling, you must:

- Organize your schedule by advisor.

- Display appointments as single 15-minute cells.

- Check the **Schedule Web Appointments Automatically** checkbox on the Shop Schedule screen. (Once this box is checked, the system will automatically uncheck the **Display Scheduled Appointments With Quoted Time** box to allow for the single 15-minute cell display.)

If your Service Schedule is currently set up with custom columns or technicians, you will need to create advisor columns and move any existing appointments from their custom or technician columns to advisor columns.

It is imperative that you follow the setup guidelines established here to ensure automatic scheduling functions correctly and effectively for your dealership.

Column Setup

The **Column Setup** button allows you to establish schedules for each of your advisors, to block off vacation time, and to dedicate your advisors to the appropriate area of the Service Department. Each advisor column can be comprised of up to 10 narrower columns, allowing overlapping appointments to be set in that column.

> **Important:** To use automatic Web appointment placement on your Service Schedule, you must organize your schedule using only advisor columns.

Creating a Column

1. Click the **Column Setup** button at the bottom of the Service Schedule quick scheduler. The Column Setup screen appears.

2. In the **Advisor/Tech** field, use the drop-down menu to choose an advisor. The Column Setup screen pulls from the list of advisors entered during Service Setup to create the schedule columns.

3. Use the **Header** field to assign the column name as it will appear on the schedule. You can choose to use the advisor's full name, a nickname, or first or last name only.

4. Use the **Num of Columns** drop-down menu to assign from one to 10 columns to the advisor under the header. Click the drop-down and select the number of columns appropriate for the advisor.

Note: If you attempt to reduce the number of columns for an advisor (for example, from three to two or two to one) and the change would result in any overlapping of appointments, the system will alert you that appointments within the columns will conflict with each other as a result of the change. Click **OK** to acknowledge the message. The change in number of columns will be blocked. Prior to retrying, reschedule any appointments that would overlap to avoid conflicts.

5. The **Daily Schedule** tab allows you to enter daily start and quit times for each advisor. For each day of the week, use the drop-down menu to choose the appropriate **Start** and **Quit** times for the advisor using a 24-hour clock. To signify that an advisor does not work on a particular day, choose the blank entry at the top of the drop-down menu.

Important: Advisor start times cannot be earlier than 30 minutes prior to the shop start time you entered in Shop Setup.

6. Click the **Lunch Schedule** tab to note the individual's lunch break for each day of the week, entering the **Start** and **Quit** time for the lunch break.

7. Use the **Vacation** tab to mark an advisor unavailable when he or she schedules vacation time. Use the drop-down menus in the **Start Date** and **End Date** fields to note the length of the individual's vacation. Click **Apply**. The dates of the vacation will appear in the box to the right.

   If an advisor decides not to take some or all of the vacation time you entered, just click on the day or hold the shift key and select all or several vacation days at once with your mouse. Click **Remove**. A message will appear asking if you are sure you want to remove the vacation time. Click **Yes**.

Tip: If an advisor for whom you are scheduling vacation time has appointments scheduled during the requested vacation period, the system will prompt you to reschedule the appointments before approving vacation. Click **OK**, close the Column Setup screen, and return to the Service Schedule main screen to reschedule the appointments. Once you have rescheduled the necessary appointments, you can repeat Step 7 to add the advisor's vacation time to the schedule.

8. In the Dedicated Service section, click the circle next to the Service area that applies to the advisor: **Service**, **Body**, **Quick Service**, or **Serv/QService**. This will place the advisor on the appropriate schedule/s.

9. Click **Update Column** to save the data.

10. The **Column List** on the right side of the screen will allow you to quickly view the day's starting and quitting times for all advisors. The top of the list will display the day's date. Beneath the date, each advisor will be listed by employee number, first and last names, start and quit times, and dedicated service area.

    You can use the Column List to determine the order in which the columns will appear on the schedule. The first advisor on the list will be the leftmost column on the schedule, while the last advisor listed will be the rightmost column on the schedule. To rearrange the list—and the columns—click on an advisor in the Column List and drag the name up or down in the list, dropping the advisor into the position in the list that corresponds to the desired column position on the schedule.

11. Click **Close** to close the Column Setup and return to the Service Schedule main screen.

Moving Appointments to a New Column

After you've created new columns, you can move appointments from their existing columns to the new columns. You cannot delete a column containing future appointments.

To move appointments from one column to another, follow this process. you may find it helpful to consult the appointment list you printed in the previous "Printing Existing Service Schedule Appointments" section of this chapter to ensure no appointments are overlooked.

1. Right-click the appointment on the schedule.

2. Click the **Reschedule** button in the Schedule Info window. The appointment will be removed from the schedule, and the cursor will be loaded with an open rectangle. The customer's name will also appear in a separate rectangle.

    If you mistakenly begin the rescheduling process or decide not to move an appointment, use the **Cancel Action** button that appears in the bottom right of the Service Schedule main screen after you click **Reschedule** to return the appointment to its original location.

3. To assign the appointment to a new column, click the appropriate time slot in the new column. The appointment will be dropped in to the schedule.

> **Tip:** Because each advisor column is comprised of several narrower columns, you can schedule multiple appointments at the same time for an advisor, one in each smaller column. If you choose to switch advisors when you reschedule an appointment, the system will ask if you are sure you want to reassign the appointment to a different advisor. Click **Yes**.

Removing Columns

After all appointments are rescheduled to advisor columns, the previous technician or custom columns must be removed.

1. Click **Column Setup**.

2. From either the **Advisor/Tech** drop-down menu or the Column List on the right side of the screen, select the column, advisor, or technician you wish to remove.

3. After that column's information populates on the left side of the screen, click the **Remove Column** button.

4. If the column has future appointments assigned to it, you will be alerted that you must reschedule all appointments before the column can be removed from the schedule. *(See the "Moving Appointments from Their Current Column to a New Column" process above for detailed directions.)* A list of the date and time for each appointment will be displayed. Reschedule the appointments.

5. The system will prompt you to verify that you want to delete the column from the schedule. Click **Yes**.

Note: If the column you are removing contains any open appointments from past dates, a list of said appointments will be generated. Removing the column will prohibit the ability to carry over these open appointments. To continue, click **Yes**.

6. Click **Close** to return to the Service Schedule main screen.

Note: Once all columns on Service Schedule correspond with an advisor, appointments can be placed automatically. If appointments are currently displayed using quoted time, the option will be disabled once automatic scheduling is enabled. Future appointments will be displayed in single 15-minute cells.