Electronic Repair Order Dispatching

The Electronic Repair Orders (ERO) program is a complete R/O dispatching system. From the Service Writing module in the Autosoft DMS system, writers dispatch repairs to specific technicians. When the technicians log on to the ERO program, their work list automatically displays on the screen. The ERO refreshes every 45 seconds to ensure the list is current as repairs are assigned throughout the day.

Technicians log repairs on and off as they work on them. The system tracks the time and time units it takes to complete each repair. The Service Writers or Service Manager can view the assigned list and check the status of each repair at any time.

> **Tip:** If you prefer to use the Autosoft full dispatcher, please refer to Appendix B for information regarding the full dispatcher.

Entering Setup Information

First, you must enter setup information for the ERO dispatching. This includes entering passwords for technicians and creating shortcuts for the ERO program on each workstation. In addition, you will set the minimum dispatch time the ERO program will use.

Technician Setup

You must first enter the ERO password for each technician that will use the ERO feature. Technicians use the password to log on to the ERO program. Based on the ID and passwords used to log on, the ERO will automatically display the technician's repair orders.

1. Open ASI DMS.

2. Click **Service** on the ASI DMS main menu.

3. Click **System Setup** on the Service Writing main menu.

4. Click **Service Technicians**. The Technician Information screen appears.

5. Select a technician from the list on the right side of the screen.

6. In **ERO Password**, type the password the technician will use to log on to the ERO program. Passwords can be up to five alphanumeric characters.

7. Click **Save**.

8. Continue to add passwords using steps 4-5 for each technician as needed.

9. Click **Exit** to close the screen when you are finished.

ERO Setup

The Electronic Repair Orders program must be installed on each workstation separately. This allows you to control which workstations have access to the program.

1. Click **Miscellaneous Parameters**. The Miscellaneous Parameters screen appears.

2. Click **Setup ERO On This Client**.

3. Click **OK** when prompted to verify you want to set up the program.

4. An **ERO** icon will appear on the workstation's desktop.

5. Click **Close**.

6. Return to the Service Writing menu.

Minimum Dispatch Time

You need to set the minimum dispatch time. When a technician logs a repair on, the clock starts timing. If the technician logs off the repair before the minimum time elapses, the system will cancel the log on, and the *time will not be added to the repair*. The default minimum dispatch time is 3 minutes. You only need to edit the parameter if you want the minimum dispatch time to be other than 3 minutes.

1. Click **System Setup** on the Service Writing main menu.

2. Click **Tax Rates/Cost Codes** on the System Setup menu.

3. In **Minimum Dispatch Time Per Unit (Minutes)**, indicate the minimum minutes that must be logged for the log on to count. The minimum can be from 1 to 9 minutes.

4. Click **Save** to close the screen and save the setting.

Dispatching Repair Orders

Service Advisors can dispatch repair orders to technicians from the Service Scheduler or the Enter Conditions screen. The repair order will appear in the technician's repair list.

Dispatching from the Service Schedule Screen

1. Click **Repair Orders** on the Service Writing main menu.

2. Open any repair order screen

3. Click **Service Schedule** to open the scheduler.

4. Click **R/O List**. The Active R/O's screen appears.

5. Click the R/O you want to dispatch. A repair order must exist in the Service Writing module before you can dispatch it to a technician. Open repair orders will have a status "Open."

6. The ERO Dispatch screen appears.

7. Click the technician in the list on the left side of the screen you want to assign the repair/repair order.

8. The window on the bottom left side of the screen displays the repairs on the selected R/O. The repair number automatically defaults to "A" for **All Current Repairs**. If you want to assign all repairs on the repair order to the technician, leave the default entry. If you only want to assign a specific repair, click the repair in the repair list. The repair number will fill in the **Repair** field.

9. If necessary, click to select the priority level for the repair. Repairs flagged "Priority 1" will display red in the technician's ERO list. The technician should complete these repairs first. Repairs flagged "Priority 2" will display pink in the technician's ERO list. The technician should complete these repairs second. Repairs flagged "No Priority" will appear in the technician's ERO list without special formatting.

10. Click **Assign**. The repairs will appear in the technician's work list in the ERO program.

11. Click **Close** to close the screen.

ERO Dispatching from the Enter Conditions Screen

1. On the Enter Conditions screen (**Start Conditions** menu option), make sure the repair order you want to dispatch is displayed on the screen.

2. Click **ERO Dispatch**.

3. Click the technician in the list on the left side of the screen you want to assign the repair/repair order.

4. The window on the bottom left side of the screen displays the repairs on the selected R/O. The repair number automatically defaults to "A" for **All Current Repairs**. If you want to assign all repairs on the repair order to the technician, leave the default entry. If you only want to assign a specific repair, click the repair in the list. The repair number will fill in the **Repair** field.

5. If necessary, click to select the priority level for the repair. Repairs flagged "Priority 1" will display red in the technician's list. The technician should complete these repairs first. Repairs flagged "Priority 2" will display pink in the technician's list. The technician should complete these repairs second. Repairs flagged "No Priority" will appear in the technician's list without special formatting.

6. Click **Assign**. The repairs will appear in the technician's work list in the ERO Program.

Removing Repairs

1. Advance to the ERO Dispatch screen through the Service Schedule or the Enter Conditions screen.

2. Verify the correct repair order is displayed on the ERO Dispatch screen. The repair order number should display in the **R/O** field on the bottom of the screen.

3. Click the repair in the repair list you want to remove.

4. Click **Remove**.

5. The repair is removed from the technician's list.

Viewing all Dispatched Repairs

While on the ERO Dispatch screen, you can use the **List All Techs** button to view all dispatched repairs. The first number in parenthesis is the technician ID assigned the repair. Next, you will see the R/O number and repair number. To the right of the repair number, you will see a code in parenthesis that identifies the status of the repair. The repair description/complaint is the last item displayed.

There are six possible status codes. The status changes as the technician works on the repair and finalizes it. Below is a list of the status codes and what each code means.

- **(Que):** The repair has not yet been started. This status will appear only for repairs flagged "No Priority."

- **(P-1):** This status only appears for repairs that have been flagged "Priority 1." This status means that the repair has not yet been started or that it has been saved but not finalized.

- **(P-2):** This status only appears for repairs that have been flagged "Priority 2." This status means that the repair has not yet been started or that it has been saved but not finalized.

- **(Wrk):** The repair is being worked on. The technician has this repair logged on in the ERO program.

- **(T/A):** Time has been assigned to the repair. The technician has logged the repair on and off but has not finalized the repair. Instead, the technician saved the information using the **Save Story** button in the ERO program. The repair will remain in the technician's list until it is finalized.

- **(Fin)**: The repair has been finalized. A repair is finalized when the technician clicks the **Finalize Repair** button in the ERO program.

Below is an example of the Dispatched Jobs list. A breakdown has been provided for each technician in the list to help illustrate how the information is displayed.

```
             Dispatched Jobs - All Techs
(01) 40373 1(Fin) LUBE-OIL-FILTER
           2(P-1) RECALL 1245780
(01) 40383 1(P-2) HEATER RUNS COLD.
(01) 40386 1(T/A) LOF
-------------------------------------------------
(02) 40388 1(Que) CUSTOMER REQUESTS TUNE UP
-------------------------------------------------
(04) 40377 1(Wrk) LUBE OIL FILTER
```

Tech	R/O	Repair	Status	Description
01	40373	1	(Fin)	The repair has been finalized.
01	40373	2	(P-1)	The repair was flagged "Priority 1." The technician has not started this repair.
01	40383	1	(P-2)	The repair was flagged "Priority 2." The technician has not started this repair.
01	40386	1	(T/A)	The repair has had time applied to it, but the technician has not finalized the repair.
02	40388	1	(Que)	The repair was flagged "No Priority." The technician has not started this repair.
04	40377	1	(Wrk)	The technician is currently working on the repair.

Using the ERO Program

The ERO program runs outside of the Autosoft DMS Service Writing module. Each technician will log on to the program. The technician's work list will automatically display the assigned repairs, and the ERO will track the total time and time units for each repair. Technicians log repairs on and off and document repair information on one screen, simplifying the process.

Various manufacturer service history reporting is available in the ERO program. This allows the technician to check for any additional repairs that may be needed. The service history integration for each manufacturer works the same way it does on the Repair Order screens in the Service Writing module.

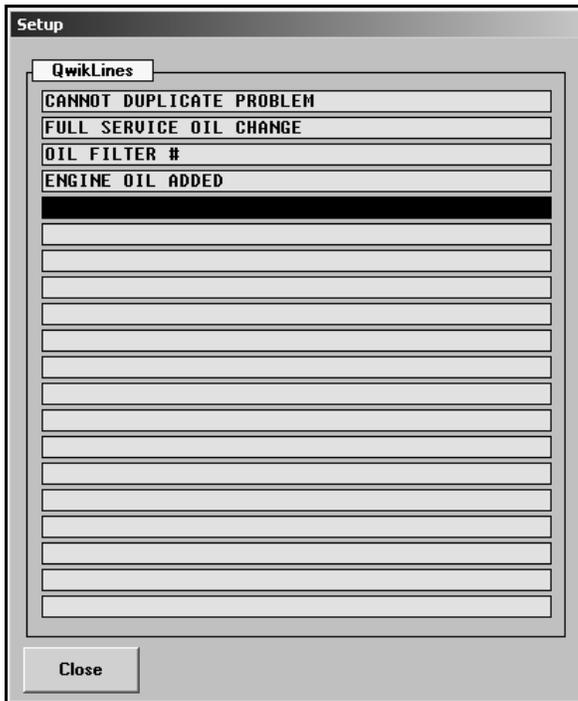## Logging on to the ERO Program

1. Double-click the **ERO** icon on the desktop.

2. Type your technician ID (user ID) and password on the prompt. (You can also click a technician in the list on the right side of the screen to have the ID automatically fill in on the prompt.)

3. The ERO opens and displays your repair orders.

Setting Up QwikLines

Each technician can save unique QwikLines. This is information that the technician may type frequently. Instead of having to repeatedly type the same information, the technician can select the text from his/her QwikLines list. QwikLines are not shared in a common list. *Each technician must enter his/her own QwikLines.*

1. Click **Setup**.

2. Type the information you want to save as your QwikLines. Each line holds up to 45 characters. If you require more than 45 characters, you must use multiple lines to add your text.

3. Click **Close**. The information is automatically saved when you close the screen.

Logging on Repairs

Only one repair can be logged on per technician at a time.

1. Click a repair in the window on the top left side of the screen.

2. The repair order number and repair number fill in on the screen for reference. The window on the bottom right side of the screen lists all the repairs on the repair order with descriptions for your reference.

3. Click **Log On**. The ERO program begins timing the repair. A yellow block appears in the center of the top window. It displays the time elapsed for the repair.

Tip: Once the repair is logged on, the **Log On** button becomes a **Cancel Log On** button. Click this button to cancel the log on. The repair is cleared from the screen, and no time is saved.

Logging off Repairs

1. Click **Log Off**.

2. The **Total Actual Minutes** and **Total Actual Units** fill in based on the time for the repair.

Tip: Remember, the minimum dispatch time can be set in the Schedule Xpress setup. If the technician logs off before the minimum time elapses, the time will not be added to the R/O.

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3. Use the lines at the bottom of the screen to enter information for the repair.

   You can pull your QwikLines to the repair by clicking **QwikLines** and clicking the line in your list. The mouse pointer becomes a piece of paper with a paper clip. Click on the line where you want to drop the QwikLine, and it will fill in the line for you. Remember, if you created a QwikLine that used two rows, you must select both rows of text to add to the story.

4. You have three options at this point:

   - If you added a story to the repair, click **Save Story** to save the changes. This leaves the repair in your list so you can log it on again or add additional information as needed. You will need to finalize the repair later to ensure it is flagged as finalized and to remove it from your list.

   - If this is the final repair on a repair order, click **Print Time Flags** to print the thermal sticker with the time for *all the repairs on the R/O*. You will need to print the time flags *before you finalize the last repair on an R/O*.

   - If you are finished with the repair, click **Finalize Repair** to finalize the repair and remove it from your list.

Important: In order to close a repair, you must click **Finalize Repair**. Logging off does not close a repair. The repair will remain in your ERO list until it is finalized.

Tip: Use the **Print LOF Window Sticker** button to print a static windshield label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft Forms division.

Sending Parts Requests

The Autosoft ERO Parts Request provides a communication tool for the Service Technicians and Parts Department. From the ERO screen, the Service Technician prepares a list of parts required for each repair order and sends the list to the Parts Department. A notification will appear on the Parts Department workstations that a parts request has been received. Once the Parts Department has fulfilled the request, the Parts Department sends message back to the technician that his/her parts are ready. The technician can pick up the parts without having to wait in the Parts Department for the order to be fulfilled.

1. Select a repair order from the work list on the left side of the screen.

2. Click **Parts Request** on the bottom right side of the Electronic Repair Order screen. The Parts Request screen appears.

3. Type the part number for the parts you want to request in the **Part Number** field and the quantity you are requesting in **Qty**.

    You can also select a part number from the customer's repair history listed on the right side of the screen to add to the request. Click the part number in the customer's history, and the mouse cursor becomes a yellow piece of paper. Click the **Parts Number** field where you want to add the part number. When selecting a part from the repair history, the quantity defaults to the quantity for that service date. Edit the quantity as needed.

    If you need to remove a part, simply change the quantity to 0 (zero). The part will be removed when the request is sent to the Parts Department.

4. The **Description** and **O/H** fields fill in with the part name and on-hand quantity from the Master Inventory record.

5. Use the **Text Message** box to type any information that you want to send with the request. The counter workers can reply to this text when fulfilling the order.

6. Click **Send** when you are finished adding parts to this request. You will be back at the Electronic Repair Order screen.

7. You will receive a message on the Electronic Repair Orders screen when the parts are ready. If a counter worker sent you a text message, it will appear in the yellow Answer Back window. Otherwise, the window will read, "Your Parts Are Ready."

8. Click **OK** to acknowledge the message.

Viewing History

Use the **History** button on the bottom of the ERO screen to view the customer's service history. A list of the service dates appears. Click a date to view the repair order.

Viewing Stats

The **Stats** button on the bottom of the ERO screen allows you to view your time. The list identifies the time for individual repairs and your total time for all the repairs in the list. The statistics for all *closed* repair orders are cleared during the daily R/O update.

Minimizing the ERO

Once the ERO program is open, you can minimize it. This allows you to keep the program open while you work on other things. Click **Minimize** on the Electronic Repair Order screen, and the ERO program is minimized to your task bar. When you need to work in the ERO program, click the ERO item on your task bar at the bottom of your screen. This gives you instant access to the program whenever you need it.

Switching Users

A new technician can log on to the ERO program while it is already open on the workstation. This allows multiple technicians to use the same workstation without having to close and reopen the program.

1. Click **New User**.

2. Type your user ID and password on the prompt. (You can also click a technician in the list on the right side of the screen to have the ID automatically fill in on the prompt.)

3. The ERO opens and displays your repair orders.

Closing the ERO Program

At the end of the day, the ERO program should be closed.

1. Click **Close**.

2. Click **OK** when prompted to verify you want to close the program.

Printing the Dispatcher Time Flags

You can print the dispatcher time flags from the Daily R/O Update menu. *This is a summary of the time for each technician for the day*. The time flags must be printed before the daily R/O update since the update clears the dispatcher information for all closed repair orders.

1. Click **Daily R/O Update** on the Service Writing Main menu.

2. Click **Dispatcher Time Flags**.

3. When prompted to verify your printer is ready, select your print criteria.

Important:	In order to ensure accurate time flags, you can only use one dispatch in the ASI DMS system. You must choose to use the traditional dispatcher (available using the **Dispatcher** button on the Service Writing menu) or the ERO dispatcher (available from the Enter Conditions screen or Xpress Scheduler). You cannot use both.

Purging Stale Records

If a Service Writer attempts to close a repair that a technician has logged on, the system will display a warning that a technician is logged on to the repair. Make sure the technician is finished with the repair, and have the technician finalize it before you continue.   In the event a repair order is updated before the technician has finished or finalized a repair, the repair will stay in the technician's list indefinitely. In this event, you will have to purge the stale records.

1. Click **Service** on the ASI DMS main menu.

2. Click **Dispatching** on the Service main menu.

3. Accept the date and time if prompted.

4. Click **Setup**.

5. Click **Purge Stale Data**.

6. Click **OK** when prompted you want to purge the data.

7. The system displays a "Did That" message when the purge is complete. Click **OK** to acknowledge the message.