

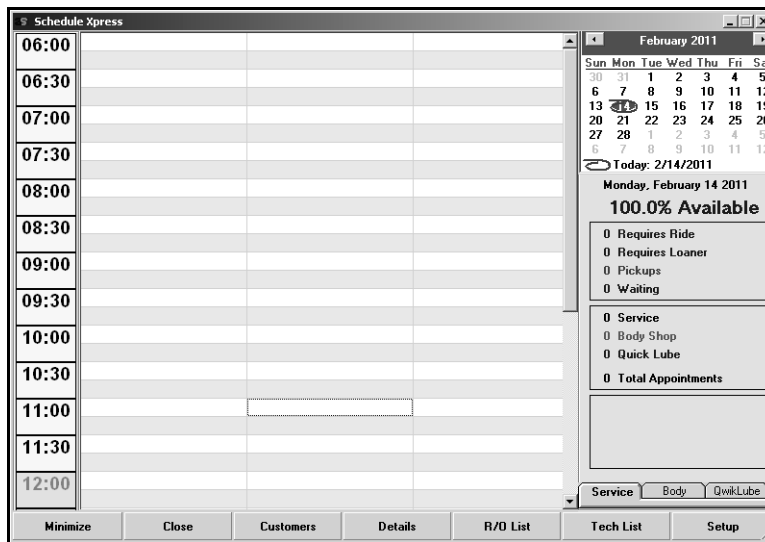
Chapter 4 Schedule Xpress Scheduler

The Schedule Xpress scheduler is a quick scheduler that allows you to schedule appointments from the Repair Order screens. At the time of scheduling, you create a prewrite that can be pulled to a repair order when the customer arrives for service. If you prefer to use the Autosoft full Service Scheduler, please refer to Appendix A for information regarding the full scheduler.

Accessing the Schedule Xpress Scheduler

Initially, you can access the Schedule Xpress Scheduler from any repair order screen.

1. Click **Service Writing** on the ASI DMS main menu.
2. Click **Repair Orders** on the Service Writing menu.
3. Click **Start RO** (or any other button on the left side of the Repair Orders menu).
4. Click **Schedule Xpress**. The Schedule Xpress scheduler opens.



Tip: When scheduling appointments, you have the option of working on three separate schedules: Service, Body Shop, and Quick Lube. Use the tabs on the bottom right side of the Schedule Xpress screen to move among the schedules. You will set the default schedule for the workstation in the Schedule Xpress Setup. If you prefer not to use the separate schedules and want to see all appointments on one schedule, Autosoft recommends that you use the columns to categorize your appointments. For example, use the first column to schedule lube-oil-filter appointments, the second column to schedule transmission work, etc.

Entering Setup Information

Before you can use the scheduler, you must complete the setup. The setup information determines how the scheduler works. In addition, you have the option to set it as your default scheduler. If you set it as the default scheduler, you can access it from all the Repair Order screens, and the Schedule Xpress scheduler will open when you click **Scheduling** on the Service Writing main menu.

1. Click **Setup** on the bottom of the Schedule Xpress Scheduler. The Setup screen appears.

2. For each day of the week, click to select the **Start** and **Quit** time. A check mark will appear in the box for the time you select. Click a check mark to clear the time slot.

Tip: You can move carry over appointments from one day to another. When these appointments are moved, they will populate the first available slots on the schedule. Therefore, you may want to leave the top slots open or set the schedule to start 30 minutes earlier so carry over appointments will always be at the top of the schedule. Otherwise, the carry over appointments may end up being mixed in throughout the schedule wherever there is an open slot.

3. In **Appt's/Day**, indicate the number of appointments you want to schedule per day. The default entry is 20.
4. In **Hours/Day**, indicate the number of hours you want available on the schedule each day. The default entry is 48.

5. The **Make Xpress My Default Scheduler** box determines where you can access the Schedule Xpress scheduler. If you leave this box empty, you will only be able to access the Schedule Xpress scheduler on the Repair Order screens. The **Scheduling** button on the Service Writing main menu will open the full Autosoft Service Writing Scheduler. If you do not plan to use the Schedule Xpress Scheduler, leave this field blank, and refer to Appendix A for information on the full Autosoft Service Writing Scheduler.

If you select this box, the Schedule Xpress scheduler will be your default scheduler. In addition to accessing it from all the Repair Order screens, you can open the Schedule Xpress scheduler using the **Scheduling** button on the Service Writing main menu.

6. If you do not want to print prewrites, click to select **Don't Prompt To Print Prewrites**. The system will automatically skip the printing prompt. If you leave this field blank, the system will prompt you to print a prewrite when you save it. You can print it or skip printing at that time.
7. The **Run In 1024 x 768 Window** field affects how the scheduler displays on the screen. If you want it to run in a full window, click to select this box. This will change the resolution of your screen. Your current resolution is displayed under this field for your reference.
8. Use the **Default Schedule This Station** section to select the schedule you want to set as the default schedule for this workstation: Service, Body Shop, or Quick Lube. Click to select the circle next to the default you want to set. This schedule will automatically display when the Schedule Xpress scheduler opens. You can still view the other schedules using the Service, Body, and QwikLube tabs on the bottom of the schedule Xpress screen.
9. Use the **Schedule Layout** section to determine the number of slots that appear on the schedule each hour. Click to select 12, 16, or 32 slots per hour. The default is 32.
10. Use the **Schedule Availability** section to indicate if you want availability calculated based on the number of appointments or the number of hours scheduled each day. If you select **By Appointments**, the system uses the figure you specified in the **Appt's/Day** field to calculate the availability. If you select **By Hours**, the system uses the figure you specified in the **Hours/Day** field to calculate the availability. The schedule availability is displayed on the schedule.

11. Under **Schedule History**, determine if you want to keep the schedule history for 10 or 30 days. Click the circle in front of the option you want to select. The default is 10.
12. Use the **Show Detail** slider to determine how much detail shows when you view the schedule details (using the Details button on the main schedule Xpress screen). If you move the slider to the left, the detail screen will display only the first complaint added to the prewrite for the appointment. If you move the slider to the right, the detail screen will display all complaints added to the prewrite for the appointment.
13. Click **Close** to save the settings and close the screen.

Tip: You can preset the minimum minutes that must be logged in order for the log on to count using the **Minimum Dispatch Time Per Unit (Minutes)** field on the Tax Rates/Cost Codes screen, accessible through the Service Writing module's System Setup menu. The minimum can be from 1 to 9 minutes. The default value is 3. When a technician logs on to a repair, the clock starts timing. If the technician logs off the repair before the minimum time is reached, the system will cancel the log on.

Important: The **Ooops** button on the bottom of the Setup screen runs a utility that recovers the schedule data in the event that the date on a computer is off. The utility must be run on the computer that is experiencing the problem. Do not use this utility without assistance from the Autosoft support desk. Call (800) 473-4630 for support.

Scheduling Appointments

You have the option of selecting the day as the first step to scheduling an appointment or selecting the customer information as the first step to scheduling an appointment. You decide which method you want to use. It is most likely that you will use a combination of both methods based on the type of customer you are scheduling (new versus existing) and the flexibility of the customer's schedule.

Tip: The lines on Scheduler Xpress are in 30 minute increments, but you can use the columns to indicate any times within the 30 minutes you prefer. For example, the first for the 8:00 slot can be for 8:00, the second column at the 8:00 slot could be for 8:10, the third column at 8:00 could be for 8:20, etc. You can customize how you use the columns based on your dealership's need.

Selecting the Customer First

When scheduling an appointment, you have the option of selecting the customer information first before selecting the day. You would use this method for existing customers. This allows you to view their service history and check Chrysler VIP, Ford OASIS, or General Motors VIS to identify any additional repairs they may need for their appointment.

1. Click **Customers** on the Schedule Xpress main screen.
2. Use the Customer Search Criteria screen to search for the customer in the system. The screen will display a list of customers who meet the criteria you specify for the search. Hold the right mouse button down on a line in the list to view a summary of the customer's information and the customer's repair history. Click the customer you want to select.
3. The customer's information fills in on the screen.

The screenshot displays the 'Schedule Service' window. On the left, a form contains customer details: Customer (SMH 126476), Writer (01), Name (STEVE SMITH), Address (555 MAIN STREET, WEST MIDDLESEX, PA 16159), Home/Work/Cell phone numbers, VIN (2G1WH52K739126476), Year (2007), Make (CHEVROLET), Model (BLAZER), Color (BLACK), and Term (36). On the right, a table lists service items with columns for item ID, description, and price. Below the table are sections for 'Complaint', 'Quick Complaints', and 'Last Service' (05/15/08, 7132). At the bottom, there are buttons for 'Cancel', 'Schedule', 'Next', and 'Customer List'.

Item ID	Description	Price
40348	02 / 08 / 08 3123	
09	W RECALL 1245700	77.40
02	Q LUBE-OIL-FILTER	21.25

4. The **Writer** field automatically defaults to the writer ID selected for the workstation.
5. You can use the **Assigned Tech** field to assign a technician for the appointment. When the prewrite is pulled to the repair order, the technician will automatically fill in for all repairs added for the appointment. *This is an optional field.* You can enter or edit the technician on the Enter Conditions screen once the prewrite is pulled to the repair order.

Click **Tech List** to view a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and on the Details screen. You can click on a technician on this screen to select the technician for the appointment.

6. Click the circle to the right of the phone number field that contains the phone number that should be used for this appointment. This is the number where the customer can be reached if questions arise during service.
7. Indicate if the customer requires a ride, requires a loaner, will be dropping off the vehicle, or if dealership needs to pick up the vehicle. Click to select the option. The system keeps a running total of this information and displays it on the scheduler for each day.
8. Click the circle next to the appointment type: service, body shop, or quick lube. This becomes the repair order type when the prewrite is pulled to the R/O. The system remembers the last appointment type selected and uses it as the default for the next appointment schedule. When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color.
9. Under **When Finished**, click to select the option that indicates how the customer will be notified when the service is done: call, e-mail, deliver, will pickup, or waiting. This information prints on all copies of the repair order.
10. Click **Next** to open the Enter Complaints screen to enter up to six complaints that will be addressed during the service. When the prewrite is pulled to the repair order, the complaints will automatically pull to the Enter Conditions screen. When you are finished entering the information, click **OK**. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Skip** to save the information without printing it. If you specified that you do not print prewrites in the scheduler setup, the system will automatically skip printing. You will be back at the Schedule Service screen.

Tip: You can print all the prewrites for a specific day from the Daily R/O Update menu. Click **Daily Reports/Prewrites**, and click **Print Prewrites**. Type the date for the day you want to print, and select your print criteria.

Enter Complaints

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Menu Service: Tech: Quoted Time:

Cancel OK

Usage	Code	Name
LOF		LUBE-OIL-FILTER
SI		STATE INSPECTION
ROT		ROTATE TIRES
BYLAB		BODY LABOR
PTLAB		PAINT LABOR
ROTAT		ROTATE TIRES
SERVI		30,000 SERVICE
USD		UPSALE DECLINED
C.U.S		SALE DECLINED
SSR		SERVICE SALES REMINDER
DECLI		CUSTOMER DECLINED REPAIRS
P&M		PAINT & MATERIAL
PDI		PRE DELIVERY INSPECTION
TTIRE		REPLACE T TIRE
BRAKF		REPALCE FRONT BRAKES
CHAIR		CHARGE AC
INSPE		INSPECTION

40348 02/08/08 3123
 09 W REGALL 1245780 77.40
 02 Q LUBE-OIL-FILTER 21.25

11. Use the **Total Estimated Time** field to indicate how many time units are required for the appointment. This is used to determine schedule availability as well.
12. Click **Schedule**.
13. Use the calendar on the right side of the screen to select the day for the appointment.
14. If you are using the three separate schedules, **make sure you are on the correct schedule for the appointment: Service Body Shop, or Quick Lube**. Click the tab on the bottom right side of the screen as needed to select the schedule.
15. Click the time slot for the appointment. The customer's name appears in the selected slot.

Selecting the Day First

You also have the option of scheduling an appointment by selecting the day first. You would use this method when scheduling an appointment for a new customer or when you need to negotiate the day first due to the customer's schedule.

1. Use the calendar on the right side of the screen to select the day for the appointment.
2. If you are using the three separate schedules, **make sure you are on the correct schedule for the appointment: Service Body Shop, or Quick Lube**. Click the tab on the bottom right side of the screen as needed to select the schedule.
3. The left side of the screen displays the times available to schedule for that day. Click the time slot you want to select. The Schedule Service screen appears.
4. If this is an existing customer, type the customer's customer number. You can also click **Customer List** to search for the customer. Use the Customer Search Criteria screen to search for the customer in the system. The screen will display a list of customers who meet the criteria you specify for the search. Hold the right mouse button down on a line in the list to view a summary of the customer's information and the customer's repair history. Click the customer in the list you want to select.

If this is a new customer, type the customer's name, address, telephone numbers, and vehicle information. A minimum of the customer's name and phone number is required for new customers. This saves the customer's information to the prewrite only. The customer information will not be added to the Service customer database until the prewrite is pulled to a repair order.

5. The **Writer** field automatically defaults to the writer ID selected for the workstation.
6. You can use the assigned Tech field to assign a technician for the appointment. When the prewrite is pulled to the repair order, the technician will automatically fill in for all repairs added for the appointment. *This is an optional field*. You can enter or edit the technician on the Enter Conditions screen once the prewrite is pulled to the repair order.

Click **Tech List** to view a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and on the Details screen. You can click on a technician on this screen to select the technician for the appointment.

7. Click the circle to the right of the phone number field that contains the phone number that should be used for this appointment. This is the number where the customer can be reached if questions arise during service.

8. Indicate if the customer requires a ride, requires a loaner, will be dropping off the vehicle, or if dealership needs to pick up the vehicle. Click to select the option. The system keeps a running total of this information and displays it on the scheduler for each day.
9. Click the circle next to the appointment type: service, body shop, or quick lube. This becomes the repair order type when the prewrite is pulled to the R/O. The system remembers the last appointment type selected and uses it as the default for the next appointment schedule. When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color.
10. Under **When Finished**, click to select the option that indicates how the customer will be notified when the service is done: call, e-mail, deliver, will pickup, or waiting. This information prints on all copies of the repair order.
11. Click **Next** to open the Enter Complaints screen to enter up to six complaints that will be addressed during the service. When the prewrite is pulled to the repair order, the complaints will automatically pull to the Enter Conditions screen. When you are finished entering the information, click **OK**. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Skip** to save the information without printing it. If you specified that you do not print prewrites in the scheduler setup, the system will automatically skip printing. You will be back at the Schedule Service screen.

Tip: You can print all the prewrites for a specific day from the Daily R/O Update menu. Click **Daily Reports/Prewrites**, and click **Print Prewrites**. Type the date for the day you want to print, and select your print criteria.

12. Use the **Total Estimated Time** field to indicate how many time units are required for the appointment. This is used to determine schedule availability as well.
13. Click **Schedule**. The customer's name will appear in the time slot you selected.

Tagging Extra Time

You can tag extra time slots for an appointment or tag slots that you want to block off on the schedule. This provides more flexibility when working with your schedule to ensure you have enough time blocked for an appointment or to ensure that certain time slots are not scheduled.

1. On the schedule, right-click the blank slot you want to tag.
2. Click **Tag** on the pop up menu that appears.



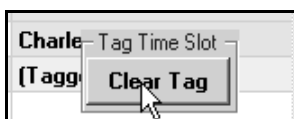
3. The slot turns yellow and reads, "(Tagged)#" (where # is the writer ID who tagged the slot).



Clearing Tagged Slots

Tagging a slot hold it but does not lock it. You can clear the tag or schedule an appointment in a tagged slot as needed.

1. Right-click the tagged slot.
2. Click **Clear Tag** on the pop up menu that appears.



3. The slot is cleared.

Viewing the Schedule

When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color. Once a prewrite is pulled to a repair order, it is flagged as processed and will have a gray background. When the repair order for an appointment is closed, the background turns dark gray. The appointment will also display (O) when the repair order is open and (C) when the repair order is closed.

09:30		[C] Buford V Hardin	
		[O] Sarah Cassell	
10:00	(O) Steve Smith	Benjamin B Davidson	
	Donnie L Adams		Charles Farmer
10:30	Angela S Bonewitz		[Tagged] 01
	Patrick E Craig		
11:00		Jeff Derhammer	
	Donna G Evans		
11:30			Bonnie J Parks
			[Tagged] 01
12:00	Johnny C Christian	Rick A Lewis	[Tagged] 01

Editing an Appointment

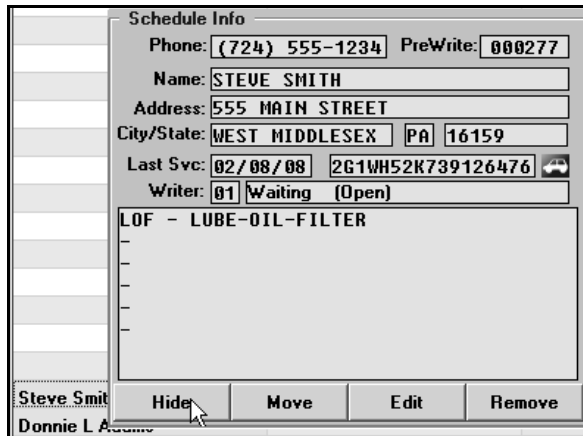
You can edit appointment information as needed. If you edit customer information in the Schedule Xpress scheduler, the changes will be saved to the customer's master file.

1. Click the appointment on the schedule. The Schedule Service screen appears.
2. Edit the information as needed.
3. Click **Schedule** to save the information.

Tip: You can also edit an appointment by clicking **Edit** on the Schedule Info screen that appears when you right-click on an appointment.

Viewing Appointment Details

1. Hold the right mouse button down on the appointment on the schedule.
2. The Schedule Info window opens and displays a summary of the information entered for the appointment.



The screenshot shows a 'Schedule Info' window with the following fields and values:

- Phone: (724) 555-1234
- PreWrite: 000277
- Name: STEVE SMITH
- Address: 555 MAIN STREET
- City/State: WEST MIDDLESEX PA 16159
- Last Svc: 02/08/08 2G1WH52K739126476
- Writer: 01 | Waiting | (Open)

Below the fields is a text area containing 'LOF - LUBE-OIL-FILTER'. At the bottom of the window are four buttons: 'Hide', 'Move', 'Edit', and 'Remove'. A mouse cursor is pointing at the 'Hide' button. In the bottom-left corner, there is a small box with the text 'Steve Smit' and 'Donnie L A...'.

3. Click **Hide** to close the summary.

Moving an Appointment

You can move an appointment as needed for rescheduling. If you attempt to schedule or move an appointment to a filled slot, you will be prompted that the space is filled. You will have to click **Replace** on the prompt to fill the space if you want to override the existing appointment. However, you will not be prompted if you attempt to schedule a tagged spot since tagged spots are spots being held and are not spots that are actually scheduled.

1. Right-click the appointment on the schedule.
2. Click **Move**.
3. Click the time slot on the schedule where you want to move the appointment.

Removing an Appointment

Removing an appointment deletes it completely from the schedule. Once you remove an appointment, the only way to get it back on the schedule is to manually reschedule the appointment.

1. Right-click the appointment on the schedule.
2. Click **Remove**.
3. Click **Gone** when prompted to verify you want to remove the appointment. The appointment is deleted from the schedule.

Viewing Technician Availability

Click **Tech List** to check technician availability. The Appointments By Tech screen displays a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the Schedule Service screen and on the Details screen.

Viewing Daily Schedule Details

Use the **Details** button on the bottom of the Schedule Xpress main screen to view the schedule details for the day currently displayed on the screen. The list will identify which prewrites have been pulled to repair orders, and you can view a summary of the repair order right from the screen.

Tip: You can dispatch electronic repair orders from this screen and the main schedule screen. Please refer to the Electronic Repair Order instructions available on the Autosoft documentation Web page for instructions on using the ERO.

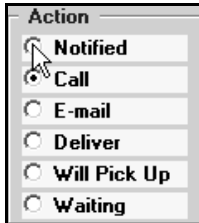
1. Use the calendar to select the day.
2. Click **Details**. The Schedule Details screen appears and displays the day's schedule.

Schedule Details									
Schedule For 02/14/11									
All R/O's		Service			Quick Lane		Body Shop		
Click "Customer" Column To Dispatch		Click "Stat" Column To View R/O			Click "Action" Column To Change				
Time	Customer	Phone	Req.	P/W	SW	TN	Stat	Action	Complaint
09:30	Buford V Hardin	(724) 555-6642	Pick	000253	01	02	Cls	Waiting	ROT-ROTATE TIRES
	Sarah Cassell	(724) 555-3662	Loner	000263	01	03	Opn	Call	SES LIGHT ON
10:00	Steve Smith	(724) 555-0001	Ride	000259	01	01	Opn	Waiting	LOF-LUBE OIL FILTER
	Benjamin B Davidson	(724) 555-5656	Drop	000264	01	03		Call	DRIVER SIDE WINSHEILD WIPER ARE DOESN
10:00	Donnie L Adams	(724) 555-4444	Pick	000255	01	01		Waiting	LOF-LUBE OIL FILTER
	Charles Farmer	(724) 555-1000	Drop	000256	01	04		Call	DENT REPAIR BUMPER
10:30	Angela S Bonewitz	(724) 555-0710	Ride	000261	01	01		Waiting	LOF-LUBE OIL FILTER
	Patrick E Craig	(724) 555-7777	Drop	000262	01	01		Waiting	LOF-LUBE OIL FILTER
11:00	Jeff Derhammer	(724) 555-1863	Pick	000257	01	02		Waiting	ROT-ROTATE TIRES
	Donna G Evans	(724) 555-8888	Drop	000266	01	01		Waiting	LOF-LUBE OIL FILTER
11:30	Bonnie J Parks	(724) 555-9422	Loner	000265	01	04		Call	DRIVER DOOR DENT REPAIR
12:00	Johnny C Christian	(724) 555-6666	Drop	000260	01	01		Waiting	LOF-LUBE OIL FILTER
	Rick A Lewis	(724) 555-5555	Ride	000258	01	03		Deliver	CUSTOMER REQUIRES A TUNE UP

Close Tech List Dispatched Jobs List Print Schedule/No Shows Move Carry Over Remove "Notified"

3. By default, all appointments are displayed. Use the tabs at the top of the screen to view just the service, quick lane, or body shop appointments. The system saves the last tab you selected and automatically displays that tab the next time you open the screen. This is saved by station.
4. The **Req** column displays the drop off information (ride, loaner, drop off, or pick up). Vehicles the dealership needs to pick up are shaded red so they are easily identified.

5. The **Stat** column indicates the status of the appointment/repair order. It displays “Cls” for closed, “Opn” for open, or remains blank if the R/O hasn’t been created. Click the status in the **Stat** column to view a summary of the repair order.
6. The **Action** column displays the action that needs to be taken when the appointment is completed. You can click this column edit the action or mark that the customer has been notified.



7. You can click to select the **Remove “Notified”** box to remove the customers who have been flagged as “Customer Notified” from the list.
8. The number of complaint displayed for each appointment is determined by the **Show Detail** slider in the scheduler setup. If the slider was set to the left, the detail screen will display only the first complaint added to the prewrite for the appointment. If the slider was set to the right, the detail screen will display all complaints added to the prewrite for the appointment.
9. Click **Tech List** to check technician availability. The Appointments By Tech screen displays a list of the technicians and a bar graph identifying the time for the day. The red bar graph identifies the time that has been assigned to each technician so far for the day while the green bar graph identifies how much time the technician has actually logged for the day in the ERO program. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and the Schedule Service screen.
10. The **Dispatched Jobs List** button will display a summary of the technicians’ times.
11. Click **Print Schedule/No Shows** on the Schedule Details screen to print the schedule as needed. You are prompted to indicate if you want to print the full schedule or just the no-show appointments. Click the button that corresponds to the list you want to print.
12. Click **Close** to close the Schedule Details screen.

Moving Carry Over Appointments

From the Schedule Details screen, you can move any appointments that have an open repair order to another day on the schedule. When appointments are moved as “carry over” appointments, they will show in the schedule list with a red background to indicate they were carried over. The appointments are added to the available appointment slots on the new day in the order the slots appear. Therefore, you may want to leave the top slots open or set the schedule to start 30 minutes earlier in the schedule setup so carry over appointments will always be at the top of the schedule. Otherwise, the carry over appointments may end up being mixed in throughout the schedule wherever there is an open slot. In this case, you may need to manually move the appointments to different slots.

1. Click **Details** on the Schedule Xpress main screen.
2. Click **Move Carry Over**.
3. The system displays a list of appointments with open repair orders. A check mark in the box in front of the name in the list indicates the appointment will be moved. Click to clear the check mark from the box for any appointments you do not want to move.

4. The **Move From** date automatically defaults to today's date.
5. Use the **Move To** date automatically defaults to tomorrow's date. If you want to move the appointments to another date, use the drop-down calendar to select the date.
6. Click **Move Now**.
7. The system prompts you to verify you want to move the appointments to the selected date. Click **OK** to acknowledge the message.
8. When the appointments have been moved, the system displays a “Did That” message. Click **OK** to acknowledge the message.
9. The appointments will appear on the selected day's schedule in red.

Tip: You can also move carry over appointments by moving the appointment as explained under “Moving an Appointment” on page 4:12. If you move an appointment in this manner, it will not be red.

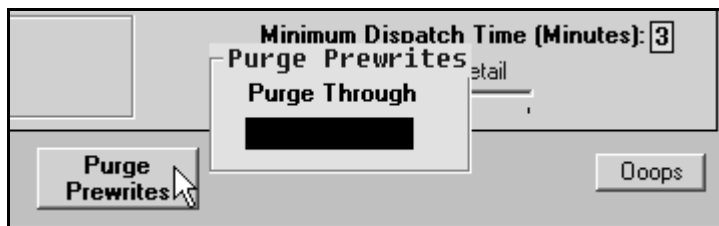
Pulling the Prewrite to a Repair Order

1. Click **Prewrite** on the Start Repair Order screen.
2. A list of all of the prewrite entries appears.
3. Click the customer you want to select. The prewrite summary appears.
4. Click **Pull To R/O** to pull the information to the Start Repair Order screen.

Purging Prewrites

The Schedule Xpress Setup screen contains a **Purge Prewrites** button. You can use this button to remove prewrites from the system. You specify the date you want to use for the purge. The system will delete all prewrites through the specified date. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

1. Click **Setup** on the bottom of the Schedule Xpress Scheduler. The Setup screen appears.
2. Click **Purge Prewrites**.
3. In **Purge Through**, type the date you want to use as the cutoff date for the purge, and press ENTER. The system will delete all prewrites through this date.



4. Click **OK** when prompted to verify you want to purge the prewrites.
5. The system displays a Did That message when the purge is complete. Click **OK** to acknowledge the message.