Autosoft

►**FLEX**™

Service Schedule
User Guide

Autosoft
Dealer Management System™

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Introduction to Service Schedule Quick Scheduler

The Service Schedule application is a quick scheduler that allows you to schedule appointments from any repair order screen. 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 full Autosoft FLEX DMS Service Writing Scheduler, please refer to Appendix A for information regarding the full scheduler.

Accessing the Service Schedule Quick Scheduler
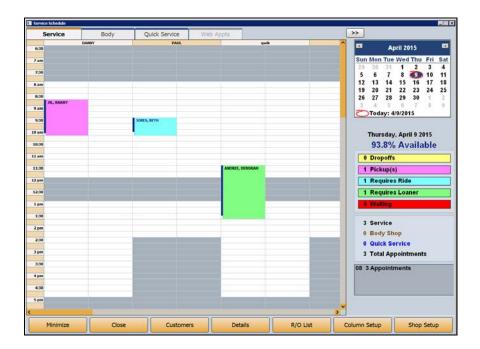
Initially, you can access the Service Schedule quick scheduler from any repair order screen. However, once you've opened the Service Schedule application for the day, you can leave it open and accessible through an Autosoft icon on the desktop taskbar.

1. On the FLEX DMS main menu, click **Service**.

2. Click **Repair Orders** on the Service Writing menu.

3. Click **Start Repair Order** to open the Start Repair Order screen.

Tip:	The Service Schedule button is accessible from any of the screens that correspond with the buttons on the left side of the Repair Orders menu.

4. Click the yellow **Service Schedule** button in the top right corner of the left column. The Service Schedule quick scheduler opens.

Tip: When scheduling appointments, you have the option of working on three separate schedules: Service, Body, and Quick Service. Use the tabs at the top of the Service Schedule screen to move among the schedules. You will set the default schedule for the workstation in the Service Schedule **Shop Setup**.

Entering Setup Information

Before you can use the scheduler, you **must** complete the setup, as the setup information determines how the scheduler works. The choices you made during the Service Schedule conversion process will affect the overall appearance and layout of your schedule, but you must still fine-tune settings within the application to optimize operation for your Service Department.

In addition, you have the option to set Service Schedule as your default scheduler. If you set it as the default scheduler, you can access it from all repair order screens, and the application will also open when you click **Scheduling** on the Service Writing main menu.

Shop Setup

The **Shop Setup** button gives you access to the schedule setup for the Service Department. Here, you will set the shop hours and customize the look of the schedule. You will also be able to set some other preferences from this screen.

1. Click the **Shop Setup** button on the bottom of the Service Schedule quick scheduler. The Shop Setup screen opens.

2. For each day of the week, select the **Start** and **Quit** time from the drop-down menus. The program uses a 24-hour schedule. In this schedule, 24:00 (12:00 a.m.) will appear as 00:00 and 24:30 as 00:30. To show that the shop is closed on a particular day, choose the blank slot in the **Start** and **Quit** drop-down menus.

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.

3. In **Hours/Day**, indicate the number of hours you want available on the schedule each day. The default entry is 48.

4. In the **Preferences** section, the **Make This My Default Scheduler** box determines where you can access the Service Schedule quick scheduler. If you leave this box empty, you will only be able to access the Service Schedule application from the repair order screens. The **Scheduling** button on the Service Writing main menu will open the full FLEX DMS Service Writing Scheduling application. If you do not plan to use the Service Schedule quick scheduler, leave this field blank and refer to Appendix A for information on the full FLEX DMS Service Writing scheduler.

   If you select the **Make This My Default Scheduler** box, the Service Schedule quick scheduler will be your default scheduler. In addition to accessing it from all repair order screens, you can open the Service Schedule application using the **Scheduling** button on the Service Writing main menu.

5. If you do not want to print prewrites, click to select **Don't Prompt To Print Pre-Writes**. 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.

6. Use the **Default Schedule This Station** section to select the default schedule for a workstation based on Service Department area: Service, Body Shop, or Quick Service. Click to select the circle next to **Service**, **Body**, or **Q/Service** to set the default. This schedule will automatically display when the Service Schedule application is opened on the workstation. You can still view the other schedules using the Service, Body, and Quick Service tabs at the top of the Service Schedule screen.

7. In the **Schedule History** section, you can purge schedule history older than 90 or 120 days. Click the circle next to either **Purge History Older Than 90 Days** or **Purge History Older Than 120 Days**. The default is 90. Click the **Purge** button to purge all schedules and prewrites fitting the option you've selected. You will not be able to purge any schedules or prewrites newer than 90 days.

Important: The Undo Purge button on the bottom of the Schedule History section runs a utility that recovers the schedule data in the event that the date on a computer is off or you need to restore purged schedules. The utility must be run on the computer that is experiencing the problem. Do not use this utility without assistance from the Autosoft Customer Support Center. Call 800-473-4630 for support.
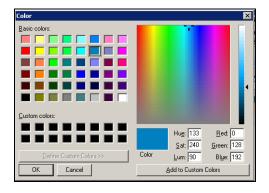
8. Use the **Customize Appt. Detail Colors** section to establish a color key to help you easily identify appointment requirements and determine whether transportation arrangements must be made for customers simply by viewing the schedule. **These color settings will be applied to every user in the Service Department.**

   Click on each of the buttons (**Dropoffs**, **Pickup(s)**, **Requires Ride**, **Requires Loaner**, and **Waiting**), to open a color palette from which you can choose a shade for each category. Click on a color from the palette and click **OK**. The color will appear in the box to the right of that appointment detail button.

   You can also create custom colors for your schedule. To create custom colors, click an appointment detail button to open the color palette and click **Define Custom Colors** at the bottom of the color palette window. This will expand the window, giving you access to a color spectrum, as well as an RGB (red, green, blue) color selector. You can use either to create a custom color. To use the spectrum selector, move the target to the desired color on the spectrum and then move the black arrow next to the vertical color bar on the right side of the window to the hue you wish to use. Click **Add to Custom Colors**, and the color will be added to the area under **Custom colors** on the left side of the window. Use the RGB selector when you know the specific RGB formula for a color you would like to use. Type the formula into the selector and click **Add to Custom Colors**. The color will appear under **Custom colors** on the left side of the window. You can add multiple colors at once using either of these methods and then select one at a time for each of the custom appointment detail buttons. After clicking on the desired color for an appointment detail, click **OK** to apply it.

Tip: Autosoft recommends that you avoid choosing black or any other dark shades when customizing your appointment details or schedule, as schedule details will not be visible on dark backgrounds.

9. Use the **Custom Schedule Colors** section to customize the schedule to easily distinguish between available and unavailable time slots on your schedule. You will follow the same process detailed in Step 8. However, unlike the appointment detail colors, the custom schedule colors are user specific. **The selections you make in this section will be reflected only in your work station.**

10. Click **Close** to save the settings and close the screen.

Tip: You can preset the minimum minutes that must be logged for the logon 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.
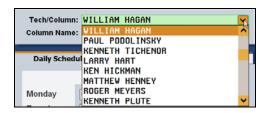
Column Setup

The **Column Setup** button allows you to establish schedules for each of your technicians or custom columns, to block off vacation time, and to dedicate your technicians to the appropriate area of the Service Department. Each custom or technician column will be comprised of two narrower columns, allowing two overlapping appointments to be set in that column.

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

2. In the **Tech/Column** field, use the drop-down menu to choose a technician or custom column. The Column Setup screen pulls from the list of technicians entered during Service Setup and the custom columns established during the Service Schedule conversion to create the schedule columns.

Tip: You can create custom columns for specific repairs or areas of the Service Department by selecting Click to Add Custom Column in the Tech/Column drop-down menu. You will be prompted to enter a column name. After you have named the column, click OK. Continue to set up the column as you would any other column.

3. Use the **Column Name** field to assign the column name as it will appear on the schedule. You can choose to use the technician's full name, or you can use his or her first or last name only or nickname. For custom columns, use a name that will help you quickly identify the column.

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

Important: A technician's start time cannot be earlier than 30 minutes prior to the shop start time you entered in Shop Setup.

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

6. Use the **Vacation** tab to mark a technician 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 technician's vacation. Click **Apply**. The dates of the vacation will appear in the box to the right.

    1. If a technician 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**.
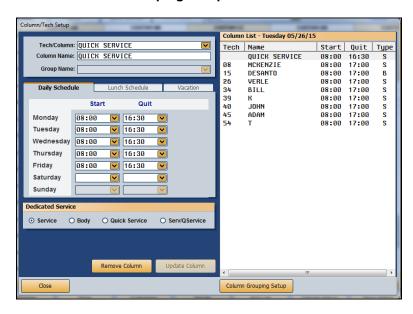
Tip: If a technician for whom you are scheduling vacation time has appointments scheduled during the requested vacation period, the system will prompt you to reschedule the appointments before approving vacation. Click OK, close the Column Setup screen, and return to the Service Schedule main screen to reschedule the appointments. Once you have rescheduled the necessary appointments, you can repeat Step 6 to add the technician's vacation time to the schedule.

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

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

9. 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 the technicians. The top of the list will display the day's date. Beneath the date, each technician will be listed by employee number, name as it appears in the **Column Name** field, start and quit times and dedicated service area.

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

10. Click **Close** to close the Column Setup and return to the Service Schedule main screen.
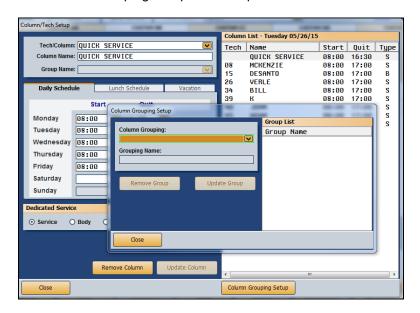
Creating Column Groupings

You can further organize your columns by creating column groupings, which you can use to collect related technicians or columns. You can add technicians or custom columns to the group and can adjust your schedule to view only these groups. The user settings you create here will be retained when you close the application and will automatically apply the next time you open Service Schedule.

1. Click **Column Setup**.

2. Click the **Column Grouping Setup** button on the bottom of the screen.
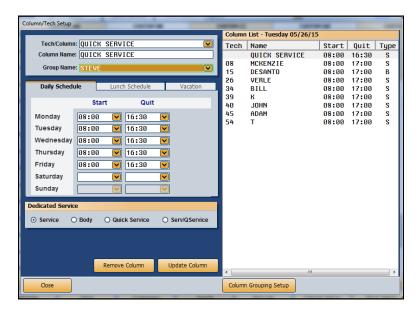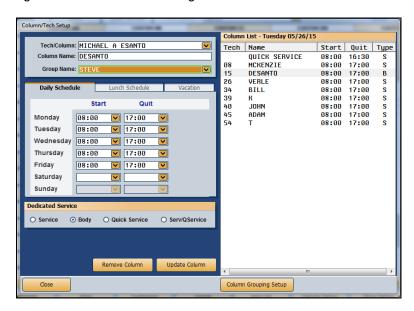

3. The Column Grouping Setup window opens.

4. Click on an advisor/writer or custom column name from the **Column Grouping** drop-down menu.
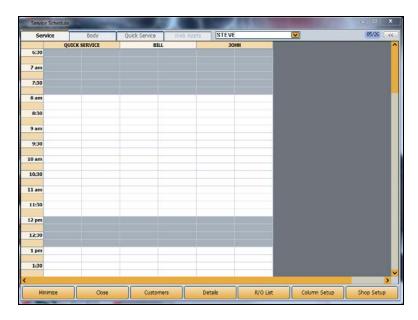
5. Use the **Grouping Name** field to edit or customize the group name.

6. Click **Update Group**.

7. You will be returned to the Column/Tech Setup screen.

8. Add a technician or column to the group by selecting the technician in the **Column List** on the right of the screen or choosing the technician from the **Tech/Column** drop-down menu.

9. Select the group from the **Group Name** drop-down menu.

10. Click **Update Column**.

11. Repeat steps 8 and 9 to add more columns or technicians to the group.

12. When you have built the group, you can view it on the schedule by selecting the group name from the drop-down menu next to the tabs at the top of the schedule. You can choose to view the full schedule or a particular group. When you close the Service Schedule application and later reopen, the schedule view you selected will be retained.

Removing Groups

You can easily remove groups when they no longer apply to your schedule.

1. Click **Column Setup**.

2. Click the **Column Grouping Setup** button.

3. Select a group from the Group List on the right side of the Column Grouping Setup screen, or use the Column Grouping drop-down menu to choose the group you would like to remove.

4. Click **Remove Group**.

5. When you're returned to the Column/Tech Setup screen, click **Close**.

Removing Columns

If you need to readjust your schedule because a technician is no longer part of your Service team, this can be done from the Column/Tech Setup screen.

1. Click **Column Setup**.

2. From either the **Tech/Column** drop-down menu or the Column List on the right side of the screen, select the column 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 appointments assigned to it, you will be alerted that you must reschedule all appointments before the column can be removed from the schedule. 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**.

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

Scheduling Appointments

You have the option of selecting the day as the first step to scheduling an appointment or selecting the customer information first. You decide which method you want to use. You will most likely 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.
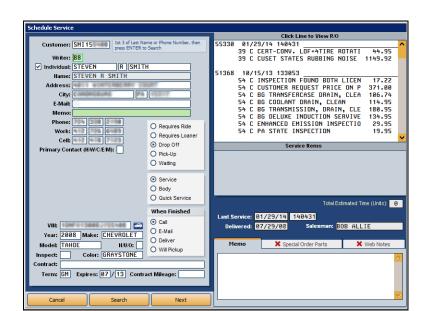
Important: The lines on Service Schedule quick scheduler are in 15 minute increments. If you opted during the Service Schedule conversion process to display appointments as single 15-minute cells, all appointments will display as a single cell despite the jobs' quoted times, and the schedule will only display the customers' last names.

If during the conversion process you chose to display scheduled appointments with quoted time, the schedule will reflect the actual time each appointment should take based in the time estimates you enter during the prewrite. However, if you do not assign quoted time estimates while completing an appointment's prewrite, the appointment will display in a single 15-minute slot.

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, General Motors VIS, Nissan, Honda, Toyota, or Mazda to identify any additional repairs a customer may need for the appointment.
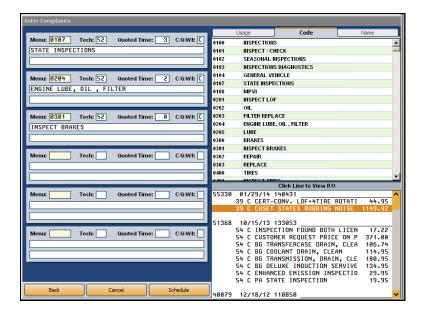
1. Click the **Customers** button on the Service Schedule main screen.

2. Use the **Customer** tab of the 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 populates.

4. The **Writer** field automatically defaults to the writer ID selected for the workstation.

5. In the **Primary Contact (H/W/C/E/M)** field, enter **H**, **W**, **C**, **E**, or **M** to note whether the customer should be reached regarding this appointment at his or her home, work, or cellular phone; email; or another means entered in the **Memo** line. This is the method by which the customer can be reached if questions arise during service.

6. Indicate if the customer requires a ride or a loaner, will be dropping off the vehicle, will be waiting for the vehicle, or if the dealership needs to pick up the vehicle. Click the circle next to the appropriate option to select it. The system keeps a running total of this information and displays it on the Service Schedule main screen for each day. If you've set custom colors to appointment details on the Shop Setup screen, clicking one of these options will appropriately color code the appointment on the schedule for easy identification at a glance.

7. Click the circle next to the appointment type: **Service**, **Body**, or **Quick Service**. This becomes the repair order type when the prewrite is pulled to the RO. The system remembers the last appointment type selected and uses it as the default for the next appointment scheduled.

8. 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**, or **Will Pickup**. This information prints on all copies of the repair order.

9. Click **Next** to open the Enter Complaints screen, where you can 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.

You can manually enter the complaints by typing the complaint description or by typing a code in the **Menu** field. If you enter a menu code in the **Menu** field, the complaint field will automatically fill with the description of the menu item.

You can also search the menu on the top right of the screen for the appropriate complaint. At the top of the menu are three tabs: **Usage**, **Code**, and **Name**. Use these tabs to determine how you view the menu of complaints. The program defaults to the **Code** tab, which organizes the complaints by code. The **Usage** tab allows you to find the complaint based on most commonly used complaints, while the **Name** tab arranges complaints alphabetically.

To choose a complaint from the menu, double-click the line on the menu, and the complaint will appear in the first available complaint field on the left side of the screen. The **Menu** field will also populate with the appropriate menu code.

10. Use the **Quoted Time** field to indicate how many time units are required for the appointment. This will automatically block the appropriate time on the schedule. Some menu items may already have service time associated with them, which will auto-populate in the **Quoted Time** field. If you leave this field blank, the system will automatically set the appointment for 15 minutes only.

11. In the **C/Q/W/I** field, signify whether the repair is customer pay, quick service, warranty, or internal. If you enter through the field without typing anything, the repair will default to **C** (customer pay).

12. Click **Schedule**. 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.

13. The main Service Schedule screen will appear. Use the calendar on the right side of the screen to select the day for the appointment.

14. If you are using three separate schedules, **make sure you are on the correct schedule for the appointment: Service, Body, or Quick Service**. Click the tab at the top of the screen as needed to select the appropriate schedule.

Your cursor will be loaded with the appointment information, noted by an empty rectangle below the cursor arrow. To set the appointment, use the horizontal bar at the bottom of the screen to scroll to the technician or custom column to which you'd like to assign the repair or scroll through the schedule to locate an open block of time adequate to complete the service. Click the time slot for the appointment. The customer's name appears in the selected slot and, if Service Schedule has been set up to display appointments with quoted time, the appropriate time will be blocked off to reflect the estimates entered in the **Quoted Time** field on the Enter Complaints screen. At this point, the technician is assigned to the repair. If Service Schedule has been set up to display appointments in single 15-minute cells, the appointment will appear as a single cell regardless of any time estimates you may have entered in the **Quoted Time** field.

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

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 a day to best accommodate the customer's schedule.

1. Use the calendar on the right side of the main Service Schedule screen to select the day for the appointment.

2. If you are using three separate schedules, **make sure you are on the correct schedule for the appointment: Service, Body, or Quick Service**. Click the tab at the top of the screen as needed to select the appropriate schedule.

3. The schedule for that day appears on the left. Click the time slot you wish to select in the appropriate custom or technician column. You can either choose to select a single 15-minute time slot and adjust it to the appropriate time on the Enter Conditions screen, or click, hold, and drag your mouse down to highlight a block of time you anticipate the repair will require. When beginning with a single time slot, simply click the chosen time slot to open the Schedule Service screen. When highlighting several consecutive time slots for an appointment, right-click on the highlighted block of time and click **Add**.

> **Important:** Step 3 only applies if Service Schedule has been set up to display appointments with quoted time. If your Service Schedule application has been set to display appointments as single 15-minute cells despite the estimated time for the repairs, you will only be able to block off a single 15-minute cell on the schedule for an appointment.

4. The Schedule Service screen opens. If this is an existing customer, type the customer's customer number, consisting of the first three letters of the customer's last name or prominent business name and the last six characters of the VIN. You can also click the **Search** button at the bottom of the screen to search for the customer. The Search Criteria screen will open to the **Customers** tab, where you can search for the customer in the system using a variety of search criteria. The screen will display a list of customers who meet the criteria you specify for the search. Right-click on a customer in the list to view a summary of the customer's information and repair history. When you are certain you've got the right customer, left click on the customer to select.

   If this is a new customer, type the customer's name, address, telephone numbers, and vehicle information on the Schedule Service screen. 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. In the **Primary Contact (H/W/C/E/M)** field, enter **H**, **W**, **C**, **E**, or **M** to note whether the customer should be reached regarding this appointment at his or her home, work, or cellular phone; email; or another means entered in the **Memo** field. This is the method by which the customer can be reached if questions arise during service.

7. Indicate if the customer requires a ride or loaner, will be dropping off the vehicle, will be waiting at the dealership, or if the dealership needs to pick up the vehicle. Click the circle next to the appropriate option to select it. The system keeps a running total of this information and displays it on the scheduler for each day. If you've set custom colors to appointment details in the Shop Setup screen, clicking one of these options will appropriately color code the appointment on the schedule for easy identification at a glance.

8. Click the circle next to the appointment type: **Service**, **Body**, or **Quick Service**. This becomes the repair order type when the prewrite is pulled to the RO. The system remembers the last appointment type selected and uses it as the default for the next appointment scheduled.

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**, or **Will Pickup**. 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.

    You can manually enter the complaints by typing the complaint description or by typing a code in the **Menu** field. If you enter a menu code in the **Menu** field, the complaint field will automatically fill with the description of the menu item.

    You can also search the menu on the top right of the screen for the appropriate complaint. At the top of the menu are three tabs: **Usage**, **Code**, and **Name**. Use these tabs to determine how you view the menu of complaints. The program defaults to the **Code** tab, which organizes the complaints by code. The **Usage** tab allows you to find the complaint based on most commonly used complaints, while the **Name** tab arranges complaints alphabetically.

    To choose a complaint from the menu, double-click the line on the menu, and the complaint will appear in the first available complaint field on the left side of the screen. The **Menu** field will also populate with the appropriate menu code.
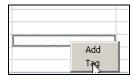
11. The **Tech** field will automatically display the number for the tech in whose column you clicked to establish the appointment.

12. Use the **Quoted Time** field to indicate how many time units are required for the appointment. This will automatically block the appropriate time on the technician's column.

13. In the **C/Q/W/I** field, signify whether the repair is customer pay, quick service, warranty, or internal. If you enter through the field without typing anything, the repair will default to **C** (customer pay).

14. When you've finished entering all information, click **Schedule**. 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 Service Schedule screen. The customer's name will appear in the time slot you selected.

Tip: You can print all the prewrites for a specific day from the Daily R/O Update menu. Click **Daily Reports/Pre-writes**, and click **Print Pre-writes**. Type the date for the day you want to print and click **OK** to verify that your printer is ready.

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. Select **Tag** on the pop-up menu that opens.
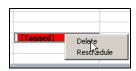

3. The slot turns red and reads, "[Tagged]."

Tip: To tag a block of time greater than a 15-minute time slot, click on a time slot, holding the mouse button down while dragging the cursor to highlight as many time slots as necessary to create the tag length you require. Right-click the highlighted block and select **Tag** to tag the block of time. Tagging a block of time slots in this way is only possible if the Service Schedule application has been set up to display appointments with quoted time.

Deleting Tagged Slots

Tagging a slot holds 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. Select **Delete** on the pop-up menu that opens.

3. The slot is cleared.

Rescheduling Tagged Slots

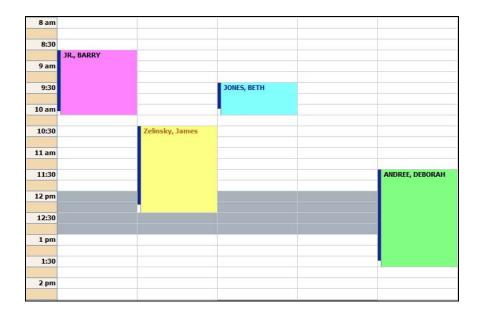You can reschedule tagged time slots if they need to be moved as appointments arise.

1. Right-click the tagged time slot.

2. Select **Reschedule** on the pop-up menu that opens.

3. The time slot is cleared. The cursor is now loaded with the tagged slot, which you can reschedule by clicking on an open time slot to drop it onto the schedule.
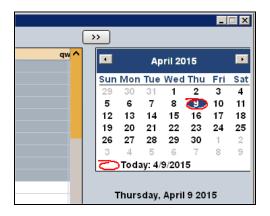
Tip: If you reschedule a tagged time slot and assign it to a different technician or column, the system will ask if you are sure you want to reassign the appointment from one technician to another. Click **Yes**.
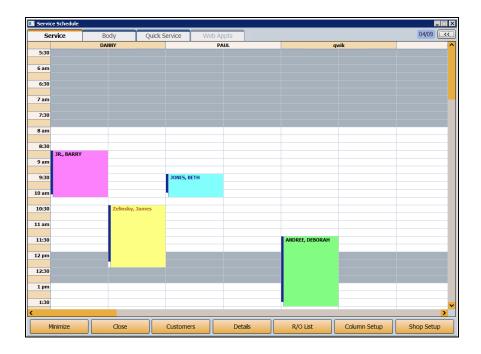
Viewing the Schedule

When viewing the schedule, you can quickly identify appointments based on the font color. Quick Service appointments will be blue, Body Shop appointments will be orange, and Service appointments will be black. The appointment will also display (O) when a repair order has been opened and (C) when a repair order has been closed.

To see more or less of the schedule, click and drag the edge of the bottom right corner of the Service Schedule screen to the desired size. You can see more of the schedule by clicking the **>>** button at the top right corner of the main Service Schedule screen.

This button will expand the schedule by collapsing the calendar and the rest of the right column content. The date displayed by the schedule will be posted in a blue box at the top right of the screen. To change the date, click the blue date box to reveal the calendar and select a different date to display.
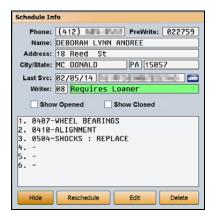

You can also view more or fewer technician columns by clicking on the edge of a column in the header row and dragging right (to enlarge) or left (to shrink). Service Schedule will retain these settings per user, so the next time you open the program, it will reflect the changes you make to the layout.
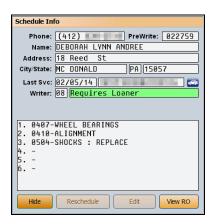
To revert to the original view featuring the calendar in the right column, click the **<<** button in the top right corner of the window.

Viewing Appointment Details

1. Right-click on the appointment on the schedule.

2. The Schedule Info window opens and displays a summary of the information entered for the appointment.

3. If you've pulled the prewrite to a repair order for the appointment, the Schedule Info window will contain a **View RO** button. Click this button to view the full repair order.

4. Click **Hide** to close the Schedule Info window.

Editing an Appointment

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

1. Right-click the appointment on the schedule. The Schedule Info window opens.

2. Click **Edit** to open the Schedule Service screen and edit the information as needed.
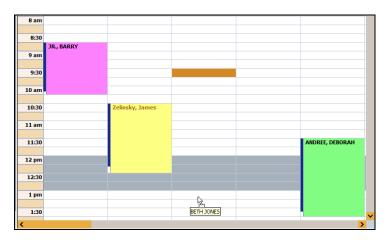
3. Click **Schedule** to save the information.

Rescheduling an Appointment

You can reschedule an appointment as needed.

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.

3. 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.

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

> **Tip:** If you attempt to schedule or reschedule an appointment to a filled or tagged slot, you will not be able to, although no message will appear. If you attempt to schedule an appointment to a slot in which it will overlap an existing appointment, a pop-up message will alert you of this. Click **OK** to close the pop-up box, and place the appointment elsewhere. Because each technician or custom column is comprised of two narrower columns, you can schedule two appointments at the same time for in a column, one in each smaller column. If you choose to switch technicians when you reschedule an appointment, the system will ask if you are sure you want to reassign the appointment to a different technician. Click **Yes**.

Deleting an Appointment

Deleting an appointment removes it completely from the schedule. Once you delete 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. The Schedule Info window opens.

2. Click **Delete**.

3. Click **Yes** when prompted to verify you want to delete the appointment and prewrite. The appointment is deleted from the schedule.
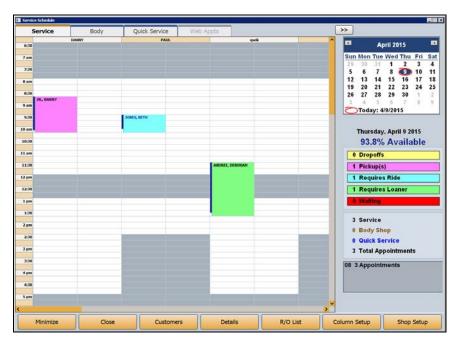
Tip: The prewrite associated with the appointment is also deleted when you delete an appointment.

Viewing Daily Schedule Details

Use the **Details** button on the bottom of the Service Schedule 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.
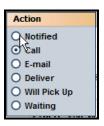
1. Use the calendar on the top right of the Service Schedule main screen to select the day.

2. Click **Details**. The Schedule Details screen opens and displays the day's schedule.

3. By default, all appointments are displayed. Use the tabs at the top of the screen to view just the Service, Body Shop, or Quick Service appointments.

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 for quick identification.

5. The **Stat** column indicates the status of the appointment/repair order. It displays "Cls" for closed or "Opn" for open, or it remains blank if the repair order 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 must be taken when the service is completed. You can click this column to edit the action or mark that the customer has been notified.

7. You can click to select the **Remove "Notified"** box at the bottom right of the screen to remove from the list any customers who have been flagged as "Notified."

8. The **Complaint** column will display the complaint code/s and description/s for each appointment.

9. The **Dispatched Jobs List** button will display a summary of the technicians' appointments and times.

10. You can print the shop schedule as needed by clicking the **Print Schedule/No Shows** button on the Schedule Details screen. The Print Details screen will open and prompt you to indicate if you want to print the full schedule or just the no-show appointments. You can also choose to filter the list by Service, Body Shop, or Quick Service; technician; service advisor; or Web appointments. Click the button that corresponds to the list you want to print. You can also set a date range using the drop-down menus in the **Print Date Range** section of the screen.

11. To print the schedule, click the **Print** button and click to select **To Printer** or **To Screen**. Click **Print.**

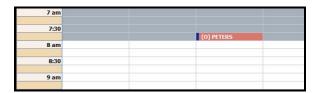12. Click **Close** to close the Schedule Details screen.

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.

1. Click **Details** on the Service Schedule 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. The **Move To** date automatically defaults to the next day'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. Click **Close**. The appointments will appear on the selected day's schedule in red.

Tip: You can also move carry over appointments by rescheduling the appointment as explained under "Rescheduling an Appointment" on page 237. If you move an appointment in this manner, it will not be highlighted in red.

Pulling the Prewrite to a Repair Order

When a customer arrives for his or her scheduled service appointment, you can quickly and easily check in the customer using the prewrite that was created while scheduling the appointment. The prewrite can be pulled to a repair order in the Start Repair Order screen.
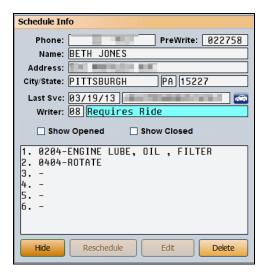
1. Click **Prewrite** on the Start Repair Order screen.

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.

Tip: It is best practice to pull the prewrite to a repair order as soon as a vehicle arrives at the shop for its service appointment. This will eliminate the need for the advisor/writer to manually enter complaints into a repair order.

Marking an Appointment as Opened and/or Closed

In addition to pulling a prewrite to a repair order and closing a repair order from the Service module, and thereby marking the appointment as opened and closed on the schedule, respectively, you can also mark an appointment as opened and/or closed directly from the Schedule Info window. It is important to note that by marking an appointment as opened or closed through the Schedule Info window, you are not actually opening or closing a repair order.

1. Right-click on the appointment on the schedule.

2. The Schedule Info window opens and displays the appointment summary.

3. Click the **Show Opened** checkbox to mark the appointment as Opened on the schedule or click the **Show Closed** checkbox to mark the appointment as Closed on the schedule.

4. On the schedule, the customer's name will be preceded by (O) or (C), respectively, on the schedule.

Tip: The **Show Opened** and **Show Closed** checkboxes should be used as a last resort only if a prewrite was not pulled to a repair order. This will provide the service department with a quick visual cue that a vehicle is in the shop, and work has begun or was completed on the vehicle.