

# Autosoft DMS **Service Schedule Conversion Guide**

## **Copyright**

© 2018 Autosoft, Inc. All rights reserved.

The information in this document is subject to change without notice. No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means electronic or mechanically, including photocopying, for any purpose other than the purchaser's personal use without written permission from Autosoft, Inc.

The software described in this document is provided under a license agreement or nondisclosure agreement between Autosoft, Inc. and the purchaser. The software may only be used and copied in accordance with the terms of that agreement.

Autosoft, Inc.  
61 Executive Court  
West Middlesex, PA 16159

[www.autosoftdms.com](http://www.autosoftdms.com)

## **Trademarks**

Autosoft is either a registered trademark or trademark of Autosoft, Inc.

# Table of Contents

Introduction to Service Schedule Conversion .....	1
Converting to Service Schedule .....	3
Converting Based on Custom Columns .....	6
Converting Based on Advisor .....	8
Converting Based on Technician .....	10
Video Tutorials .....	12
Appendix: Conversion from the Legacy Service Scheduler Application to the New Service Schedule Application.....	13
Before You Begin .....	13
Converting From Legacy Application to Service Schedule .....	13



## Introduction to Service Schedule Conversion

The Autosoft DMS 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.

Before using the Service Schedule application in your Service Department, you must run a one-time conversion from Schedule Xpress (Autosoft's former quick scheduler) to Service Schedule. **Once you've completed this conversion, you cannot return to Schedule Xpress, so be sure you are ready to make the change.** Going forward, Autosoft will no longer update Schedule Xpress, and if you continue to use that application, you will not be able to utilize web scheduling functionality.

Because the conversion process is non-reversible and the foundational setup of the schedule (appointments displayed as single 15-minute cells or as full quoted time) cannot be changed once the conversion is complete, it's important to choose the conversion method that makes the most sense for your shop and its current method of scheduling.

If your shop organizes its schedule based on technician, it's best to choose to convert using full quoted appointment time. You can then choose to organize the schedule either by technician or custom columns.

If your shop organizes its schedule based on service advisor, choose to display scheduled appointments as single 15-minute cells. When you choose this option, the schedule will automatically convert based on custom columns, to which you can assign advisor names or other names that help you stay organized.

**Important:** A password is required to complete the conversion. Prior to beginning the conversion process, please read this document in its entirety and contact an Autosoft Customer Support Center representative at 800-473-4630 for assistance. All users must be out of your current scheduling application at the time of the conversion.

You will be given several choices about how you set up Service Schedule for your shop, and each option will require you to invest some time after conversion to adjust your schedule to the new format. Choose the options that best meet your Service Department's needs because **once you convert to the new application, you cannot reverse your choice.**

**For users of the original legacy scheduling application:** If you are currently using the original legacy scheduling module that predated Schedule Xpress, your existing scheduled appointments will not convert to the new Service Schedule application using the steps outlined in this document. **You must follow a manual conversion process detailed in the Appendix at the end of this manual.**



## Converting to Service Schedule

Converting to Service Schedule requires a few simple steps. Prior to beginning the conversion process, you must make some decisions about how you would like to use the application in your Service Department because **once you complete the conversion, you will not be able to change the foundational setup (appointments displayed as single 15-minute cells or as full quoted time).**

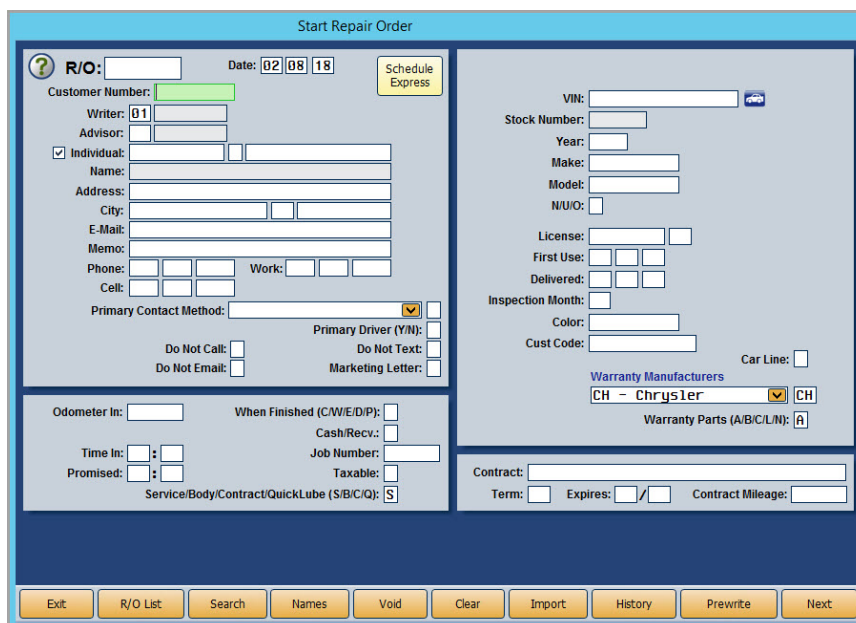
If your shop organizes its schedule based on technician, you **must** choose to convert using full quoted appointment time. You can then choose to organize the schedule either by technician, advisor, or custom columns.

If your shop organizes its schedule based on service advisor, choose to display scheduled appointments as single 15-minute cells. When you choose this option, the schedule will automatically convert based on custom columns, to which you can assign advisor names or other names that help you stay organized.

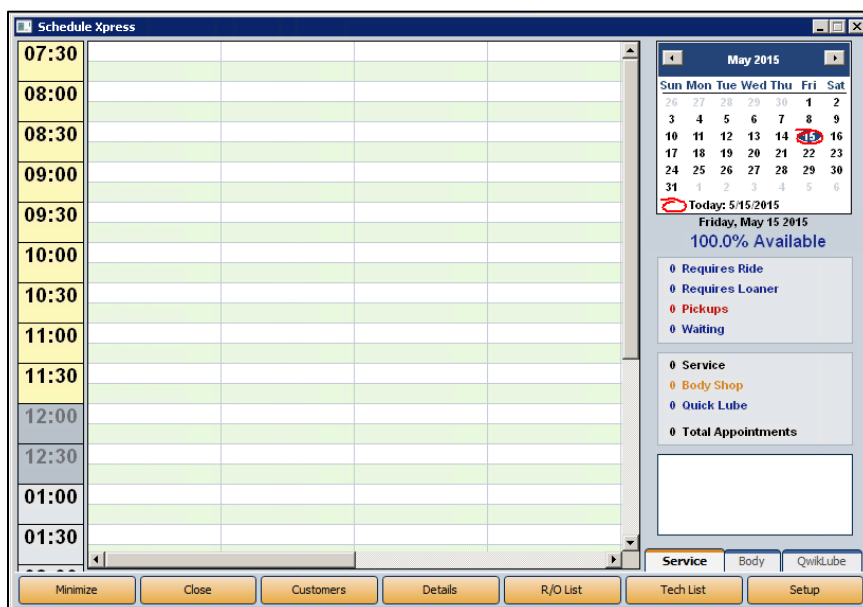
1. In the Autosoft DMS Service Writing main menu, click **Repair Orders**.
2. Click **Start Repair Order** from the Repair Orders menu.

**Tip:** The Service Xpress button is available in the screens accessible through any of the buttons in the left column of the Repair Orders menu. Once you've completed the conversion, it will be replaced by a Service Schedule button.

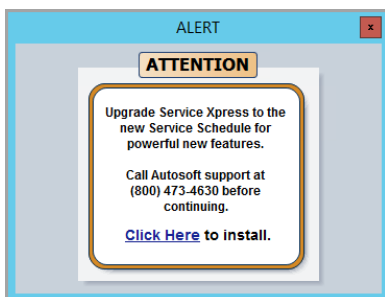
3. Click the yellow **Schedule Xpress** button on the Start Repair Order screen.



4. The Schedule Xpress screen will open. To begin the conversion process, click the **Setup** button.



5. An alert will appear, informing you that a new version of the quick scheduler is available. If you haven't yet contacted an Autosoft Customer Service Center representative, do so now. The representative will have the necessary password to continue and can answer questions you may have regarding the conversion process.



**Tip:** If you do not wish to update to the new Service Schedule application, click the **x** in the upper right corner of the alert popup and continue making changes to the Schedule Xpress setup if necessary.

6. To install, click on **Click Here** in the popup window.



7. The Service Schedule Shop Setup screen will open. Click the **Run Schedule Conversion** button on the bottom right of the screen.

8. You will be prompted to enter a password. Enter the password given to you by the Autosoft support representative and click **Submit**.

9. The Conversion Options popup window will open. At this point you will need to decide how you would like to display appointments on the schedule. The system will default to **Display Scheduled Appointments With Quoted Time**. If you wish to change the display settings to only show an appointment as a single 15-minute cell, click the radio button next to **Display Scheduled Appointments As A Single 15 Minute Cell**.

If your shop organizes its schedule based on technician, you **MUST** choose to convert using full quoted appointment time. However, if your shop organizes its schedule based on service advisor, choose to display each appointment as a single 15-minute cell.

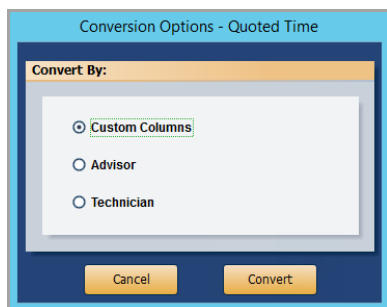
10. Click **Next**.

**Tip:** If you choose to display appointments only as a single 15-minute cell, the space limitations will mean that only the last name of the customer associated with the appointment will be visible on the schedule.

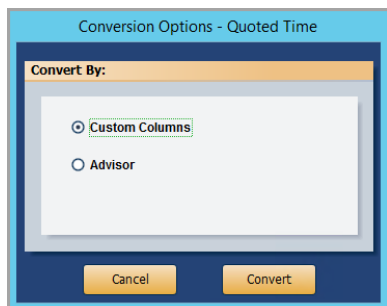
## Converting Based on Custom Columns

**Important:** If you selected **Display Scheduled Appointments As A Single 15 Minute Cell** in the previous portion of setup, your schedule can be converted using either custom columns or advisors. The 15-minute cell display option does not allow you to display by technician.

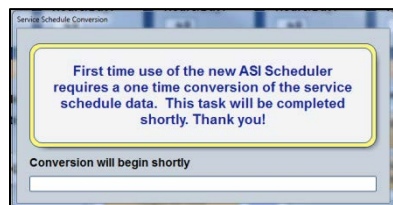
1. If you chose **Display Scheduled Appointments With Quoted Time** in the previous portion of setup, a pop-up box will ask you to choose to convert your current schedule based on custom columns, advisor, or technicians. The system will default to **Custom Columns**.



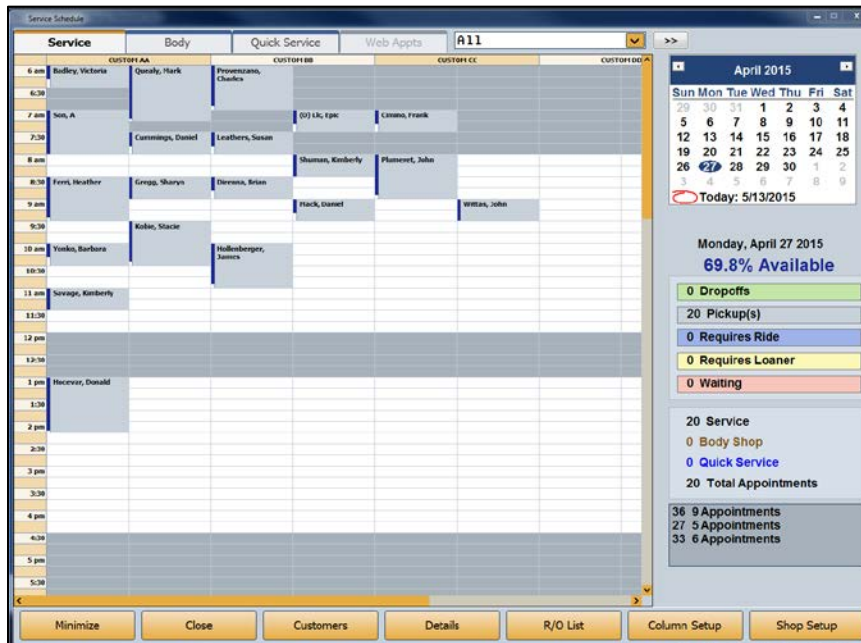
If you selected **Display Scheduled Appointments As a Single 15 Minute Cell** in the previous portion of setup, the pop-up will prompt you to convert your current schedule based on custom columns or advisor. The system will default to **Custom Columns**.



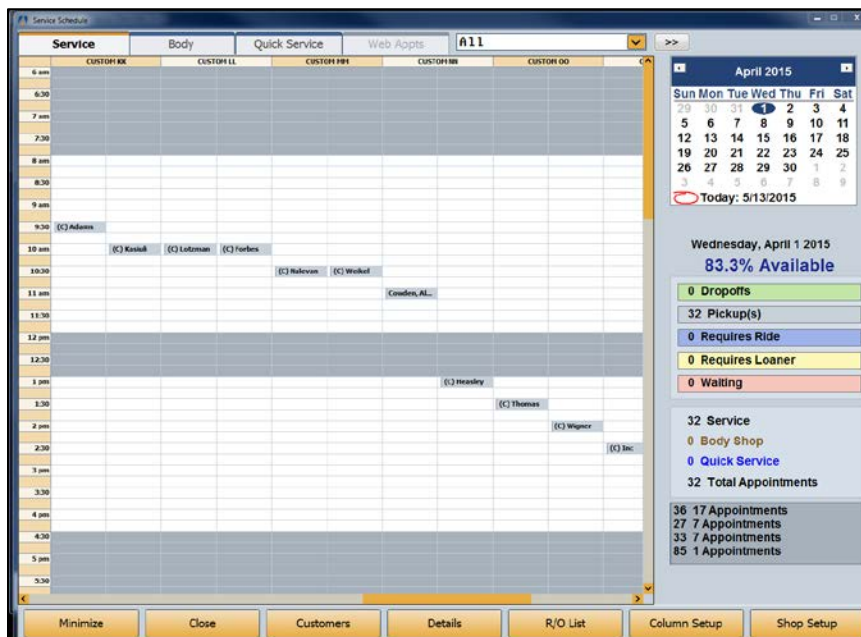
2. Click **Convert**.
3. A popup box will appear with a status bar. The length of time it will take for the Service Schedule to convert your data will vary based on how many appointments you have in your existing schedule.



4. The converter will look at your existing schedule and autofill time slots beginning with Custom AA. If your existing schedule has multiple appointments beginning at the same time, the second appointment at a given time will be moved to the second column of Custom AA, the third to the first column of Custom BB, the fourth to the second column of Custom BB, and so on.



Quoted Time View

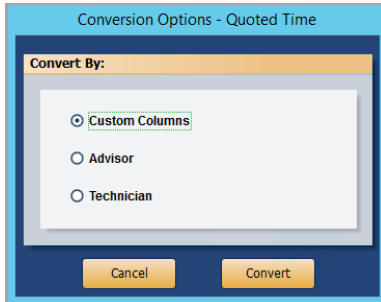


Single 15-Minute Cell View

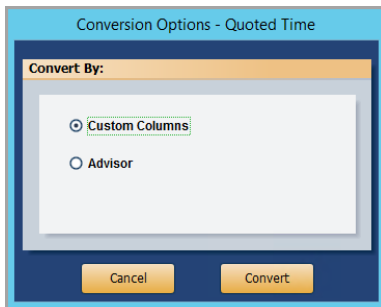
5. At this point, you will want to rename your custom columns, assigning each column easily identifiable names. For directions covering renaming custom columns, please refer to the Service Schedule manual.

## Converting Based on Advisor

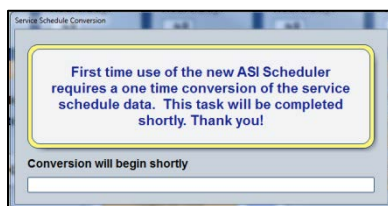
1. If you chose **Display Scheduled Appointments With Quoted Time** in the previous portion of setup, a popup box will ask you to choose to convert your current schedule based on custom columns, advisor, or technicians. Select **Advisor**.



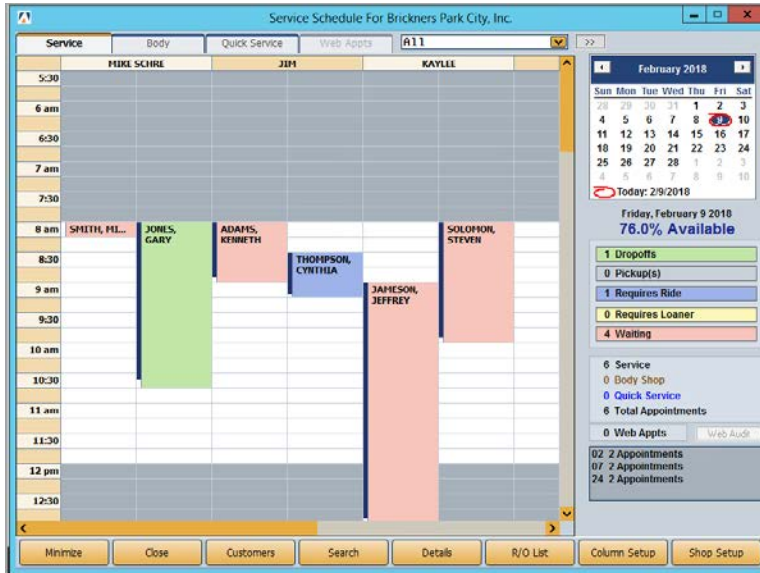
If you selected **Display Scheduled Appointments As a Single 15 Minute Cell** in the previous portion of setup, the pop-up will prompt you to convert your current schedule based on custom columns or advisor. Select **Advisor**.



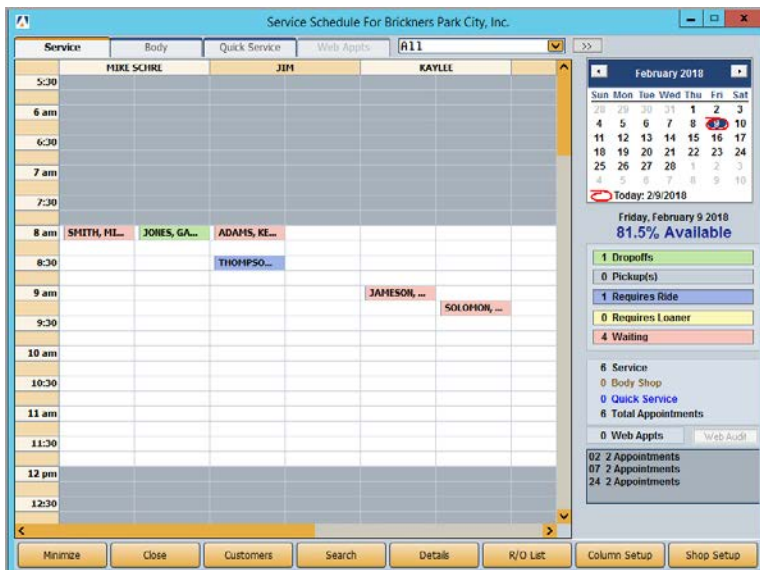
2. Click **Convert**.
3. A popup box will appear with a status bar. The length of time it will take for the Service Schedule to convert your data will vary based on how many appointments you have in your existing schedule.



4. The converter will look at your existing schedule and create columns for each of your advisors. Appointments will be placed into advisor columns based on the Writer ID that was entered when the appointment was made. If only one advisor was scheduling appointments, that advisor will be assigned multiple columns, and all appointments will be placed into those columns. Appointments can be moved and the number of columns under each advisor can be changed in Column Setup. (See the [Service Schedule User Guide](#) for step-by-step directions for changing column setup.)



Quoted Time View



Single 15-Minute Cell View

If any appointments contain invalid Writer IDs, the appointments will be placed into a custom column. Custom columns can be deleted once the conversion is finished. Verify the custom column does not contain current or future appointments before removing the column from the schedule.

All advisors and appointments will be placed on the Service tab of your schedule by default. If any existing appointments have been scheduled for the Body Shop or Quick Service, you must create the advisor columns within those tabs and move the appointments once the conversion is complete.

## Converting Based on Technician

**Important:** The option to convert based on technician is only available to you if you've opted to display scheduled appointments with quoted time. Schedules displayed in single 15-minute cells can only be converted using custom columns or advisors.

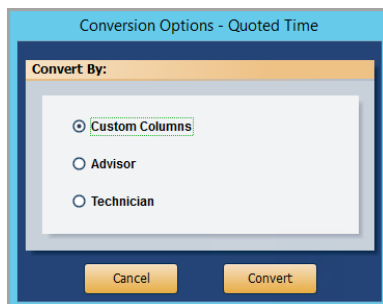
Before you proceed with the technician-based conversion, you will need to ensure that all technicians have a department assignment in the Service module's System Setup.

### Assigning Service Technician Departments

1. From the Service Writing main menu, click **System Setup**.
2. Click **Service Technicians**.
3. Select each technician from the list on the right and check that each has a department listed in the **Dedicated Service/Body/QuickLube** field.
4. Click **Save**.
5. Repeat this process for each technician that does not have a department assignment.

This is also a good time to clean up your technician list, removing any obsolete technicians or updating any details.

4. To convert your schedule based on technician, click the radio button next to **Technician** in the Conversion Options – Quoted Time window, and click **Convert**.



5. A popup box will appear with a status bar. The length of time it will take for the Service Schedule to convert your data will vary based on how many appointments you have in your existing schedule.



## Video Tutorials

We've created a series of videos that will illustrate the Autosoft DMS Service Schedule conversion process. To access these videos, visit <https://autosoftdms.com/service-schedule/> and click on the **Service Schedule Conversion Videos** tab.

If you encounter any problems while working within Service Schedule, consult the F1 Help screens for assistance or contact the Autosoft Customer Support Center at 800.473.4630.



## Appendix: Conversion from the Legacy Service Scheduler Application to the New Service Schedule Application

If you are using the original legacy scheduling module that predated Schedule Xpress and wish to convert to the new Service Schedule application, first read this appendix in its entirety to ensure that you fully understand the process you must follow, and then follow the steps outlined here.

**Important:** Your existing scheduled appointments will not convert to the new Service Schedule application. This will be a manual conversion process, and it is crucial that you follow the steps outlined below.

### Before You Begin

Before you even begin the conversion from the original legacy service scheduling application to the new Service Schedule application, you must first print your schedules from your current scheduling application as a safety measure. It may also be useful to print this manual for reference as you walk through the schedule conversion process.

### Converting From Legacy Application to Service Schedule

When converting from the legacy scheduler to the new Service Schedule application, it is important that you do not set the new application as your default scheduling method until **AFTER** the conversion process is complete. This will allow you to access the legacy application and your existing schedule, which you will have to manually re-enter into the new application. Once the conversion is complete, you may make the new Service Schedule application your default scheduler.

1. From the Autosoft DMS startup menu, click **Service** to open the Service Writing module.
2. On the Service Writing main menu, click **Repair Orders**.
3. Click any of the service processes on the left side of the Repair Orders menu to access the Schedule Xpress button on the corresponding repair order screen.
4. Click the **Service Schedule** button.
5. Once inside Schedule Xpress, click the **Setup** button.
6. A warning will pop up concerning the new schedule conversion.

7. To install, click **Click Here**.
8. The Service Schedule Shop Setup screen opens.
9. You must uncheck the **Make This My Default Scheduler** checkbox. This will allow you to retain access to the legacy scheduler, where your appointments are displayed.

**Note:** If you do not uncheck the **Make This My Default Scheduler** checkbox at this point in the conversion process, wait until the new Service Schedule application loads, click the **Shop Setup** button, and uncheck the **Make This My Default Scheduler** checkbox.

10. Follow the conversion steps outlined earlier in this document to set up the new Service Schedule application in a way that will best serve your shop.
11. Refer to your existing schedule in the legacy service scheduler or the schedule you printed before you began the conversion process. Manually re-enter the appointments from your existing schedule into the new Service Schedule application.
12. When finished with the conversion of appointments, click the **Shop Setup** button in the Service Schedule application and check the **Make This My Default Scheduler** checkbox.