

Autosoft DMS **Service Schedule User Guide**

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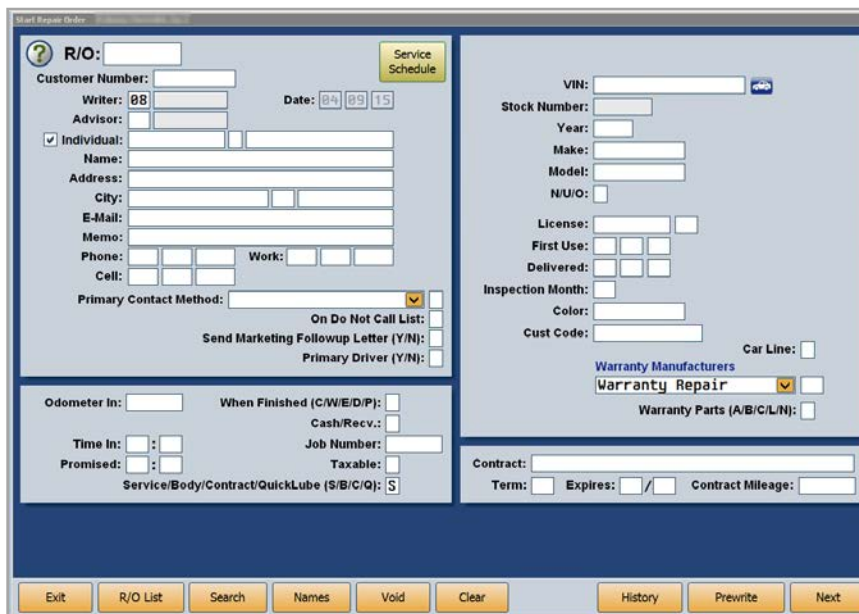
Introduction to Service Schedule

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 DMS Service Writing Scheduler, please refer to Appendix A for information regarding the full scheduler.

Accessing the Service Schedule Application

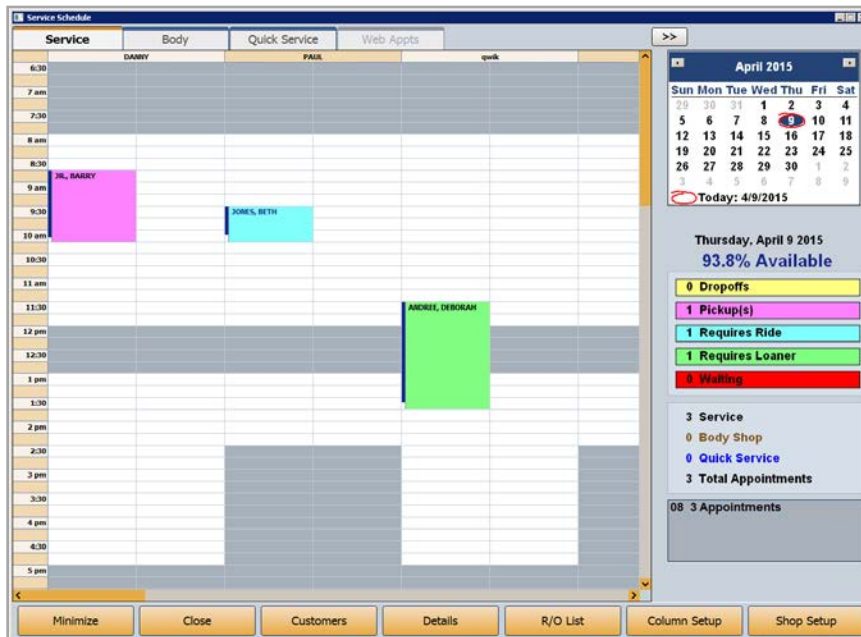
Initially, you can access the Service Schedule quick scheduler from any repair order screen. However, once you've opened the Service Schedule application for the day, you can leave it open and accessible through an Autosoft icon on the desktop taskbar.

1. On the Autosoft 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.

- Click the yellow **Service Schedule** button in the upper-right corner of the left column. The Service Schedule application 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.

4. In **Hours/Day**, indicate the number of hours you want available on the schedule each day. The default entry is 48.
5. 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 **Service Schedule** button on repair order screens. The **Scheduling** button on the Service Writing main menu will open the full Autosoft 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 Autosoft 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.

6. 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.
7. Use the **Display Scheduled Appointments With Quoted Time** checkbox to change how appointments are displayed on your schedule. During the conversion process, if your dealership chose to display appointments with full quoted time, this box will be checked. However, if your dealership instead chose to display appointments as single 15-minute cells, the box will be unchecked.

Check the box at any point to change the way future appointments are scheduled (existing appointments will continue to display according to the setting at the time the appointments were created). If the box is checked, any appointment you set from that point until you uncheck the box will be displayed with quoted time. If you uncheck the box, all appointments you set will be seen on the schedule as single 15-minute cells.

Note: If your dealership wishes to allow a manufacture or third-party web appointment integration to automatically place web appointments on your Service Schedule, you must organize your Service Schedule by advisor and display appointments using 15-minute cells. If you've checked the **Display Scheduled Appointments With Quoted Time** box and later check the **Schedule web Appointments Automatically** box in Step 9 of this setup, you will receive a warning notifying you that appointments will now be displayed in 15-minute cells. If you wish to allow the change in appointment display, click **Yes**; your selection to **Display Scheduled Appointments With Quoted Time** will be unchecked and once the shop setup is complete, you will see all appointments as single 15-minute cells. Hovering over the cells will reveal the total quoted time for the repairs. If you select **No** on this warning, you will not be able to use automatic web appointment scheduling.

8. Check the **Display Time in 24-Hour Format** box to select if you wish to display your schedule using the 24-hour format. Leave this box unchecked if you wish to view the schedule using the 12-hour AM/PM format.

9. Check **Schedule Web Appointments Automatically** to allow a manufacturer or third-party web appointment integration to automatically place appointments set using online service scheduling applications on your schedule. To use this feature, your schedule must be set up to display appointments in 15-minute cells and to use advisor columns.

Note: All columns in Service Schedule must correspond with an advisor. If one or more columns is not associated with an advisor, a warning message will appear. All non-advisor columns must be removed before you can select automatic scheduling. Click **OK** to dismiss the warning. Make the necessary changes on the Column Setup screen and return to this step once it's complete.

10. 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.

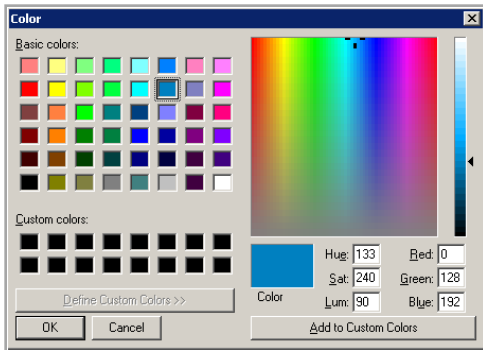
11. Use the **Customize Appt. Detail Colors** section to establish a color key to help you easily identify appointment requirements and determine whether transportation arrangements must be made for customers simply by viewing the schedule. **These color settings will be applied to every user in the 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.

12. Use the **Customize 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.**
13. Use the **Default Shop** 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.
14. 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.

If you've set up your schedule for automatic placement of web appointments—displaying appointments as single 15-minute cells, arranging your schedule by advisors (*See the following topic to make any necessary column adjustments*), and checking the **Schedule Web Appointments Automatically** box—you'll be alerted that your system is ready to automatically place Web appointments onto Service Schedule. Click **OK** to acknowledge the message.

Column Setup

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

Important: If you wish to allow a manufacturer or third-party integration to automatically place web appointments on your Service Schedule, you must organize your schedule using only advisor columns.

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

ID	Name	Start	Quit	Type
02	MICHAEL SCHRA...	08:00 AM	03:30 PM	S
07	MIKE SCHRAMER	08:00 AM	03:30 PM	S
24	MIKE SCHRAMER	08:00 AM	03:30 PM	S
26	MIKE SCHRAMER	08:00 AM	04:30 PM	S
33	MIKE SCHRAMER	08:00 AM	04:30 PM	S
37	MIKE SCHRAMER	08:00 AM	04:30 PM	S
38	MIKE SCHRAMER	08:00 AM	04:30 PM	S

2. In the **Advisor/Tech** field, use the drop-down menu to choose an advisor, 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 **Advisor/Tech** 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 Header field to assign the column name as it will appear on the schedule. You can choose to use the full name of the advisor or technician, or you can use a nickname or first or last name only. For custom columns, use a name that will help you quickly identify the column.
4. Use the **Num of Columns** drop-down menu to assign from one to 10 columns to the advisor, technician, or custom column under the header. Click the drop-down and select the number of columns appropriate for the advisor, technician, or custom column. This is particularly helpful when scheduling by advisor.

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

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

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

6. Click the **Lunch Schedule** tab to note the individual's lunch break for each day of the week, entering the **Start** and **Quit** time for the lunch break.
7. Use the **Vacation** tab to mark an advisor or 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 individual's vacation. Click **Apply**. The dates of the vacation will appear in the box to the right.

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

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

8. In the Dedicated Service section, click the circle next to the Service area that applies to the advisor or technician: **Service**, **Body**, **Quick Service**, or **Serv/QService**. This will place the technician or advisor on the appropriate schedule/s.
9. Click **Update Column** to save the data.
10. The **Column List** on the right side of the screen will allow you to quickly view the day's starting and quitting times for all the technicians and advisors. The top of the list will display the day's date. Beneath the date, each technician or advisor will be listed by employee number, name as it appears in the **Column Name** field, start and quit times and dedicated service area.

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

11. Click **Close** to save the changes, 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.

ID	Name	Start	Quit	Type
02	QUICK SERVICE	08:00 AM	03:30 PM	S
07	QUICK SERVICE	08:00 AM	03:30 PM	S
24	QUICK SERVICE	08:00 AM	03:30 PM	S
26	QUICK SERVICE	08:00 AM	04:30 PM	S
33	QUICK SERVICE	08:00 AM	04:30 PM	S
37	QUICK SERVICE	08:00 AM	04:30 PM	S
38	QUICK SERVICE	08:00 AM	04:30 PM	S
32	QUICK SERVICE	07:00 AM	03:30 PM	Q

3. The Column Grouping Setup window opens.

Click on an advisor/writer or custom column name from the **Column Grouping** drop-down menu.

4. Use the **Grouping Name** field to edit or customize the group name.
5. Click **Update Group**, followed by **Close**.

- You will be returned to the Column/Tech Setup screen. Add a technician, advisor, or column to the group by selecting the advisor, technician, or custom column in the **Column List** on the right of the screen or choosing the technician, advisor, or custom column from the **Advisor/Tech** drop-down menu.

Column Setup

Advisor/Tech: **MICHAEL SCHRAMER**

Header: **MIKE SCHRAMER**

Num of Columns: **2**

Group Name: **QUICK SERVICE**

Daily Schedule | Lunch Schedule | Vacation

Start | **Quit**

Monday: 07:00 AM | 03:30 PM

Tuesday: 07:00 AM | 03:30 PM

Wednesday: 07:00 AM | 03:30 PM

Thursday: 07:00 AM | 03:30 PM

Friday: 07:00 AM | 03:30 PM

Saturday: |

Sunday: |

Dedicated Service

☐ Service ☐ Body ☐ Quick Service ☐ Serv/Quick Service

Remove Column Update Column

Close Column Grouping Setup

ID	Name	Start	Quit	Type
08		08:00 AM	03:30 PM	S
07		08:00 AM	03:30 PM	S
24		08:00 AM	03:30 PM	S
26		08:00 AM	04:30 PM	S
33		08:00 AM	04:30 PM	S
37		08:00 AM	04:30 PM	S
38		08:00 AM	04:30 PM	S
32		07:00 AM	03:30 PM	Q
		07:00 AM	03:30 PM	S
02	MICHAEL SCHRA...	07:00 AM	03:30 PM	S

- Select the group from the **Group Name** drop-down menu.
- Click **Update Column**.
- Repeat steps 7 through 9 to add more columns, advisors, or technicians to the group.
- 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.

Service Schedule For Brickners Park City, Inc.

Service | Body | Quick Service | Web Appts

MIKE SCHRE | **JIM**

QUICK SERVICE

5:30 | 6 am | 6:30 | 7 am | 7:30 | 8 am | 8:30 | 9 am | 9:30 | 10 am | 10:30 | 11 am | 11:30 | 12 pm | 12:30

February 2018

Sun Mon Tue Wed Thu Fri Sat

28 29 30 31 1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 1 2 3

4 5 6 7 8 9 10

Today: 2/13/2018

Tuesday, February 13 2018

100.0% Available

0 Dropoffs

0 Pickup(s)

0 Requires Ride

0 Requires Loaner

0 Waiting

0 Service

0 Body Shop

0 Quick Service

0 Total Appointments

0 Web Appts

Web Audit

Minimize Close Customers Search Details R/O List Column Setup Shop Setup

Moving Appointments from Their Current Column to a New Column

Once you've created new columns, you can move appointments that were placed on Service Schedule through the conversion process. This will be necessary if you've converted based on advisor and have not previously used advisor columns to organize your schedule. You cannot delete a column containing future appointments.

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

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

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

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

Tip: If your Service Schedule is set up to display appointments as total quoted time, when 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, advisor, or custom column is comprised of several narrower columns, you can schedule multiple appointments at the same time for a technician, advisor, or custom column, one in each smaller column. If you choose to switch technicians or advisors 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**.

Removing Columns

During your initial setup of Service Schedule, you may need to remove obsolete columns that are created when converting to Service Schedule. Removing columns may also be necessary if a technician or advisor is no longer part of your Service team.

1. Click **Column Setup**.
2. From either the **Advisor/Tech** drop-down menu or the Column List on the right side of the screen, select the column or technician you wish to remove.
3. After that column's information populates on the left side of the screen, click the **Remove Column** button.
4. If the column has future appointments assigned to it, you will be alerted that you must reschedule all appointments before the column can be removed from the schedule. *(See the "Moving Appointments from Their Current Column to a New Column" process above for detailed directions.)* A list of the date and time for each appointment will be displayed. Reschedule the appointments.
5. The system will prompt you to verify that you want to delete the column from the schedule. Click **Yes**.

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

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

Scheduling Appointments in Service Schedule

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. Hovering over an appointment will reveal the full estimated appointment time based on the time estimates entered during the prewrite.

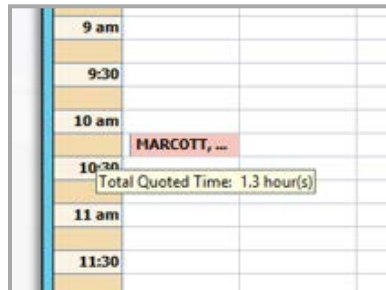
If during the conversion process you chose to display scheduled appointments with quoted time, the schedule will reflect the actual time each appointment should take based on the time estimates you enter during the prewrite. However, if you do not assign quoted time estimates while completing an appointment's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

Viewing the Schedule

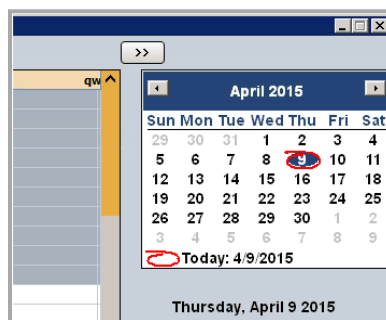
When viewing the schedule, you can quickly identify appointments based on the font color. Quick Service appointments will be blue, Body Shop appointments will be orange, and Service appointments will be black. The appointment will also display (O) when a repair order has been opened and (C) when a repair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

8 am					
8:30					
9 am	JR., BARRY				
9:30			JONES, BETH		
10 am					
10:30		Zelinsky, James			
11 am					
11:30					
12 pm					ANDREE, DEBORAH
12:30					
1 pm					
1:30					
2 pm					

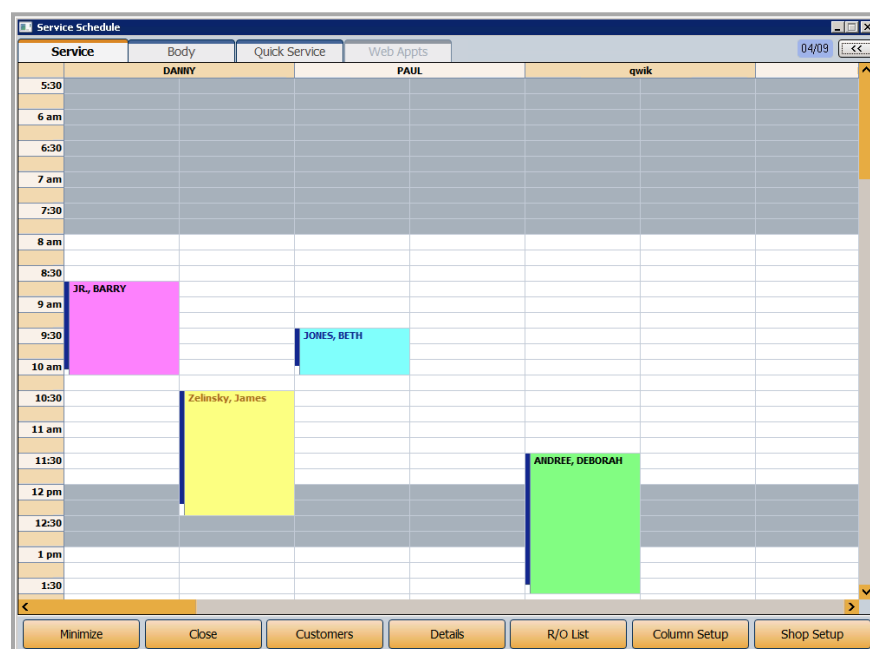
Hovering over an appointment reveals the scheduled time for the service, even when the schedule is set up using 15-minute cells for each appointment.



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 advisor, technician, or custom 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.

Scheduling an Appointment by 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 GM eVIP, Chrysler VIP, Ford OASIS, 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 the screen.

The screenshot shows the 'Schedule Service' window. On the left, the 'Customer' tab is active, displaying information for customer SM1500563, ALYSSA SMITH. Fields include Name, Address (23 MAIN ST, HERMITAGE, PA 16121), E-Mail (ALYSSASMITHERS@MAIL.COM), Phone (724 555 0123), and VIN (1C4NJDEB5ED500563). The 'Primary Contact Method' is set to 'H' (Home Phone). The 'eVIP' section shows 'Last Name: SMIT' and a 'Get VIP' button. The 'When Finished' section has radio buttons for 'Call', 'E-Mail', 'Deliver', and 'Will Pickup'. The right pane shows a list of service items with dates and times, including '05983 01/31/18 99239' and '05340 01/22/18 99215'. The bottom of the window has 'Cancel', 'Search', and 'Next' buttons.

4. The **Writer** field automatically defaults to the writer ID selected for the workstation if scheduling the appointment in a technician or custom column. If the appointment is being placed into an advisor column, the ID will correspond with the advisor on the column.
5. Use the **Primary Contact Method** drop-down to select how the customer should be reached regarding this appointment. The field to the right will be populated with **H** (home phone), **W** (work phone), **M** (cell phone), **E** (email), or **A** (mailing address) based on your selection.

6. Use the **Do Not Call**, **Do Not Text**, **Do Not Email**, and **Marketing Letter** fields to indicate the customer's contact preferences. Enter **Y** for yes in the corresponding field if the customer does not want to be receive calls, text messages, emails, or follow-up marketing letters. Enter **N** for no if they are open to receiving these forms of contact.
7. 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.
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, 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.

The screenshot shows the 'Enter Complaints' window. On the left, there are six complaint entry fields. Each field has a 'Menu' dropdown, a 'Tech' dropdown, a 'Quoted Time' field, and a 'C/O/W/I' checkbox. The first field has 'Menu: 0107', 'Tech: 52', 'Quoted Time: 3', and 'C/O/W/I: C'. The second field has 'Menu: 0204', 'Tech: 52', 'Quoted Time: 2', and 'C/O/W/I: C'. The third field has 'Menu: 0301', 'Tech: 52', 'Quoted Time: 8', and 'C/O/W/I: C'. The fourth field has 'Menu: 0301', 'Tech: 52', 'Quoted Time: 8', and 'C/O/W/I: C'. The fifth field has 'Menu: 0301', 'Tech: 52', 'Quoted Time: 8', and 'C/O/W/I: C'. The sixth field has 'Menu: 0301', 'Tech: 52', 'Quoted Time: 8', and 'C/O/W/I: C'. On the right, there is a list of complaint codes and descriptions. The list is organized into three tabs: 'Usage', 'Code', and 'Name'. The 'Code' tab is selected, showing a list of codes from 0100 to 0400. The list includes codes for inspections, lube, oil, filter, brakes, and tires. At the bottom of the right pane, there are buttons for 'Back', 'Cancel', and 'Schedule'.

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. 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 if you've set the schedule to display appointments by full quoted time. 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 or have selected to display appointments as single 15-minute cells, the system will automatically set the appointment for 15 minutes only.
12. 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).
13. 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.
14. The main Service Schedule screen will appear. Use the calendar on the right side of the screen to select the day for the appointment.
15. 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.

Scheduling an Appointment by 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, advisor, 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 if scheduling the appointment in a technician or custom column. If the appointment is being placed into an advisor column, the writer ID will correspond with the advisor on the column.
6. Use the **Primary Contact Method** drop-down to select how the customer should be reached regarding this appointment. The field to the right will be populated with **H** (home phone), **W** (work phone), **M** (cell phone), **E** (email), or **A** (mailing address) based on your selection.
7. Use the **Do Not Call**, **Do Not Text**, **Do Not Email**, and **Marketing Letter** fields to indicate the customer's contact preferences. Enter **Y** for yes in the corresponding field if the customer does not want to be receive calls, text messages, emails, or follow-up marketing letters. Enter **N** for no if they are open to receiving these forms of contact.

8. 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.
9. 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.
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**, or **Will Pickup**. 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.

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.

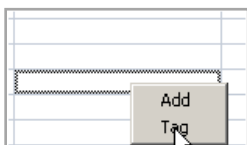
12. If using technician columns, the **Tech** field will automatically display the number for the tech in whose column you clicked to establish the appointment.
13. Use the **Quoted Time** field to indicate how many time units are required for the appointment. This will automatically block the appropriate time on the technician's column if you've set the schedule to display appointments by full quoted time.
14. 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).
15. 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.

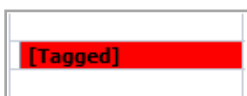
Tagging Extra Time

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]."

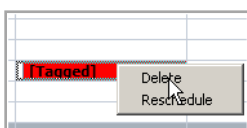


Tip: To tag a block of time greater than a 15-minute time slot, click on a time slot, holding the mouse button down while dragging the cursor to highlight as many time slots as necessary to create the tag length you require. Right-click the highlighted block and select **Tag** to tag the block of time. 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.

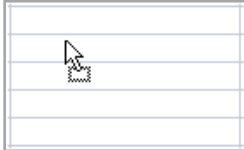


3. The slot is cleared.

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 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.

Schedule Info

Phone: (412) [redacted] PreWrite: 022759

Name: DEBORAH LYNN ANDREE

Address: 18 Reed St

City/State: MC DONALD PA 15057

Last Svc: 02/05/14 [redacted]

Writer: 08 Requires Loaner

☐ Show Opened ☐ Show Closed

1. 0407-WHEEL BEARINGS
 2. 0410-ALIGNMENT
 3. 0504-SHOCKS : REPLACE
 4. -
 5. -
 6. -

Buttons: Hide, Reschedule, Edit, Delete

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.

Schedule Info

Phone: (412) [redacted] PreWrite: 022759

Name: DEBORAH LYNN ANDREE

Address: 18 Reed St

City/State: MC DONALD PA 15057

Last Svc: 02/05/14 [redacted]

Writer: 08 Requires Loaner

☐ Show Opened ☐ Show Closed

1. 0407-WHEEL BEARINGS
 2. 0410-ALIGNMENT
 3. 0504-SHOCKS : REPLACE
 4. -
 5. -
 6. -

Buttons: Hide, Reschedule, Edit, View RO

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

Editing an Appointment

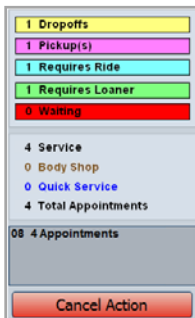
You can edit appointment information as needed. If you edit customer information in the Service Schedule quick scheduler, the changes will be saved to the customer's master file.

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.

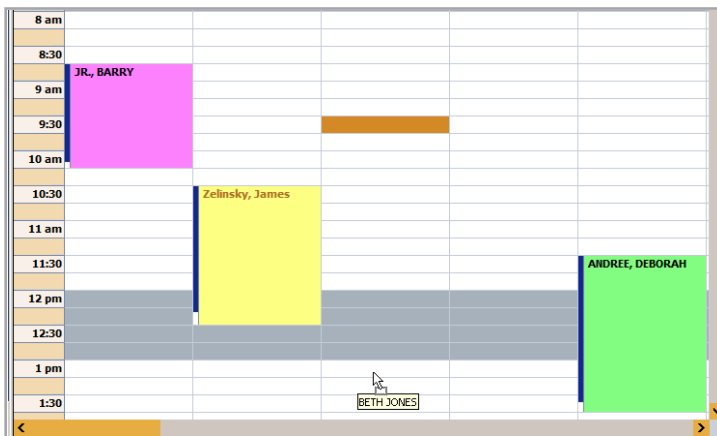
Rescheduling an Appointment

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 your Service Schedule is set up to display appointments as total quoted time, when 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, advisor, or custom column is comprised of several narrower columns, you can schedule multiple appointments at the same time for a technician, advisor, or custom column, one in each smaller column. If you choose to switch technicians or advisors 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.

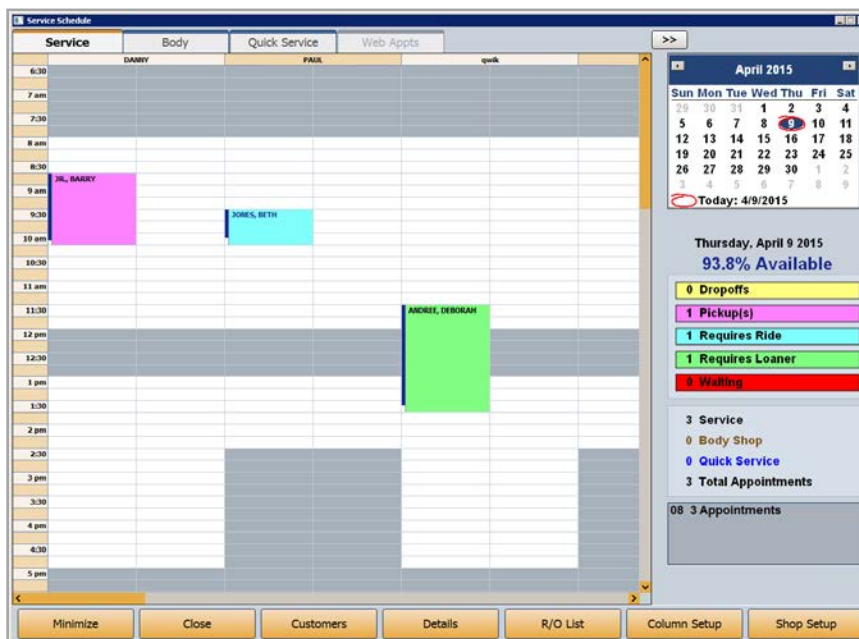
Tip: The prewrite associated with the appointment is also deleted when you delete an appointment.

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.



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

Schedule Details

Schedule For 04/09/15

All R/O's Service Body Shop Quick Service

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
08:45	BARRY E. MILLER JR.		Pick	022757	08	52	Opn	Call	0103 - Inspections Diagnostics 0107 - State Inspections 0204 - Engine Lube, Oil , Filter 0404 - Rotate
08:45	JAMES SMITH		Drop	022761	08	53	Opn	Call	0107 - State Inspections 0204 - Engine Lube, Oil , Filter 0404 - Rotate
10:15	COLLEEN SMITH		Drop	022762	08	53	Opn	Call	0605 - Battery Cable Replace 0600 - Batteries
10:30	James R Zelinsky		Drop	022760	08	52	Opn	Call	6004 - Paint 6007 - Panel : Repair
11:30	DEBORAH LYNN ANDREE		Loaner	022759	08	00	Cls	P/Up	0407 - Wheel Bearings 0410 - Alignment 0504 - Shocks : Replace
13:00	BETH JONES		Ride	022758	08	53	Cls	Call	0204 - Engine Lube, Oil , Filter

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

- 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.
- 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.
- 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.
- 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.

Action

☐ Notified

☒ Call

☐ E-mail

☐ Deliver

☐ Will Pick Up

☐ Waiting

- 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."
- 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.

The screenshot shows a window titled "Print Details" with a "Print Schedule Options" section. It contains four groups of radio buttons: "Department" with options "Service" (selected), "Body Shop", and "Quick Lube"; "Schedule Type" with options "Full List" (selected), "No Shows", and "Web No Shows"; "Print Schedule For" with options "All" (selected), "Technician", "Advisor", and "All Web"; and "Print Date Range" with "From:" and "To:" fields both set to "2 / 9 / 2015" with calendar icons. At the bottom are "Close" and "Print" buttons.

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.

7 am				
7:30				
8 am			(0) PETERS	
8:30				
9 am				

Tip: You can also move carry over appointments by rescheduling the appointment as explained under “Rescheduling an Appointment” on page 25. 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.

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

- Phone: [Redacted]
- PreWrite: 022758
- Name: BETH JONES
- Address: [Redacted]
- City/State: PITTSBURGH PA 15227
- Last Svc: 03/19/13 [Redacted]
- Writer: 08 Requires Ride
- ☐ Show Opened ☐ Show Closed
- Service List:
 - 1. 0204-ENGINE LUBE, OIL , FILTER
 - 2. 0404-ROTATE
 - 3. -
 - 4. -
 - 5. -
 - 6. -
- Buttons: Hide, Reschedule, Edit, Delete

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.

Web Appointment Integration

As an Autosoft DMS user, you can employ third-party web appointment software to allow customers to establish, update, and cancel service appointments through manufacturer and third-party web applications. This integration means no longer having to rekey web appointment data into Autosoft DMS. The manufacturer or third-party software transmits new appointments, updates, and cancellations to the Autosoft DMS Service Schedule application, where you will be notified of web appointments awaiting addition to the schedule or updating based on customer alterations.

This protocol ensures that with just a few clicks of the mouse, you will be aware of all new web appointments and can schedule those appointments to the appropriate time slot and column based on the appointment requirements without having to rekey every piece of data entered by the customer during scheduling. You also can track cancelled web appointments for follow-up. This application provides you with full control over your schedule and your shop's time.

If your schedule is organized using advisor columns, you've chosen to display appointments as single 15-minute cells, and you've turned on the parameter within the Shop Setup screen that allows web appointments to be placed automatically in Service Schedule, no additional work is necessary for the web appointments to be added to your schedule. The appointments are automatically placed on your schedule, and an asterisk (*) to the left of the customer name indicates that the appointment was scheduled via the web appointment integration.

Note: You must use the Autosoft DMS Service Schedule application to integrate with third-party Web appointment applications. Autosoft's Schedule Xpress scheduling application will not allow you to integrate with third-party Web appointment software.

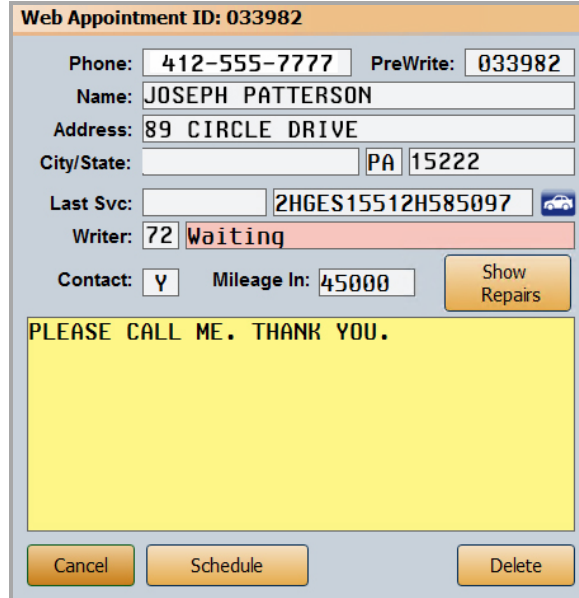
Important: If you have not enabled automatic placement of web appointments, it is crucial that you monitor the Web Appointments tab throughout the day. Without automatic placement of Web appointments enabled, the Web appointment integration requires shop review and processing to ensure your shop schedule is up to date. It's a best practice to process Web appointments as they come in through the integration.

Automatically Added Web Appointments

If you've checked the **Schedule Web Appointments Automatically** box on Service Schedule's Shop Setup screen and have set up your schedule using advisor columns and displaying appointments as single 15-minute cells, web appointments will automatically be placed on your Service Schedule.

Web appointments automatically placed on your schedule by a manufacturer or third-party integration will be noted with an asterisk (*) to the left of the appointment's customer name, noting them as web appointments.

Right-clicking on a web appointment will open the Web Appointment Details screen. If web notes were entered while the appointment was being made, the Web Notes box will display in place of the appointment repairs. Clicking **Show Repairs** will display the requested service. If web notes weren't entered while the appointment was being set, the Web Appointment Details screen will open to the requested repairs view.



The screenshot shows a 'Web Appointment ID: 033982' window. It contains several input fields: Phone (412-555-7777), PreWrite (033982), Name (JOSEPH PATTERSON), Address (89 CIRCLE DRIVE), City/State (PA 15222), Last Svc (2HGES15512H585097 with a car icon), Writer (72), and a status box showing 'Waiting' in red. There are also fields for Contact (Y) and Mileage In (45000). A 'Show Repairs' button is located next to the Mileage In field. Below these fields is a large yellow text area containing the message 'PLEASE CALL ME. THANK YOU.' At the bottom of the window are three buttons: 'Cancel', 'Schedule', and 'Delete'.

Web Appointment ID: 033982	
Phone:	412-555-7777
PreWrite:	033982
Name:	JOSEPH PATTERSON
Address:	89 CIRCLE DRIVE
City/State:	PA 15222
Last Svc:	2HGES15512H585097
Writer:	72
Waiting	
Contact:	Y
Mileage In:	45000
Show Repairs	
PLEASE CALL ME. THANK YOU.	
Cancel	Schedule
Delete	

Any web appointments scheduled and later canceled through a manufacturer or third-party integration will be automatically removed from your schedule. Because you may not notice when an appointment is removed from your shop schedule, Service Schedule will alert you of deleted appointments using the **Web Audit** button in the lower-right corner of the main Service Schedule screen. The **Web Audit** button will change from gray to light blue to alert you of any deleted web appointments.

Manually Adding Web Appointments

Understanding Web Appointment Notifications

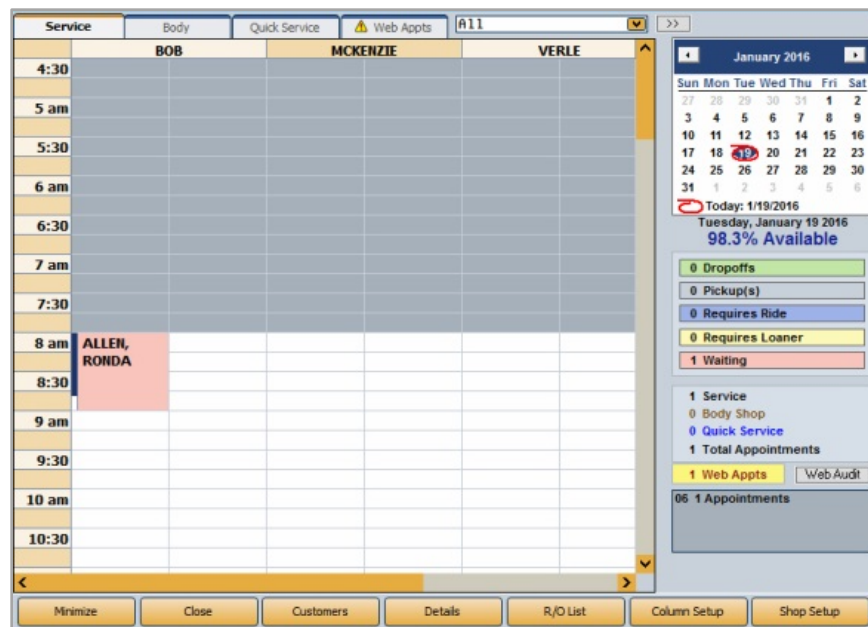
With the web appointment integration for the Autosoft DMS Service Schedule application, when a customer makes an appointment through a manufacturer or third-party interface on your website, the appointment information is passed on to Autosoft DMS, which retrieves the data every 60 seconds. Once the DMS retrieves the web appointment data for Service Schedule, you must manually confirm the appointment and place it on your shop schedule. Any updates to the appointment made in that third-party application will also be passed along to your dealership in this way and must be confirmed.

You can easily identify whether you have web appointments waiting to be added to your schedule or updated by glancing at your main Service Schedule screen. When the **Web Appts** tab along the top of the screen is grayed out and the **Web Appts** box in the bottom right corner of the screen reads “0 Web Appts,” you have no web appointments to process.

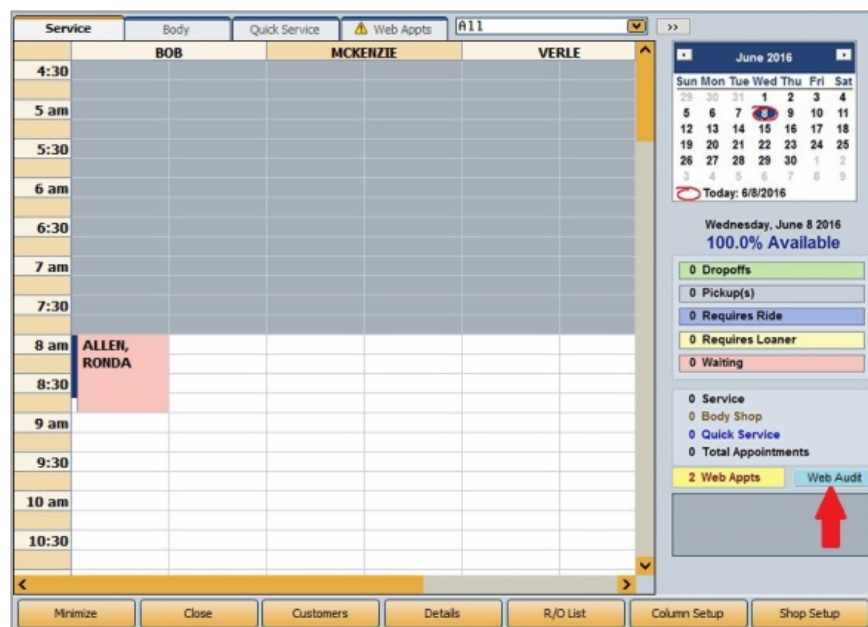
The screenshot displays the Autosoft DMS Service Schedule application. The main window features a grid for scheduling appointments. The columns are labeled 'Service', 'Body', 'Quick Service', and 'Web Appts'. The rows show time slots from 4:30 to 10:30. A calendar on the right shows January 2016, with the 19th highlighted. A summary box on the right indicates 0 Web Appts and 06 1 Appointments. The bottom of the screen has buttons for Minimize, Close, Customers, Details, R/O List, Column Setup, and Shop Setup.

Whenever a customer uses a manufacturer or third-party web appointment application to make a service appointment or later update an appointment, the integration pushes the appointment into Autosoft DMS. This triggers Service Schedule to display web appointment notices.

You'll be notified of waiting web appointments by an alert symbol inside the now-clickable **Web Appts** tab, as well as by the now-yellow **Web Appts** box in the bottom right corner of the screen, which will display the number of web appointments waiting to be committed to your shop schedule.



These alerts appear for both new appointments and any updated appointments. However, when an appointment is cancelled by the customer using the manufacturer or third-party software, the appointment is removed from your schedule automatically. Because you may not notice when an appointment is removed from your busy shop schedule, Service Schedule alerts you of deleted appointments using the **Web Audit** button at the bottom right corner of the main Service Schedule screen. The **Web Audit** button changes from gray to light blue to alert you of any deleted Web appointments.



Adding New Web Appointments to Your Shop Schedule

Monitor Service Schedule throughout the day to ensure the timely processing of web appointments awaiting commitment to your shop schedule. When you see the alert symbol in the **Web Appts** tab or a number of web appointments waiting to be processed in the yellow **Web Appts** box at the bottom right of the screen, take the following steps to commit the appointment to the appropriate column of your shop schedule.

1. Click the **Web Appts** tab containing an alert symbol signifying awaiting web appointments.

Service	Body	Quick Service	Web Appts	All
	BOB	MCKENZIE	VERLE	
4:30				
5 am				
5:30				

The yellow **Web Appts** box in the bottom right corner of the main Service Schedule screen will alert you to the number of web appointments awaiting processing.

2. A list of web appointments awaiting commitment to your shop schedule opens. Right-click on a web appointment labeled as “New” in the **Type** column.

The screenshot shows the 'Service Schedule For Integration Testing' window. The 'Web Appts' tab is selected, displaying a list of appointments. The summary panel on the right shows the date 'Wednesday, June 8 2016' and '100.0% Available'. It lists various appointment types with counts: 0 Dropoffs, 0 Pickup(s), 0 Requires Ride, 0 Requires Loaner, 0 Waiting, 0 Service, 0 Body Shop, 0 Quick Service, 0 Total Appointments, and 2 Web Appts. A 'Web Audit' button is also present.

Type	Schedule Day/Time	Name	Cell Phone	Work Phone	Home Phone	Email
New	06/07/2016 14:00	ZACHARY ZAZ	700-800-9000	*100-200-3000	100-200-3000	ZAZ@GMAIL.COM
New	06/08/2016 09:30	JOSEPH PATTERSON	412-333-7777	412-111-2222	*412-555-7777	JPATTERSON123@Y

3. The Web Appointment Details screen opens. The screen displays the appointment's ID number, which is assigned as the prewrite number. It also contains basic customer and vehicle information and the requested vehicle repairs.


Web Appointment ID: 033979

Phone: 100-200-3000 PreWrite: 033979

Name: ZACHARY ZAZ

Address: 1406 MAIN RD

City/State: PITTSBURGH PA 15555

Last Svc: 2HGFG12877H570048 

Writer: 17 Requires Loaner

Contact: Y Mileage In: 45000

1. LOF-LUBE OIL FILTER 1
2. T101-TIRE ROTATION 1
3. -
4. -
5. -
6. -

Cancel Schedule Delete

If the customer entered notes when establishing the web appointment, instead of the list of requested repairs, the Web Appointment Details screen opens to the Web Notes view. The text box at the bottom of the details screen is shaded yellow and contains the notes entered by the customer.


Web Appointment ID: 033982

Phone: 412-555-7777 PreWrite: 033982

Name: JOSEPH PATTERSON

Address: 89 CIRCLE DRIVE

City/State: PA 15222

Last Svc: 2HGES15512H585097 

Writer: 72 Waiting

Contact: Y Mileage In: 45000 Show Repairs

PLEASE CALL ME. THANK YOU.

Cancel Schedule Delete

When in the Web Notes view, click **Show Repairs** to view the list of requested repairs. Click **Show Web Notes** to return to the web notes view from the requested repairs view.


Web Appointment ID: 033982

Phone: 412-555-7777 PreWrite: 033982

Name: JOSEPH PATTERSON

Address: 89 CIRCLE DRIVE

City/State: PA 15222

Last Svc: 2HGES15512H585097 

Writer: 72 Waiting

Contact: Y Mileage In: 45000 * Show *
Web Notes

1. LOF-LUBE OIL FILTER 1
2. -
3. -
4. -
5. -
6. -

Cancel Schedule Delete

Tip: It is vital that you read any web notes, as they may contain information that will affect customer satisfaction.

4. Click **Schedule**.
5. The main Service Schedule screen opens, and the web appointment customer name and appointment date and time appears in blue text at the top right corner of the schedule to remind you of the date and time selected by the customer.

Service	Body	Quick Service	Web Appts	* JOSEPH PATTERSON 06/08/16 8:00 AM	
	BOB	MCKENZIE	VERLE		
4:30					
5 am					
5:30					

6. Locate the appropriate opening in your shop schedule at the scheduled appointment time. Find a column with the necessary time available based on the appointment's requested repairs. Click on the appropriate time slot.

Tip: If you attempt to schedule an appointment at a time other than that requested by the customer, a warning will alert you that the customer wanted the appointment at a different date or time.

7. The Schedule Service screen opens with all of the information gathered by the manufacturer or third-party scheduling application. Enter through the fields, verifying the information.

Schedule Service

Customer: PAT100194 1st 3 of Last Name or Phone Number, then press ENTER to Search

Writer:

☒ Individual: JOSEPH ☐ PATTERSON

Name: JOSEPH PATTERSON

Address: 89 SOUTHWOOD CIR

City: CARNEGIE PA 15106

E-Mail: JPATT@MAIL.COM

Memo:

Phone: 412 555 7777

Work: 412 111 2222

Cell: 412 333 7777

Primary Contact Method: ☒ Home Phone ☐ H ☐ Drop Off

Do Not Call: ☐ N ☐ Do Not Text: ☒ Y ☐ Pick-Up

Do Not Email: ☐ N ☐ Marketing Letter: ☒ Y ☐ Waiting

GM Vehicle History

VIN: 1G11C5SL2FF100194

Year: 2015 Make: CHEVROLET

Model: MALIBU 1LT NUIO: 0

License: FP00362 PA

Inspect: Color: BLACK

Contract:

Term: Expires: Contract Mileage:

Click Line to View R/O

84283	12/29/15	18132	52 W CHEV2014-15 2YEAR DEXOS 5W3	51.95
83097	11/27/15	16881	43 C ENHANCED EMISSION INSPECTIO	29.95
			43 C PA STATE INSPECTION	19.95
80834	10/05/15	15177	76 W CUST STATES SES LIGHT ON	61.53
80050	09/15/15	14725	74 W CUST STATES SEAT BELT STOPP	301.27
78500	08/07/15	12970		

Service Items

Total Estimated Time (Units): 0

Last Service: 12/29/15 18132

Delivered: 00/00/00 Salesman:

Memo

8. Any web notes entered by the customer during the scheduling process are noted by a blue checkmark symbol in the **Web Notes** tab in the bottom right corner of the screen. Click on the **Web Notes** tab to view those notes for any important details entered by the customer.
9. Click **Next**.
10. The Enter Complaints screen will open. ENTER or TAB through the fields to ensure that the DMS codes associated with the requested repairs are added to the prewrite.
11. Click **Schedule**.

12. You are returned to the main Service Schedule screen, where the web appointment now appears on the schedule. An asterisk signals to users that the appointment was established via the web integration.

Service	Body	Quick Service	Web Appts	All
	BOB	MCKENZIE	VERLE	
4:30				
5 am				
5:30				
6 am				
6:30				
7 am				
7:30				
8 am	ALLEN, RONDA	* PATTERSON, JOSEPH		
8:30				
9 am				
9:30				
10 am				
10:30				

13. Repeat steps 1 through 12 to continue to add web appointments to your schedule until the **Web Appts** box in the bottom right corner of the Service Schedule main screen reads "0 Web Appts."

Confirming Updated Web Appointments

When a customer uses the manufacturer or third-party web application to update an appointment he or she has set through the application, the third-party pushes that update to the Autosoft DMS Service Schedule application, which automatically checks for web updates every 60 seconds. When an appointment is updated, the appointment will be removed from your schedule and placed within the Web Appts tab, which will again contain an alert symbol notifying you of the need to process a web appointment. The count in the Web Appointments box in the lower right corner of the screen reflects the appointment change, as well.

Important: An appointment is removed from your schedule when an update is made to provide you with full control over your schedule and where the updated appointment should be placed. This prevents scheduling conflicts based on the updated service appointment time or skill requirements. It is imperative that you continually monitor the **Web Appts** tab to ensure your shop schedule is current.

To commit an updated web appointment to your shop schedule, take the following steps:

1. You are alerted to the number of web appointments awaiting processing by the yellow Web Appts box in the bottom right corner of the main Service Schedule screen. Click the **Web Appts** tab containing the alert symbol, which also signifies awaiting Web appointments.

Service	Body	Quick Service	Web Appts	All
	BOB	MCKENZIE	VERLE	
4:30				
5 am				
5:30				

2. A list of web appointments that must be committed to your shop schedule opens. Right-click on a web appointment labeled as "Update" in the **Type** column.

Service	Body	Quick Service	Web Appts	All
Type	Schedule Day/Time	Name	Cell Phone	Work Phone
Update	01/19/2016 08:00	JOSEPH PATTERSON	412-333-7777	*412-555-7777 41

January 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 1/19/2016
Tuesday, January 19 2016
98.3% Available

0 Dropoffs
0 Pickup(s)
0 Requires Ride
0 Requires Loaner
1 Waiting

1 Service
0 Body Shop
0 Quick Service
1 Total Appointments

1 Web Appts Web Audit

06 1 Appointments

Minimize Close Customers Details R/O List Column Setup Shop Setup

- Verify the information in the Web Appointment Details screen. Take note of any additional repairs that have been requested in the update. If the customer entered web notes at the time of establishing or updating the appointment, the Web Appointment Details screen opens to the Web Notes view. In this case, click the **Show Repairs** button to review the repairs.

Web Appointment ID: 033982

Phone: 412-555-7777 PreWrite: 033982

Name: JOSEPH PATTERSON

Address: 89 CIRCLE DRIVE

City/State: PA 15222

Last Svc: 2HGES15512H585097

Writer: 72 Waiting

Contact: Y Mileage In: 45000 * Show *
Web Notes

1. CFF-COOLANT FLUSH AND FILL
 2. Align-4 WHEEL COMPUTER ALIGNMENT
 3. MB4-MOUNT OF BALANCE 4 TIRES
 4. -
 5. -
 6. -

Cancel Schedule Delete

- Click **Show Web Notes** to check for any new customer notes that may be necessary.

Tip: It is vital that you read any web notes, as they may contain information that will affect customer satisfaction.

- Click **Schedule**.
- You are returned to the main Service Schedule screen, where you will replace the updated web appointment on the shop schedule. The customer's name and appointment time and date appear in blue font at the top right corner of the schedule to remind you where to place the appointment on the schedule.

Service	Body	Quick Service	Web Appts	* JOSEPH PATTERSON 06/08/16 8:00 AM	
	BOB	MCKENZIE	VERLE		
4:30					
5 am					
5:30					

- Click the appropriate open time slot to accommodate the appointment based on the appointment time and the requested repairs and estimated length of the service appointment.

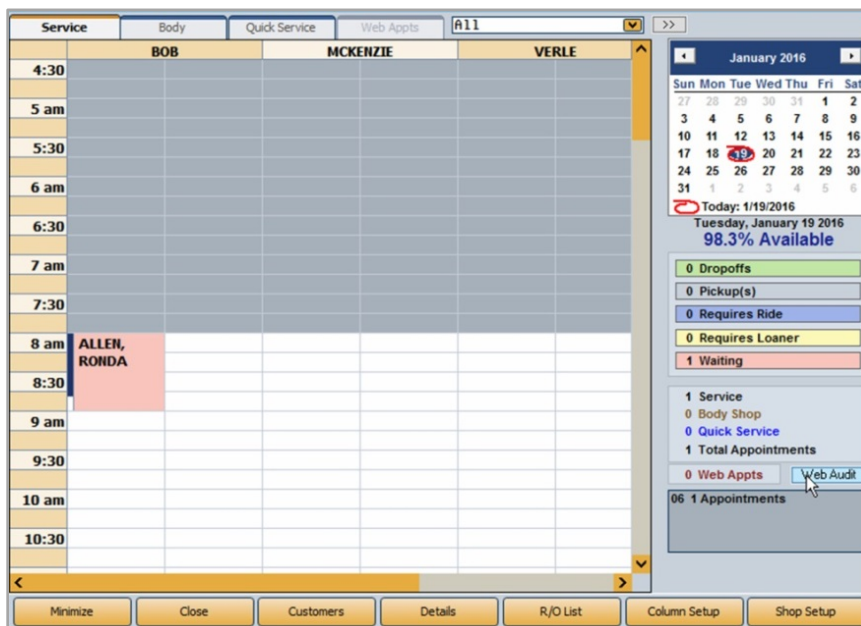
Managing Deleted Web Appointments

The Autosoft DMS Service Schedule application automatically checks for new, updated, and deleted web appointments every 60 seconds. When a customer uses a manufacturer or third-party web appointment integration to delete a web appointment, the service appointment is automatically removed from your shop schedule.

You don't have to take any steps to update your schedule to reflect deleted appointments. You can, however, track web cancellations. This information can then be used to follow up with these customers to determine the reason for the cancellation and reschedule the appointment when necessary.

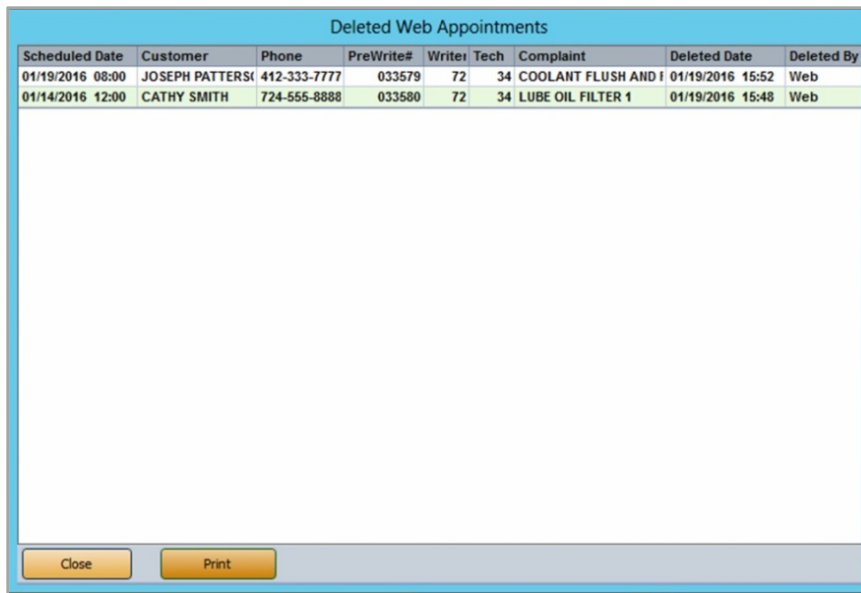
Use the Web Audit list to track all web appointments cancelled in the last 30 days using the integration. When a web appointment is cancelled by the customer, the appointment is removed from your schedule, and the Web Audit button in the bottom right corner of the screen turns light blue. To view the Web Audit list, follow these steps:

1. The **Web Audit** button turns from gray to light blue when a web appointment is deleted by the customer through the third-party interface.



2. Click **Web Audit**.

- The Web Audit list opens. The list contains only those appointments that were deleted by the customer through the web appointment interface. Appointments remain in the Web Audit list for 30 days from the date of deletion, at which point they are automatically cleared from the list.



Scheduled Date	Customer	Phone	PreWrite#	Writer	Tech	Complaint	Deleted Date	Deleted By
01/19/2016 08:00	JOSEPH PATTERSON	412-333-7777	033579	72	34	COOLANT FLUSH AND I	01/19/2016 15:52	Web
01/14/2016 12:00	CATHY SMITH	724-555-8888	033580	72	34	LUBE OIL FILTER 1	01/19/2016 15:48	Web

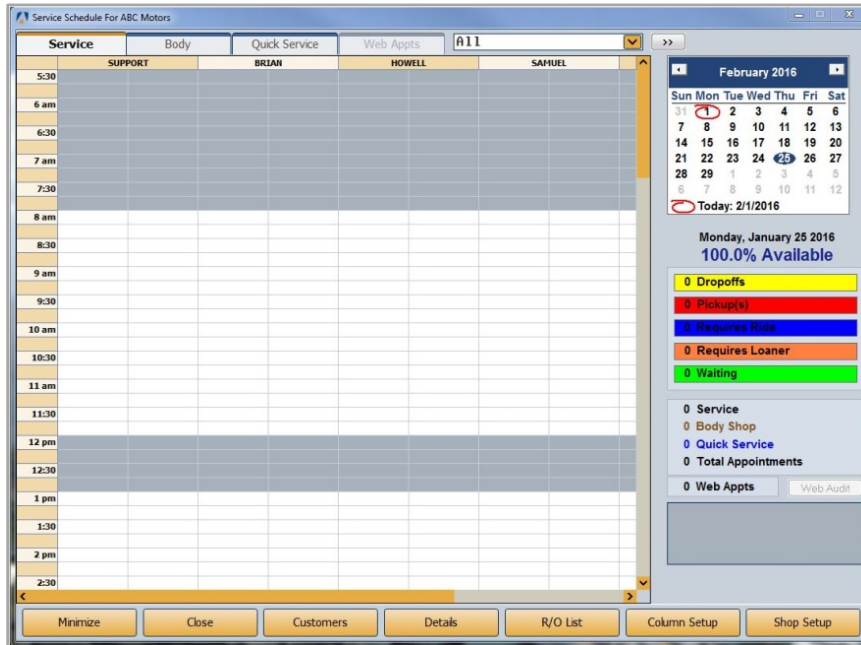
Close Print

- To print the Web Audit list for follow-up, click **Print**.
- When prompted to verify that your printer is ready, select **To Printer** to print a hardcopy of the list. If you wish to instead view or save the list electronically, select **To Screen**.
- Click **Print**.

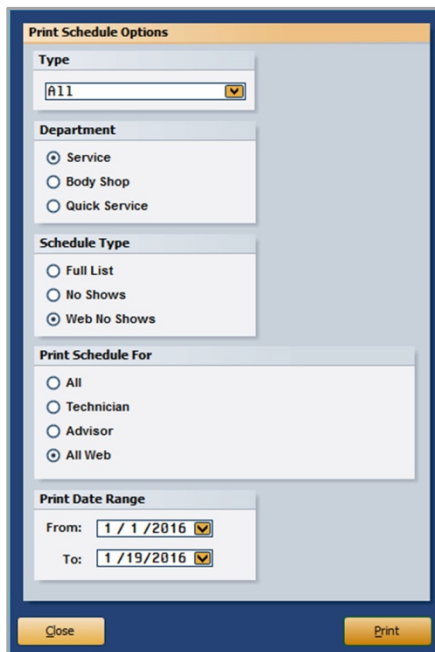
Tracking Web Appointment No-Shows

You can also view and print a report of Web appointment no-shows for follow-up purposes. Take the following steps:

1. Click the **Details** button at the bottom of the Service Schedule main screen.



2. The Schedule Details screen opens. Click **Print Schedule/No Shows**.
3. The Print Details window opens. Select the department for which you'd like to print the schedule.



4. In the **Schedule Type** box, click to select **Web No Shows**.

5. In the **Print Schedule For** box, click to select **All Web**.
6. Use the **From** and **To** fields to enter the appropriate date range or select the start and end dates for the report using the drop-down calendars.
7. Click **Print**.
8. When asked to verify that your printer is ready, select **To Printer** or **To Screen**, and click **Print**. A list of all no-show Web appointments prints or opens on the screen, depending on your print criteria.

Video Tutorials

We've created a series of videos that illustrate the use of the Autosoft DMS Service Schedule Web Appointment integration. To access these videos, visit <https://autosoftdms.com/service-schedule/> and click on the **Service Schedule Integration 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.