

FLEX DMS Service Schedule Web Appointment Integration

As an Autosoft FLEX DMS user, you can employ third-party Web appointment software to allow customers to establish, update, and cancel service appointments through third-party's Web applications. This integration means no longer having to rekey Web appointment data into FLEX DMS. The third-party software transmits new appointments, updates, and cancellations to FLEX DMS Service Schedule, 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.

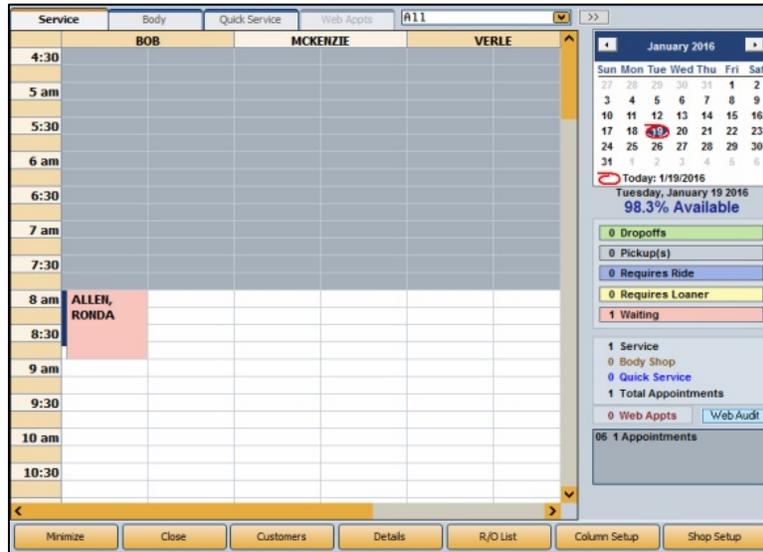
Note: You must be a FLEX DMS Service Schedule quick scheduler user to integrate with third-party Web appointment applications. Autosoft's Schedule Xpress scheduling application will not allow you to integrate with third-party Web appointment software.

Important: Because the Web appointment integration requires shop review and processing to ensure your shop schedule is up to date, it is crucial that you monitor the Web Appointments tab throughout the day and process Web appointments as they come in through the integration.

Understanding Web Appointment Notifications

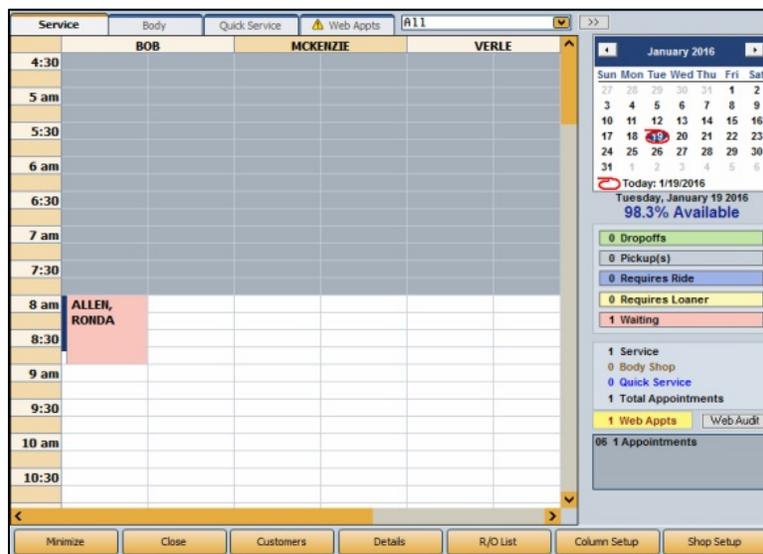
With the new Web appointment integration for the FLEX DMS Service Schedule application, when a customer makes an appointment through a third-party interface on your Website, the third party will pass the information on to FLEX DMS, which retrieves the third-party data every 60 seconds. Once FLEX DMS retrieves the Web appointment data for Service Schedule, you will have to 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.

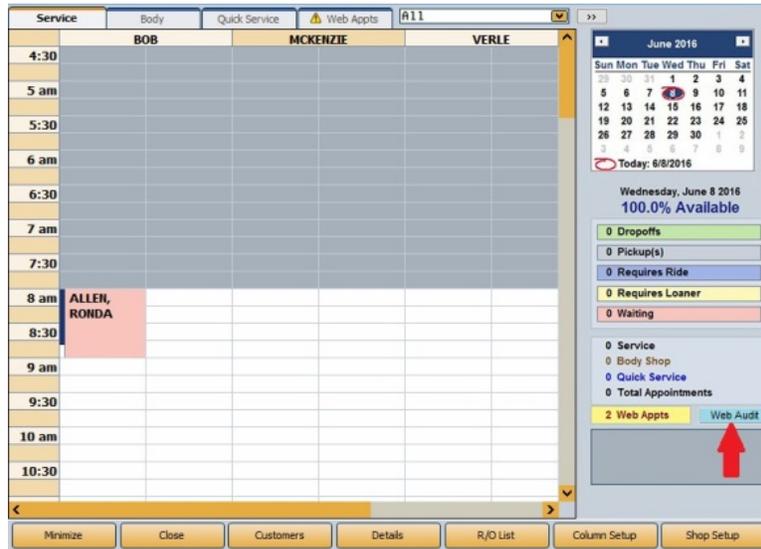


Whenever a customer uses a third-party Web appointment application to make a service appointment or later update an appointment, the third-party software will push the appointment into FLEX DMS. This will trigger Service Schedule to display Web appointment notices.

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 third-party software, the appointment will be removed from your schedule automatically. Because you may not notice when an appointment is removed from your busy shop schedule, Service Schedule will alert you of deleted appointments using the **Web Audit** button at the bottom 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.



Adding New Web Appointments to Your Shop Schedule

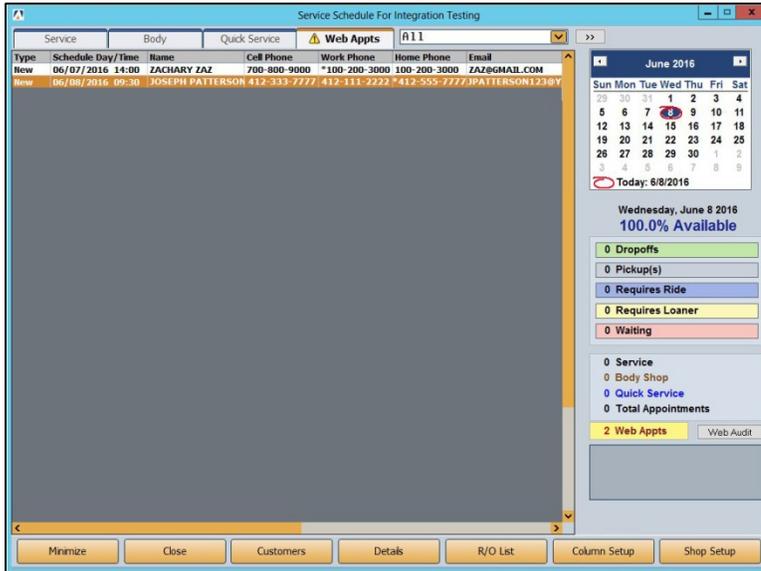
Monitor Service Schedule throughout the day to ensure the timely processing of Web appointments awaiting commitment to your shop schedule. When you see the alert symbol in the **Web Appts** tab or a number of Web appointments waiting to be processed in the yellow **Web Appts** box at the bottom right 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.



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.

- 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 Web Appointment details screen will open. 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.

The screenshot shows a "Web Appointment ID: 033979" details form. It includes the following fields: 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), and Mileage In (45000). Below these fields is a list of requested repairs: 1. LOF-LUBE OIL FILTER 1, 2. T101-TIRE ROTATION 1, 3. -, 4. -, 5. -, 6. -. At the bottom are buttons for Cancel, Schedule, and Delete.

If the customer entered notes when establishing the Web appointment, instead of the list of requested repairs, the Web appointment details screen will open to the Web notes view. The text box at the bottom of the details screen will be shaded yellow and contain the notes entered by the customer.

Web Appointment ID: 033982

Phone: PreWrite:

Name:

Address:

City/State: PA

Last Svc:

Writer: Waiting

Contact: Mileage In:

PLEASE CALL ME. THANK YOU.

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: PreWrite:

Name:

Address:

City/State: PA

Last Svc:

Writer: Waiting

Contact: Mileage In:

1. LOF-LUBE OIL FILTER 1

2. -

3. -

4. -

5. -

6. -

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 will open, and the Web appointment customer name and appointment date and time will appear 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 8:00AM
	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 will open with all of the information gathered by the third-party scheduling application. Enter through the fields, verifying the information.

The screenshot shows the 'Schedule Service' form with the following details:

- Customer:** PAT100194
- Individual:** JOSEPH PATTERSON
- Address:** 89 SOUTHWOOD CIR, CARNEGIE PA 15106
- Phone:** 412 555 7777
- Work:** 412 111 2222
- Cell:** 412 333 7777
- Primary Contact Method:** Home Phone
- Do Not Call:** N, **Do Not Text:** Y, **Marketing Letter:** Y
- GM Vehicle History:** VIN: 1G11C5SL2FF100194, Year: 2015, Make: CHEVROLET, Model: MALIBU 1LT, License: FP00362 PA, Color: BLACK
- Service Items List:**
 - 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
 - 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
- When Finished:** Service, Body, Quick Service, Call, E-Mail, Deliver, Will Pickup
- Bottom Right:** Memo, Special Order Parts, Web Notes (indicated by a red arrow)

8. Any Web notes entered by the customer during the scheduling process will be 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 FLEX DMS codes associated with the requested repairs are added to the prewrite.
11. Click **Schedule**.
12. You will be returned to the main Service Schedule screen, where the Web appointment will now appear on the schedule. An asterisk will signal to users that the appointment was established via the Web integration.

Service	Body	Quick Service	Web Appts	Filter
	BOB	MCKENZIE	VERLE	All
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 third-party Web application to update an appointment he or she has set through the application, the third-party pushes that update to the FLEX 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 to notify you of the need to process a Web appointment. The count in the Web Appointments box in the lower right corner of the screen will reflect 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 will be 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.

The screenshot shows the 'Web Appts' tab selected. The main window displays a table with columns: Type, Schedule Day/Time, Name, Cell Phone, Work Phone, and Ho. A single row is visible with the following data:

Type	Schedule Day/Time	Name	Cell Phone	Work Phone	Ho
Update	01/19/2016 08:00	JOSEPH PATTERSON	412-333-7777	*412-555-7777	41

On the right side, a summary panel for January 19, 2016, shows:

- 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
- 06 1 Appointments

- 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 will open 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: Mileage In: 45000

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

- 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 will be 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 will 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
	BOB	MCKENZIE	VERLE
4:30			
5 am			
5:30			

* JOSEPH PATTERSON
06/08/16 8:00 AM

- 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.

- The Schedule Service screen will open. TAB or ENTER through the fields, verifying the information. While on this screen, check for a blue checkmark in the **Web Notes** tab, which will signify that the customer entered a note during Web scheduling. That note may affect customer satisfaction.

- Click **Next**.
- The Enter Complaints screen will open. Any menu codes added during the Web appointment update will appear on this screen. TAB or ENTER through the fields to ensure the appropriate FLEX DMS menu codes will appear on the prewrite.

- Click **Schedule**.
- The updated Web appointment will be returned to the shop schedule, reflecting any changes to the total time for the appointment based on added or removed repairs. An asterisk next to the customer name in the appointment will signify it was established via the Web integration.

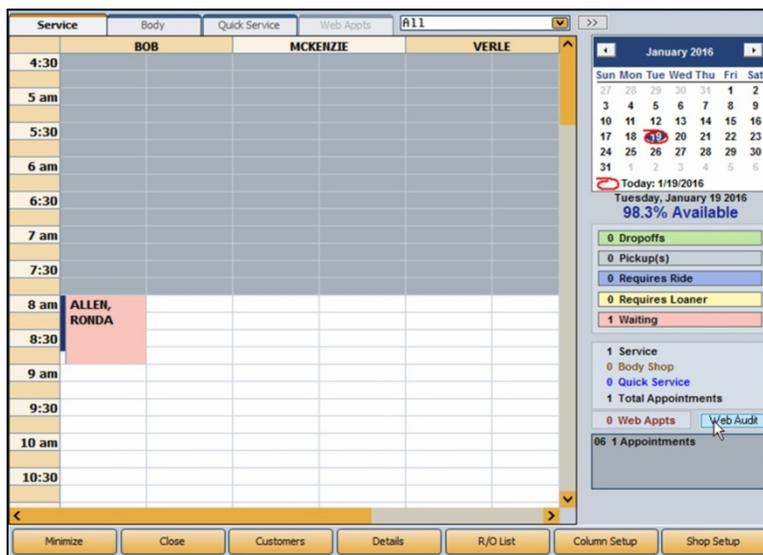
Managing Deleted Web Appointments

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

You will not 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.

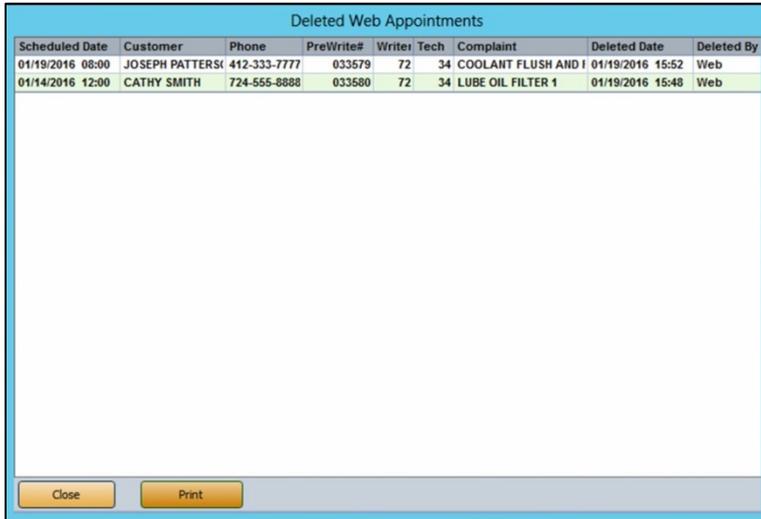
Use the Web Audit list to track all Web appointments cancelled in the last 30 days using the integration. When a Web appointment is cancelled by the customer, the appointment will be removed from your schedule, and the Web Audit button in the bottom right corner of the screen will turn light blue. To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

1. The **Web Audit** button will turn 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 will open. The list contains only those appointments that were deleted by the customer through the third-party Web appointment interface. Appointments will remain in the Web Audit list for 30 days from the date of deletion, at which point they will be automatically cleared from the list.



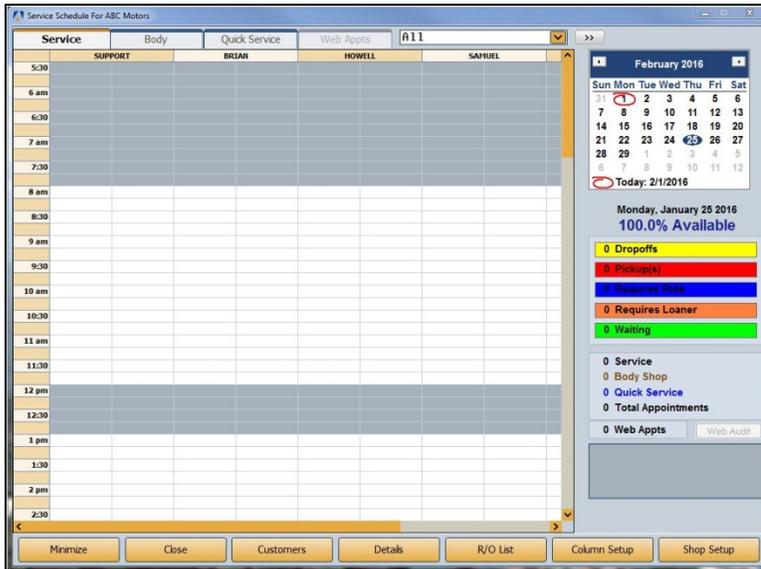
Scheduled Date	Customer	Phone	PreWrite#	Writer	Tech	Complaint	Deleted Date	Deleted By
01/19/2016 08:00	JOSEPH PATTERSON	412-333-7777	033579	72	34	COOLANT FLUSH AND F	01/19/2016 15:52	Web
01/14/2016 12:00	CATHY SMITH	724-555-8888	033580	72	34	LUBE OIL FILTER 1	01/19/2016 15:48	Web

- 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 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 will open. Click **Print Schedule/No Shows**.
3. The Print Details window will open. 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**.
9. A list of all no-show Web appointments will print or open on the screen, depending on your selection.

Video Tutorials

We've created a series of videos that will illustrate the use of the FLEX 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.