# Appendix A Full Service Scheduler

The Service Writing module has a full scheduler you can use to manage your service schedule. You can use it to schedule service appointments, print schedules, and view loaner or rental vehicle schedules. This is a separate scheduler from the Schedule Xpress Scheduler. You can only use one scheduler. The two schedulers do not interface with each other, so you cannot pull information from one scheduler to the other scheduler.

The full scheduler is only available from the Service Writing main menu, unlike the Schedule Xpress scheduler that is available from all the Repair Order screens. The full scheduler offers a few additional features not available in the Xpress Scheduler, such as multiple printing options for the schedule and access to your loaner information. You should use whichever scheduler fits your dealership's needs.

The availability of the full Service Scheduler depends on the **Make Xpress My Default Scheduler** box in the Schedule Xpress setup. This field determines if you can access the full scheduler or just the Schedule Xpress scheduler. If you leave this box empty, you will be able to access the full scheduler using the **Scheduling** button on the Service Writing main menu. If you select this box, the Schedule Xpress scheduler will be your default scheduler. In addition to being able to access the Schedule Xpress from all the Repair Order screens, the Schedule Xpress scheduler will open when you click **Scheduling** on the Service Writing main menu. If you have selected to use the Schedule Xpress Scheduler as your default scheduler, you cannot access the full scheduler. Refer to Chapter 4 for instructions on using the Schedule Xpress Scheduler.
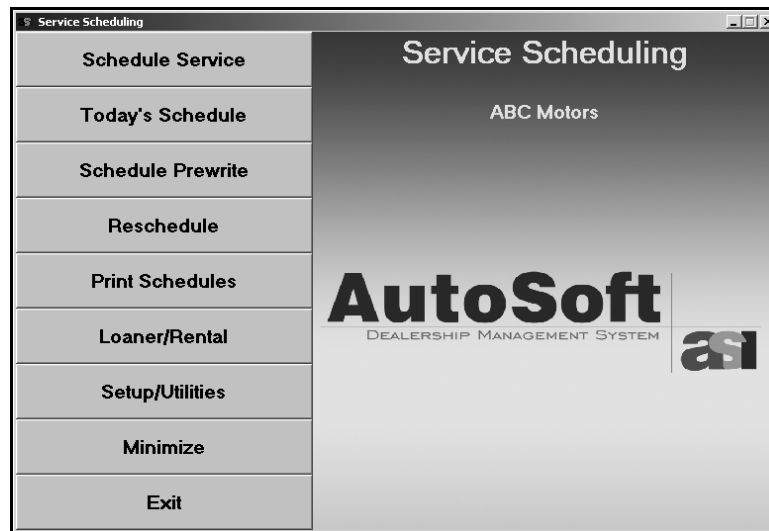
Entering Technicians' Schedules

Before you can use the scheduler, you must enter your technicians' schedules. The technicians must be set up in the Service Writing System Setup before you can add their schedules to the Service Scheduler.

1. Click **Setup/Utilities**.

2. Click **Technicians Information**. The Technician Information Screen appears.

3. The window on the right side of the screen displays a list of the service technicians in the system. Type the technician's ID number, or click the technician in the list.

4. The **Short Name** field automatically displays the technician's first name or nickname. This is the same name entered in the **Short Name** field on the Technician Information screen in the Service Writing System Setup.

5. Indicate if this is an active or inactive technician. Type **A** for active or **I** for inactive. **A** is the default entry. Only active technicians appear on the service schedule.

6. Type the technician's start and end times for each day. You must enter the time in military time and in 15-minute intervals. There is a conversion chart to the right of the fields to assist as you enter times.

7. Click **Save** to save the schedule.

Tip: If you add a technician or edit a technician's schedule after opening a day on the service schedule, use the **Refresh Schedules** utility on the Service Scheduling Setup & Maintenance menu to refresh the schedule and to apply the new settings. See page A:22 for more information on this utility.

Creating Dummy Technicians

If you do not schedule appointments with specific technicians, you can create dummy technicians here that will appear on the schedule. You will need to create enough dummy technicians to accommodate your schedule. For example, if you schedule three appointments per time slot, you may want to create three dummy technicians.

1. In **Technician Number**, type two letters as the technician's ID (AA, BB, CC, etc.).

2. Type a description for the technician, or leave the field blank if you prefer not to use a description.

3. Type **A** to make this an active technician.

4. Enter the schedule.

5. Click **Save**.

Making a Technician Inactive

Once a technician is active, you can make the technician inactive by changing the technician's status to **I** for inactive. The technician will no longer appear on the schedule, but the system *retains the technician's hours* on this screen in case you want to make the technician active again later.

1. Select the technician.

2. Type **I** in the **Active/Inactive** field.

3. Click **Save**. The technician's status in the technician list will read, "Inactive."

Removing a Technician from the Schedule
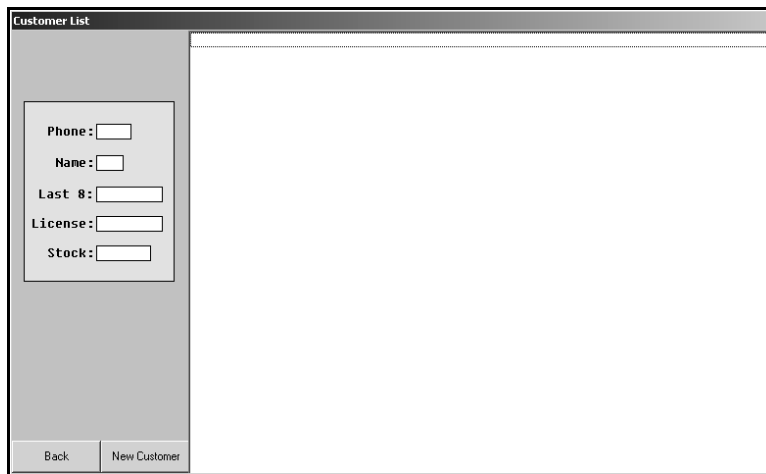
The **Remove** button also makes a technician inactive, but this option *clears the technician's hours* on this screen. You would use this option if you do not want to retain the technician's hours. This option removes "dummy" technicians from the system.

1. Select the technician.

2. Click **Remove**.

3. Click **OK** when prompted to verify you want to remove the technician from the schedule.

4. The system informs you that the technician will be removed from the schedule but left in the list. Click **OK** to acknowledge the message.

5. The technician's status in the technician list will read, "Inactive."

Schedule Service

You will use the **Schedule Service** button to schedule the service appointments. When scheduling an appointment, you will advance through several screens. This section provides an overview of the scheduling process.

Scheduling an Appointment by Selecting the Day First

1. Click **Schedule Service**. The Service Scheduling screen appears.

2. As you begin to schedule appointments, each day will displays the percentage of the day available for scheduling. Blank buttons are days that have not been opened.

3. Click the calendar day you want to schedule the appointment. You will have to click the day twice if you are selecting/opening a new day.

4. The Daily Schedule screen appears and displays the times available to schedule for that day. The left side of the screen displays the morning hours, and the right side of the screen displays the afternoon and evening hours.

5. If this day is not acceptable to the customer, click **Back** to return to the Service Scheduling screen to select another day.

Tip: If you click and hold the left mouse button on a customer's name, you can view appointment detail for the repair.

6. Once you have verified the day is acceptable to the customer, click **Customer Information**. The Customer List screen appears.

7. At this point, you have two options depending on whether the appointment is for an existing customer or new customer.

If the appointment is for an *existing customer*,

a. Search for the customer by entering the last four digits of the customer's phone number, the first three digits of the customer's name, the last eight digits of the vehicle's VIN, or the vehicle's license plate number. If this is an appointment for an internal, you can search based on the vehicle's stock number.

b. A list of customers who meet the criteria you entered is displayed in the list window on the right side of the screen. Click the customer you want to select.

c. The system will advance you to the Repairs screen. The top of the screen displays the customer's service history. This information allows you to review the history and sell additional services the customer may need at this time.

d. Enter up to six complaints in the bottom part of the screen.

You can manually enter the complaints by typing the complaint description or by entering a menu code. You entered the menu codes in the Service Menu setup. If you type a menu code in the **Menu** field, the description of the menu item will automatically fill in the **Comp** field.
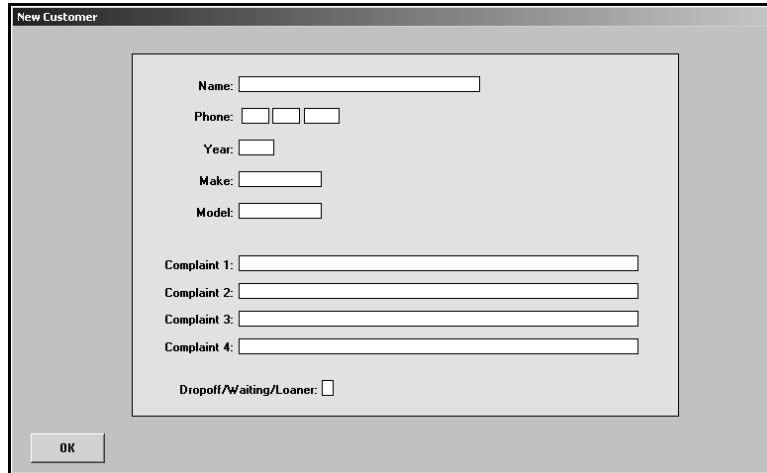
You can search a list of menu items by clicking **Menu List**. A list of the menu items entered in the Service FasQuote setup is displayed. Click the menu item in the list you want to select. Click the **Menu** field where you want to add the menu item. The menu code and description will automatically fill in, along with the time units and default technician the code was assigned.

e. Indicate if the customer is dropping off the vehicle, waiting at the dealership during the service, or using a loaner vehicle. Click to select the option, or type the letter that corresponds to the option you want to select in the field provided.

f. When you are finished entering complaints, click **Next**. The system automatically saves the information you enter on this screen.

g. Go to step 7 on page A:7 to finish scheduling the customer's appointment.

If the appointment is for a *new customer*,

    a.   Click **New Customer** on the Customer List screen. The New Customer screen appears.

```
┌──────────────────────────────────────────────────────────────┐
│ New Customer                                                   │
│                                                                │
│          Name: [                              ]                │
│         Phone: [    ][    ][    ]                              │
│          Year: [    ]                                          │
│          Make: [        ]                                      │
│         Model: [        ]                                      │
│                                                                │
│     Complaint 1: [                                    ]        │
│     Complaint 2: [                                    ]        │
│     Complaint 3: [                                    ]        │
│     Complaint 4: [                                    ]        │
│                                                                │
│   Dropoff/Waiting/Loaner: [ ]                                  │
│                                                                │
│   ┌──────┐                                                     │
│   │  OK  │                                                     │
│   └──────┘                                                     │
└──────────────────────────────────────────────────────────────┘
```

    b.   Type the customer's name and telephone number.

    c.   Type the vehicle's model year, make, and model name.

    d.   Type descriptions for up to four complaints the customer wants addressed during the appointment.

    e.   Indicate if the customer is dropping off the vehicle, waiting at the dealership during the service, or using a loaner vehicle. Type the letter that corresponds to the option you want to select in the field provided

    f.   When you are finished, click **OK**.

    g.   Go to step 7 below to finish scheduling the customer's appointment.

7. A list of the technicians scheduled for this day appears in the pink window on the left side of the screen, and a list of the complaints entered for the appointment is displayed in the window in the bottom-left corner of the screen.

8. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.

9. Click a time slot. The customer's name and the first complaint entered appear. If the appointment requires more than one slot, click the additional slots needed to reserve them for this appointment.

10. If there is more than one complaint scheduled, you can schedule the complaint for the same technician or with another technician. If necessary, select another technician from the list. Click the next complaint in the list displayed, and click the slot(s) you want to select for the appointment. Continue until all of the complaints have been scheduled.

11. When all of the complaints have been scheduled, click **Schedule Now**. This saves the appointment and advances you to the Prewrite Service screen where you can enter information about the appointment. This information can be pulled to a repair order when the customer comes in for the appointment.

12. The prewrite screen pulls the information entered for the customer. If necessary, enter any additional information. Press ENTER to advance through the fields.

13. Click **Next** when you are finished entering the information.

14. The Enter Complaints screen appears. The complaints entered for the appointment automatically fill in on this screen. If necessary, you can add complaints to this screen. You can enter up to six complaints that will be addressed during the appointment. You can select menu items from the list on the right side of the screen by clicking the item you want to select and clicking in the **Menu Service** field where you want to add the complaint. The menu number and description fill in. You can also manually type a complaint in the **Complaint** field and enter the technician for the service and a quoted time for the repair.

15. When you are finished entering the information, click **Save/Print**.

16. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

17. The system takes you back to the Service Prewrite screen. Click **Exit** to return to the Service Scheduling menu.

Scheduling an Appointment by Selecting the Customer First

1. Click **Customer Information** on the Service Scheduling screen.

2. At this point, you have two options depending on whether the appointment is for an existing customer or new customer.

   If the appointment is for an existing customer,

   a. Search for the customer by entering the last four digits of the customer's phone number, the first three digits of the customer's name, the last eight digits of the vehicle's VIN, or the vehicle's license plate number. If this is an appointment for an internal, you can search based on the vehicle's stock number.

   b. A list of customers who meet the criteria you entered is displayed in the list on the right side of the screen. Click the customer you want to select.

   c. The system will advance you to the Repairs screen. Enter the necessary repair information, and click the **Next**.

   If the appointment is for a new customer,

   a. Click **New Customer** on the Customer List screen. The New Customer screen appears.

   b. Enter the customer information on this screen.

   c. When you are finished, click **OK**.

3. Click the calendar day you want to schedule the appointment. You will have to click the day twice if you are selecting/opening a new day.

4. The Daily Schedule screen appears and displays the times available to schedule for that day. The left side of the screen displays the morning hours, and the right side of the screen displays the afternoon and evening hours. If this day is not acceptable to the customer, click **Back** to return to the Service Schedule screen to select another day. Once the day is acceptable to the customer, click **Next**.

5. A list of the technicians scheduled for this day appears in the pink window on the left side of the screen, and a list of the complaints entered for the appointment is displayed in the window in the bottom-left corner of the screen.

6. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.

7. Click a time slot. The customer's name and the first complaint entered appear. If the appointment requires more than one slot, click the additional slots needed to reserve them for this appointment.

8. If there is more than one complaint scheduled, you can schedule the complaint for the same technician or with another technician. If necessary, select another technician from the list. Click the next complaint in the list displayed. Click the slot(s) you want to select for the appointment. Continue until all of the complaints have been scheduled.

9. When all of the complaints have been scheduled, click **Schedule Now**. This saves the appointment and advances you to the Prewrite Service screen where you can enter information about the appointment. This information can be pulled to a repair order when the customer comes in for the appointment.

10. The prewrite screen pulls the information entered for the customer. If necessary, enter any additional information. Press ENTER to advance through the fields.

11. Click **Next** when you are finished entering the information.

12. The Enter Complaints screen appears. The complaints entered for the appointment automatically fill in on this screen. If necessary, you can add complaints to this screen. You can enter up to six complaints that will be addressed during the appointment. You can select menu items from the list on the right side of the screen by clicking the item you want to select and clicking in the **Menu Service** field where you want to add the complaint. The menu number and description fill in. You can also manually type a complaint in the **Complaint** field and enter the technician for the service and a quoted time for the repair.

13. When you are finished entering the information, click **Save/Print**.

14. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

15. The system takes you back to the Service Prewrite screen. Click **Exit** to return to the Service Scheduling menu.

Tip: The information entered on the Prewrite screen can be pulled to a repair order when the customer comes in for the appointment. Please see the Schedule Prewrite on page A:13 for complete instructions on entering, editing, and deleting prewrite information.

Today's Schedule

Use the **Today's Schedule** button to view the service schedule either by date or by technician. You can also use this screen to find a customer's appointment. The information on this screen is for viewing only. You cannot make changes to the schedule from this screen.

1. Click **Today's Schedule** on the Service Scheduling menu.

2. The Daily Schedule screen appears and displays the day's schedule.

Daily Schedule								
Thursday, Jun 1, 2006								
Time	TN	WN	Customer	Complaint	Vehicle	Phone	Waiting	
08:00								
:00	01	01	STEVE SMITH	LUBE-OIL-FILTER	05 CHEVR BLAZER	(724) 555 1234	Waiting	
:30	01	01	STEVE SMITH	RECALL 1245780	05 CHEVR BLAZER	(724) 555 1234	Waiting	
09:00								
:00	02		ETHAN DURICK	LUBE-OIL-FILTER	02 CHEVR CAVALI	(330) 534 9586	Waiting	
:00	05		SIENNA METZ	BRAKE PEDAL VIBRATES	01 CHEVR CORVET	(330) 758 6959	Waiting	
:30	01		ROGER CRIM	LUBE-OIL-FILTER	01 OLDSM BRAVAD	(330) 448 6523	Waiting	
:30	03		LAURA FRANKFORD	LUBE-OIL-FILTER	04 OLDSM ALERO	(724) 555 4067	Waiting	
10:00								
:00	05		ELIZABETH SCOTT	LUBE-OIL-FILTER	04 DODGE DURANG	(724) 555 4598	Waiting	
:00	08		WILLIAM P IVANY	REPLACE MOLDING	04 CHEVR MONTEC	(724) 555 9896	Waiting	
11:00								
:00	04		HAROLD E MUIR	LUBE-OIL-FILTER	04 CHEVR BLAZER	(330) 746 2564	Waiting	
:30	06		ALICE BALDWIN	LUBE-OIL-FILTER	04 CADIL DEVILL	(724) 555 4206	Waiting	
12:00								
:00	05		AMANDA HARTMAN	COOLANT LEAKS	05 PONTI SUNFIR	(330) 755 9802	Waiting	
:00	06		BRIAN MYERS	REPLACE FRONT BRAKES	97 FORD F150	(724) 555 2636	Waiting	
01:00								
:00	07		JACK KELLER	FOUR WHEEEL ALIGNMENT	95 PONTI SUNFIR	(330) 545 9856	Waiting	

Back	Previous Day	Today	Next Day	By Technician	Find

Viewing Schedules for Other Days

There are three viewing options available on this screen:

- Click **Previous Day** to display the schedule for the previous day. If you continue to click this button, the schedule will continue to go back one day.

- Click **Next Day** to display the schedule for the following day. If you continue to click this button, the schedule will continue to go forward one day.

- Click **Today** to display the current day's schedule again.

Viewing a Technician's Schedule

1. Use the **Previous Day**, **Today**, and **Next Day** buttons to advance to the appropriate day.

2. Click **By Technician**. The schedule appears broken down by technician.

3. The top of the screen displays the date and the percentage of time available for scheduling in the morning, afternoon/evening, and for the whole day.

4. Each column represents a technician. The technician number is displayed for your reference. The percentages next to the technician's ID identify the percentage of the technician's day available for scheduling in the morning, afternoon/evening, and for the whole day.

5. Use the scrollbars to view information that will not fit on the screen.

6. If you click and hold the left mouse button on a customer's name, you can view appointment detail for the repair.

7. Click **Back** to return to the Daily Schedule screen.

Finding a Customer's Appointment

1. Click **Find**. The Find Schedule screen appears.

2. Search for the customer by typing the last four digits of the customer's phone number or the last eight digits of the vehicle's VIN.

3. The screen displays the appointments for any customers meeting the criteria.

4. Click **Back** to return to the Daily Schedule screen.

5. Click **Back** on the Daily Schedule screen to return to the Service Scheduling menu.

Schedule Prewrite

The Schedule Prewrite option on the Service Scheduling menu opens the same prewrite screen that appears when you are initially scheduling the customer's service appointment. You can use this screen to enter prewrite information for a customer without scheduling an appointment, or you can use this screen to view and edit prewrite information for a customer.

Tip: The Prewrite feature is also available on the Repair Orders menu. The screens that appear are the same screens that appear in Service Scheduling.

Adding a Prewrite for a New Customer

1. Click **Schedule Prewrite**. The Service Prewrite screen appears.

2. The **P/W No.** field will fill in with the assigned prewrite number when the prewrite is printed.

3. Type the appropriate customer and vehicle information in the remaining fields.

Tip: This screen is integrated with DaimlerChrysler VIP and General Motors VIS. A **Get VIP** or **Get VIS** button will appear if the VIN is for a DaimlerChrysler or General Motors vehicle and you have your DaimlerChrysler or General Motors user name and password entered on the appropriate DCS integration setup screens.

4. Click **Next** to advance to the Enter Complaints screen.

5. The **Menu Service** field is an optional entry. Type the menu code, or click the code in the list on the right side of the screen. The mouse cursor becomes a yellow folder. Click in a **Menu Service** field to drop the code.

6. In **Tech**, type the ID number for the technician who will be working on the repair. If you do not know which technician will be assigned the repair, leave this field blank. The technician can be assigned at the time of generating the repair order.

7. In **Quoted Time**, type the time units quoted for the repair. This is an optional entry.

8. In **Complaint**, type a description of the complaint. If you selected a menu code, the description of the code automatically fills in this field.

9. Use the **Cause** field to identify the cause of the problem if this information is available.

10. Click **Save/Print**.

11. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

Adding a Prewrite for an Existing Customer

1. Click **Schedule Prewrite**. The Service Prewite screen appears.

2. Type the customer number in the **Customer** field. You can also search for the customer by clicking **Customer List**. On the Customer Search screen, type the first three letters of the customer's last name, the last four digits of the customer's phone number, or the customer's license plate number. A list of the customers who meet the criteria you entered appears. Click the customer you want to select.

3. The customer's information fills in on the screen. Enter any additional information as needed.

4. Click **Next** to advance to the Enter Complaint screen.

5. Enter up to six complaints for the service.

6. Click **Save/Print**.

7. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

Editing a Customer's Prewrite Information

Once a prewrite has been entered, it can be viewed and edited as needed.

1. Click **Prewrite List**. The Prewrite list appears and displays all of the prewrites that have been entered. If necessary, you can search for a customer in the list by entering the last four digits of the customer's phone number.

2. Click the prewrite you want to view. The prewrite information fills in on the screen.

3. Click in a field, and edit the information as needed.

4. Click **Next** to advance to the Enter complaints screen, and edit the complaint information as needed.

5. Click **Save/Print**.

6. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

Viewing a Customer's Service History

Once you have a customer's prewrite information displayed on the screen, you can view the customer's service history.

1. Select the customer.

2. Click **Service History**. The Service History screen appears and displays all of the repair orders entered for the customer.

3. Click a repair order to view a summary of the repair order.

4. Click **Back** to close the repair order.

5. Click **Back** to return to the Service Prewrite screen.

Deleting a Prewrite

In the event a customer cancels an appointment, you can delete a prewrite from the system. Deleting the prewrite removes the prewrite record but does not remove the customer's appointment. You must use the **Reschedule** option to remove the appointment. (See page A:18 for information about removing appointments.) Similarly, deleting a prewrite does not affect a customer's master file.

1. Select the customer.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record.

Reschedule

Clicking **Reschedule** opens the Reschedule screen. You can use this screen to reschedule or delete service appointments.

Rescheduling an Appointment

1. Click **Reschedule**.

2. Click a day on the calendar in the upper-left corner of the screen to display a list of technicians scheduled for that day.

3. Click the technician whose schedule you want to view. The schedule is displayed in the blue window on the right side of the screen.

4. Click the appointment (and all slots that correspond to the appointment) that you want to reschedule. The appointment times are highlighted to indicate you have selected them.
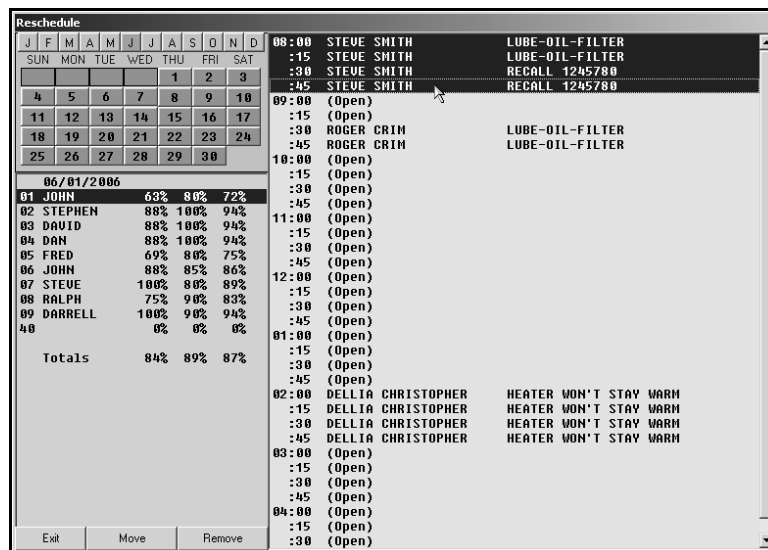
5. Click **Move**.

6. A blank calendar appears. (The month buttons on the calendar are light green.)

7. Click the day on which you want to reschedule the service.

8. A list of technicians scheduled for that day is displayed in the pink window in the left part of the screen.

9. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.

10. Click the first time slot where you want to move the appointment.

11. Click **OK** when prompted to verify you want to move the appointment.

12. The system returns you to the day you moved the appointment from so you can see it has been moved.

13. Select the day where you moved the appointment. The appointment appears in the selected slot.

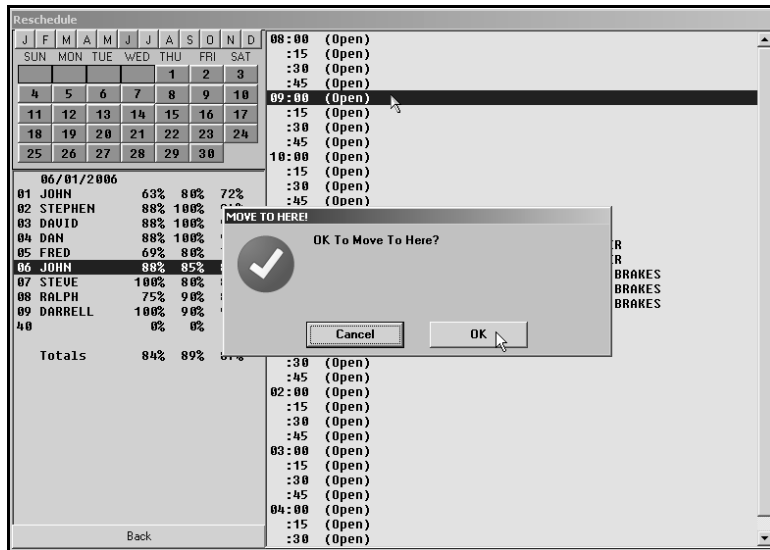## Deleting an Appointment

1. Click a day on the calendar in the upper-left corner of the screen to display a list of technicians scheduled for that day.

2. Click the technician whose schedule you want to view. The schedule is displayed in the blue window on the right side of the screen.

3. Click the appointment (and all slots that correspond to the appointment) that you want to remove.

4. Click **Remove**.

5. Click **OK** when prompted to verify you want to delete the appointment. The appointment is removed from the schedule.

Print Schedules

The **Print Schedules** button opens the Service Scheduling screen. This screen allows you to view and print three types of schedules. Click **Back** to return to the Service Scheduling menu when you are finished printing the schedules.

```
Service Scheduling
 J  F  M  A  M  J  J  A  S  O  N  D     08:00  (Open)
SUN MON TUE WED THU FRI SAT              :15  (Open)
                         1    2    3     :30  (Open)
                                         :45  (Open)
  4    5    6    7    8    9   10      09:00  (Open)
                                         :15  (Open)
 11   12   13   14   15   16   17        :30  ROGER CRIM      LUBE-OIL-FILTER      01 OLDSM
 18   19   20   21   22   23   24        :45  ROGER CRIM      LUBE-OIL-FILTER      01 OLDSM
 25   26   27   28   29   30           10:00  (Open)
                                         :15  (Open)
      06/01/2006                         :30  (Open)
01 JOHN         88%  80%  83%            :45  (Open)
02 STEPHEN      88% 100%  94%         11:00  (Open)
03 DAVID        88% 100%  94%            :15  (Open)
04 DAN          88% 100%  94%            :30  (Open)
05 FRED         69%  80%  75%            :45  (Open)
06 JOHN         63%  85%  75%         12:00  (Open)
07 STEVE       100%  80%  89%            :15  (Open)
08 RALPH        75%  90%  83%            :30  (Open)
09 DARRELL     100%  90%  94%            :45  (Open)
40              0%   0%   0%          01:00  (Open)
                                         :15  (Open)
                                         :30  (Open)
      Totals    84%  89%  87%            :45  (Open)
                                      02:00  DELLIA CHRISTOP  HEATER WON'T STAY WARM 94 PONTI
                                         :15  DELLIA CHRISTOP  HEATER WON'T STAY WARM 94 PONTI
                                         :30  DELLIA CHRISTOP  HEATER WON'T STAY WARM 94 PONTI
                                         :45  DELLIA CHRISTOP  HEATER WON'T STAY WARM 94 PONTI
                                      03:00  (Open)
                                         :15  (Open)
  Print This Tech    Print All Techs     :30  (Open)
                                         :45  (Open)
       Print No-Shows                  04:00  (Open)
                                         :15  (Open)
    Back        Print This Day           :30  (Open)
```

Printing a Selected Day's Schedule

1. Click **Print Schedules**.

2. Click the day on the calendar in the upper-left corner of the screen.

3. Click **Print This Day**.

4. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

Printing a Selected Technician's Schedule

1. Click the day on the calendar in the upper-left corner of the screen.

2. A list of the technicians scheduled to work that day appears in the pink area on the left side of the screen. The percentage of the technician's day that is scheduled is displayed to the right of the technician's name.

3. Click the technician whose schedule you want to print. The schedule is displayed in the blue area on the right side of the screen.

4. Click **Print This Tech**.

5. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

Printing the Schedule for All Technicians

1. Click the day on the calendar in the upper-left corner of the screen.

2. Click **Print All Techs**.

3. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

Printing the No-Show List

The No-Show List will list all of the customers who did not come in for their scheduled appointment. This is based on the prewrites. Prewrites that are not pulled to repair orders in the Service Writing module remain in the prewrite list and are flagged as no-shows. These are the appointments that print on the list.

1. Click the day on the calendar in the upper-left corner of the screen.

2. Click **Print No-Shows**.

3. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

Loaner/Rental

This button opens the Loaner/Rental screen. This screen pulls the loaner/rental vehicle schedule from the Daily Auto Rental module so you can see which vehicles are scheduled for rental and which vehicles are available. You cannot schedule a rental from this screen. Instead, you will have to send customers to the Rental Department when they need to schedule a loaner vehicle.

1. Click **Loaner/Rental**. The Loaner/Rental Schedule screen appears.

2. Click the day on the calendar you wish to view. The rental schedule for that day is displayed. Available vehicles are flagged **(A)**, and scheduled vehicles are flagged ****S****.

3. Click **Back** to return to the Service Writing menu.

Setup & Maintenance

Click **Setup/Utilities** to open the Setup & Maintenance menu. In addition to entering and editing technician information (covered earlier in this chapter), you use this menu to purge schedules and prewrites, to refresh your schedules, to remove days from the schedule, and to remove technicians from the schedule. All other users must be out of the Service Scheduler when using any of the utilities on this menu.

Purge Schedules

Use this button to remove schedules from the system. All of the schedules before the specified date will be removed. Once you remove the schedules, you cannot access them, so be sure you want to remove the schedules before running this utility. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

1. Click **Purge Schedules**.

2. Type the date you want to use as the cutoff point for the purge. All of the schedules before this date will be removed. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

3. The system warns you that all others users should be out of the scheduler. Click **OK**.

4. Click **OK** when prompted to verify you want to purge the old schedules.

5. The system displays a message when it is finished removing the schedules. Click **OK**.

Purge Prewrites

Use this button to remove prewrites from the system. All of the prewrites before the specified date will be removed. Once you remove the prewrites, you cannot access them, so be sure you want to remove the prewrites before running this utility. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

1. Click **Purge-Prewrites**.

2. Type the date you want to use as the cutoff point for the purge. All of the prewrites before this date will be removed. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

3. The system warns you that all others users should be out of the scheduler. Click **OK**.

4. Click **OK** when prompted to verify you want to purge the prewrites.

5. The system will display a message indicating it is finished purging the prewrites. Click **OK**.

Refresh Schedules

Use this button to refresh the schedule. You would use this utility, for example, if you added a technician to the schedule after creating a day and want the technician to be included in the existing days. The technician will be added to the schedule starting from the current calendar date (today).

> **Tip:** Before refreshing the schedule, Autosoft suggests running the Purge Schedules and Purge Prewrites utilities. These utilities clean up the service schedule files and will improve the speed of the refresh utility.

1. Click **Refresh Schedules**.

2. The system warns you that all others users should be out of the scheduler. Click **OK**.

3. Click **OK** when prompted to verify you want to refresh the schedules.

4. The system displays a message when it is finished. Click **OK**.

Remove A Schedule

Use this button to remove a day from the schedule. This utility is useful, for example, if you scheduled appointments on a day that was not supposed to be open. This will delete all of the appointments for the day, so reschedule any appointments as needed before removing the day.

1. Click **Remove A Schedule**.

2. Type the date for the day you are removing. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

3. The system warns you that all others users should be out of the scheduler. Click **OK**.

4. Click **OK** when prompted to verify you want to remove the schedule.

Change Technician

This utility has two functions. First, you can use it to switch the appointments for one technician to another technician. Second, you can use it to remove a technician from the schedule.

Switching Technicians

The following instructions walk you through moving all of one technician's appointments to another technician's schedule. This is useful, for example, if a technician calls in sick and you need to have another technician cover the appointments.

1. Click **Change Technician**.

2. In **From Tech**, type the ID number for the technician who originally had the appointments.

3. In **To Tech**, type the ID number for the technician who will be taking the appointments.

4. In **From Date** and **Through Date**, type the date range that applies to the move. Type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

5. The system warns you that all others users should be out of the scheduler. Click **OK**.

6. Click **OK** when prompted to verify you want to change technicians.

7. The system displays a message when it is finished moving the schedule. Click **OK**.


Removing a Technician from the Schedule

The following instructions walk you through removing a technician from the schedule for a specified period. This is useful, for example, when you need to remove the technician from the schedule due to vacation, personal leave, etc. The system does not check for existing appointments before removing a technician from the schedule, so you should reschedule any appointments before removing the technician.

1. Click **Change Technician**.

2. In **From Tech**, type the ID number for the technician you are removing.

3. Leave the **To Tech** field *blank*, and press ENTER.

4. In **From Date** and **Through Date**, type date range for the time you want to remove the technician from the schedule. Type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.

5. The system warns you that all others users should be out of the scheduler. Click **OK**.

6. Click **OK** when prompted to verify you want to change technicians.

7. The system displays a message when it is finished moving the schedule. Click **OK**.

Minimize

Once the Service Scheduler is open, you can minimize it. This allows you to keep the program open while you work on other things. Click **Minimize** on the Service Scheduling menu, and the Service Scheduling program is minimized to your task bar.
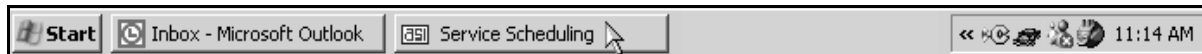
When you need to schedule an appointment, click the Service Scheduling item on your task bar at the bottom of your screen. This gives you instant access to the program whenever you need it.