

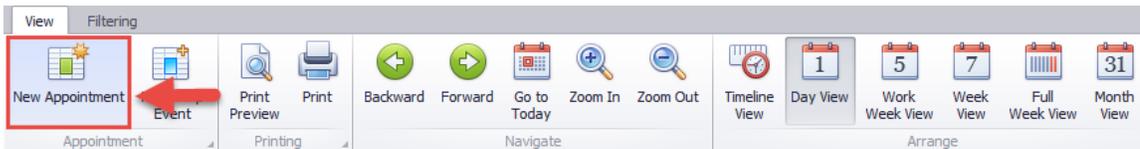
## Creating a Quick Appointment Using the New SE Schedule

The new Manager SE Schedule is far more capable than the legacy Schedule, which has been unchanged since 1995. The new design reflects many user requests to include vehicle, technician and resource details and make use of color coding. What users may not realize at first is that despite there being more data points to consider, it's still quite possible to make basic appointments that skip past the additional details that provide better data in the future.

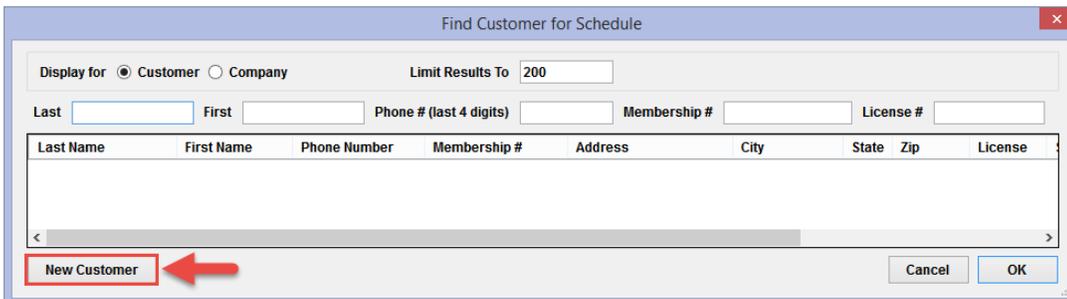
One of the comments we hear is "How do I just make a quick appointment? This seems like a lot more steps now." That's why we've prepared this article to show you how to do exactly that.

| Steps using the LEGACY 1995 Schedule                 | Steps using the NEW SE 7.1.7 Schedule                        |
|--|--|
| 1) Click on <b>Add</b>                               | 1) Click on <b>New Appointment</b>                           |
| 2) Enter a <b>Name</b>                               | 2) Click on <b>New Customer</b>                              |
| 3) Keep/change <b>Scheduled</b> time / date          | 3) Enter a <b>Name</b>                                       |
| 4) Enter <b>Category</b> (or not)                    | 4) In Vehicle Selection, click <b>Cancel</b>                 |
| 5) Enter an amount of time in <b>Estimated Hours</b> | 5) Keep/adjust <b>Start/End Times</b> (like Estimated Hours) |
| 6) Enter any <b>Notes</b> about the appointment      | 6) Add any notes in <b>Comment</b> (like Notes)              |
| 7) Click on <b>OK</b>                                | 7) Click on <b>Save &amp; Close</b>                          |

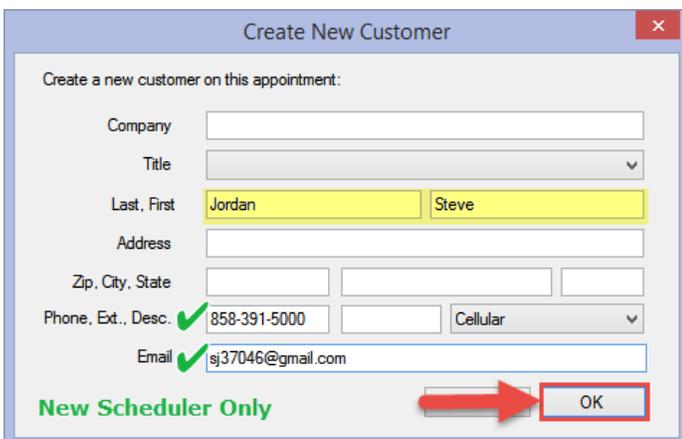
### 1) Click on **New Appointment**



### 2) Click on **New Customer**



### 3) Enter a **Name** \* Enter phone # and/or enter email (can't do that with the 1995 Schedule)



4) In Vehicle Selection, click **Cancel**

| License | State | Year | Make | M |
|---------|-------|------|------|---|
|         |       |      |      |   |

5) Keep/adjust **Start/End Times** (like Estimated Hours)

6) Add any notes in **Comment** (like Notes)

7) Click on **Save & Close**

3/28/2017: Jordan, Steve

Save & Close Create... Cancel

Subject: Jordan, Steve Appointment State: Open (OPEN)

Drop Off: 3/28/2017 8:00 AM Auto Adjust End Time:

Starts: 3/28/2017 9:00 AM Scheduled Hours: 0.50 Reminder:

Ends: 3/28/2017 9:30 AM All day event:  Order Hrs: 0.00 0 minutes

Comments (223 Chars Remaining) Print on order as Note:  Technician: PLEASE, SELECT

Notes about work to perform Resource: <None>

Customer - Jordan, Steve Vehicle - N/A

Contact: (Cellular) 858-391-5000 ✓  
Email: sj37046@gmail.com ✓  
Company:  
Address: New Scheduler Only

Promised Time: 3/28/2017 5:30 PM

Job Hours: 0.00 Source: <None > Jobs: Add Delete

Description

When the legacy 1995 Schedule was open, you couldn't do anything else in the program until you exited the Schedule. Because you can keep the new Manager SE 7.x Schedule open all the time (even on a second screen) it's always ready to go and other tasks to perform in Manager SE aren't delayed or prevented.

We know that it will take users a little time to get to know the new scheduler and see all that it offers. At first glance it may seem intimidating; the new SE Schedule can capture and display all kinds of data such as vehicle, technician & resource assignments, etc., while providing a solid platform for future on-line scheduling needs.