Chapter 1 - Setup

Schedule Options

- Regular Business Hours ................................................................. 1
- Drop Off Time (setting a default) ................................................... 1
- Hours Visible on Schedule ............................................................. 2
- Show Last (number of days) ........................................................... 2
- Auto-Adjust Appointment Time ..................................................... 2
- Holiday Setup ............................................................................... 2

Schedule States

- Add/Edit Appointment States ....................................................... 3

Schedule Resources

- Add/Edit Schedule Resources ....................................................... 4

Technician Setup

- Technician / Service Writer Profiles ............................................. 5
- Technician / Service Writer Pay Definitions .................................. 5
- Technician Wages & Commission Dialog ..................................... 6
- Technician Hours Dialog .............................................................. 7
- Technician Address Dialog ............................................................ 8

Shop Data Setup / Screen View

- Auto Scheduling Default .............................................................. 9

Chapter 2 – Navigating and Using the Appointment Scheduler

Schedule Navigation

- Navigating the Calendar ............................................................... 10
- Resource View / Filtering ............................................................. 11
- Appointment and Shop Events Tabs .......................................... 12
- Printing Appointment and Shop Events ...................................... 13

Creating/Editing Appointments

- Creating a New Appointment ....................................................... 14
- Selecting Customer & Vehicle ..................................................... 15
- Using the Appointment Editor ..................................................... 16
- Creating a Shop Event ................................................................. 17

Integration Points (within other SE program screens)

- Work in Progress Detail Dialog .................................................. 18
DISCLAIMER OF WARRANTIES: Although the information contained within this volume has been obtained from sources generally believed to be reliable, no warranty (expressed or implied) can be made as to its accuracy or completeness, nor is any responsibility assumed by Mitchell Repair Information Company or anyone connected with it for loss or damages suffered through reliance on any information contained in this volume. SPECIFICALLY, NO WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR ANY OTHER WARRANTY IS MADE OR TO BE IMPLIED WITH RESPECT TO THIS VOLUME AND ITS CONTENTS. In no event will Mitchell Repair Information Company be liable for any damages direct or indirect, consequential or compensatory, including, without limitation, lost profits, for any representations, breaches, or defaults arising out of the use of this volume. Customer agrees to indemnify Mitchell Repair Information Company and hold it harmless against all claims and damages, including without limitation, reasonable attorney’s fees arising out of the use of this volume, unless such claims or damages result from the infringement of any copyright or other proprietary right of any third party. This document contains confidential and trade secret information of Mitchell Repair Information Company. Any unauthorized reproduction, photocopy, or use of the information herein, in whole or in part, without the prior written approval of Mitchell Repair Information Company is prohibited.

Mitchell 1, Mitchell 1 Teamworks SE, ShopKey Professional SE, Elite, OnDemand5, Shopkey5, OnDemand5.com, ShopKey5.com, ProDemand.com, and ShopKeyPro.com trademarks or registered trademarks of Mitchell Repair Information Company, LLC and Snap-on Incorporated.

Microsoft Word, Access, and MSDOS are registered trademarks of Microsoft Corporation. Windows is a trademark of Microsoft Corporation.

Authored by Tim McDonnell, John Dwulet and Jemuel Maghirang
Published in the USA by Mitchell 1
CHAPTER 1 - SETUP

This chapter covers the setup of the scheduling module within SE version 7. Within this document, you will find detailed setup instructions and descriptions of the new schedulers’ functions and capabilities and how to use them. Let’s get started.

SCHEDULE OPTIONS

These options include defining regular business hours, range of hours to show in calendar, number of previous days to be displayed by default, setting default Drop Off time, Auto Adjust Appointment Time and selecting any recurring holidays or special events.

REGULAR BUSINESS HOURS

- Each day of the week must be setup as either CLOSED or with actual Start/End times. For the example above: left-click your mouse on the Monday button; doing so would set initial Start and End times as 8:00 AM to 5:00 PM and paint the Monday button green. Repeat this process to set the time for each day of the week. Then if required, modify the times for each day by clicking on the down arrows and selecting the time required from the list provided. NOTE: Left-clicking on any day button a second time will set that day to display as CLOSED.

DROP OFF TIME

- A default Drop off time can be set here; this can easily be changed in the Appointment editor.
HOURS VISIBLE ON SCHEDULE

- Set the system to display the portion of the day you want displayed in the calendar view. Typically this would be set to an hour before and after regular business hours.

SHOW LAST (NUMBER OF DAYS)

- This is the number of days to display in the calendar from the current date. You may experiment with this setting to meet your specific needs. A typical setting would be 15 or 30 days. If your shop has a large number of appointments per day, you may want to use a much lower setting.

AUTO ADJUST APPOINTMENT TIME

- When selected, it will adjust appointment time span based on Order hours. For example, if the appointment time is set for 2 hours and the order hours totals 3 hours, the appointment time will automatically adjust to match the order hours.

HOLIDAY SETUP

- Name, Occurrence Type, and date define Holidays. The Import button presents the user with a list of standard US Holidays to be auto-imported into the yearly calendar. To enter an additional Holiday or special event not listed, click on the Add button.
  - Name the holiday or event by typing text into the Name field.
  - Holiday Occurrence Type defaults to today’s date; you may overtype this or use the calendar tool to enter a specific date. If this is a recurring event, change to Pattern mode and enter parameters such as Fourth Wednesday of October for example. Be sure to click Save for any holidays created and then click the Red X to close the Holiday Setup window when finished.
Appointment states are used to represent the current state of the appointment. Several common appointment states are provided as system defaults; these cannot be changed. These include Waiting, Arrived, Awaiting Parts, Call and Remind, Call Customer, Cancelled, Closed, Finished, No Show and Open.

**ADD/EDIT APPOINTMENT STATES**

- You may add your own *Custom States* by clicking on the *Add* button; the example below is ‘Inspection Complete’. Please note any Custom states are Active by default. State color will appear on the Appointment screen as a quick visual reference (*See page image on page 16*). Click on *Save* to record this and close the window.
Schedule Resources allows you to catalog your bays, pieces of equipment, scan tools, lifts, tire machines, locations or anything specifically required for certain types of appointments. Each resource is defined by Name, Schedule Color (easier to identify on the calendar), Brand Name, Nickname, Size, Serial Number, Location, Description, Warranty Information, and Notes.

ADD/EDIT SCHEDULE RESOURCES

- To get even more control with the Scheduler, you’ll want to define resources in your shop that are required for specific jobs. For example, you may need to use a specific bay that includes special equipment used for emission testing. Having these resources cataloged and color coded allows the user to better visualize what is and isn’t available for a particular time slot. The resource editor is also a handy place to store service and repair information specific to that item.
- Catalog a new resource by clicking on the Add button and complete any or all fields. The Active in Scheduler checkbox controls visibility of the resource for potential assignment; it is checked by default. Remember to click on Save when finished.

NOTE: At this time, only one resource may be associated with an appointment or event.
The Technician Setup provides space to store and edit background details of technicians, service advisor(s) and entry of a shop Manager. NOTE: The shop Manager wage has no impact on check profit functions. Create a new employee entry by clicking on the Add button and complete any or all fields.

Define each Technician or Service Advisor with the following parameters for entry [next page]:

- **Technician Wage Information** – Select either an Hourly or Salary type wage; enter number of hours in pay period (ex. 80 hrs. for two weeks) into Hours per Week.

- **Parts Commission - Type / Rate** of commission on parts if technician or service advisor is participating; % of profit or sale of parts.

- **Labor Commission - Type / Rate** of commission on labor if technician or service advisor is participating; % of profit or sale of labor.

- **Sublet Commission - Type / Rate** of commission on sublets if technician or service advisor is participating; % of profit or sale of sublet operations.

NOTE: If any technician also works as a service advisor, or vice versa, they should be entered twice; as both Technician AND Service Writer, in order for their names to appear on each appropriate list for assignment purposes.
When creating or editing a technician record it is useful to assign a unique color to that technician; this will provide a strong visual cue when viewing the calendar.

This screen’s enhancements include **Date Hired**, **Date Discharged**, **Last Pay Raise** and a setting to mark the record as inactive (if discharged or other long-term reason). The **Inactive** checkbox prevents this entry from being available for assignment; it is un-checked by default.

Once you’ve completed entry of wages & commissions, click on the **Hours** tab to fill out work hours for this employee. The calendar uses these hours to alert you if the tech is overbooked.
The Technician Hours Dialog is where the Tech’s or Service Advisor’s Start & End times are recorded.

By default, times are set to 8:00 AM to 4:00 PM. In the example below, clicking on the blank Start time for Wednesday, the Start and End times of 8 to 4 are automatically entered. Modify these time as needed. Click on any cell and hit the DEL key on the keyboard to delete the time. For example, if the employee does not work Wednesdays, delete the Start & End time for that day.

The next step is to move on to the Address information.
The Technician Address Dialog is a handy location to store additional personal information for each employee. While this information is not required to use the scheduler, we have included it for your convenience. Click on OK when entry is completed.
Complete the setup of the scheduler by selecting whether 1) Quotes or 2) Estimates should be displayed in the schedule and 3) setting the Auto Scheduling default behavior. The following options are available:

1. **Show Quotes in Schedule** – Recommended Default Setting is Un-Checked
   - This Option should be un-checked in most cases. There is no need to add Quotes to the schedule when starting orders from the Appointment Editor (Covered in Chapter 2)

2. **Show Estimates in Schedule** – Recommended Default Setting is Un-Checked*
   - This Option should be un-checked in most cases. There is no need to add Estimates to the schedule if starting the Estimate (or RO) from the Appointment Editor.
   - * If using SocialCRM, you would likely check the box to include Estimates in Schedule.

3. **Auto Scheduling Default (Next Visit)**
   - a. **Never** – Don’t prompt the user to create a new appointment when posting an invoice
   - b. **Always** – Automatically open the Appointment Editor when posting an invoice
   - c. **Prompt** – Ask the user to start the Appointment Editor when posting an invoice; this allow the user to have the option to dismiss it
This chapter details the use of the calendar and appointment scheduling functionality. This section is for use by service advisors and technicians in aftermarket repair shops.

Schedule displays an electronic calendar of time available for shop activity. It is useful for planning your workload by appointments per day. While it opens in a smaller window, the Scheduler can be made full screen. Most changes to the SE Schedule window appearance are saved to the User profile currently in use.

TIP: Schedule may also be dragged to a second screen and kept open, if you have a dual monitor setup.

Navigating the Calendar

The default view is opening on the Scheduling tab view for today’s date. Since 8AM & 5PM were specified in calendar settings as the Start / End time to display, hours before and after them are visible but shaded.

- Current / next month appear alongside the main calendar for handy reference. Dates in bold have appointments scheduled; click any date to advance calendar to display that specific date.
- Use the provided Today (in left pane) or Go to Today (main toolbar) buttons to restore the view to the current date. Use the arrows to change the month and/or year of your schedule view.
- You may click on New Appointment to schedule service work or use New Shop Event to create a shop job for non-customer related activities (i.e. shop meeting, etc.)
- Backward & Forward arrows provided here make it easy to jog back or forward a day, week or month at a time, depending on the view currently selected.
- Zoom In and Zoom Out buttons control the vertical sizing of the hours displayed; handy to squeeze more lines onto your screen or to view fewer events in a larger font size.
- Instantly change the view from Day View to 5 day Work Week, 7 day Week, Full Week (in columns) or Month View.
- Print function will create a detailed Scheduled Events report for the date range you specify.
RESOURCE VIEW / FILTERING

Resource View Mode options control the way in which the calendar data is displayed:

- **Normal** provides an overview driven by customer names and appointment slots per day.
- **Technician** organizes the calendar by technician names, then dates and hours and Tech color.
- **Technician (By Date)** changes this array to sort by names & days of the week followed by technician names.
- **Resource** organizes the calendar by resource names then dates and hours and Resource color.
- **Resource (By Date)** changes this array to sort by Resources & days of the week followed by resource names.
  - Show/Hide checkboxes adds or subtracts elements from the view; columns width changes accordingly.
  - As you switch to views that contain more data than current width can display, a new toolbar appears along the bottom. This allows you to quickly toggle left or right a single step or all the way in either direction. + / - allow fine-tuning of display size.
  - Your keyboard’s arrow keys are usually active and available as well in this grid.

Filtering – Provides ability to include/exclude data displayed by Type of record (EST, RO, etc.) and/or Appointment State (Open, Awaiting Parts, Waiting, etc)
The **Appointment** tab displays all of your appointments in rows as single line items; scrolling to the right reveals additional data columns.

The **Shop Events** tab displays other commitments that can impact the shop's schedule. These would include anything that is not a customer-driven appointment entry.

- The Appointment tab can be displayed with or without Default Group. The Default Group function will categorize your appointments as follows: Previous, Today, Tomorrow and Future (depending on appointment dates). Each group can be expanded or collapsed.
  - Clicking on "Reset Layout" sets Default Group "ON" and collapses (closes) all of the groups. Simply click on the group label(s) to display the appointments within each group again.
- Column sequence may be changed; any column sorts in an ascending or descending order.
- Right mouse clicking on a column name presents a handy search tool to locate a specific item.
- Sort order and preference are stored, similar to your Work-In-Progress screen.
PRINTING SCHEDULED EVENTS

The Print button will create a (user-defined date-ranged) printout of all Scheduled Events, including both customer Appointments and Shop Events. Items in RED indicate no technician is selected or promise time is before scheduled time. The graphic below shows a “Shop Event” that is scheduled on the calendar.

NOTE: The toolbar includes a Print Preview as Schedule doesn’t use SE ‘print to screen’ default settings.
CREATING A NEW APPOINTMENT

Create and edit existing appointments using the Appointment Editor. You may open the editor by:
1) Clicking on the Schedule (“calendar”) icon in the main SE toolbar, 2) clicking on the Appointment button on the bottom of the Work in Progress screen with desired order selected, or 3) by selecting Order Options - Appointment from the SE Order screen.

- A customer calls to get some work done; click on Schedule to open the calendar.
- Highlight the start time and click on New Appointment or double-click directly on the time itself to start the process.

TIP: If you know the work requires a longer appointment, you may click and drag to highlight the longer time period, then right-click and select New Appointment.
SELECTING CUSTOMER & VEHICLE

Existing Customer / Vehicle Dialogs

- **Find Customer for Schedule** window opens; type a few letters of the last name (or use other means) to see if they’re an existing customer; when you get a match, click on the name or click **OK**. If this is a first time customer, click on **New Customer** to enter their details. [see sample below]

![Find Customer for Schedule](image1)

- The **Vehicle Selection** screen opens with customer’s vehicle list. Select the vehicle to be assigned to the appointment, and click **OK**. If this is a new vehicle for this customer, click on **Add Vehicle**. [see below]

![Vehicle Selection](image2)

New Customer / Vehicle Dialogs

- **New Customer** entry is followed by **New Vehicle** entry; then Appointment Editor displays this data.

![Create New Customer](image3)

![New Vehicle](image4)
After the customer / vehicle is selected, the Appointment Editor will open with the customer’s name shown in the Subject field, vehicle information, the start time and the Appointment State as Open.

- If you highlighted a specific time slot in the schedule before launching the Appointment Editor, that will set the Start time.
- Change the Start and End times and Dates using the drop-down lists + calendar from keyboard.
- Auto Adjust End Time appears with default setting (checked or un-checked).
- Scheduled Hours = appointment length / Order Hrs = 0.00 until appointment becomes EST/RO
- The All Day event checkbox reserves the entire day for larger jobs.
- An internal Reminder can be set for this event; check the box and chose a unit of time from list.
- Comments text will print on orders as Notes (by default unless unchecked) to provide
- Make Technician and Resource assignment(s) at this time, if these are known.

NOTE: This example shows ‘Technician not available’ warning due to previous assignments, not being available that day, etc. This is so shops don’t overbook or create tech / resource assignments that are invalid.

Using the Appointment Editor is continued with adding Canned Jobs option [next page]
MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

- **Apply Canned Jobs** to appointment in two ways; the **Add** button provides access to search full list of canned jobs in your system, or you may right-click in the bottom grid to access any of your 30 selected **Quick Canned Jobs**. The **Appointment Editor** warns when the amount of work is greater, indicating you should adjust the appointment time accordingly.

![Appointment Editor](image)

When you are satisfied with the appointment input, click on **Save & Close**. Depending on the view selected, the appointment is now visible in your schedule with customer name and any **Comment** text, if so enabled.

- If a customer calls back and says they can’t make it to their existing appointment, check the calendar and simply drag it to another time that works better for you and your customer. **NOTE:** You may also drag it to a different technician and the tech assignment will be updated for all labor lines **except** those where shop has manually made an assignment to certain lines.

- When the customer arrives, double-click on their appointment to open it in the editor and then click **Create** to launch an Estimate or Repair Order to proceed with the actual work.

---

**CREATING A SHOP EVENT**

**Shop Events** are units of time (blocks) in the shop calendar not driven by customer appointments. **Shop Events** are useful to plan the work day. Typical Shop Events might be ‘Bay Hoist Repair’ or ‘Shop Meeting’.

- Open the Schedule (calendar icon) then click on **New Shop Event**.

![New Shop Event](image)

- A generic entry of ‘Shop Event’ is visible in **Subject**, which can be changed to specific text you prefer to be visible in the Schedule calendar.

- Default **Start** value is system time when creating a **Shop Event**; default time allocation is half an hour. The event can be set to **All Day event** if applicable.

- **Shop Event** may also include **Canned Jobs** if that is applicable.
MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

INTEGRATION POINTS

WORK IN PROGRESS DETAIL DIALOG

Right-clicking on any desired line within the WIP screen brings up the Work in Progress Detail dialog.

- Work in Progress (WIP) screen has been modified to also include Schedule information (#1).
- The information displayed for each order shows the start time and the number of hours included on the order (#2). Date shown in both (#2 and #3) reflect changes made in the Appointment Editor.