

Service Scheduler - Basics

- [Client installation](#)
- [Mobile client installation](#)
- [Application server settings](#)
- [Starting and Logging into Service Scheduler](#)
- [Loan car diary](#)
 - [Creating, editing and deleting entries](#)
 - [Loan car form](#)
 - [Loan car diary administration](#)
- [Workshop planner](#)
 - [Adding staff / contractors](#)
- [User interface](#)

Client installation

The **User setup** does not require Administrative rights to install, but means only the user that installed the program can use it. There is a **System setup** available, but requires Administrative rights to install. You will be able to find these options on your Service Scheduler software home page. The **User setup** is the **recommended** version.

Download client

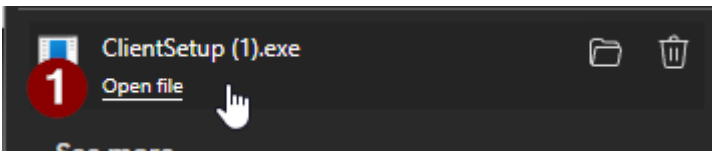
The client is available on the from the running server instance of service scheduler. (eg <http://servsched:8090>) The default Server Port: 8090 however this could be changed during installation.

image.png

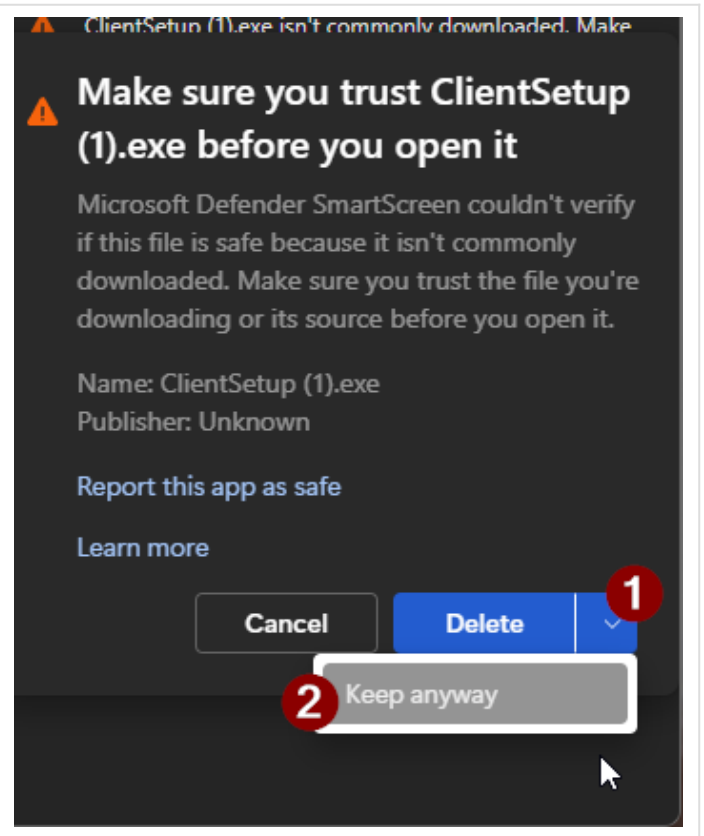
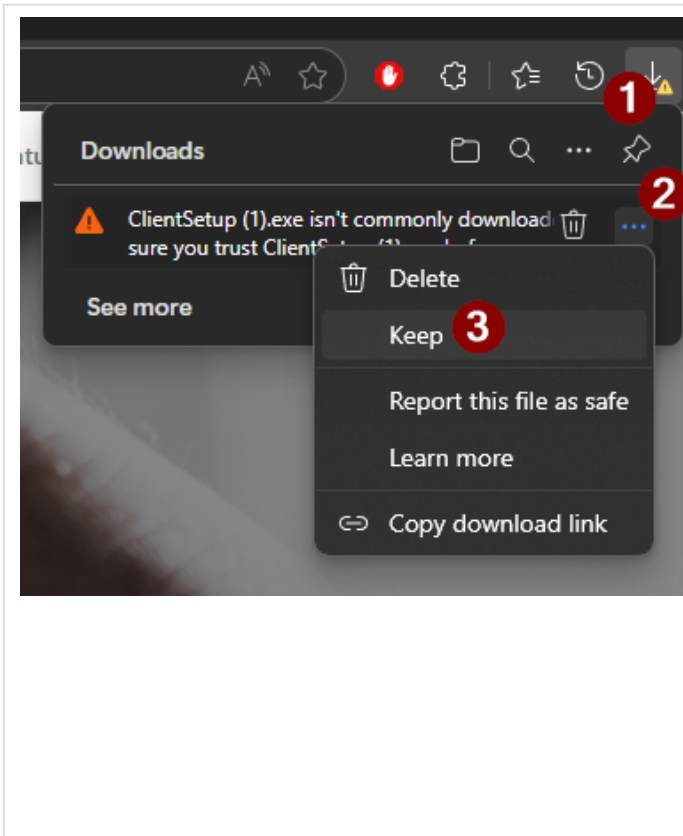
| | |
|-----------------------------------|---|
| Client - User Setup | This will install the application in the user current profile. Admin rights are not require |
| Client - User Setup (System Wide) | This will install a stub in the program files folder and a desktop icon for all users. This will then install the application in users profile. This is helpful for workstations used by multiple users |
| Client - System Setup | This will install in Program files for all users. Requires admin rights. |

Launch client download

Once the download is complete click open file

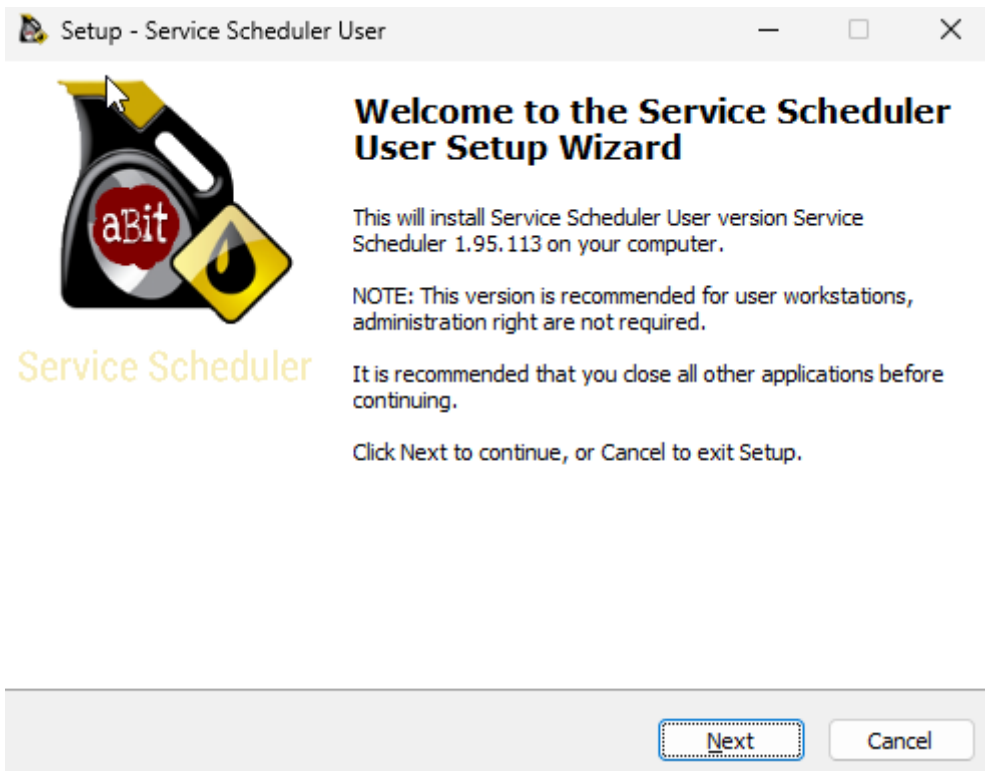


Some browsers may prompt about trusting the file. Select the 3 dots "... " and press keep



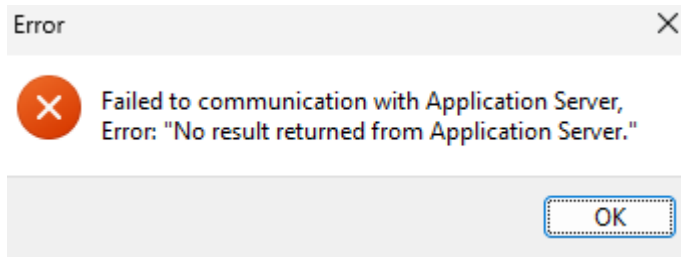
Client Installation

Press Next until installation is finished, not options need to be changed.



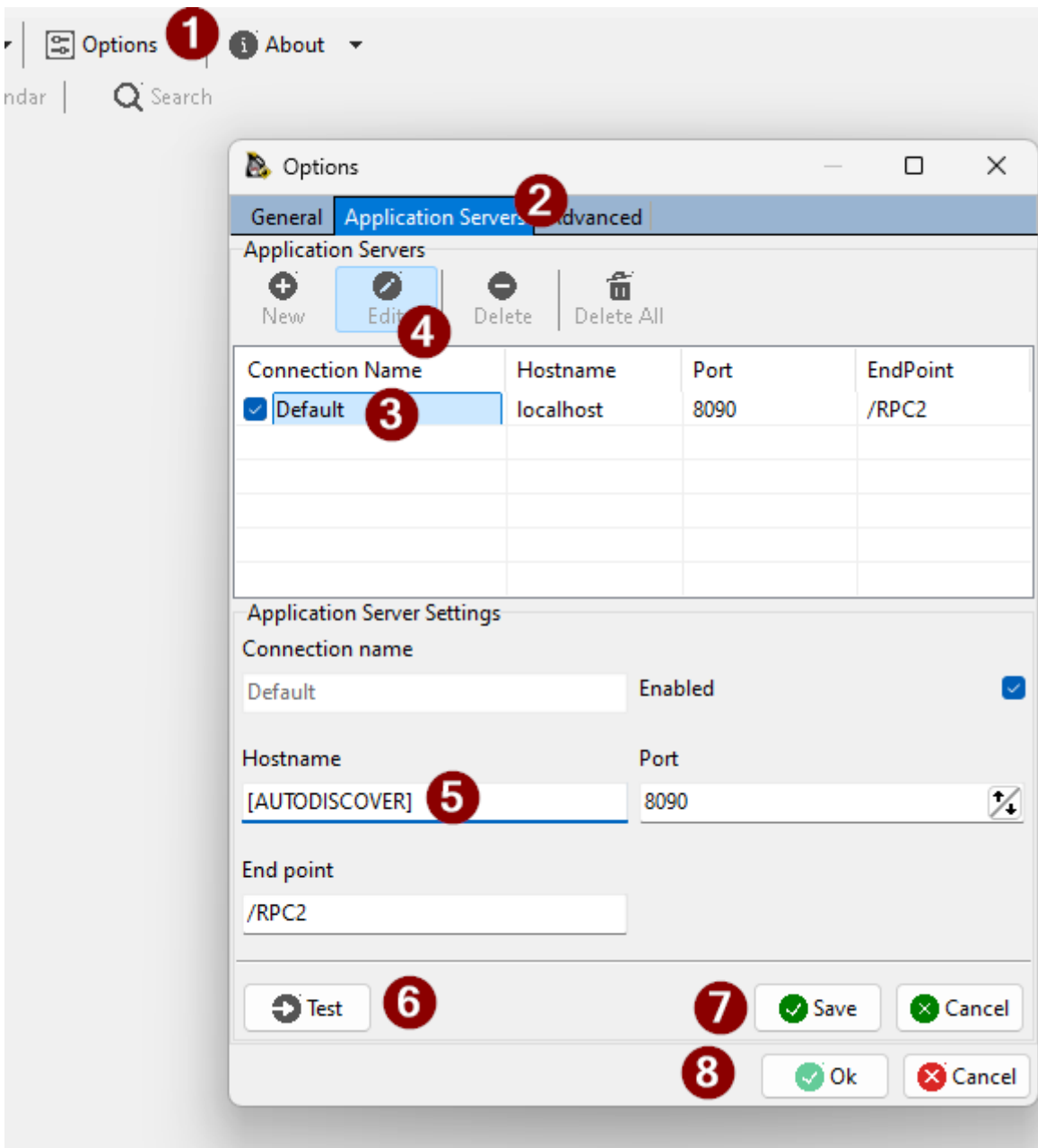
Client configuration

For many sites service scheduler will work immediately after installation however if a connection error occurs the server address will need to be entered manually.

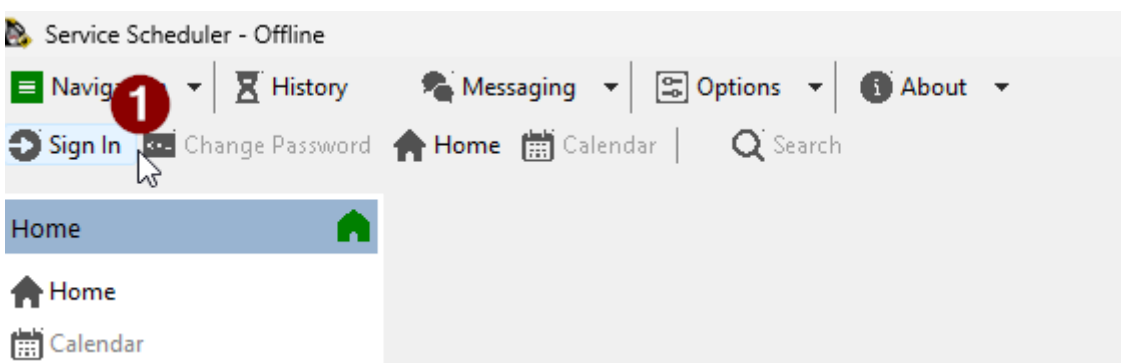


Select Options -> Application Server and adjust the [AUTODISCOVER] value to the server name or ip address of the Service Scheduler server.

If a URL was provided for installation (eg <http://172.16.1.10:8090>) the address would 172.16.1.10.



Press Sign in again



Mobile client installation

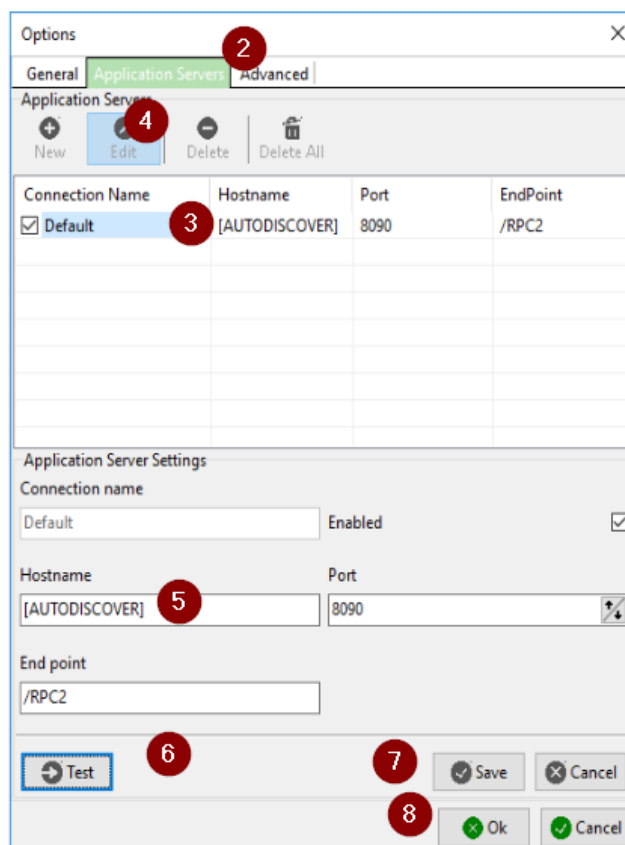
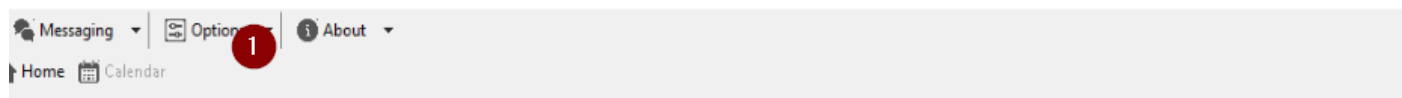
Service Scheduler mobile requires that Web Services are installed and accessible from customer WAN

- [Android] (<https://play.google.com/store/apps/details?id=au.com.abitsoftware.servsched>)
- [iOS] (<https://itunes.apple.com/us/app/service-scheduler/id898640065?ls=1&mt=8>)

Application server settings

The default setting for the application server in Service Scheduler is [AUTODISCOVER] this will attempt to find the server user DNS SRV records.

If DNS is not configured or testing connectivity issues, the hostname can be adjusted.



NOTE: DNS is the recommended method with the next preference being a hostname (eg servsched) this makes future upgrades or migrations to new servers easier.

Starting and Logging into Service Scheduler

Starting Service Scheduler

To start Service Scheduler, you have the following options:

1. Use the provided desktop shortcut on your computer to start Service Scheduler.
2. Go into the Start Menu and find the Service Scheduler program under the "S" section.
3. Search "Service Scheduler" in the Search Box.

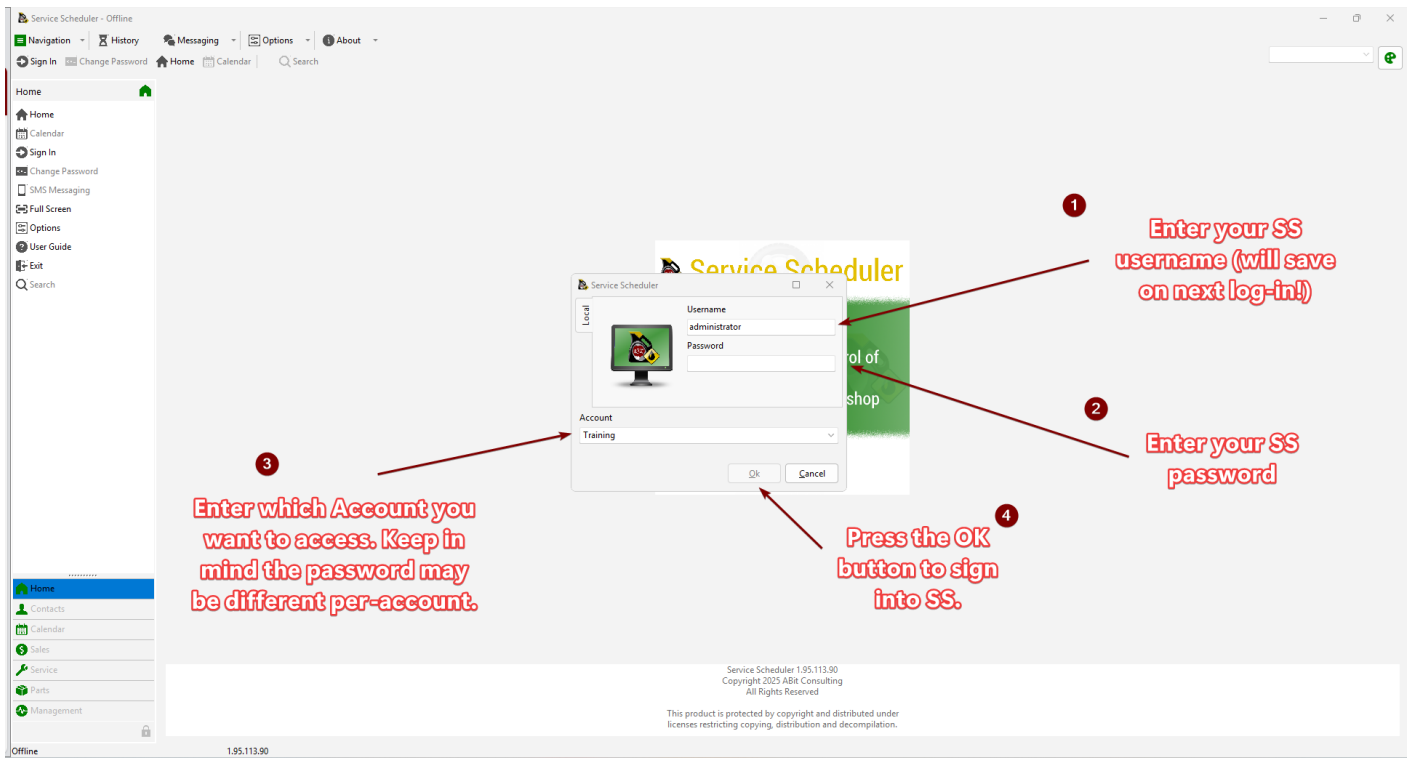


Logging into Service Scheduler

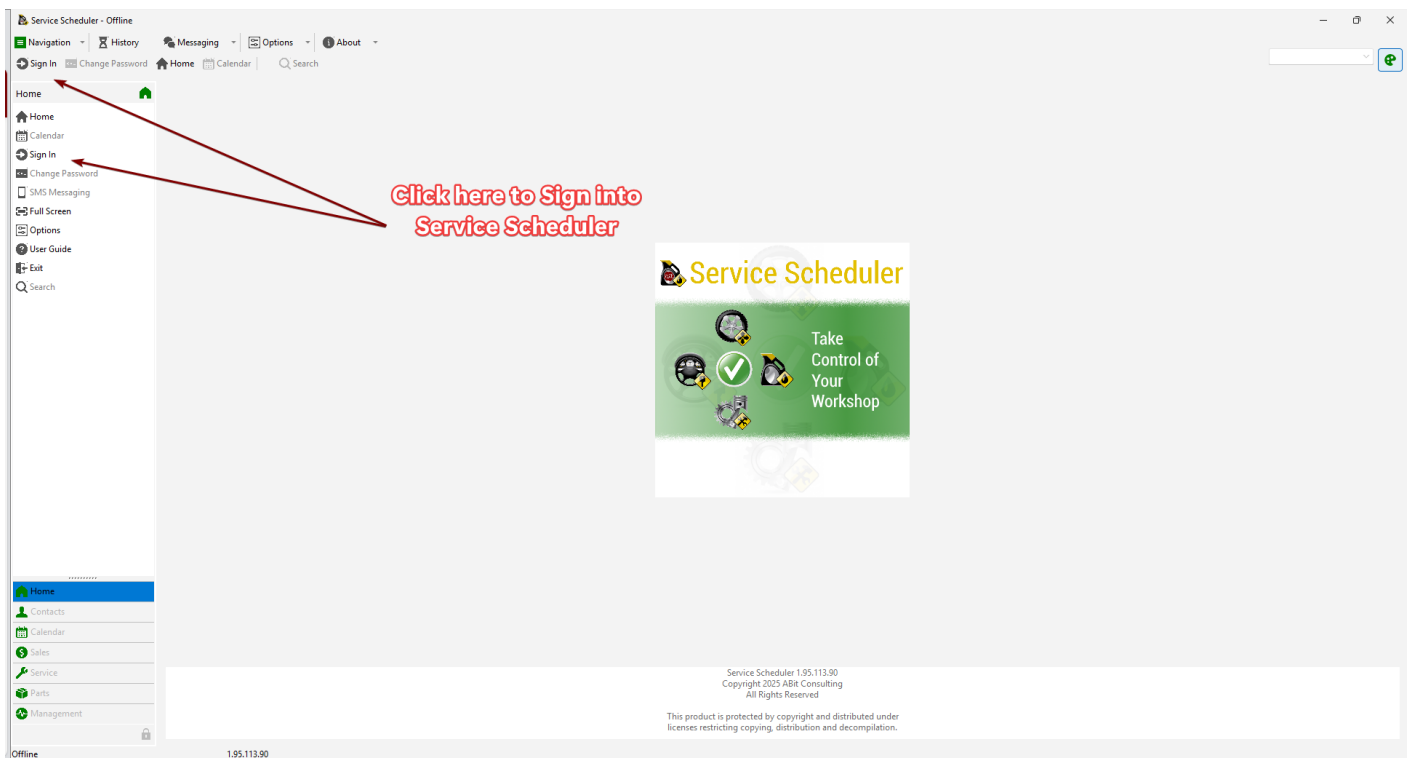
When you start Service Scheduler, you will be shown a pop-up window to log into the application.

Your Service Scheduler **username** and **password** is provided by your IT support. The **account** section will only appear if you are a part of multiple accounts for your Policebook site. Please pick the account that is best suited for your current use. You can switch between accounts once you

have signed into the application.



If you closed the pop-up, you can still sign in by pressing the 2 buttons at the top-left of the screen called "**Sign In**".



After a successful sign-in, you will be greeted by the front page of Service Scheduler. You will be able to see the current account at the top-right corner of the application, with a greeting message below showing who is signed into the application currently.

To sign out, you can go to the left sidebar or the top bar.

The screenshot shows the Service Scheduler software interface. At the top, there is a navigation bar with options: Navigation, History, Messaging, Options, and About. Below this is a secondary bar with Sign Out, Change Password, Home, Calendar, and Search. The left sidebar contains a list of menu items: Home, Calendar, Sign Out, Change Password, SMS Messaging, Full Screen, Options, User Guide, Exit, and Search. At the bottom of the sidebar, there is a section with Home, Contacts, Calendar, Sales, Service, Parts, and Management. The main area of the interface features a central graphic with the text "Your current account is shown here" and "Service Scheduler" in large yellow letters. Below this is a green box with the text "Take Control of Your Workshop" and several icons. To the right of the central graphic, there is a welcome message: "Good Afternoon 'Service Scheduler Administrator', welcome to Service Scheduler." Below the central graphic, there is a search bar, an options dropdown menu (Jobs, Parts, Order, Pre-Delivery, Reconc), and a record limit dropdown menu (1000). At the bottom of the interface, there is a quote box with the text: "I told the doctor I broke my leg in two places. He told me to quit going to those places."

To Sign Out, click here

Your current account is shown here

Your name will be shown here

Loan car diary

Loan car diary

Creating, editing and deleting entries

To access the loan car diary select Service -> Loan cars

Navigation | History | Messaging | Options | About

Dashboard | Jobs | Planner | Bookings | Loan Cars | Courtesy Bus | Wait Service | Road Test | Tyre Bookings | License Bookings

Service

Thursday 11 Jul 2024 02:00 pm

New | Edit | Delete | Refresh | Calendar | Prior Week | Current Week | Next Week

All | Service | test

| Zoom In | Monday 08/07 | | Tuesday 09/07 | |
|---|--------------|----|---------------|----|
| | AM | PM | AM | PM |
| MAZDA 3 Neo Eternal Blue 1GMX259 | | | | |
| MAZDA CX-5 Touring Machine Grey 1GOM104 | | | | |
| MAZDA CX-5 Touring Sonic Silver 1GOM105 | | | | |
| MAZDA CX-3 Neo Ceramic 1GOM106 | | | | |
| MAZDA CX-3 Maxx White 1GOM112 | | | | |
| MAZDA CX-5 Maxx Sport Machine Grey 1GOM113 | | | | |
| MAZDA 3 MAXX SPORT Machine Grey 1GOM114 | | | | |
| MAZDA 3 MAXX SPORT Tit Flash 1GOM149 | | | | |

Home | Contacts | Calendar | Sales | **Service** | Parts | Management

New entry

Double click on desired date and available vehicle. If the vehicle is password protected enter the required password.

Loan Car Booking: Insert

Loan Form

Scan License

License Check

Audit Log

Booking Details

Booking name RO number

Start date Start time Status In Out

End date End time

Driver Details

Contact Details Notes

Driver Details

Customer name Date of birth

License number License class License expiry

License address

State

License Front License Back

(Customer License Image)

Booking Information

Booked date Booked time Booked by

Vehicle Details

Loan Car

Registration

Details

Scanner is offline

Insert

Save and Close

Save

Cancel

If you are using the ABit License Scanner you can place the license on the scanner and all details and a copy of the image are extracted and stored.

Edit entry

Double click on an entry to make changes

Refresh | Calendar | Previous Week | Current Week | Next Week | Scan

Loan Car Booking: 7287 (Fredd Bloggs)

PM

- Loan Form
- Scan License
- License Check
- Audit Log

Booking Details

Booking name: **Fredd Bloggs**

Start date: 8/07/2024

End date: 8/07/2024

Driver Details

Contact Details | Notes

Driver Details

Customer name:

License number:

License address:

State:

Booking Information

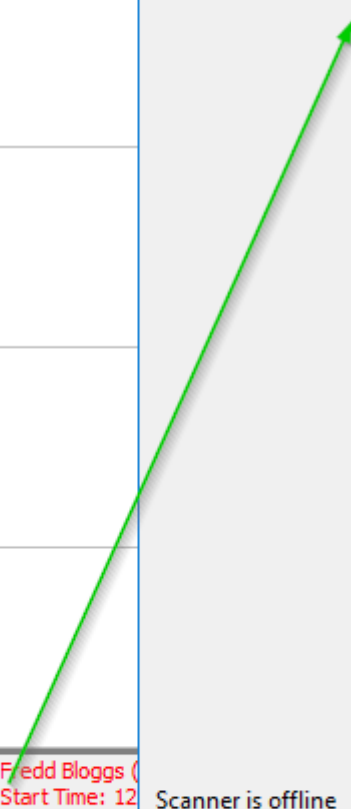
Booked date: 11/07/2024

Fredd Bloggs (Start Time: 12:00)

Customer Name: , Lic Number:

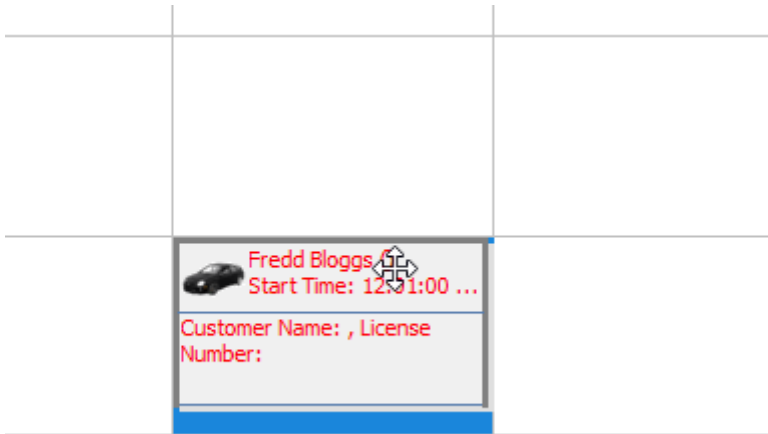
Scanner is offline

Browse



Move entry

Move the mouse of an entry until the icon changes into 4 arrows. Hold down the mouse button and move the entry.




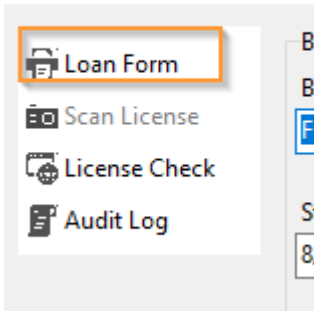
Loan car diary

Loan car form

If a Loan Form has been configured in Loan Car Maintenance the form can be printed from the Loan Form button. The Loan Form will fill in the required fields and be displayed in Microsoft Word.

Workstations will require Microsoft Word for this feature to work

 Loan Car Booking: 7287 (



COMPANY NAME

ADDRESS LINE 1
 ADDRESS LINE 2
 PHONE LINE 1
 PHONE LINE 2
 WEBSITE
 EMAIL

VEHICLE EVALUATION FORM

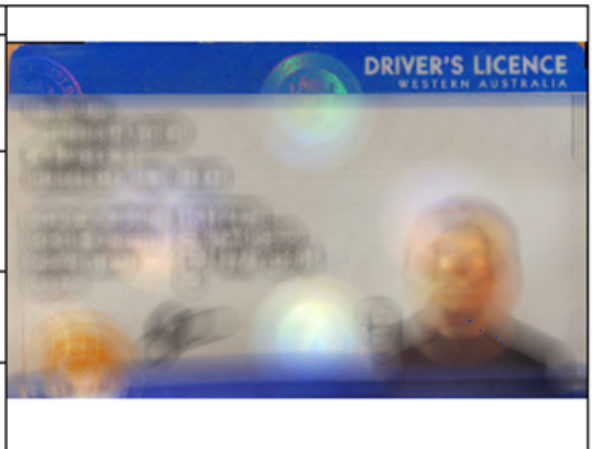
Repair Order:

Evaluation Number:

374



| Vehicle Details | | | |
|------------------|----------------|--------------|-------------|
| Vehicle | silver captiva | | |
| Colour | | | |
| Rego No. | 1ddg726 | Keys Out | |
| Details | | | |
| Date Out | 20/02/2012 | Date Due | 20/02/2012 |
| Time Out | 07:00:00 AM | Time Due | 12:00:00 PM |
| Fuel Rate | | | |
| Customer Details | | | |
| Name | Tristan Marlow | Address | |
| Phone No. | | | |
| Driver Details | | | |
| Name | Tristan Marlow | License No. | 1234567 |
| Phone No. | | License Exp. | 25/02/2013 |



The Dealer makes available to the customer a vehicle for evaluation purposes only on the terms and conditions described below.

1. RUNNING EXPENSES

The Customer agrees to pay for all fuel, oil, grease, tires, tubes and batteries used or required to keep the vehicle in proper running order whilst the Customer has possession of the vehicle. The Customer agrees to pay for all repairs made necessary by negligent use of the vehicle whilst the Customer has possession of same and the Customer agrees to indemnify The Dealer against the cost thereof.

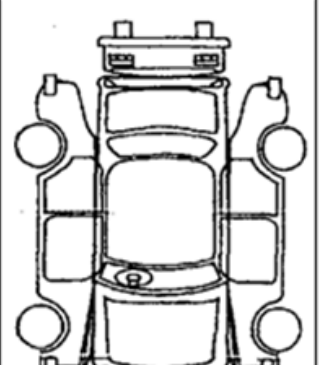
2. MAINTENANCE

The Customer agrees to keep and operate the vehicle in good and serviceable condition.

3. DUTIES OF THE CUSTOMER

The Customer will - Comply with all statutes, rules and regulations governing the use and driving the vehicle;

- Not allow the vehicle to be driven by any person not holding a full drivers license;
- Not part with possession of the vehicle;
- Not smoke in the vehicle;
- Not allow any animals in the vehicle;
- Not drive the vehicle or allow it to be driven in a careless, reckless or dangerous manner or by a person under the influence of intoxicating liquor or drugs;
- Not use the vehicle for purposes of hire;
- Be responsible for all fines resulting from Breaches of Traffic regulations incurred while the vehicle is in the care, custody and control of the Customer and will also



Loan car diary

Loan car diary administration

Creating, editing or deleting a loan car

NOTE: Deleting a loan car that has history is not recommended. Set the vehicle to inactive

System

- System Settings
- General
- Documents
- Messaging
- Reports
- Staff
- Security
- System

Select item from menu below

New
 Edit
 Delete
 Refresh
 Show

- Risk Incidents
- Departments
- Priorities
- Service
 - Job Status
 - Job Types
 - Job Wash Status
 - Job Filters
 - Job Booking Status
 - Service Groups
 - Loan Cars 2
 - Loan Car Groups
 - Courtesy Bus
 - Wait Service
 - Wait Service Status
 - Tyre Booking Status
 - Tyre Booking Type
 - Tyre Booking Bay
 - License Booking Status
 - License Booking Vehicle
 - License Booking Location
 - License Booking Bay
 - Wash Bays
 - Wash Status
 - Wash Type
 - Wheel Alignment
- Sales
 - Pre-Delivery Status
 - Pre-Delivery Stock
 - Pre-Delivery Work
 - Pre-Delivery Sales
 - Pre-Delivery Location
 - Pre-Delivery Filters
 - Recondition Location
 - Recondition Source
 - Recondition Status
 - Recondition Work
- Parts
 - Parts Order Status
- Planner
 - Planner Filters
- DMS
 - ERA - Field Maps
 - ERA - Accounts

| Car Details | Car Registration | Group Name | Authorise C Required Ir |
|-----------------|------------------|------------|-------------------------------------|
| MAZDA 3 Neo Ete | 1GMX259 | Service | <input type="checkbox"/> |
| MAZDA CX-5 Tour | 1GOM104 | Service | <input type="checkbox"/> |
| MAZDA CX-5 Tour | 1GOM105 | Service | <input type="checkbox"/> |
| MAZDA CX-3 Neo | 1GOM106 | Service | <input type="checkbox"/> |
| MAZDA CX-3 Max | 1GOM112 | Service | <input type="checkbox"/> |
| MAZDA CX-5 Max | 1GOM113 | Service | <input type="checkbox"/> |
| MAZDA 3 MAXX S | 1GOM114 | Service | <input type="checkbox"/> |
| MAZDA 3 MAXX S | 1GOM149 | Service | <input type="checkbox"/> |
| MAZDA BT-50 Ser | 1EDR173 | Service | <input checked="" type="checkbox"/> |
| MAZDA BT-50 GT | 1GKW527 | Service | <input checked="" type="checkbox"/> |

- Home
- Contacts
- Calendar
- Sales
- Service
- Parts
- Management 1

Create a new or edit existing vehicle

Loan Car Details
✕

↻ Move bookings

Car Details

Active

Car Details

MAZDA 3 Neo Eternal Blue

Registration

1GMX259

Options

Car icon

Car 11

Loan car group

Service

Loan car document

LOAN VEHICLE AGREEMENT

Authorization required

⌂
Edit

✓ Save and Close

✓ Save

✕ Cancel

| | | |
|------------------------|---|--|
| Active | Is vehicle available in the calendar | |
| Authorization required | To add or edit a booking a password is required | The password is specified in system settings loan_car_override |

Moving bookings to another vehicle

If you are making a vehicle inactive, use the "Move bookings" option to reassigned bookings to another vehicle.

The screenshot displays a software interface with a sidebar on the left containing navigation options like Home, Contacts, Calendar, Sales, Service, Parts, and Management. The main area shows a list of documents, with 'LOAN VEHICLE AGREEMENT' selected. A 'Document Details' dialog box is open, showing the following information:

- Document Title:** LOAN VEHICLE AGREEMENT
- Document Filename:** LOAN VEHICLE AGREEMENT.doc
- Keywords:** THE, AND, VEHICLE, YOU, ANY, WILL, FOR, DEALERSHIP, THIS, LOAN, CUSTOMER, NOT, DAMAGE, AGREEMENT, INFORMATION, DATE, WITH, ALL, ALLOW, THAT, YOUR, RETURN, INSURANCE, CAR, TIME, DETAILS, IMMEDIATELY, INCLUDING, EXCESS, AGREED, PAY, LICENCE, LICENSE, ARE, OTHER, OUR, PERSONAL, MAY, WHILST, OUT, RESPONSIBLE, CAUSED, PROVIDE, SHOULD, DRIVER, HOW, HAVE, USE, ABOVE, CONDITIONS, TERMS, TIMES, RECOVERY, COMMENCEMENT, COVER, PROPERTY, PARTY, THIRD, ACCIDENT, KIND, POLICY, SIGNATURE, BELOW, ACCEPT, CHECK, USED, BREACH, CORRECT, AUSTRALIAN, WHICH, SERVICE, FUEL, FINES, FULL, NUMBER, COST, MAINTAIN, STATE, EVENT, ROAD, DRIVE, SMOKE, CONTROL, PAYMENT, REPRESENTATIVE, 000, THESE, COSTS, PRIVACY, THAN, BUT, CLAIM, CAN, PHONE, NAME, PERSON, UNDER, FROM, LAWS, FOREIGN, INTERNATIONAL, CLASS, BIRTH, EXPIRY, CHECKED, INSERT, DIAGRAM, NOTED, POLICE, SUBJECT, TITLE, RESPONSIBILITY, R
- Date Modified:** 11/07/2024 2:08:20 PM

A note at the bottom of the dialog states: "NOTE: Document keywords are automatically updated by the server when a document is modified. User defined keywords will be cleared if a file is modified."

Loan Form Fields (Merge Fields)

The following fields can be placed onto a loan form and data will automatically be merged.

| Field name | Description |
|--------------------------------|------------------------|
| :customer_name: | Customer name |
| :ro_number: | Repair Order Number |
| :customer_license_number: | Drivers license number |
| :customer_license_expiry_date: | License expiry date |
| :car_details: | Vehicle Description |

| | |
|----------------------|----------------------|
| :booking_start_date: | Booking start date |
| :booking_end_date: | Booking end date |
| :booking_start_time: | Booking start time |
| :booking_end_time: | Booking end time |
| :car_registration: | Vehicle Registration |

System settings

[System settings](#) related to the loan car diary

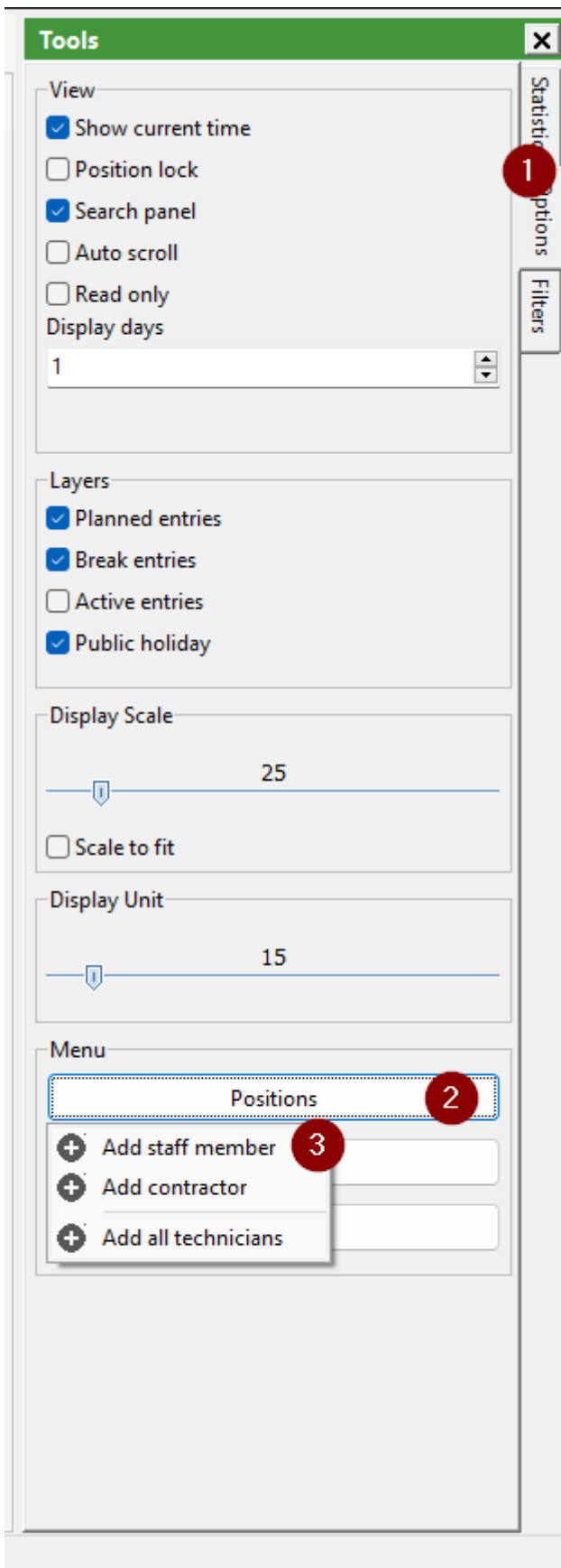
| Key | Description |
|--------------------------|--|
| loan_car_calendar_days | Number of days to show on the loan car calendar (eg 5 or 7 days) |
| loan_car_delete_password | The password used to delete an entry |
| loan_car_override | The password use to modify bookings on a vehicle with <input type="checkbox"/> Authorization required checked |

Workshop planner

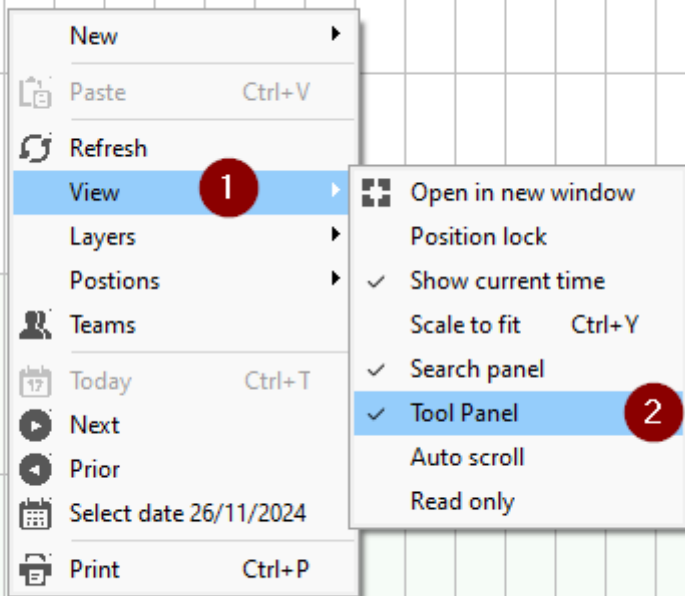
Workshop planner

Adding staff / contractors

If the planner has not staff members, select the tools then press on the positions button



If the tools menu is missing, right click on the planner grid and select View -> Tool panel



User interface

Navigation and toolbars

| | |
|-------------------|----------|
| Toggle navigation | ALT + F1 |
| Toggle toolbars | ALT + F2 |

