Service Scheduler - User guide

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- Loan car diary
  - Creating, editing and deleting entries
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- Workshop planner
  - Adding staff / contractors

Client installation

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.

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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.

Mobile client installation

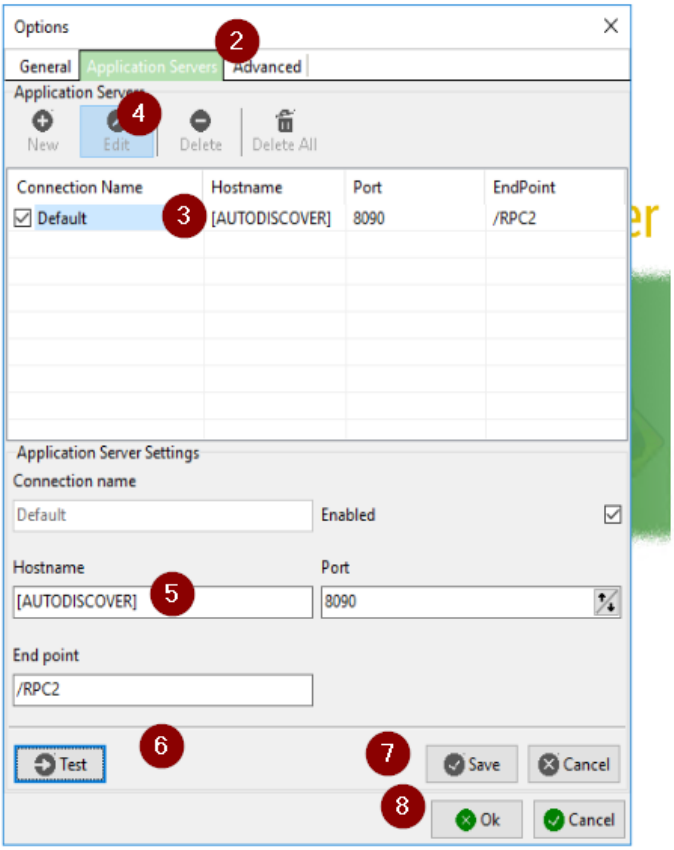
Service Scheduler mobile requires that Web Services are installed and accessible from customer WAN

- [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.

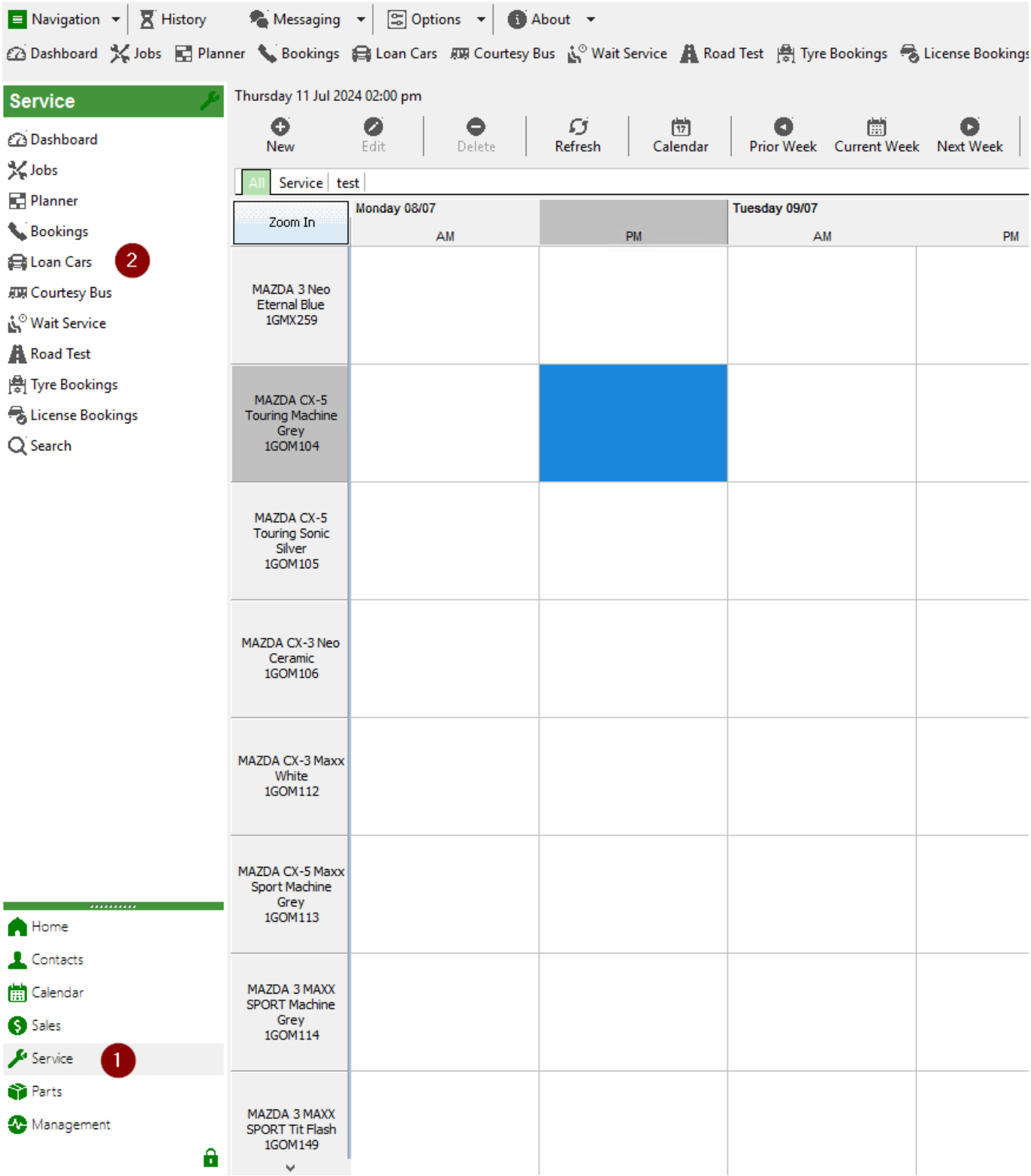


NOTE: DNS is the recommended method with the next preference being a hostname (eg servsched) this makes future upgrades or migrations to new servers easier.

Loan car diary

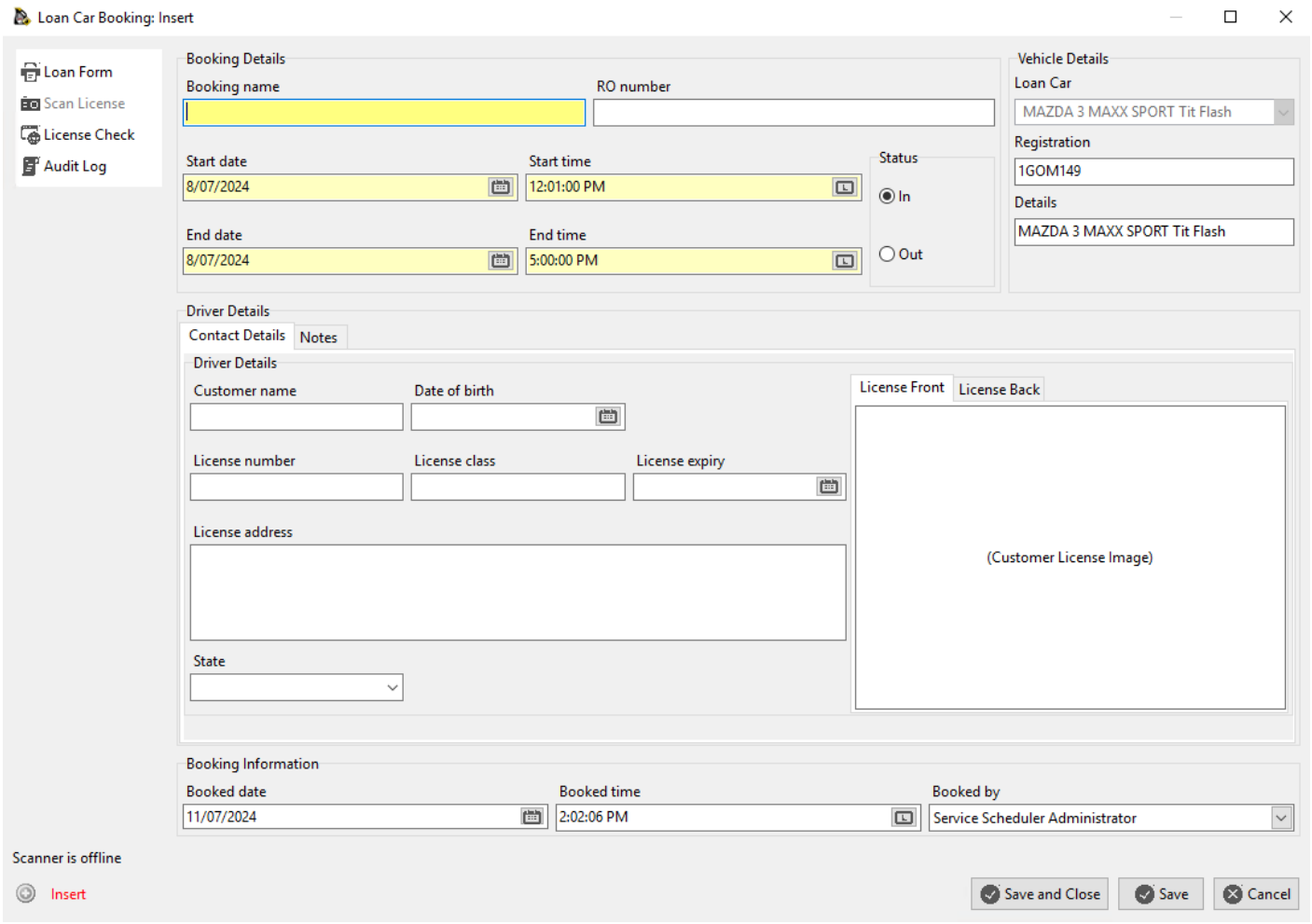
Creating, editing and deleting entries

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



New entry

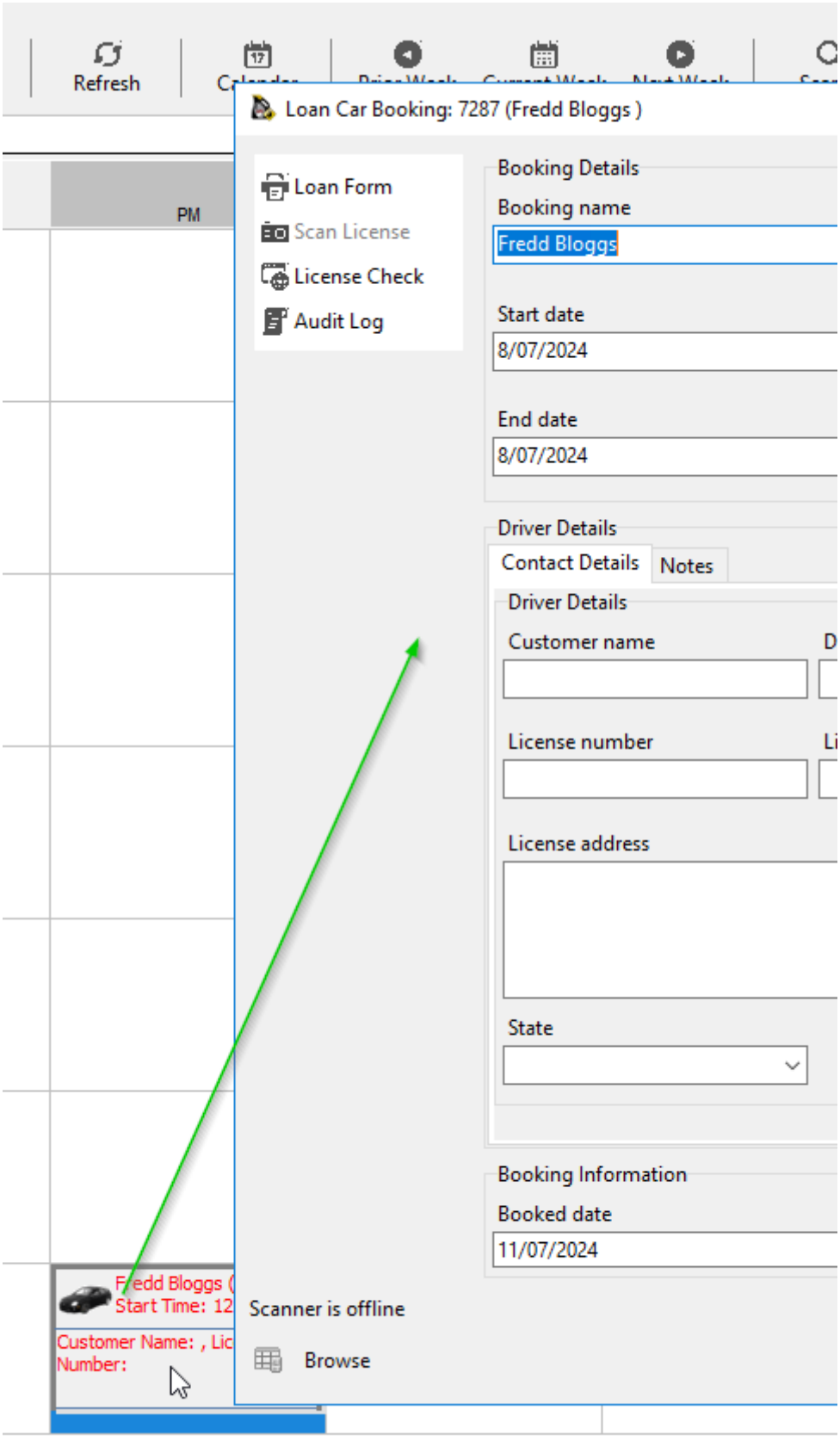
Double click on desired date and available vehicle. If the vehicle is password protected enter the required password.



> 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
PM
Loan Car Booking: 7287 (Fredd Bloggs)
Loan Form
Scan License
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Booking Details
Booking name
Fredd Bloggs
Start date
8/07/2024
End date
8/07/2024
Driver Details
Contact Details
Notes
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License address
State
Booking Information
Booked date
11/07/2024
Fredd Bloggs (
Start Time: 12
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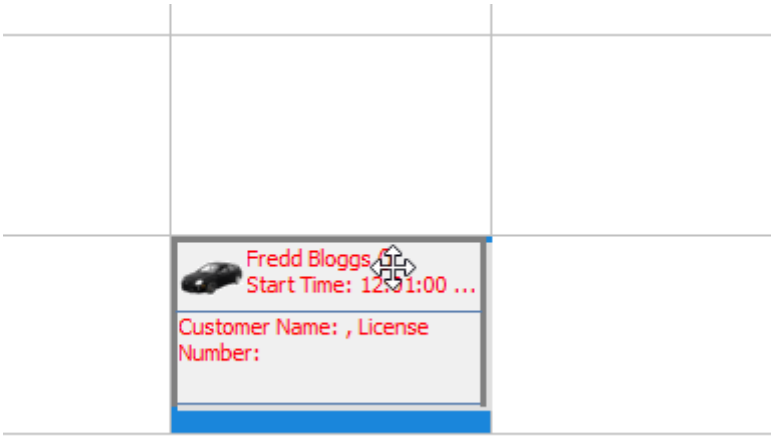
Browse

Move entry

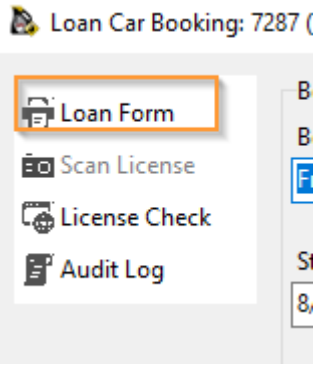
Move the mouse of an entry until the icon changes into 4 arrows. Hold down the mouse button and move the entry.



Loan car 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



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	**Kms 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.**	26/02/2013

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

1. RUNNING EXPENSES

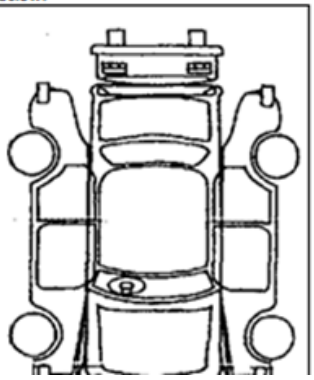
   The Customer agrees to pay for all fuel, oil, grease, tires, tubes and batteries used or required to keep the vehicle in proper running order whilst the Customer has possession of the vehicle. The Customer agrees to pay for all repairs made necessary by negligent use of the vehicle whilst the Customer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

2. MAINTENANCE

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

3. DUTIES OF THE CUSTOMER

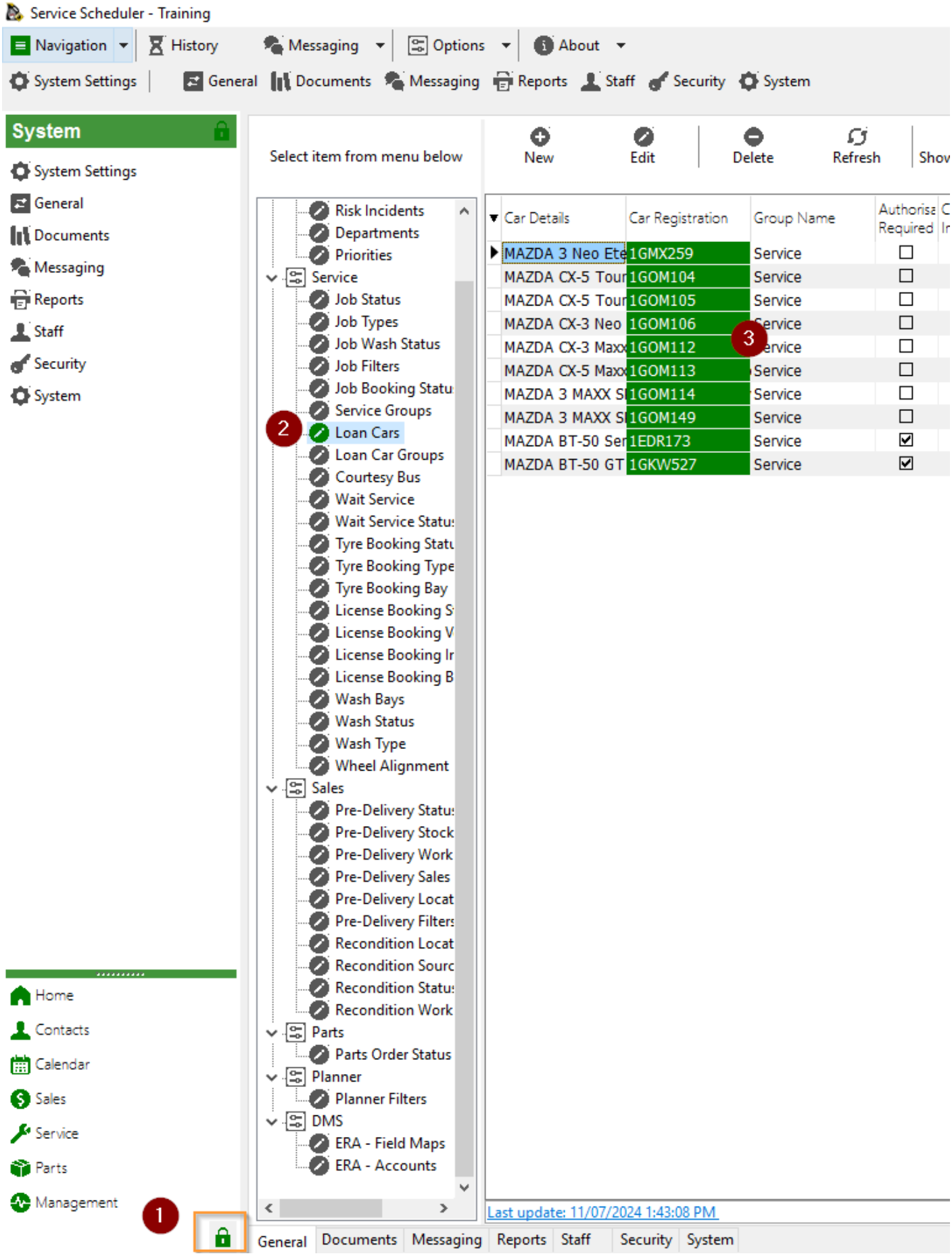
   The Customer will: - Comply with all statutes, rules and regulations governing the use and driving the vehicle;
   - Not allow the vehicle to be driven by any person not holding a full drivers license;
   - Not part with possession of the vehicle;
   - Not smoke in the vehicle;
   - Not allow any animals 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



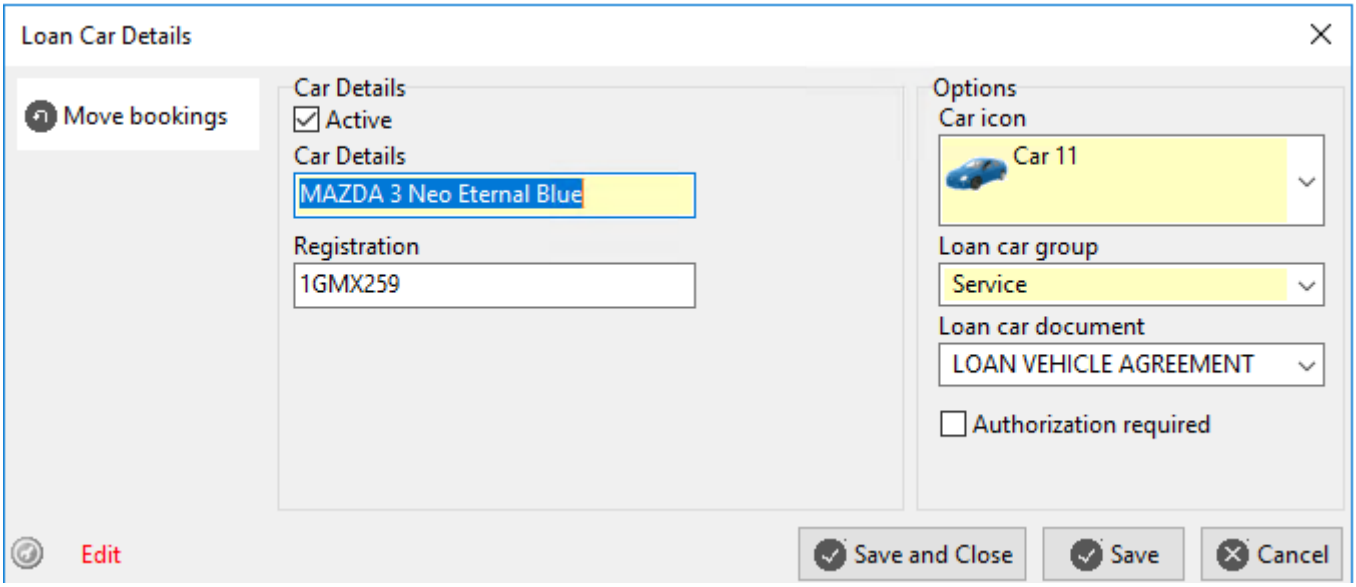
Loan car diary administration

Creating, editing or deleting a loan car

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



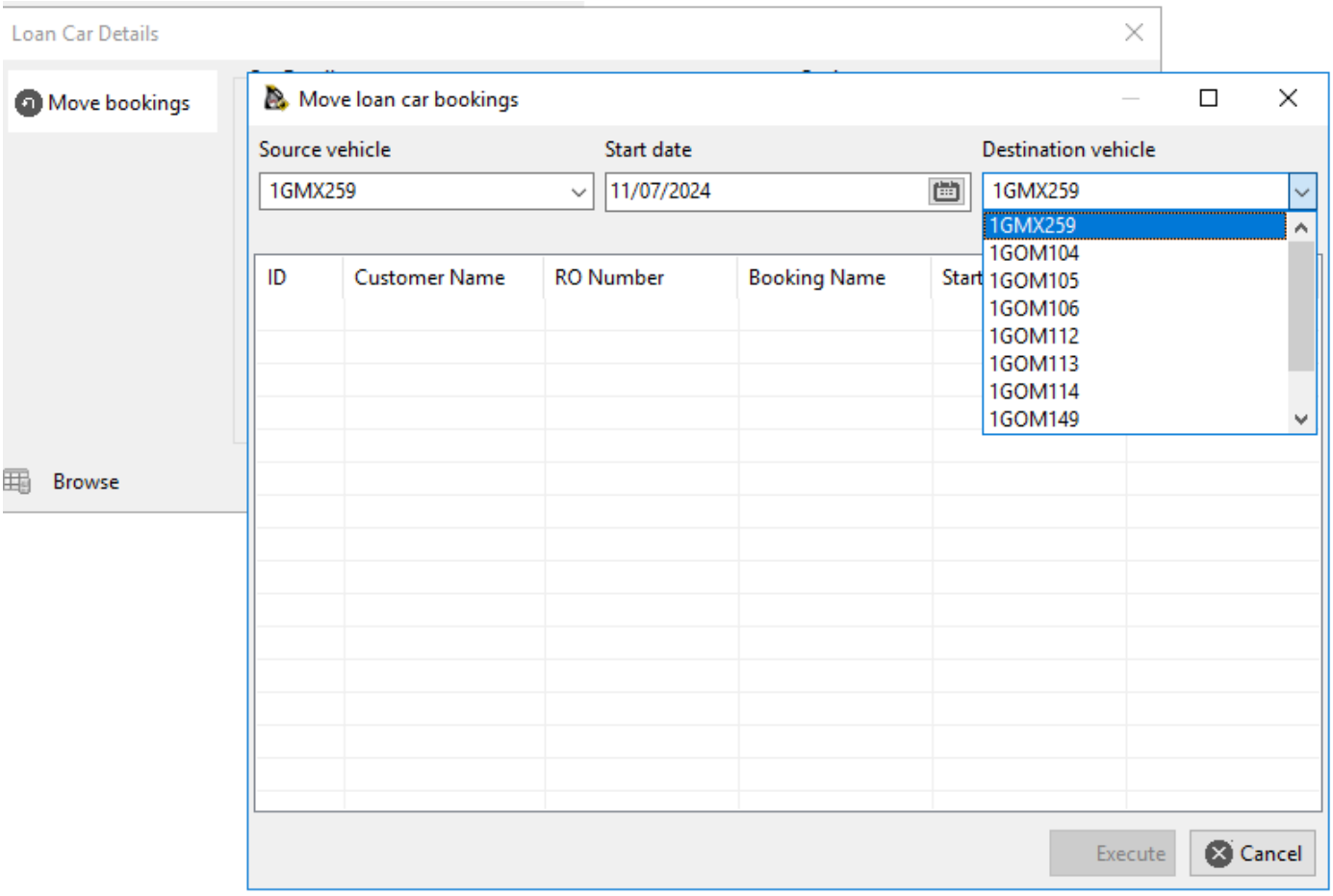
Create a new or edit existing vehicle



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

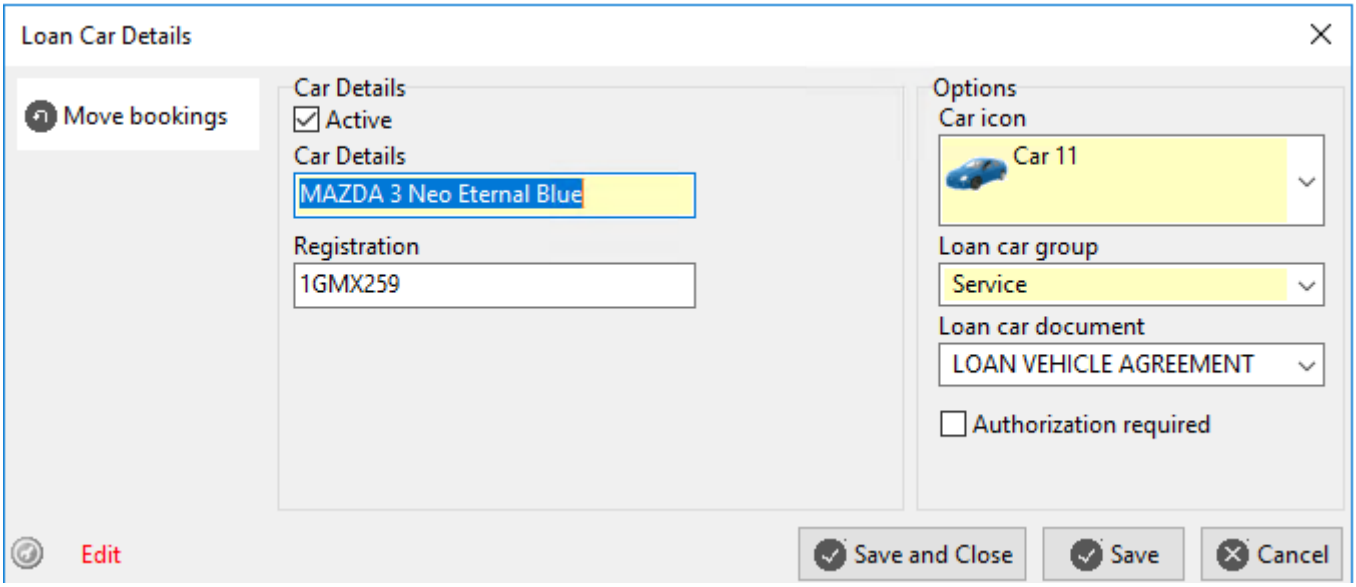
Moving bookings to another vehicle

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

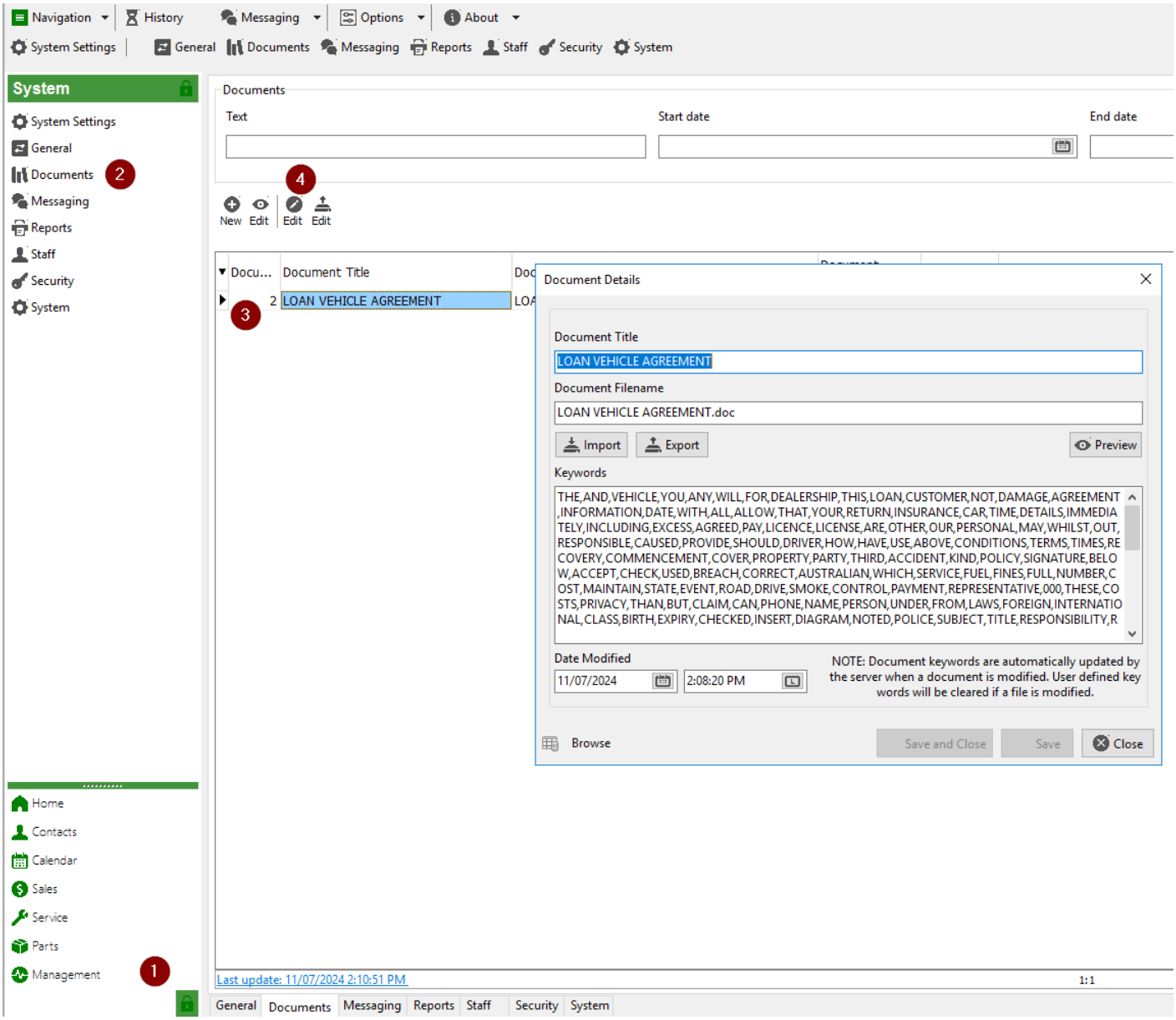


Loan car forms

Locate the document that matches the Loan car document drop down name in system documents.



Use the export and import buttons to obtain the word document and replace it as needed.



Loan Form Fields (Merge Fields)

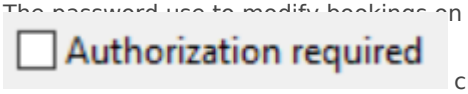
The following fields can be placed onto a loan form and data will automatically be merged.

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

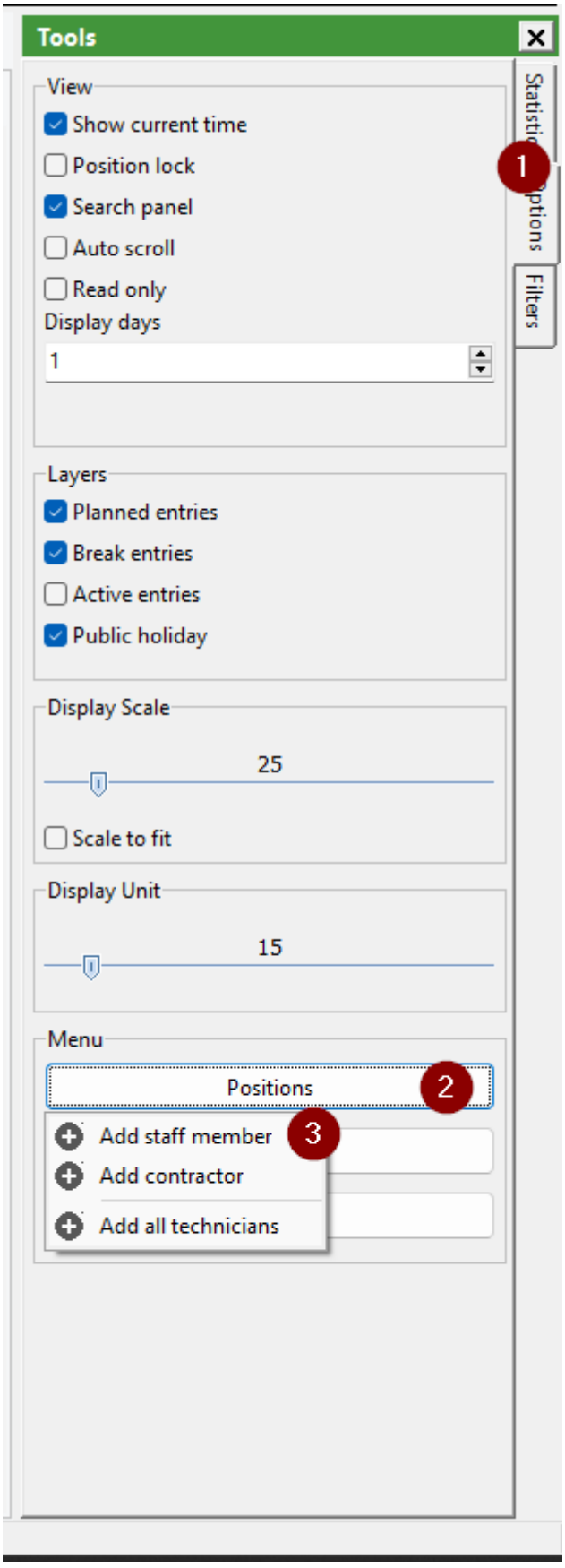
System settings related to the loan car diary

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  checked

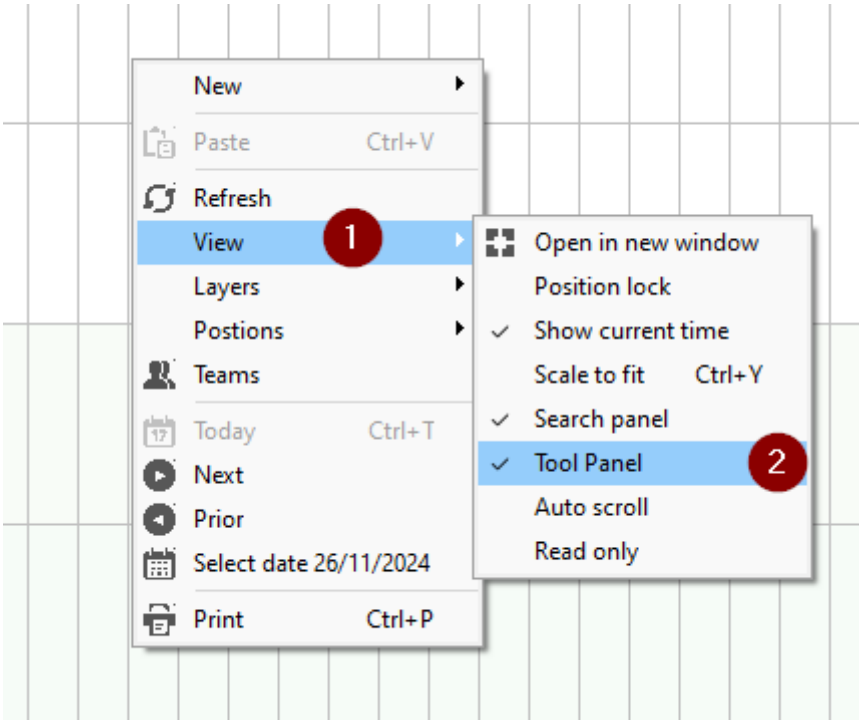
Workshop planner

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


New
Paste Ctrl+V
Refresh
View
Layers
Postions
Teams
Today Ctrl+T
Next
Prior
Select date 26/11/2024
Print Ctrl+P
1
Open in new window
Position lock
Show current time
Scale to fit Ctrl+Y
Search panel
Tool Panel
Auto scroll
Read only
2