

Service Scheduler - User guide

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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.

 or type unknown

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

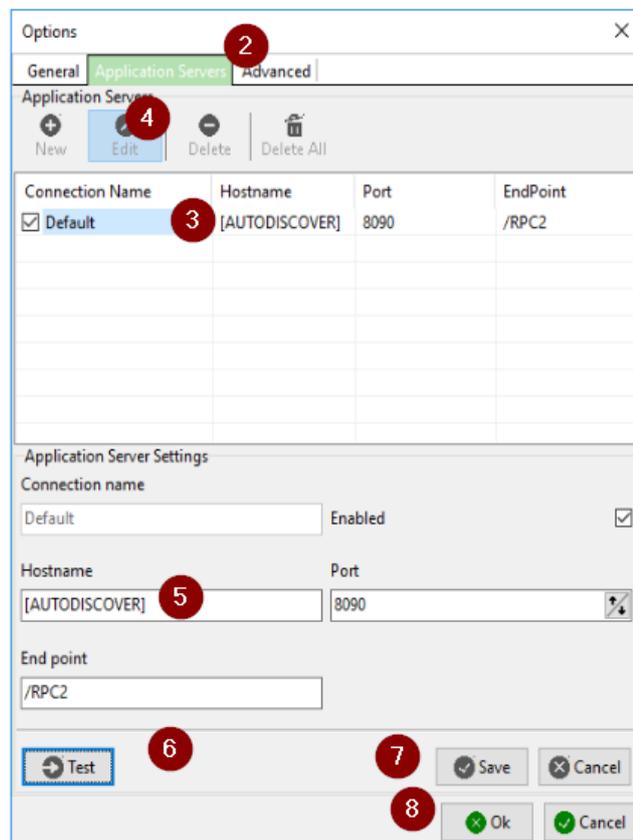
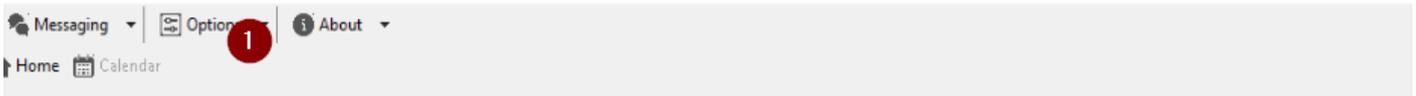
Service Scheduler mobile requires that Web Services are installed and accessible from customer WAN

- [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

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

End date End time

Status In Out

Vehicle Details

Loan Car

Registration

Details

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

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

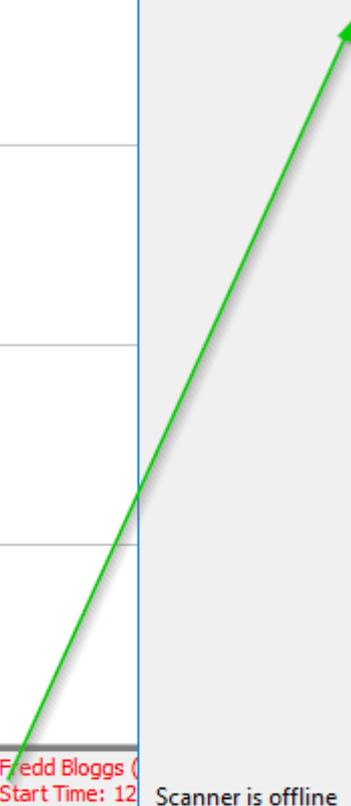
Booked date: 11/07/2024

Fredd Bloggs (Start Time: 12:00)

Customer Name: , Lic Number:

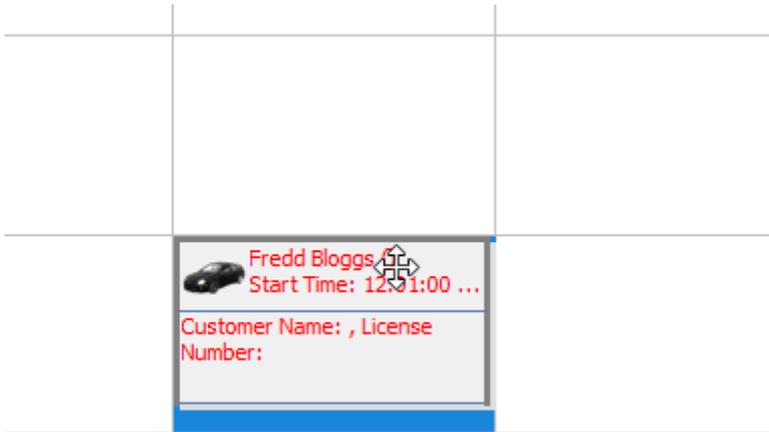
Scanner is offline

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.

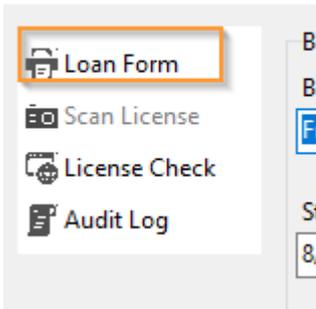


Loan car form

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	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.	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.

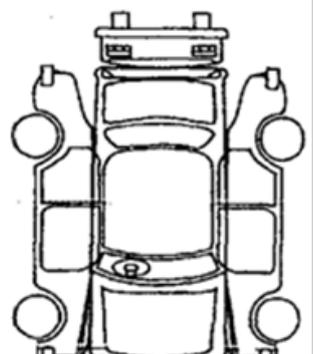
2. MAINTENANCE

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

Navigation History Messaging Options About

System Settings General Documents Messaging Reports Staff Security System

System

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

Select item from menu below

- Risk Incidents
- Departments
- Priorities
- Service
 - Job Status
 - Job Types
 - Job Wash Status
 - Job Filters
 - Job Booking Status
 - Service Groups
 - Loan Cars**
 - 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

New
 Edit
 Delete
 Refresh
 Show

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

General Documents Messaging Reports Staff Security System

Last update: 11/07/2024 1:43:08 PM

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." Buttons for 'Import', 'Export', 'Preview', 'Save and Close', 'Save', and 'Close' are visible.

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

Tools [X]

View

- Show current time
- Position lock
- Search panel
- Auto scroll
- Read only

Display days
1

Layers

- Planned entries
- Break entries
- Active entries
- Public holiday

Display Scale

25

Scale to fit

Display Unit

15

Menu

Positions

- + Add staff member
- + Add contractor
- + Add all technicians

Statistics
Options
Filters

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

