

# Mitchell1 and ShopKey Schedule Setup and Use

Setting up and using Scheduling in version 7

MANAGER SE /  
SHOPKEY ELITE  
VERSION 7.0  
UPDATE

NOVEMBER 2015

# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## CONTENTS

Chapter 1 - Setup.....	1
Schedule Options.....	1
• Regular Business Hours.....	1
• Hours Visible on Schedule.....	2
• Show Last (number of days).....	2
• Holiday Setup.....	2
Schedule Statuses.....	3
• Add/Edit Appoint Schedule Statuses.....	3
Schedule Resources.....	4
• Add/Edit Schedule Resources.....	4
• Technician Setup.....	5
• Technician And Service Advisor Parameters.....	5
• Tech Wages and Commission Dialog.....	6
• Tech Hours Dialog.....	7
• Tech Address Dialog.....	8
Shop Data Setup / Screen View.....	9
• Auto Scheduling Default.....	9
Chapter 2 – Navigating and Using the Appointment Scheduler.....	10
Schedule Navigation.....	10
• Navigating the Calendar.....	10
• Resource View.....	11
• Appointment and Shop Events Tabs.....	12
Creating/Editing Appointments.....	13
• Creating a New Appointment.....	13
• Using the Appointment Editor.....	15
• Creating a Shop Event.....	16
Integration Points.....	17
• Work in Progress Detail Dialog.....	17

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

Copyright 2015 Mitchell Repair Information Company, LLC All Rights Reserved

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 and John Dwulet  
Published in the USA by Mitchell 1



# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## CHAPTER 1 - SETUP

This chapter covers the *setup of the scheduling module within SE version 7*. This manual is intended for use by service advisors and technicians in aftermarket repair shops. 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

Find **Schedule Options** under **Configuration/Scheduler Setup/Schedule Options**. These options include defining regular business hours, the range of hours to be shown in the calendar, number of previous days displayed by default, and selecting any recurring holidays or special events.

	Start	End
Sunday	CLOSED	CLOSED
Monday	CLOSED	CLOSED
Tuesday	CLOSED	CLOSED
Wednesday	CLOSED	CLOSED
Thursday	CLOSED	CLOSED
Friday	CLOSED	CLOSED
Saturday	CLOSED	CLOSED

Hours Visible on Schedule

Visible Hours Start: 8:00 AM End: 5:30 PM

Show last: 30 days

Holidays... Cancel OK

## REGULAR BUSINESS HOURS

- Each day of the week must be setup as either **CLOSED** or with **Start/End** times. To set the start time for Monday, left-click on the **Monday** button, doing so sets the initial **Start** and **End** times as 8:00 AM to 5:00 PM, and paints the button green. Set the time for each day of the week, then if required modify the times for each day by clicking on the down arrows. Left Clicking on the button corresponding to the day a second time will set that day to **CLOSED**.

Monday 8:00 AM 5:00 PM

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### HOURS VISIBLE ON SCHEDULE

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

	<b>Start</b>	<b>End</b>
Visible Hours	7:00 AM	6:00 PM

### 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 lower setting.

Show last	15	days
-----------	----	------

### 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.

The screenshot shows a window titled "Holiday Setup" with a close button (X) in the top right corner. On the left is a table with two columns: "Holiday Name" and "Occurance".

Holiday Name	Occurance
New Year's Day	First Thursday of January
Memorial Day	Last Monday of May
4th Of July	7/4 <sup>th</sup>
Untitled	Fourth Wednesday of October

On the right side of the window, there are several input fields and buttons:

- Name:** A text box containing "Untitled" and a checked checkbox for "Recurring".
- Holiday Occurance Type:** Two radio buttons, "Date" (unselected) and "Pattern" (selected).
- Date:** A date picker showing "10/21/2015".
- Occurance Pattern:** Four dropdown menus labeled "Occurs", "On Day", "On Month", and "Year". The values are "Fourth", "Wednesday", "October", and "2015" respectively.
- Buttons:** "Cancel", "Delete", "Import", "Add", and "Save".

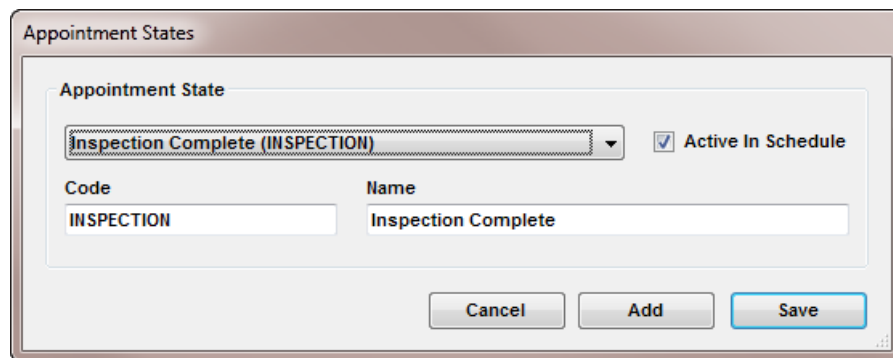
## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### SCHEDULE STATUSES

Find Schedule Statuses under **Configurations/Scheduler Setup-Add/Edit Schedule Statuses**. Appointment statuses are used to represent the current state of the appointment. Several appointment states are 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 APPOINT SCHEDULE STATUSES

- You may add **Custom States** by clicking on the **Add** button; the example below is 'Inspection Complete'. Please note any Custom states by default are Active. Click on **Save** to record this and close the window.



The screenshot shows a dialog box titled "Appointment States". Inside, there is a section for "Appointment State" with a dropdown menu showing "Inspection Complete (INSPECTION)" and a checked checkbox labeled "Active In Schedule". Below this, there are two input fields: "Code" with the value "INSPECTION" and "Name" with the value "Inspection Complete". At the bottom of the dialog, there are three buttons: "Cancel", "Add", and "Save".

# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## SCHEDULE RESOURCES

Find **Schedule Resources** under **Configurations-Scheduler Setup-Add/Edit/Schedule Resources**. **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

- Before using 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 information specific to that resource such as service and repair information.
- Catalog new resources 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 done. At this time, only one resource may be associated with an appointment or event.

Scheduler Resource Editor

Select a Resource to Edit  
Alignment Bay (14000 Lbs, Bay number 5)

Required Information

Name Alignment Bay  Active in Scheduler

Schedule Color [Click to change Color](#)

Optional Information

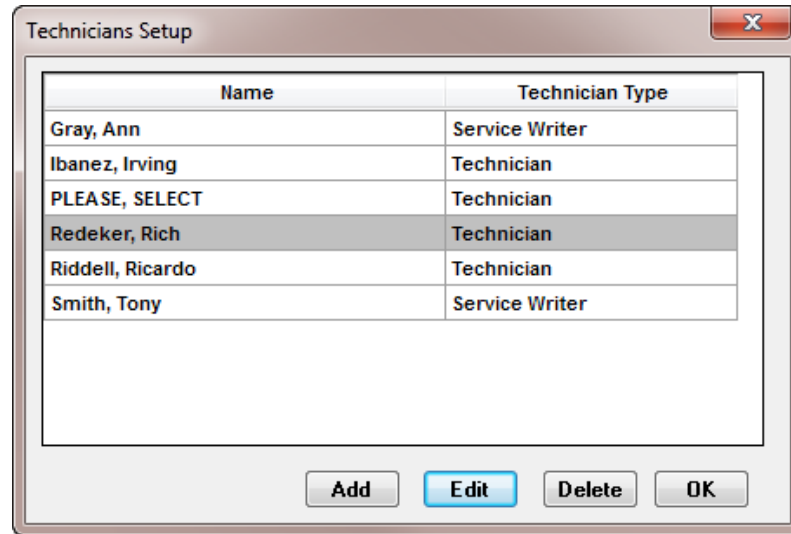
Brand Name	Nickname
Snapon - EELR13A	Scissor Lift
Size	Serial Number
14000 Lbs	EE7896SMA
Location	
Bay number 5	
Description	
Scissor Align Rack - Serviced by: Snap-on Equipment	
Warranty Information	
Purchased Nov 2013	
Notes	
For Service or Support, call 800-225-5555 For Parts, call 800-225-5555	

Cancel Add Save

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### TECHNICIAN SETUP

Find **Technician Setup** under **Configurations/Technician Setup**. The Technician Setup provides space to store and edit background details of technicians, service advisor(s) and entry of a shop Manager. 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.



The screenshot shows a window titled "Technicians Setup" with a close button (X) in the top right corner. The window contains a table with two columns: "Name" and "Technician Type". The table lists the following technicians:

Name	Technician Type
Gray, Ann	Service Writer
Ibanez, Irving	Technician
PLEASE, SELECT	Technician
Redeker, Rich	Technician
Riddell, Ricardo	Technician
Smith, Tony	Service Writer

Below the table are four buttons: "Add", "Edit", "Delete", and "OK". The "Edit" button is highlighted in blue.

### TECHNICIAN AND SERVICE ADVISOR PARAMETERS

Define Technicians and Service Advisors with the following parameters:

- **Technician Wage Info** - Hourly or Salary wage, number of hours in pay period (ex. 80 hrs. for two weeks).
- **Parts Commission - Type / Rate** of tech's commission on parts if participating; % of profit or sale of parts.
- **Labor Commission - Type / Rate** of tech's commission on labor if participating; % of profit or sale of labor.
- **Sublet Commission - Type / Rate** of tech's commission on sublets if 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 appropriate lists for assignment.



## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### TECH WAGES AND COMMISSION DIALOG

- When creating or editing a technician record it is useful to assign a unique color to that technician, this will provide visual clues 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 (do so if discharged). The **Inactive** checkbox prevents this entry from being available for assignment; it is un-checked by default.
- Once you completed creating a new record or editing an existing record, 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 screenshot shows the 'Employees' dialog box with the following fields and options:

- Select an Employee:** A dropdown menu showing 'Ibanez, Irving (Technician)' and an  **Inactive** checkbox.
- Employee Code:** Text field with 'si'.
- Last Name:** Text field with 'Ibanez'.
- First Name:** Text field with 'Irving'.
- Schedule Color:** A button labeled 'Click to change'.
- Date Hired:** Date picker showing '9/ 1/2013'.
- Date Discharged:** Date picker.
- Wages & Commission Tab:**
  - Wage Information:**
    - Hourly** /  **Salary**
    - Last Pay Raise:** Date picker showing '1/ 4/2015'.
    - Wage:** Text field with '\$18.00'.
    - Hours Per Week:** Text field with '40'.
    - Employee Type:** Dropdown menu showing 'Technician'.
  - Parts Commission:** Type: 'None', Rate %: '0.000%'.
  - Labor Commission:** Type: 'None', Rate %: '0.000%'.
  - Sublet Commission:** Type: 'None', Rate %: '0.000%'.

At the bottom, there is a warning icon and the message: 'Commission changes apply to all open orders.' Below this are 'Cancel' and 'OK' buttons.

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### TECH HOURS DIALOG

- The Technician **Hours** Dialog is where you store the Technician or Service Advisor's **Start and End** time, click on the **Hours** tab.
- 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 Tuesdays, delete the **Start and End** time for that day.
- The next step is to move on to the **Address** information.

Employees

Select an Employee  
Ibanez, Irving (Technician)  Inactive

Employee Code: si      Last Name: Ibanez      First Name: Irving

Schedule Color:       Date Hired: 9/ 1/2013      Date Discharged:

Wages & Commission    **Hours**    Address

Hours

Hourly Cost: 18.00      Hours Scheduled Per Week: 16.00

	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Start		08:00 AM	08:00 AM				
End		04:00 PM	04:00 PM				

\* To remove the start and end times for a day use the keyboard "Delete" key

Commission changes apply to all open orders.

# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## TECH ADDRESS DIALOG

- 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 convenience. Click on **OK** when entry is completed.

The screenshot shows a software window titled "Employees" with a tabbed interface. The "Address" tab is selected. The form contains the following fields and values:

Field	Value
Select an Employee	Ibanez, Irving (Technician)
Employee Code	si
Last Name	Ibanez
First Name	Irving
Schedule Color	Click to change
Date Hired	9/ 1/2013
Date Discharged	
Address	77 Linwood Ave
Zip Code	92145
City	San Diego
State	CA
Phone 1	555-942-8445
Phone 2	858-980-7867
E-Mail	iibanez@yahoo.com
Birthday	09/21 MM/DD

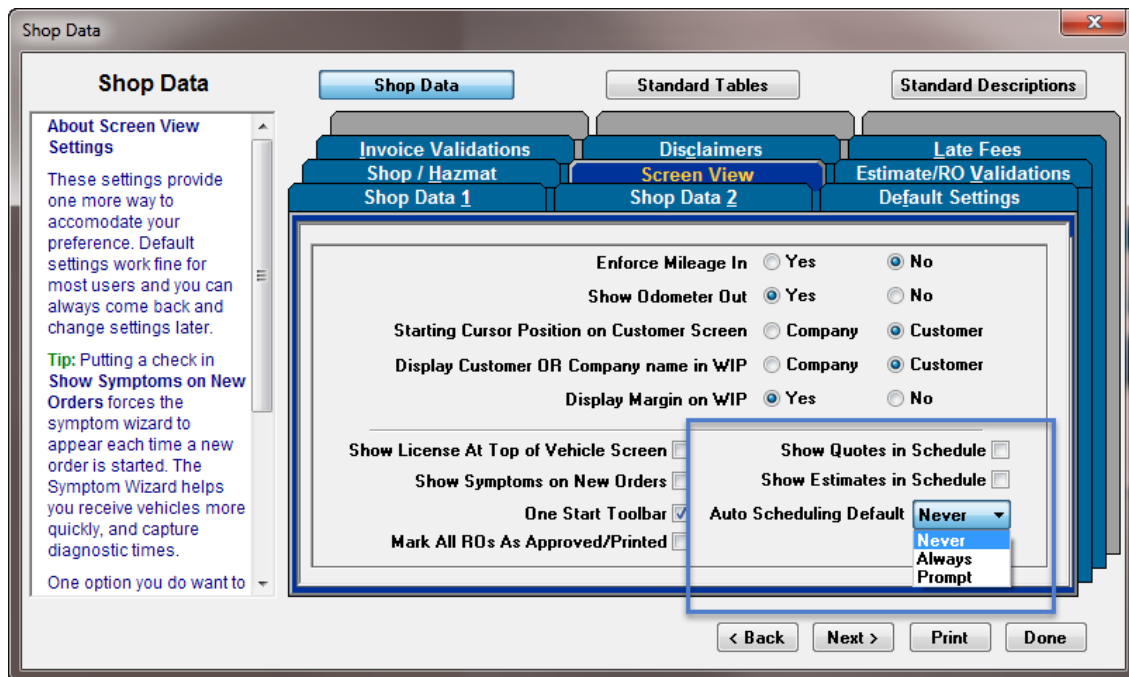
Notes: Information above will be used for future reports.

Warning: Commission changes apply to all open orders.

Buttons: Cancel, OK

### AUTO SCHEDULING DEFAULT

- Click on the **GEAR** icon on the main tool bar, select **Shop Data**, then **Screen View** tab.
- The final setup options for the new scheduler is to set the schedule behavior and **Auto Scheduling** Default, the following options are available:
  1. **Show Quotes in Schedule – Preferred Default is Un-Checked**
    - a. This Option in most cases should be un-checked. There is no need to add Quotes to the schedule when starting orders from the **Appointment Editor**. (See Chapter 2 for Appointment Editor)
  2. **Show Estimates in Schedule – Preferred Default is Un-Checked**
    - a. This Option in most cases should be un-checked. There is no need to add Estimates to the schedule if starting the Estimate (or RO) from the **Appointment Editor**. (See Chapter 2 for Appointment Editor)
  3. **Never** – Don't prompt the user to create a new appointment when posting an invoice
  4. **Always** – Automatically start the **Appointment Editor** when posting an invoice
  5. **Prompt** – Ask the user to start the **Appointment Editor** when posting an invoice
    - a. This allow the user to dismiss that option



# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## CHAPTER 2 – NAVIGATING AND USING THE APPOINTMENT SCHEDULER

This chapter details the use of the calendar and schedule functionality. This section is for use by service advisors and technicians in aftermarket repair shops.

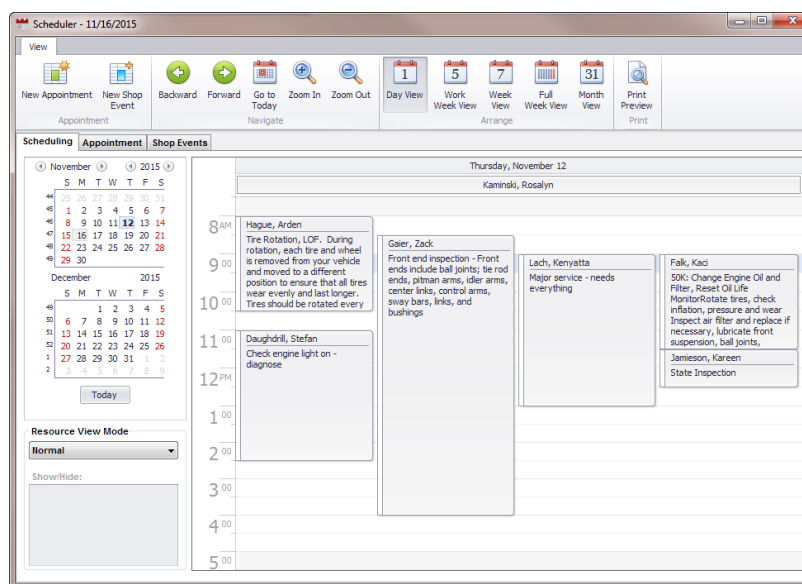
### SCHEDULE NAVIGATION

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. The screen may also be dragged to a second screen and left 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.

- The current month and next month both appear alongside the main calendar view for handy reference. Dates in bold have appointments scheduled. It is possible to click on any date and advance the calendar to that specific date.
- Use the provided **Today** (in left pane) and **Go to Today**(main toolbar) buttons to restore the view to the current date. You may use the arrows to change the month and/or year of your schedule view.
- On the top row, you may click **New Appointment** to schedule service work or use **New Shop Event** to create a shop job for non-customer related activities (i.e. Paint Flag Pole.)
- The **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.
- The **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



## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

- Instantly change the view from **Day View** to **5 day Work Week**, **7 day Week**, **Full Week** (in columns) or **Month View**. The **Print Preview** function follows your viewing selection.

### RESOURCE VIEW

**Resource View Mode** options control the way in which you view the calendar

- Normal** provides an overview driven by customer names and appointment slots per day
- Technician** organizes the calendar by technician names then dates and hours
- 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
- Resource (By Date)** changes this array to sort by Resources & names of the 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.

The screenshot displays the Mitchell 1 Scheduler software interface. At the top, there is a toolbar with various icons for navigation and viewing. Below the toolbar, there are tabs for 'Scheduling', 'Appointment', and 'Shop Events'. The main area shows a calendar for November and December 2015. A red arrow points to the 'Resource View Mode' dropdown menu, which is currently set to 'Technician'. Below the dropdown, there are checkboxes for 'Show/Hide' for each technician: Chavez, Mark; Ibanez, Irving; Redeker, Rich; Riddell, Ricardo; and (unassigned). All checkboxes are checked. The main grid shows appointments for Thursday, November 12, 2015, organized by technician. The appointments are: Chavez, Mark (Major service - needs everything); Ibanez, Irving (50K: Change Engine Oil and Filter, Reset Oil Life Monitor/Rotate tires, check inflation, pressure and wear. Inspect air filter and replace if necessary, Jamieson, Karen State Inspection); Redeker, Rich (Hague, Arden Tire Rotation, LOF. During rotation, each tire and wheel is removed from your vehicle and moved to a different position to ensure that all tires); Riddell, Ricardo (Gajer, Zack Front end inspection - Front ends include ball joints; tie rod ends, pitman arms, idler arms, center links, control arms, sway bars, links, and bushings); and (unassigned) (Daughdrill, Stefan Check engine light on - diagnose).

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### APPOINTMENT AND SHOP EVENTS TABS

The **Appointment** tab displays all of your appointments as single line items; scrolling to the right reveals additional columns. The **Shop Events** tab displays other commitments that can affect the shop's schedule. These would include anything that is not a customer-driven appointment entry. The data controls and options are essentially the same as the **Appointment** tab.

- The column sequence may be changed and 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.

Customer	Vehicle	Contact Phone	Technician	Status	Hat	Job Hours	Start Date
Hague, Arden	1992 Pontiac Grand Prix SE 3.1L, V...	555-871-7030	Redeker, Rich	Open		0.00	11/12/2015 8:00 AM
Gaier, Zack	2000 Infiniti I30 Base 3L, V6 (184CL...	555-374-0567	Riddell, Ricardo	Open		0.00	11/12/2015 8:30 AM
Falk, Kaci	1996 Dodge Pickup R1500 5.9L, V8...	555-834-4312	Ibanez, Irving	Open		0.40	11/12/2015 9:00 AM
Lach, Kenyatta	2008 Toyota Highlander Limited 3...	555-310-1488	Chavez, Mark	Open		0.00	11/12/2015 9:00 AM
Daughdrill, Stefan	2007 Chevrolet Silverado Classic ...	555-832-0720 Ext. ...	Redeker, Rich	Open		1.50	11/12/2015 11:00 AM
Jamieson, Kareen	1995 Chevrolet Camaro Base 3.4L...	555-694-6904	Ibanez, Irving	Open		0.40	11/12/2015 11:30 AM
	2005 Chevrolet Astro 4.3L, V6 (26...	619-820-9898	Ibanez, Irving	Open		0.90	11/12/2015 1:00 PM

# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

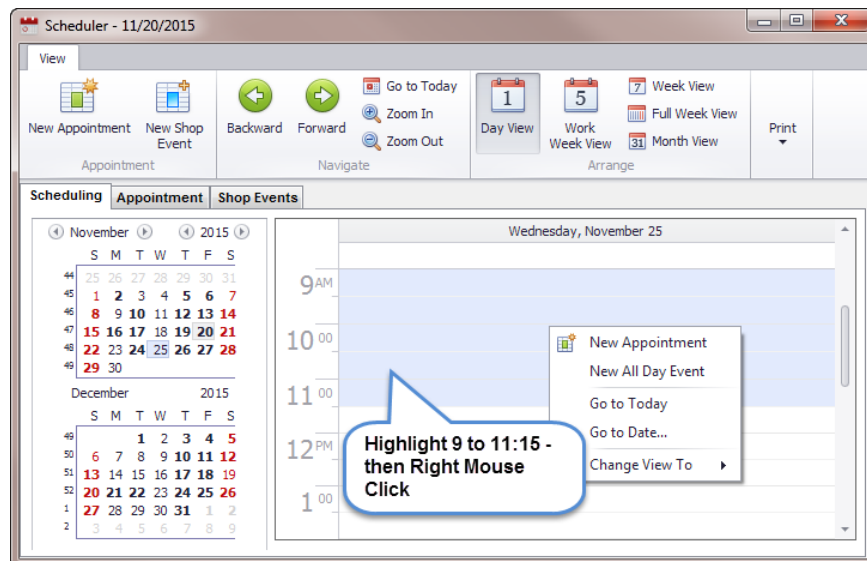
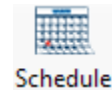
## CREATING/EDITING APPOINTMENTS

### CREATING A NEW APPOINTMENT

Create and edit existing appointments with the **Appointment Editor**. Open the appointment editor by clicking on the **Calendar** icon on the main toolbar, clicking on the **Appointment** button on the Work in Progress screen, or by selecting **Options/Appointment** from the repair order screen.

**Appointment**

- 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.
  - If you know the work requires a longer appointment, you may click and drag to highlight the time period, then right-click and **New Appointment**





## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

- The **Find Customer for Schedule** window opens; type a few letters of the last name to see if they're an existing customer; when you get a match, click on the name or click **OK**.

Last Name	First Name	Phone Number	Membership #	Address	City	State	Zip	License
Dwulet	John	619-555-1616	8827218207	14145 Danielson street	Poway	CA	92064	3MQD165

- The **Vehicle Selection** screen opens for selection of that customers vehicles
  - Select the vehicle to be assigned to the appointment, and click **OK**. If this is a new vehicle for this customer, click on the **Add Vehicle** to create a new vehicle record.

License	State	Year	Make	Model	Unit #	Vin
3MQD165	Ca	1995	Jeep	Cherokee		1J4FJ68S4L60...
JONY 5	CA	2007	Chevrolet	Silverado Classic		1GCHK23D67F...

## MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

### USING THE APPOINTMENT EDITOR

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 be the start time.
- Change the **Start** and **End** times and **Dates** using the keyboard.
- 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 the list.
- **Comments** may be included and by default will print on orders at notes, handy to provide guidance.
- Make **Technician** and **Resource** assignment at this time if known.

11/20/2015: Dwulet, John

Save & Close Delete Create... Cancel

Subject: Dwulet, John Appointment State: Open (OPEN)

Starts: 11/20/2015 8:30 AM All day event

Ends: 11/20/2015 9:00 AM Total Hours: 0.50 Reminder: 0 minutes

Comments (184 Chars Remaining) Print on order as Note

This is a note that will appear on the order if the box is checked

Technician: PLEASE, SELECT

Resource: Alignment Rack

Customer - Dwulet, John

Contact: (Home) 619-555-1616

Email: john.dwulet@mitchell1.com

Company: --

Address: 14145 Daniels on street  
Poway, CA 92064

Vehicle - 2007 Chevrolet Silverado Classic 2500 HD

VIN: 1GCHK23D6 7F108489

License Plate: JONY 5

Engine: 6.6L, V8 (403CI) VIN(D)

Hat:

Odometer In: 22,536

Yearly Mileage: 11,680 (approximated)

Color:

Total job hours is longer than the appointment time (0.45 hours over)  
Technician is not available during appointment time.

Promised Time: 11/20/2015 5:00 PM

Job Hours: 0.95 Source: <None > Jobs: Add Delete

Description

Alignment - 4 Wheel

## 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, or you may right-click in the bottom grid to access any of your 30 **Quick Canned Jobs**. The **Appointment Editor** warns when the amount of work is greater, indicating you should adjust the appointment time accordingly.

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.

Promised Time: 11/20/2015 5:00 PM

Job Hours: 0.95 Source: <None >

Jobs: Add Delete

Description

Alignment - 4 Wheel

Right Click blank line to add Quick canned Job

- 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 for you and your customer.
- When they do arrive, double-click on the appointment to open it and then click Create to choose Estimate or Repair Order to proceed with the work.

## CREATING A SHOP EVENT

**Shop Events** are units of time (appointments) in the shop not driven by customer appointments. **Shop Events** are useful to plan the work day. A typical Shop Event might be



'Paint Flag Pole'.

- Open the Calendar then click on **New Shop Event**.
- A generic entry of 'Shop Event' is visible in **Subject**, which can be changed to specific text you prefer to be visible in the 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**

11/20/2015: Shop Event - New Front Counter Installation

Save & Close Delete Cancel

Subject: Shop Event - New Front Counter Installation Appointment State: Open (OPEN)

Starts: 11/20/2015 12:30 PM All day event

Ends: 11/20/2015 4:00 PM Total Hours: 3.50 Reminder: 0 minutes

Comments (215 Chars Remaining) Print on order as Note Technician: Kirtley, Travis

Move computers to new front counter Resource: <None>

Customer - N/A Vehicle - N/A

Contact: Email: Company: Address: V8ll: License Plate: Engine: Rat: Odometer In: Yearly Mileage: Color:

Promised Time: 11/20/2015 5:00 PM

Job Hours: 0.00 Source: <None >

Jobs: Add Delete

Description

# MITCHELL 1 / SHOPKEY MANAGEMENT SYSTEM SCHEDULER

## INTEGRATION POINTS

### WORK IN PROGRESS DETAIL DIALOG

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

- We also modified the Work in Progress (WIP) screen to include Schedule information (#1).
- The information displayed for each order shows the start time and the number of hours included on the order (#2). Both shown date (#2 and #3) reflect changes made in the appointment editor.

icense	Color	Vehicle	Sched	Promised	RO Prn
		1976 Nissan 28...	9/27/2014 9:50 AM (0.00 hrs)	9/15/2015 5:00:0...	No
IXC972		1994 Jeep Wra...	10/4/2015 9:46 AM (3.64 hrs)	10/4/2015 5:00:0...	No
PF301		2003 Buick Cen...	10/5/2015 9:00 AM (0.12 hrs)	10/5/2015 5:00:0...	No
LP026		1994 Ford Thunderbird LX	10/4/2015 9:06 AM (1.68 hrs)	10/4/2015 5:00:0...	Yes
IDA526		1995 Chevy SS	10/2/2015 3:50 PM (1.00 hrs)	10/2/2015 5:00:0...	No
UV364					
LG885					
QH654					
JF994					
JL224					
IQD165					
87762					
iCEDD					
593M1					
S541					
ALS64					
UN624					
:24595					
01019					
9N					
.LU370					
IC630		1998 Chevrolet...	5/2/2015 3:43 PM (0.12 hrs)	5/2/2015 5:00:0...	Yes
'81230		2001 Ford Pick...	7/27/2015 3:05 PM (14.12 hrs)	9/28/2015 5:00:0...	No

Work In Progress Detail

Invoice 049381

Name Yarruso, Al  
License 3HLP026 (CA)  
Year/Make/Model 1994 Ford Thunderbird LX  
Service Writer Stuart, Vicki

Update Fields  
Status In Progress  
Location Travis  
Hat # 43 Reference #

Phone Numbers  
Home Ext.  
Office

Time/Date In 11:33 AM 11/20/2015  
Promised Time/Date 5:00 PM 10/04/2015  
Completion Time/Date 11:33 AM 11/20/2015

Schedule Start 10/4/2015 9:06 AM  
Schedule End 11/20/2015 3:00 PM

Appointment

Repair Order Printed  Invoice Printed