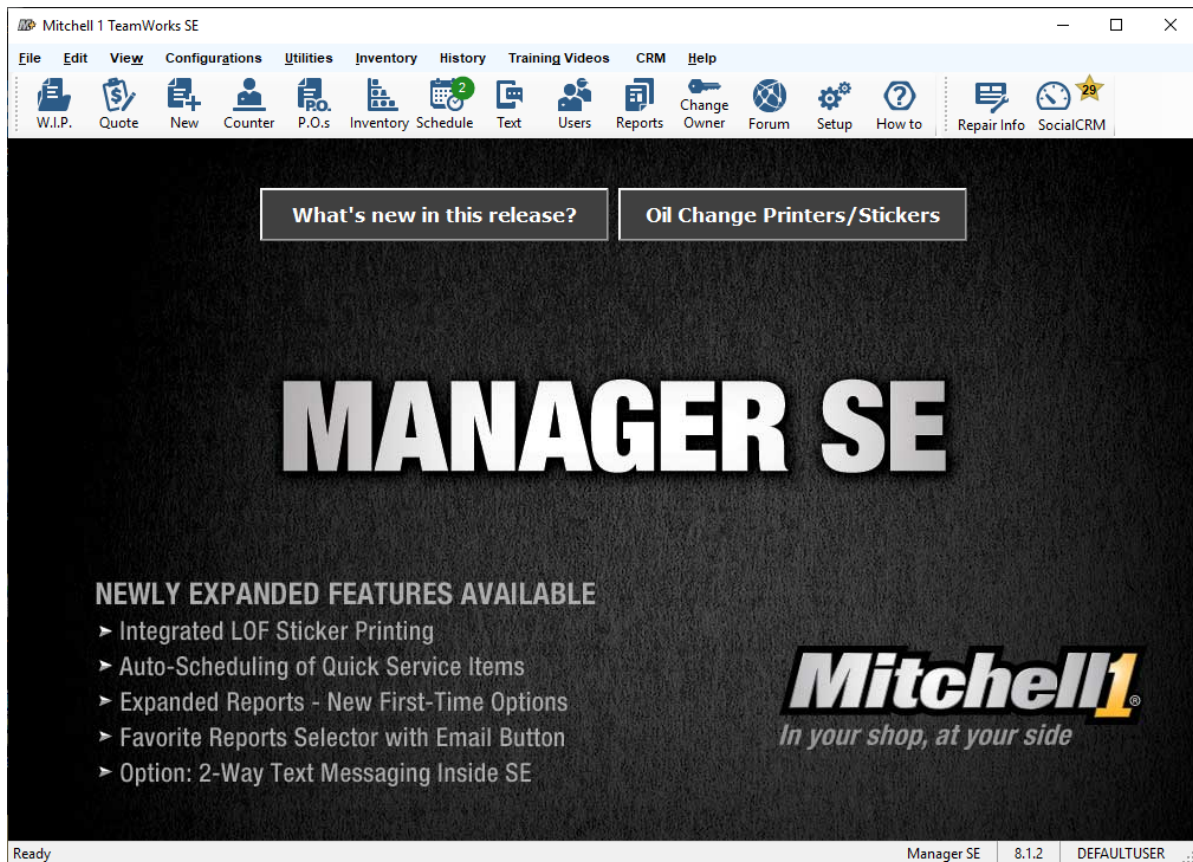


Online Appointments

User's Guide



System Requirements:

- Manager SE version 8.1.3 or higher
 - SocialCRM subscription
- Manager SE Connection (MSEC)

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Contents

- Overview 1
- Online Appointments Setup 2
 - Online Appointment Options 2
 - Online Appointments Availability Options 5
 - Web Submission Acknowledgement 7
 - Declined/Confirmation Email and Text 8
- Working With Online Appointments 9
 - Overview 9
 - Appointment Request..... 9
 - Onboarding 11
- Getting Help..... 13

Overview

Online Appointments (OLA) for Manager SE is a feature included with SocialCRM that allows customers to request scheduled appointments using the shop's website. The scheduled appointments requests are then received into Manager SE where they are confirmed, declined, or set as pending by the shop.

Shops can notify the customer of their scheduled appointment via predefined text or email, or by phone. Once the request is confirmed, it will then appear in the Manager SE Scheduler for the shop to process.

The screenshot shows a web browser window with the title 'Appointment Request'. The browser's address bar is empty. The form is divided into two main sections: '1 Contact' and '2 Appointment'. The 'Contact' section contains the following fields: 'First Name' (required), 'Last Name' (required), 'Address' (required), 'City' (required), 'State' (required, dropdown menu with 'Select a state'), 'Zip' (required), 'Email' (required), and 'Confirm Email' (required). There is also a checkbox for 'Cell Phone' which is checked, and a dropdown for 'Preferred contact method?' with 'Text' selected. The 'Appointment' section contains the following fields: 'License Plate (optional)', 'License Plate State (optional)' dropdown menu with 'Select a state', 'Mileage (optional)', 'Year' dropdown menu with 'Select Year', 'Make' dropdown menu with 'Select Make', and 'Model' dropdown menu with 'Select Model'. A 'Next' button is located at the bottom right of the form.

Online Appointment Request Form

The fields and wording in the form is customizable to the needs of your business as described in the following section.

Online Appointments Setup

An extensive set of setup options are available to control the timing and availability of appointments and to customize the form and automated email messaging to suit the needs of your business.

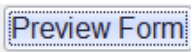
NOTE: It is necessary to close Manager SE program on all other workstations than the PC being used to configure these settings. When workstations are re-started they will inherit those new settings.

Online Appointment Options

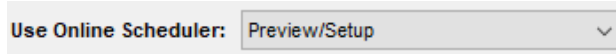
The Online Appointment Options panel provides a number of options to customize the Online Appointments form. This section will guide you through the necessary steps for setting up your shop's online appointments form.

The screenshot shows the 'Scheduler - 11/21/2019' application window. The left sidebar contains a navigation menu with the following items: Online Help, Sign Out, Scheduler Options, Scheduler Resources, Scheduler States, **Online Appointments Setup** (highlighted), Online Appointments Options, Availability Options, Web Submission Acknowledgement, Declined Email, Declined Text, Confirmation Email, and Confirmation Text. The main content area is titled 'Online Appointments Options' and contains the following elements:

- A 'View Filtering' toolbar at the top.
- A 'Preview Form' button.
- A 'Use Online Scheduler:' dropdown menu set to 'Preview/Setup'.
- Three main configuration sections:
 - Reason For Visit Information:** This information is used to populate the 'How did you hear about us?' section of your appointment form. This value is shared with the Invoice and Appointment Source fields. Includes buttons for 'Reason For Visit Information' and 'Change Prompt'.
 - Change Prompt:** Define your drop-off and waiting options here. The additional description field is optional, and is recommended to be used to set customer expectations. Includes a 'Transportation Needs' button.
 - Service Categories:** Enable this option if you would like your customers to select the category of service they are requesting. You may define as many options as you'd like. Includes a 'Service Categories' button and a checked checkbox for 'Display Service Categories field on Request Form'.
- Membership Groups:** This optional field is shared with your Market groups. This information is presented as a Membership option on your appointment request form. De-selecting the option to Display Membership will remove the field completely from your appointment request form. Includes a 'Membership Groups' button and a checked checkbox for 'Display Membership field on Request Form'.

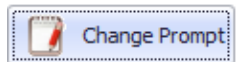
Starting from the top of the screen,  **Preview Form** provides an opportunity to view the appointment request form exactly as it would appear to shop customers accessing it from your shop website. It's a good way to make changes and quickly check the results without having to leave this screen.

Use Online Schedule - The default setting is 'Off' until the OLA option is configured. **Preview/Setup** mode keeps it private while you make adjustments to finalize its design. Once you're satisfied



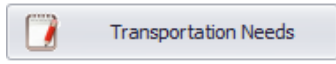
request page visible to the world.

The Reason For Visit Information function is provided to record 'how did you hear about us?' information from customers to compare which marketing options are working. Please note that entries for this field are stored in your Manager SE Source field. This is accessed from the Order screen as a drop-down list with an access button to add/Edit/Delete these. If you have previously used the Source field for other purposes, this will require some thought about how to balance these two requirements.



Change Prompt provides access to edit the question that customers will see in the OLA window. If you would like to word the question differently, this is your opportunity to make changes and then click OK.

with all of the contents, you would then switch to **Live** mode to make the appointment

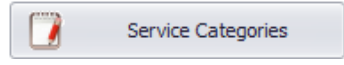


Transportation Needs allows configuration of the options that customers will select from. Each Transportation Option can also include any Additional Description necessary to clarify the choice. There is also a check box option for any of the options to indicate 'Is Customer Waiting'.

Transportation Option	Additional Description	Is Customer Waiting
I'll be dropping my vehicle off	Please arrive 15 minutes before your scheduled appointment to allow for the check-in process.	<input type="checkbox"/>
I'd like a courtesy loaner vehicle during my service	Loaner vehicles are available for vehicle service exceeding a full day.	<input type="checkbox"/>
I'd like to wait for my service	Waiting for your vehicle service is recommended only for simple maintenance. We do not recommend waitin...	<input checked="" type="checkbox"/>
		<input type="checkbox"/>

Transportation Need 4 of 4

Transportation Option text is what will appear to your customer as a drop-down option on your appointment request form. Additional Description is optional. Use it for additional explanation to your customers regarding transportation options on your appointment request form.



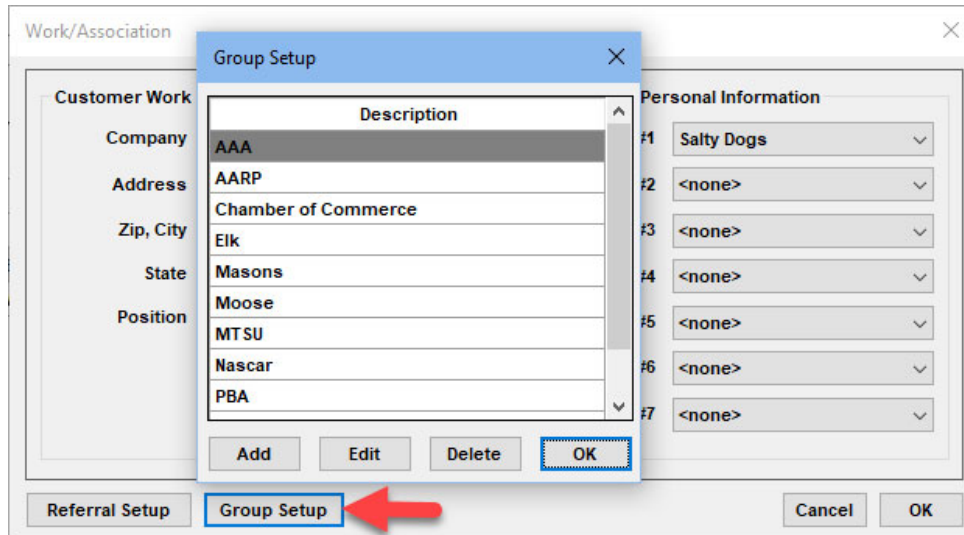
Service Categories allows your customer to specify type(s) of work thought to be needed for this shop appointment. This is an optional feature for your online appointment request form. If you do not wish to make this feature visible, uncheck the box labelled *Display Service Categories field on Request Form*.

Description
Brake Service
Diagnostic & Repair Service
I'm not sure - Comments below
Oil Change Services
Scheduled Maintenance
Tire Replacement/Repair

Membership Groups allows your customer to specify any group(s) they belong to. This is optional for your online appointment request form. The values for this field are stored under the

Change Customer Tax Type **Market**

Market button on the Customer Screen. Add or change available groups by clicking on Groups Setup.



If you do not wish to make this feature visible, uncheck the box labelled *Display Membership field on Request Form*.



Online Appointments Availability Options

The Availability settings panel allows you to specify the maximum number of appointments to be shown to customers requesting an appointment online. Enter the number of appointments you wish to allow for each hour of each day you are open for business.

NOTE: It is necessary to close Manager SE program on all other workstations than the PC being used to configure these settings. When workstations are re-started they will inherit those new settings.

Scheduler - 11/25/2019

View Filtering

Online Help
Sign Out

Scheduler Options

Scheduler Resources

Scheduler States

Online Appointments Setup

Online Appointments Options

Availability Options

Web Submission Acknowledgement

Declined Email

Declined Text

Confirmation Email

Confirmation Text

Online Appointment Availability Settings [\(Online Help\)](#)

Fill in the time intervals below to determine what available times will be shown to your customers when requesting an appointment online. Times shown as available to a user will be compared to your already confirmed appointments for the given time. For example, set an interval to zero to prevent it from being shown to a customer on the appointmentrequest form. Setting a value of 3 means the slot will show as available for a customer to select until you already have 3 appointments confirmed during that time.

Set your maximum number of appointments per time period:

Week Day	1...	1...	2...	3...	4...	5...	6...	7...	8...	9...	1...	1...	1...	1...	2...	3...	4...	5...	6...	7...	8...	9...	1...	1...	Total
Sunday																									0
Monday									3	1	3	1			1	2	2								13
Tuesday									3	1	3	1			1	2	2								13
Wednesday									3	1	3	1			1	2	2								13
Thursday									3	1	3	1			1	2	2								13
Friday									3	1	3	1			1	2	2								13
Saturday									2	1	3	1													7

Lead time is the minimum number of hours from the current time that you'd like a customer to be able to make an appointment online. For example, a value of 2 hours means that at noon, the soonest time displayed to a customer would be 2:00 pm.

Lead Time (in Hours)

Use Shop Hours

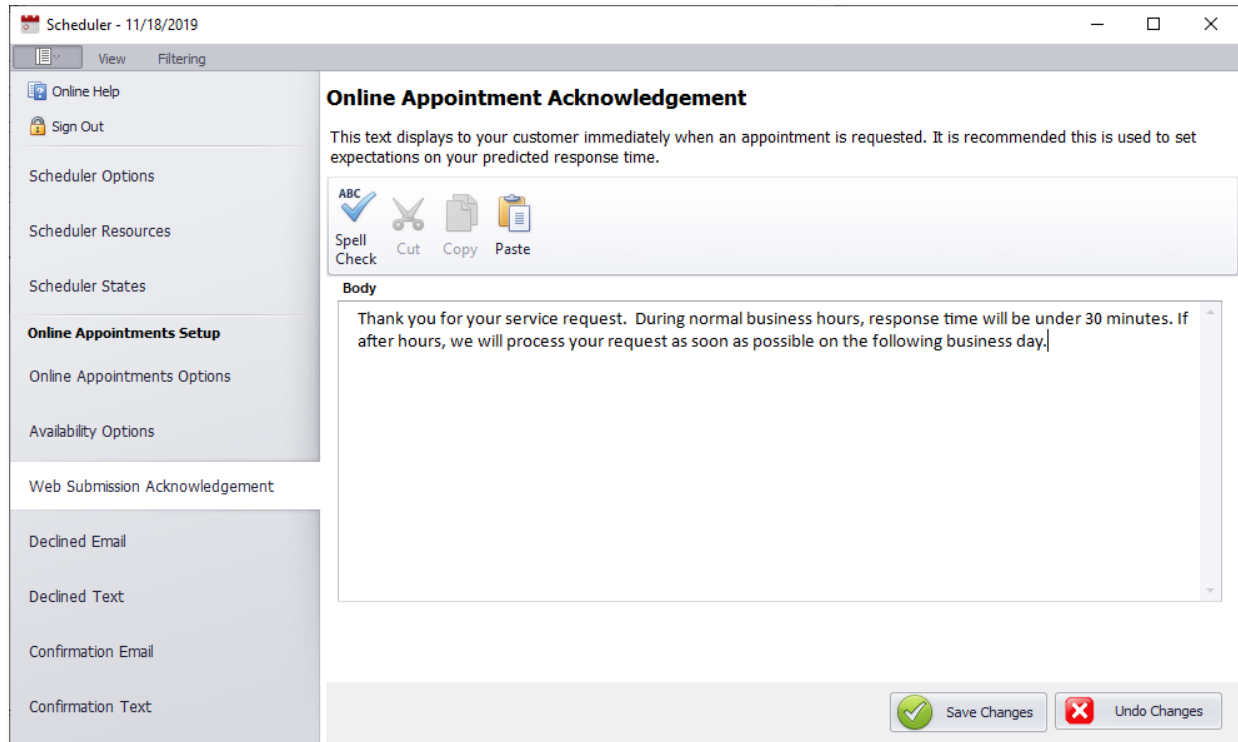
Save Changes Undo Changes

Use Shop Hours: when enabled, only shop hours are displayed. Disabling will allow the shop to set maximum number of appointments outside shop hours.

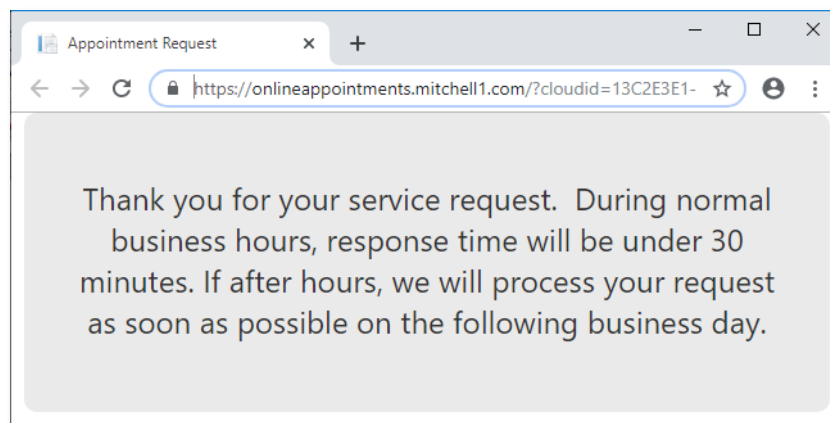
Lead Time (in Hours): minimum number of hours from the current time before the customer will be able to schedule an appointment.

Web Submission Acknowledgement

The Online Appointment Acknowledgement is the confirmation message your customer receives after requesting an appointment. Edit or replace the default text with a custom message from your shop.



Be sure to click **Save Changes** before exiting.

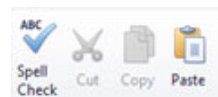


Sample Customer Acknowledgement

Declined/Confirmation Email and Text

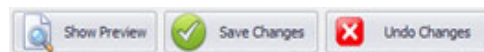
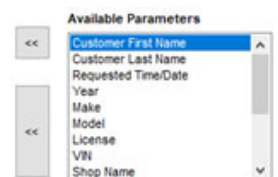
Use these four panels to customize the standard messaging to meet the needs of your shop. Click on the template you want to modify, change the text as desired, then save your changes.

The screenshot shows the 'Appointment Request Decline (Email)' editor in the Scheduler application. The sidebar on the left contains navigation options: Online Help, Sign Out, Scheduler Options, Scheduler Resources, Scheduler States, Online Appointments Setup, Online Appointments Options, Availability Options, and Web Submission Acknowledgement. Below these are four red arrows pointing to 'Declined Email', 'Declined Text', 'Confirmation Email', and 'Confirmation Text'. The main editing area has a title bar 'Appointment Request Decline (Email)' and a description: 'Emails are sent to users that specified it as their preferred contact method. This editor allows you to configure the message sent to your customers should you decline an appointment request.' Below this are editing tools: Spell Check, Cut, Copy, and Paste. The 'Subject' field contains 'Your Appointment Request with {Shop Name}'. The 'Body' field contains 'Dear {Customer First Name},
Unfortunately we are unable to accept your requested appointment. Please call us at {Shop Phone#} for more information. We apologize for any inconvenience.' To the right is an 'Available Parameters' list with items: Customer First Name, Customer Last Name, Requested Time/Date, Year, Make, Model, License, VIN, and Shop Name. At the bottom are three buttons: Show Preview, Save Changes, and Undo Changes.



Editing Tools – Click **Spell Check** to check your finished message template for spelling errors. Use the **Cut** (ctrl-x), **Copy** (ctrl-c), and **Paste** (ctrl-v) functions to edit the text.

Available Parameters – Personalize your messaging to customers with some Manager SE database fields. To add a database field to your message, click on one listed in the Available Parameters list, then use the appropriate arrow keys to insert it into your message Subject or Body section.

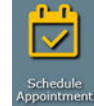


- **Show Preview** - Click Show Preview to view your changes before finalizing.
- **Save Changes** – Once finalized, click to save changes to the live template.
- **Undo Changes** – Cancels your changes and restores the template to its original state.

Working With Online Appointments

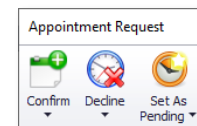
Overview

1. Customers request a scheduled appointment using the OLA form on the shop's website.
2. The appointment request is received into Manager SE for review.



Scheduling	Appointment	Shop Events	1 Requests	
Customer/Company	Vehicle	Contact Phone	Contact Email	
▼ Status: New				
Tom Bradley	2015 Chevrolet Silverado 150...	(619) 555-2458	tombradley22@gmail.c...	
▶ Status: Confirmed				

3. Shop personnel confirms, declines, or sets the appointment as pending. The shop notifies the customer via predefined text or email, or by phone using custom notifications, or by phone.
4. Customers that are confirmed or set as pending are onboarded (matched as an existing user or entered as new record) into the shop's database. Once onboarded, the appointment appears in the Schedule.



Appointment Request

Appointment Requests are confirmed in the Requests tab of the Scheduler. If there are outstanding appointment requests that need to be confirmed, the number will appear in the tab, highlighted in green.

A screenshot of the Scheduler software interface. The "Requests" tab is highlighted with a green circle and the number 4. The table below shows appointment requests categorized by status: New, Pending, Confirmed, and Declined.

Scheduling	Appointment	Shop Events	4 Requests	
Customer/Company	Vehicle	Contact Phone	Contact Email	Preferred
▼ Status: New				
Jim Wells	2006 Subaru Impreza Outbac...	(858) 555-7776	jimwells143619188@h...	Text
▼ Status: Pending				
Caivid Draig	2009 Jeep Commander Limited	(555) 555-5555	caviddraig@gmail.com	Text
Tom Bradley	2015 Chevrolet Silverado 150...	(619) 549-2519	tombradley22@gmail.c...	Text
▼ Status: Confirmed				
Jack Miller	2015 Chevrolet Silverado 150...	(619) 555-2458	tombradley22@gmail.c...	Text
▼ Status: Declined				
Juan Espinoza	2015 Chevrolet Silverado 150...	(619) 555-2458	tombradley22@gmail.c...	Text

Click on a request to open the Appointment request dialog box.

Appointment Request

Confirm
Decline
Set As Pending

Confirm with Text ▶
 Confirm with Email ▶
Confirmed By Phone

Last Name: **Bradley** Status: **New** Requested: **Verado 1500 LTZ** [View C](#)

Contact	Request Specifics
Phone: (619) 555-2458 <input checked="" type="checkbox"/> Text Capable Email: tombradley22@gmail.com Prefers: Text	Service(s) Requested: Brake Service Transportation Needs: I'll be dropping my vehicle off

You can **Confirm** or **Decline** the appointment by text or email using one of the pre-defined templates. Select **Confirmed/Declined by Phone** if you have confirmed or declined the appointment by phone already.

Set as Pending - This function allows the shop to designate that a request is being processed without having been confirmed or denied. Use this whenever additional communication or clarification with the customer is required before accepting an appointment.

Confirming the request initiates the Customer/Vehicle Onboarding process.

Onboarding

The onboarding wizard is used to associate the appointment request's customer and vehicle to an existing customer in the database. This process happens automatically when you **Confirm** or **Set As Pending** an Appointment request.

Appointment Request Onboarding

Step 1 of 4. Search / Create Customer and Vehicle
Step 1. Search / Create Customer and Vehicle > Step 2. Verification > Step 3. Confirmation > Step 4. Success

Onboarding Customer

Customer

Last: Rabelas
First: Eric
Company:
Phone: (213) 123-2132
E-mail: ericrabelas@gmail.com

Address

Street: asdfasfd
City: asdfasfd
State, Zip: CA 99999

Vehicle

VIN:
License:
Year/Make: 2002 Honda
Model: Accord LX

Select a Vehicle, Add a Vehicle, or Create New Customer and Vehicle

Last, First, Spouse or Company Name: Rabelas, Eric
Phone (Last 4 digits):
VIN:
License:
Unit #:

Customer Comments
asdfasfd

Rank	Last Name	First Name	Spouse	Company
1	Rabelas	Eric		
	Year	Make	Model	VIN
	2002	Dodge	Dakota	ASDFASD
2	Lenart	Eric		
	Year	Make	Model	VIN
	1998	Plymouth	Neon	1P3ES47C4WD664018
				8S7BW54
	Mcglasson	Erick		Triozap
	Year	Make	Model	VIN
	1995	Dodge	Caravan	2B4GH45R3SR179923
				5T08W72
	Trull	Erich		
	Year	Make	Model	VIN
	2011	Honda	CR-V	JHLRE4H5BC014332
				9S2SA31

Create New Customer and Vehicle Add Vehicle Use Vehicle Cancel

To Select a Vehicle click in the grid below the customer's name. The selected vehicle appears in the updated grid and the **Use Vehicle** button is now selectable.

Appointment Request Onboarding

Step 1 of 4. Search / Create Customer and Vehicle
Step 1. Search / Create Customer and Vehicle > Step 2. Verification > Step 3. Confirmation > Step 4. Success

Onboarding Customer

Customer

Last: Rabelas
First: Eric
Company:
Phone: (213) 123-2132
E-mail: ericrabelas@gmail.com

Address

Street: asdfasfd
City: asdfasfd
State, Zip: CA 99999

Vehicle

VIN:
License:
Year/Make: 2002 Honda
Model: Accord LX

Select a Vehicle, Add a Vehicle, or Create New Customer and Vehicle

Last, First, Spouse or Company Name: Rabelas, Eric
Phone (Last 4 digits):
VIN:
License:
Unit #:

Customer Comments
asdfasfd

X	Year	Make	Model	VIN	License
	2002	Dodge	Dakota		ASDFASD

Create New Customer and Vehicle Add Vehicle Use Vehicle Cancel

Use Vehicle

Click the **Use Vehicle** button. This sends you to Step 2 Verification.

Appointment Request Onboarding

Step 2 of 4. Verification
Step 1. Search / Create Customer and Vehicle > Step 2. Verification > Step 3. Confirmation > Step 4. Success

Onboarding Customer

Customer: Last: Rabelas, First: Eric, Company: , Phone: (213) 123-2132, E-mail: ericrabelas@gmail.com

Address: Street: asdfasfd, City: asdfasfd, State, Zip: CA 99999

Vehicle: VIN: , License: , Year/Make: 2002 Honda, Model: Accord LX

Verify Record
Verify customer and vehicle information and make changes if needed.
User submitted data on the left can be copied to clipboard to update fields manually.

Customer Comments
asdfasfd

Existing Customer

Company: , Title: , Last, First: Rabelas Eric, Address: 11231 Paradise Road, Zip, City, State: 91915 Chula Vista CA, Phone, Ext., Desc: 619-722-5014 Cellular - 6, Email: eric.rabelas@mitchell1.com

Existing Vehicle

VIN: , License: ASDFASD, State/Prov: CA, Light Vehicles (selected), Med and HD Vehicles, Year / Make: 2002 Dodge, Model: Dakota, Body Style: , Engine / Fuel: , Transmission:

< Back Next > Cancel

Validate the information and make additions and changes if necessary and click the **Next** button to display **Step 3 Confirmation**.

Appointment Request Onboarding

Step 3 of 4. Confirmation
Step 1. Search / Create Customer and Vehicle > Step 2. Verification > Step 3. Confirmation > Step 4. Success

Onboarding Customer

Customer: Last: Rabelas, First: Eric, Company: , Phone: (213) 123-2132, E-mail: ericrabelas@gmail.com

Address: Street: asdfasfd, City: asdfasfd, State, Zip: CA 99999

Vehicle: VIN: , License: , Year/Make: 2002 Honda, Model: Accord LX

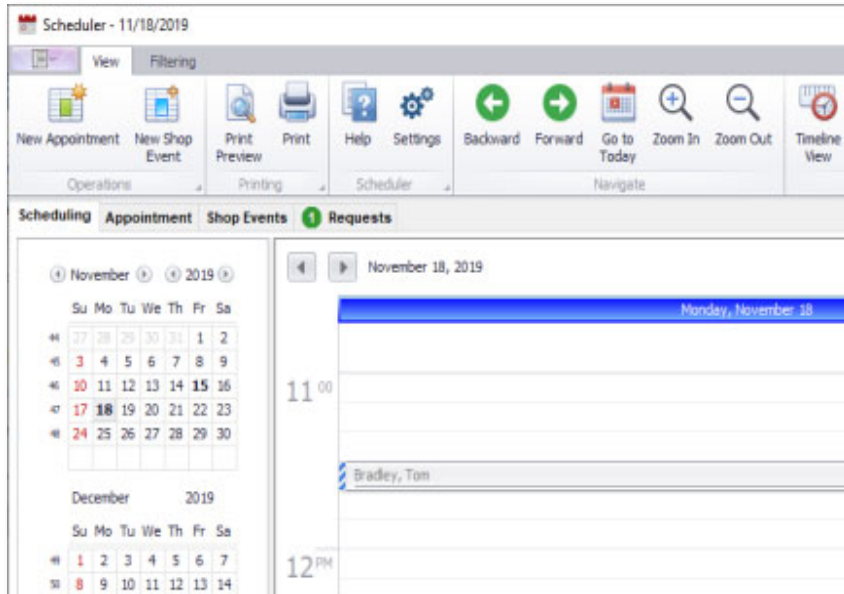
Confirm Information and Accept Appointment Request Onboarding Customer
Confirm information below is correct.

Incoming Appointment Request will onboard to:
Existing Customer: Rabelas, Eric
Existing Vehicle: 2002 Dodge Dakota VIN:

< Back Accept Cancel

Review the information and if correct, click **Accept**.

Once onboarded, the appointment appears in the Schedule.



Getting Help

Context-sensitive Online Help is available in every screen by clicking Help on the menu or pressing F1.



Training Videos are available for many screens. If a video is available, a Training Video icon displays at the top of the Help topic. Click on the icon to run the YouTube video.