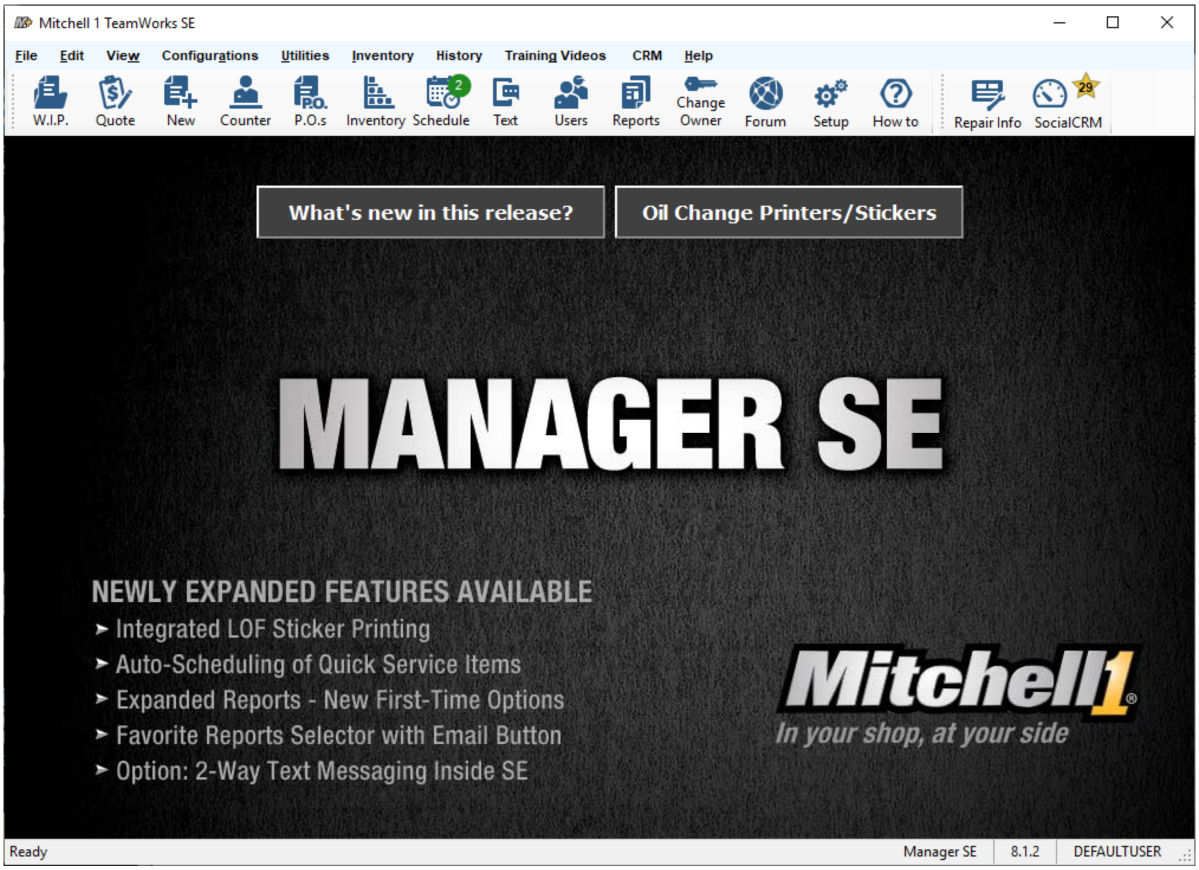
Online Appointments

User's Guide



System Requirements:

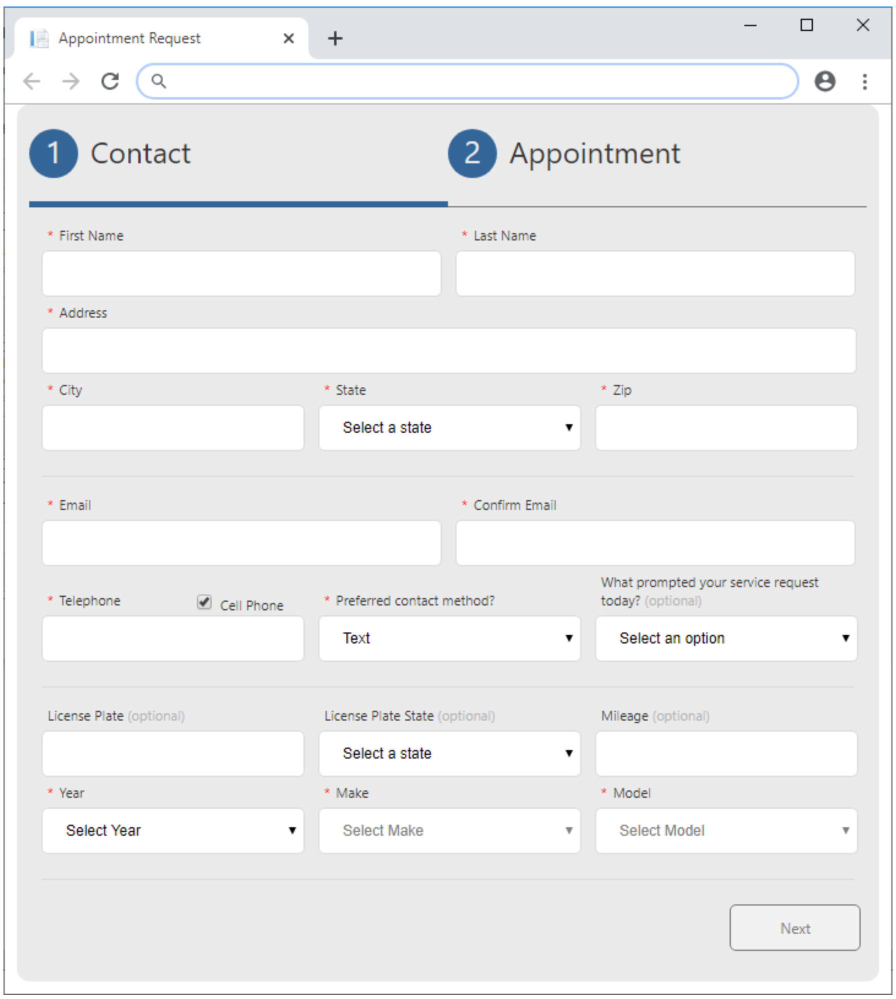
- Manager SE version 8.1.3 or higher
- SocialCRM subscription
- Manager SE Connection (MSEC)

Contents

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.



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.

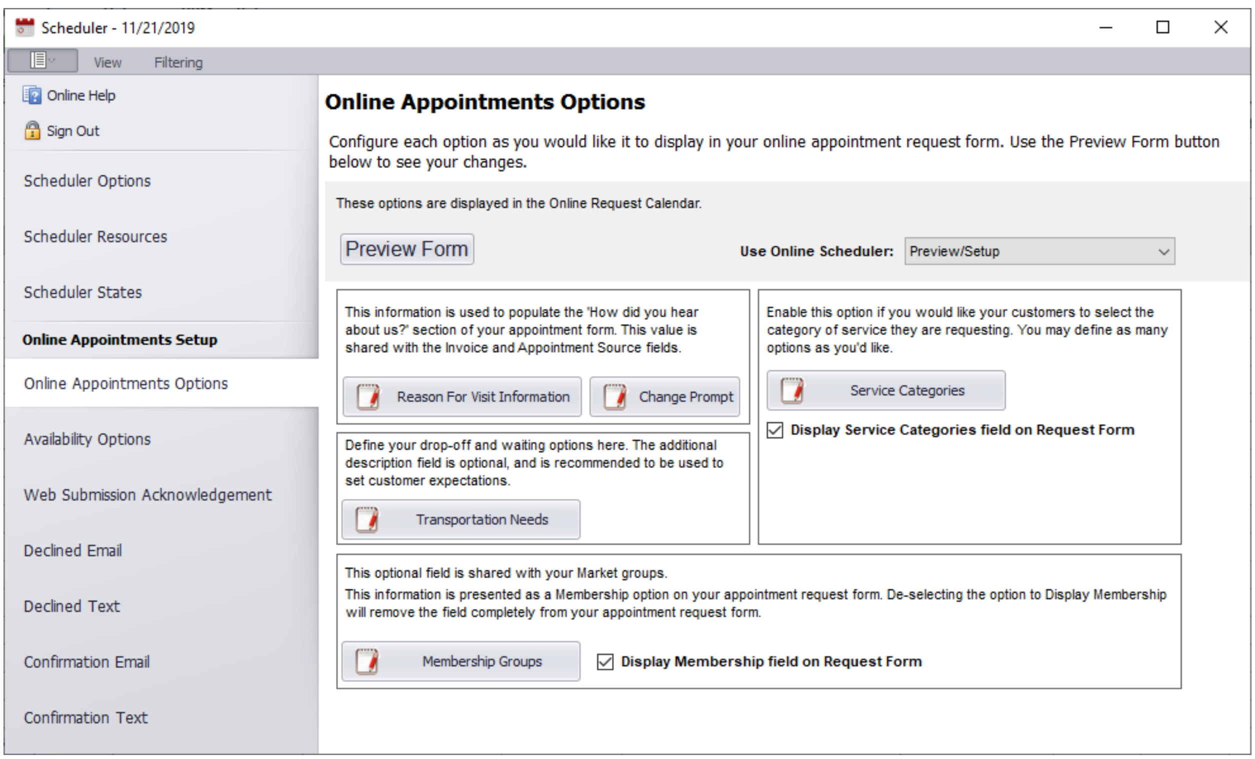
Online Appointments Setup

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.

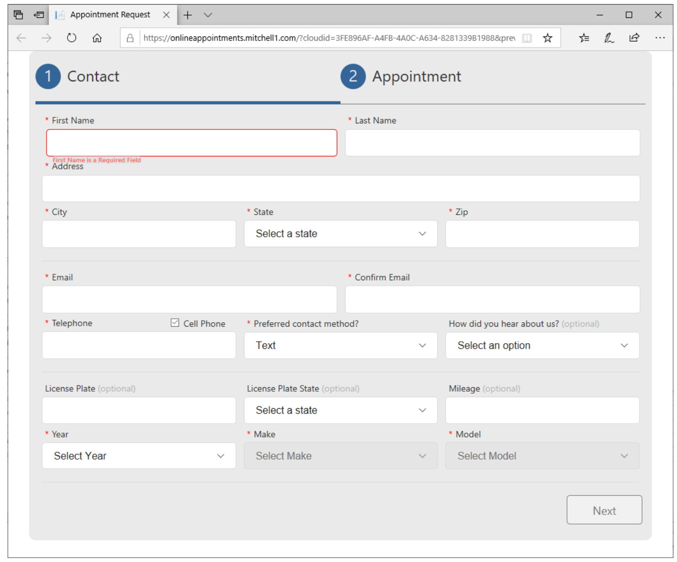
Online Appointment Options

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.

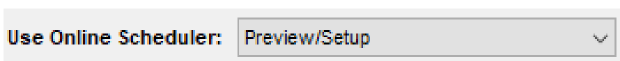


Starting from the top of the screen,

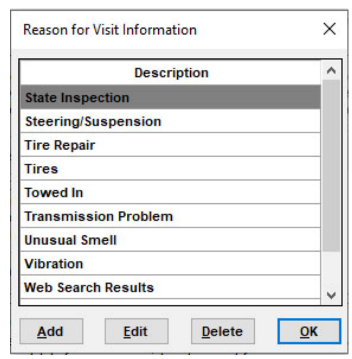
Preview Form provides an opportunity to view the appointment request form exactly as it would appear to shop customers accessing it from your shop website. It's a good way to make changes and quickly check the results without having to leave this screen.



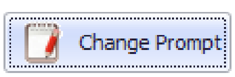
Use Online Schedule - The default setting is 'Off' until the OLA option is configured. **Preview/Setup** mode keeps it private while you make adjustments to finalize its design. Once you're satisfied



with all of the contents, you would then switch to **Live** mode to make the appointment request page visible to the world.

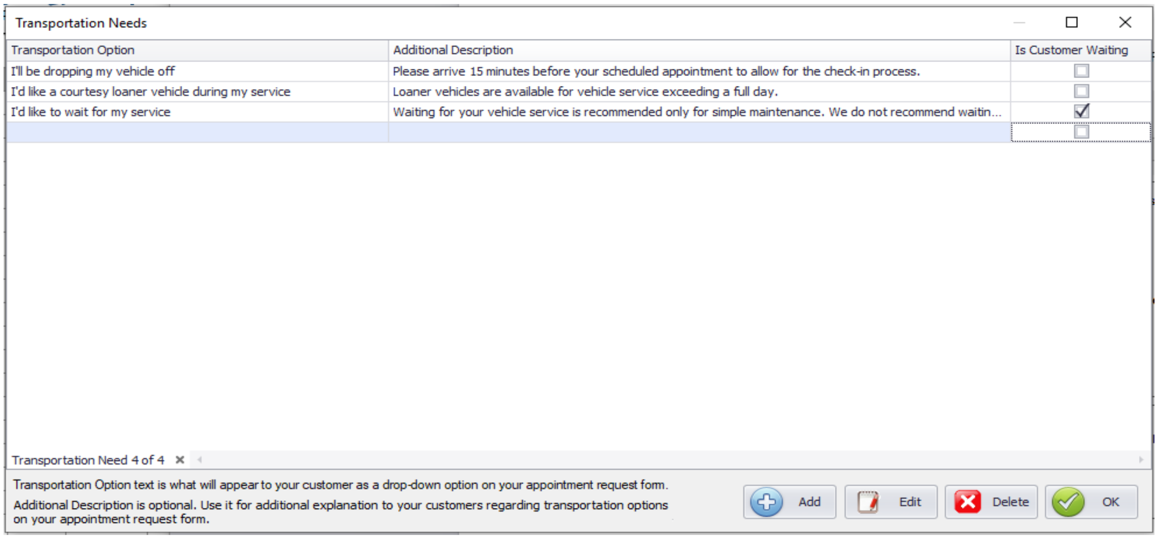


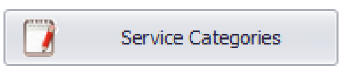
The Reason For Visit Information function is provided to record 'how did you hear about us?' information from customers to compare which marketing options are working. Please note that entries for this field are stored in your Manager SE Source field. This is accessed from the Order screen as a drop-down 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.



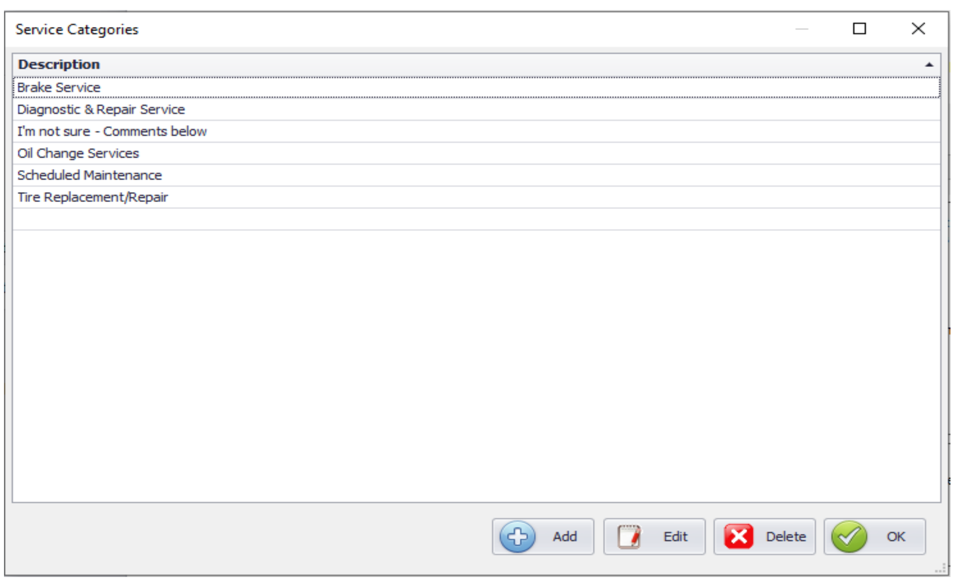
Change Prompt provides access to edit the question that customers will see in the OLA window. If you would like to word the question differently, this is your opportunity to make changes and then click OK.

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'.

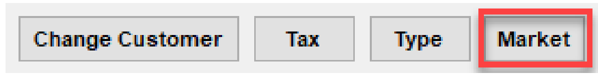




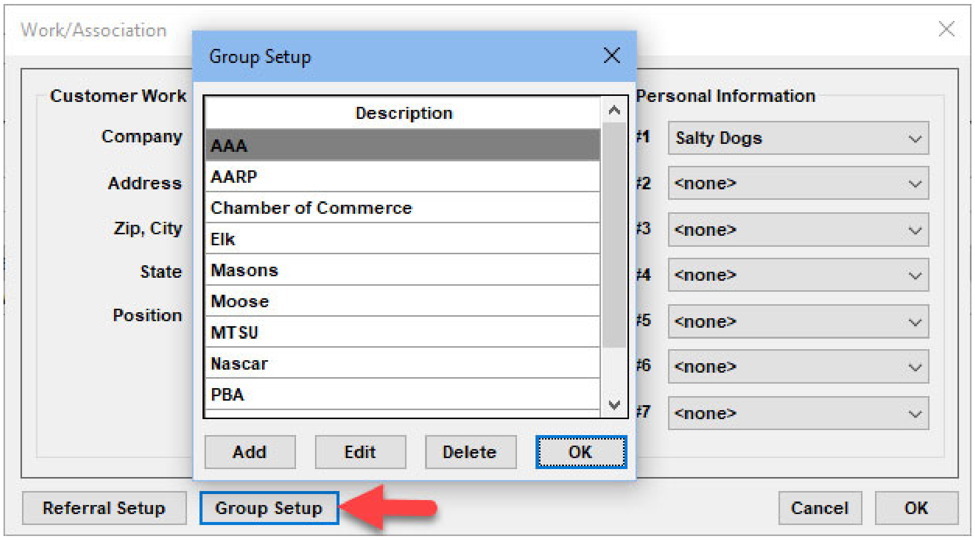
Service Categories allows your customer to specify type(s) of work thought to be needed for this shop appointment. This is an optional feature for your online appointment request form. If you do not wish to make this feature visible, uncheck the box labelled *Display Service Categories field on Request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



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



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

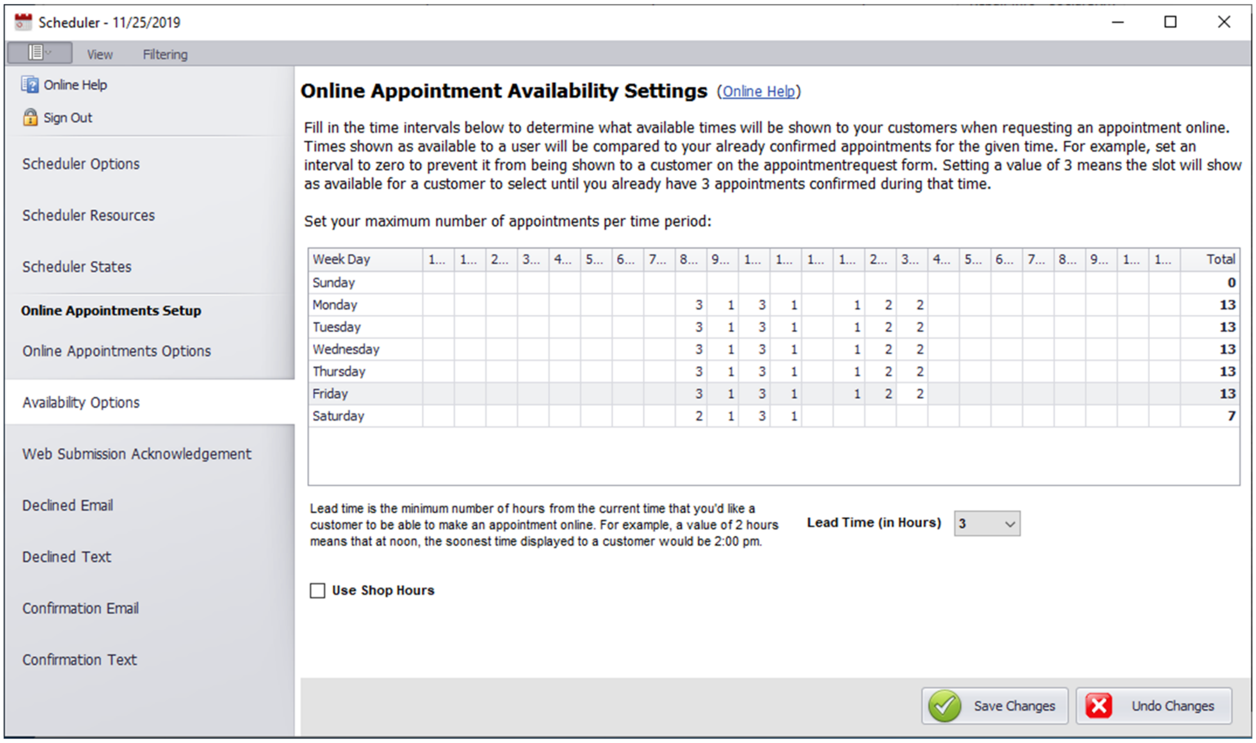


If you do not wish to make this feature visible, uncheck the box labelled *Display Membership field on Request Form.*

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.

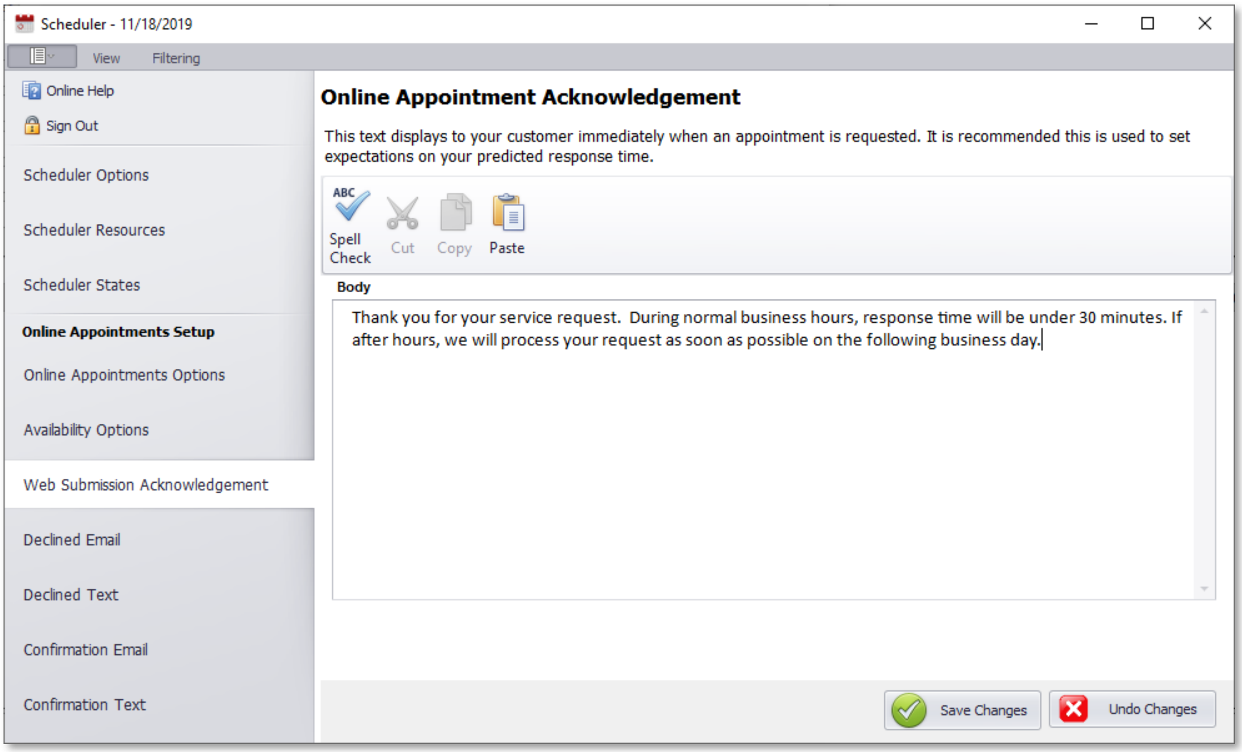


Use Shop Hours: when enabled, only shop hours are displayed. Disabling will allow the shop to set maximum number of appointments outside shop hours.

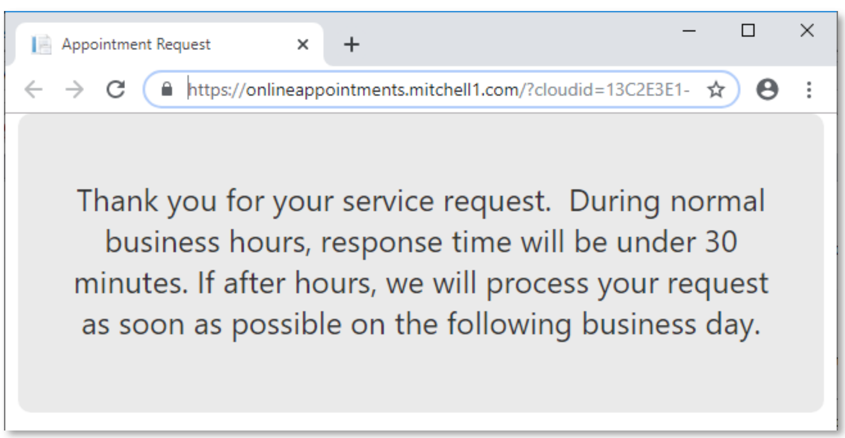
Lead Time (in Hours): minimum number of hours from the current time before the customer will be able to schedule an appointment.

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.



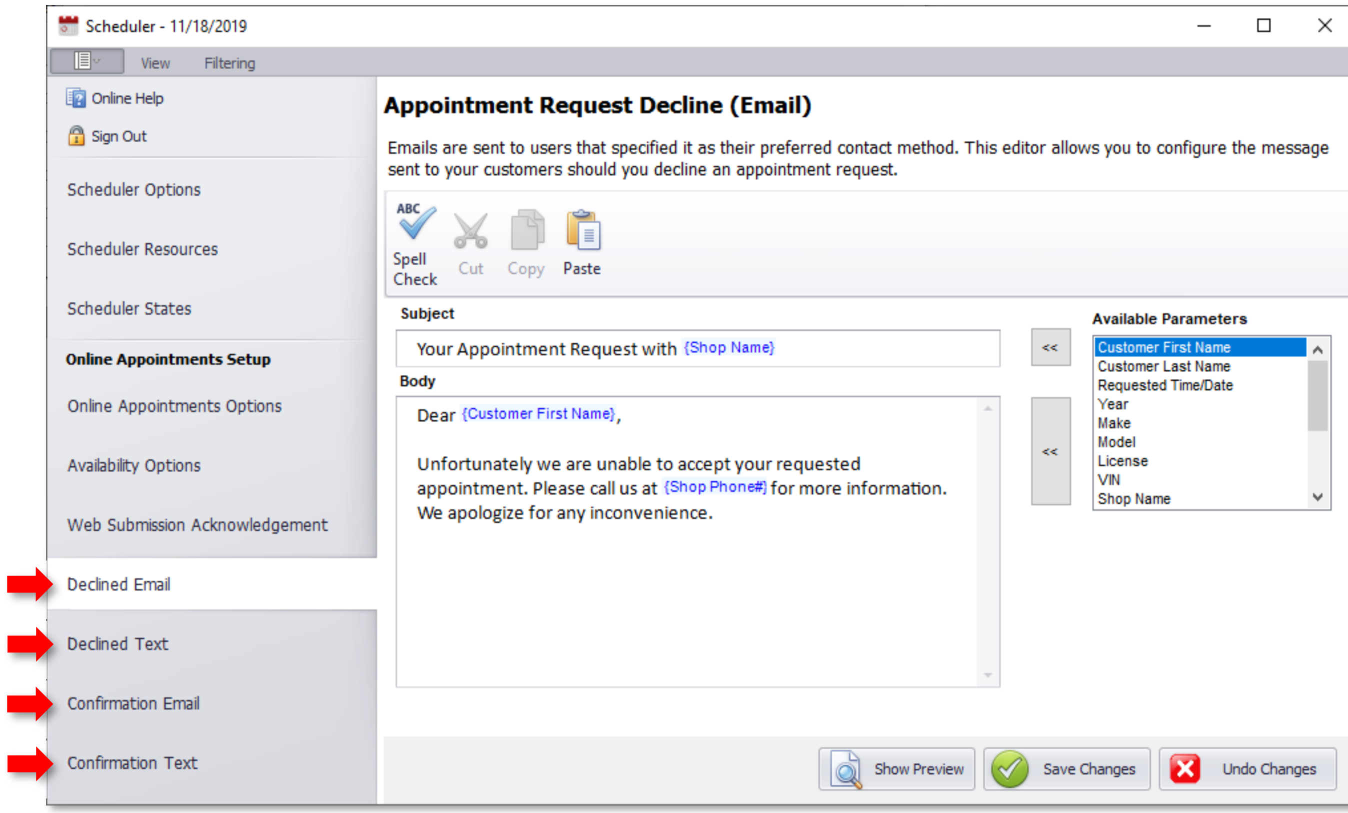
Be sure to click **Save Changes** before exiting.



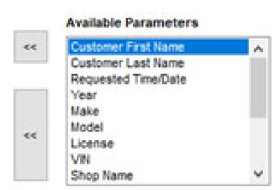
Sample Customer Acknowledgement

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.



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.



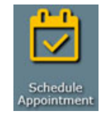
Available Parameters – Personalize your messaging to customers with some Manager SE database fields. To add a database field to your message, click on one listed in the Available Parameters list, then use the appropriate arrow keys to insert it into your message Subject or Body section.

- **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.

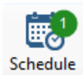
Working With Online Appointments

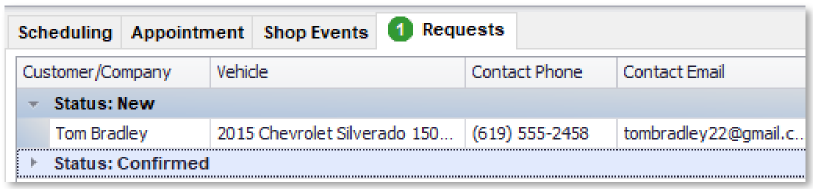
Overview

1. Customers request a scheduled appointment using the OLA form on the shop's website.

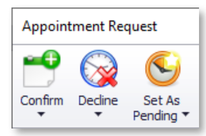


2. The appointment request is received into Manager SE for review.





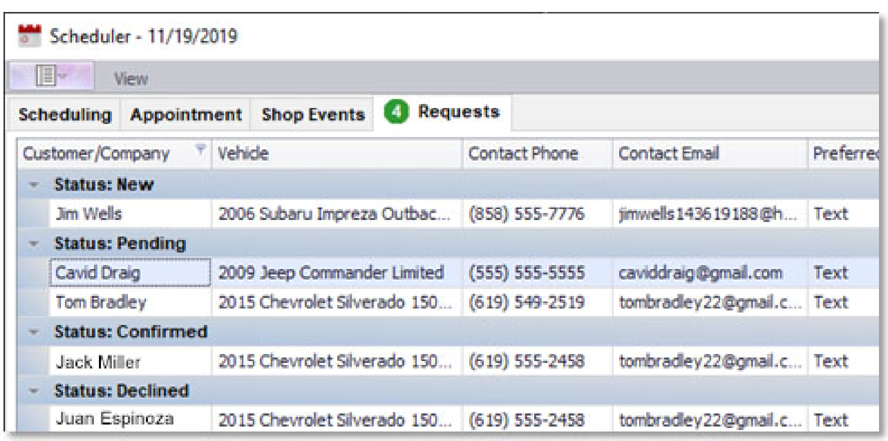
3. Shop personnel confirms, declines, or sets the appointment as pending. The shop notifies the customer via predefined text or email, or by phone using custom notifications, or by phone.



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.



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

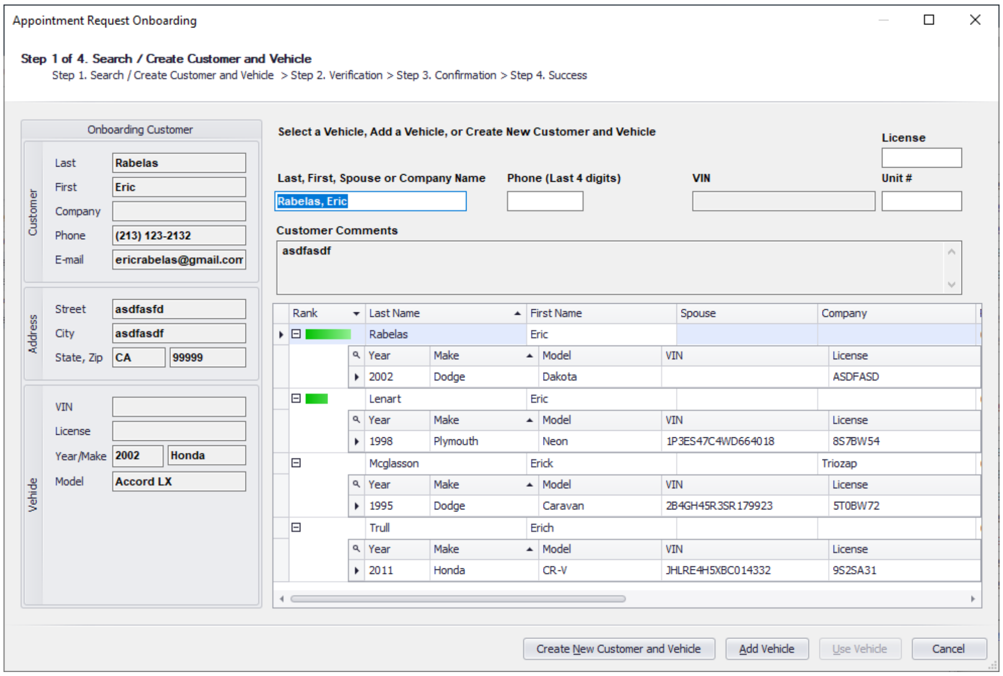
You can **Confirm** or **Decline** the appointment by text or email using one of the pre-defined templates. Select **Confirmed/Declined by Phone** if you have confirmed or declined the appointment by phone already.

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.

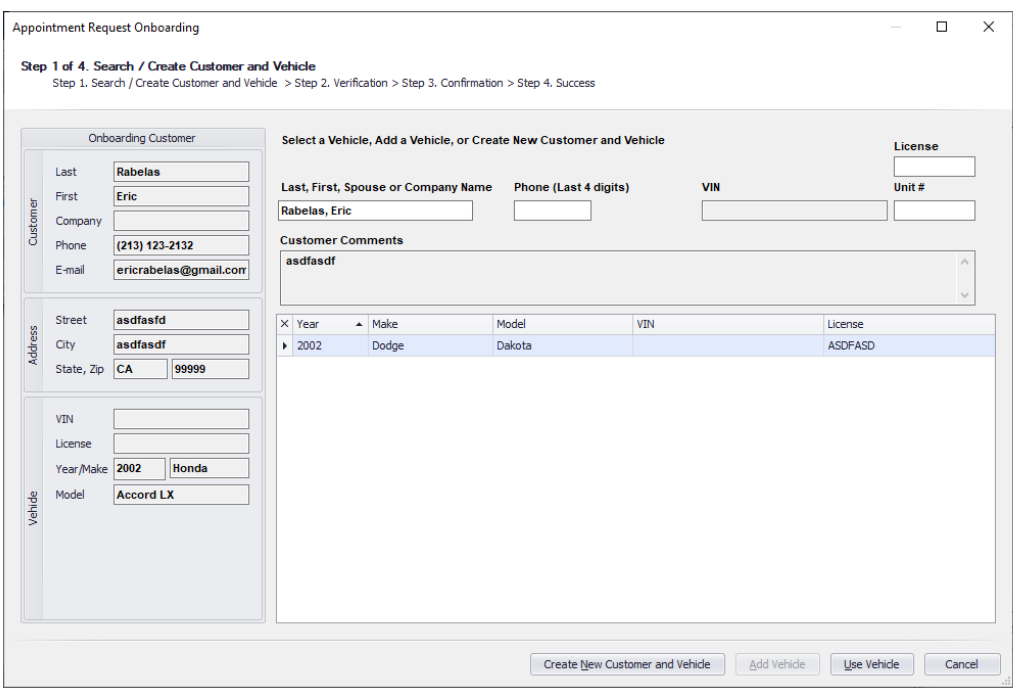
Confirming the request initiates the Customer/Vehicle Onboarding process.

Onboarding

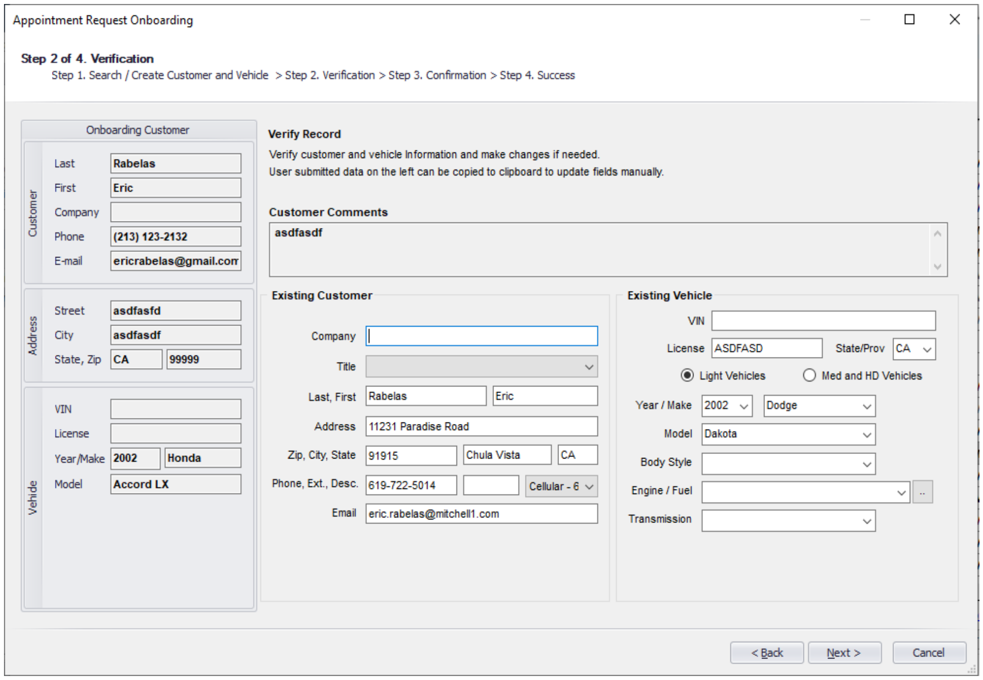
The onboarding wizard is used to associate the appointment request's customer and vehicle to an existing customer in the database. This process happens automatically when you **Confirm** or **Set As Pending** an Appointment request.



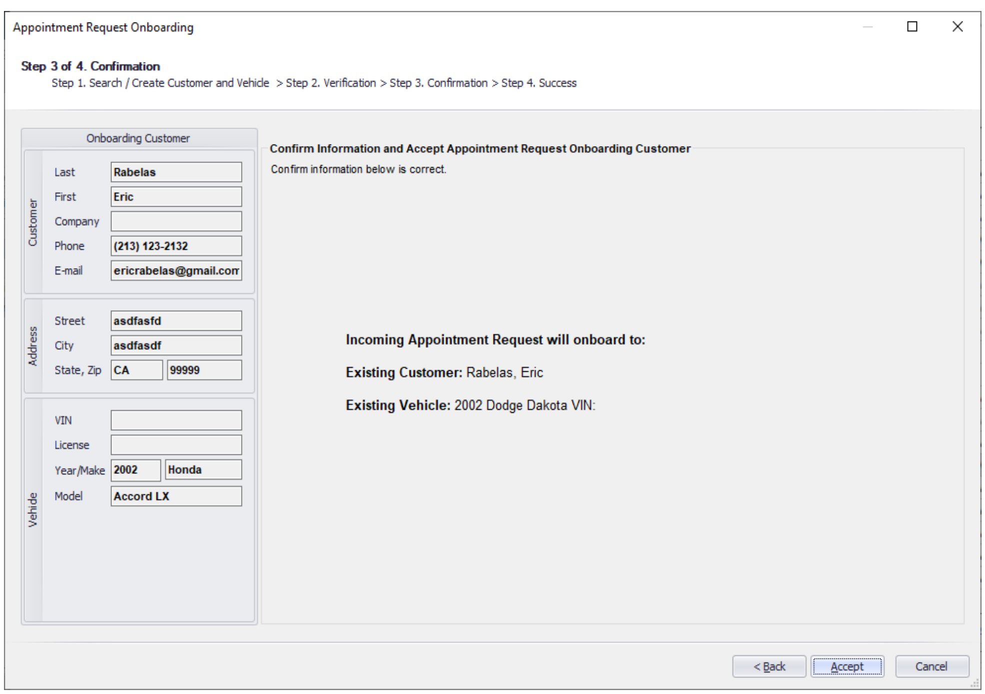
To Select a Vehicle click in the grid below the customer's name. The selected vehicle appears in the updated grid and the **Use Vehicle** button is now selectable.



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

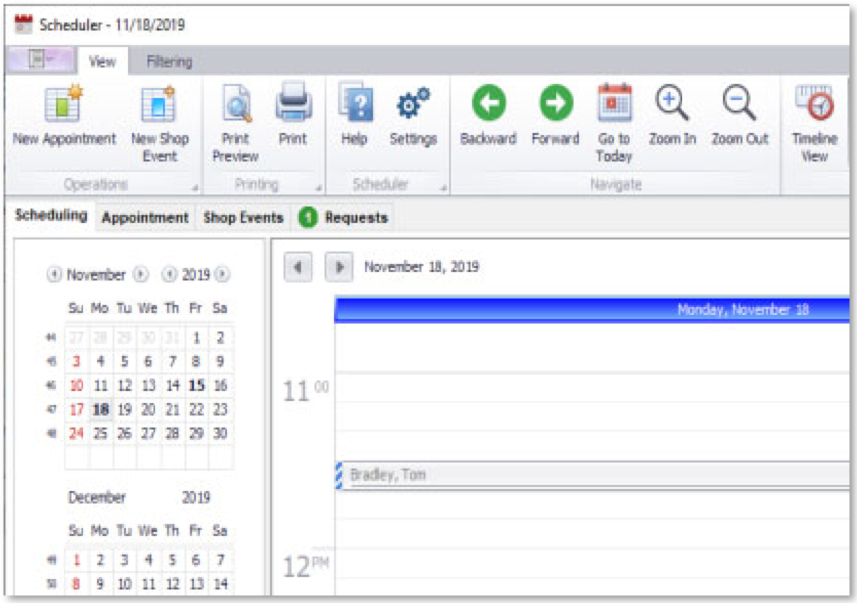


Validate the information and make additions and changes if necessary and click the **Next** button to display **Step 3 Confirmation**.



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.