

Ticket - Appointment/Bay Management Carryovers AV Ref # 579

There is also a video showing how to perform this function: Ticket - Carryovers (1:24) – AV Ref# 304

About:

You may frequently have open workorders at the end of each day, tickets for vehicles that haven't been picked up yet or work that has not been completed. BPOS offers several different methods for making sure that these tickets don't disappear.

If You Are Using the Appointment/Bay Management feature:

- 1. At the end of your business day, click on **Views** \rightarrow **Sales Counter**.
- 3. For tickets that still have work that needs to be completed, you can right-click on the ticket and select **Edit Appointment**:

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7:00 PM													~

(Continued on next page)

4. Change the **Appointment Date** to the following store date. Edit any other fields as needed (Bay assignment, Time Promised, etc.). Click the **Save & Exit** button which will move this ticket the following day for you:

Edit Appointment	Info - Ticket #1680633 X
Ticket #	1680633
Cust #	42004 Name DARRELL MILLS
Tag#	XVM-9527 Make NISSAN Model QUEST Year 2007
Appointment Active	
Appointment Date	07/23/2016 💿 Time 💿 10:00 AM 💿 🛑
Code	Mechanical Labor v Duration 30
Bay	Bay 2 - LUBE/TIRE 🗸 🔶
Customer Waiting	Yes \checkmark Suspended No \checkmark
Promised Date	07/23/2016 Time ASAP Type Promised ~
Confirmation	No Confirmation v
Salesrep	
Method	Phone-To Person v
Date	Time
Vehicle Status	Not Here Yet Value Time S
	Refresh Save Save & Exit Help Clear Appointment

5. For any other tickets who are simply waiting for payment to be closed, click on the **Ticket** drop-down menu → click on **Push Workorders**:

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	07/22/16 7:00 AM 1690624	V				
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6. The correct store dates should default for you but you can change them if needed, in case you forgot to push the tickets on the prior store date or if the next day is closed and you need to push the tickets to a further date. If the dates are correct, click on the **Push** button:

File Views Appointments	Tickets Inventory	Customers C	Contacts Vel	hicles VSR	Suppliers L	inks Set Stor
Clear Appt Tickets Fetch#	Last Recent Workorder	Quote Inventory	RESET Cust	tomers History	Contacts Vehic	kes History VSR
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Push Workorders						
This routine finds all ope (normally, the next store	en workorders for the day). Password pe	e date displayed rmission P40=`	d and "pushe Y is required	es" them to the	e store day s se this routin	pecified e.
If you are using the App at the end of the work d can continue to track the	pointment Scheduler ay or beginning of th em on the calendar.	for job and bay ie next day, to '	managemer 'push" any op	nt, you shouk pen workorde	d use this rou ers forward se	itine either o that you
	From 07/2	2/2016 💿 To	07/23/2	2016 💿		
	F	Push Cancel	Help			

7. The next day when we access the Appointment screen, we can see we have 3 Carryover tickets that we pushed and one appointment that we manually set:

File Views Appointment	ts Tickets Inventor	y Customers C	ontacts Vehicles	VSR SL	ppliers Li	nks Set Store Help						
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Option Settings:

**Note: Users must have password permission to use the Push Workorder function (P40). If you need to give a user permission to have the permission setting, please contact your system administrator.