

Ticket – Editing Appointments  
AV Ref # 658

**About:**

When using Bay Management and/or the Appointment screen, you will discover it is a fluid process, constantly changing throughout your business day. Estimates change, parts have to be ordered, customers need to be called, etc. With both the appointment screen and bay management, there are several different ways to edit and update your tickets with statuses, new times, and color-codes.

**How:**

**To Change the Appointment time or Bay assignment:**

1. The easiest method, when using Bay Management, is to simply drag and drop. Using your mouse, click and hold the left button on your mouse down on the appointment you wish to move:

Appt Date	Appt Time	NB	Bay 1 LUBE/TIRE	Bay 2 LUBE/TIRE	Bay 3 LUBE/TIRE	
SAT 03/18	6:00 AM	!!! NN !!!				
	6:15 AM					
	6:30 AM					
	6:45 AM					
SAT 03/18	7:00 AM					
	7:15 AM					
	7:30 AM					
	7:45 AM					
SAT 03/18	8:00 AM					
	8:15 AM		(S) 			
	8:30 AM		S			
	8:45 AM					
SAT 03/18	9:00 AM		(L) 			
	9:15 AM		L			
	9:30 AM		L			
	9:45 AM		L	(L)		
SAT 03/18	10:00 AM		L	L		
	10:15 AM		L	L		
	10:30 AM		L		(S) 	
	10:45 AM		L		S	
SAT 03/18	11:00 AM					
	11:15 AM					

- Using your mouse and continuing to hold the left button down, drag the appointment to the bay/time you want to move it to:

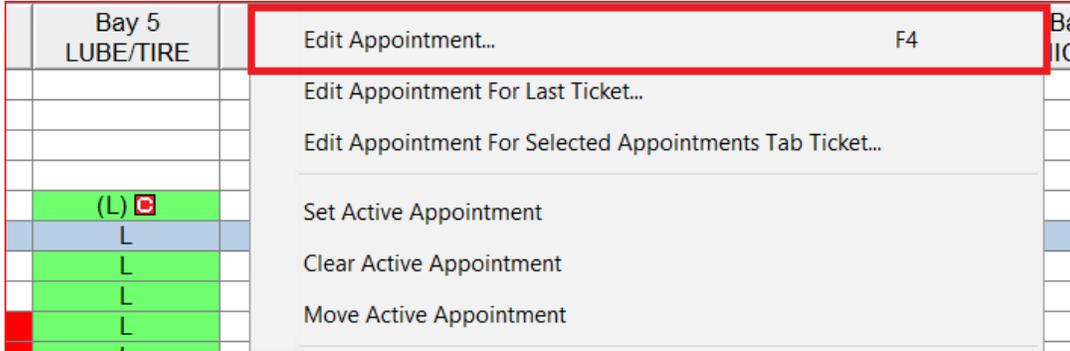
Appt Date	Appt Time	NB	Bay 1 LUBE/TIRE	Bay 2 LUBE/TIRE	Bay 3 LUBE/TIRE	Bay 4 LUBE/TIRE	Bay 5 LUBE/TIRE
SAT 03/18	6:00 AM	!!! NN !!!					
	6:15 AM						
	6:30 AM						
	6:45 AM						
SAT 03/18	7:00 AM						
	7:15 AM						
	7:30 AM						
	7:45 AM						
SAT 03/18	8:00 AM		(S) S			(L) L L	
	8:15 AM						
	8:30 AM						
	8:45 AM						
SAT 03/18	9:00 AM		(L)				
	9:15 AM		L				
	9:30 AM		L				
	9:45 AM		L	(L) L			
SAT 03/18	10:00 AM		L				
	10:15 AM		L				
	10:30 AM		L		(S) S		
	10:45 AM		L				
SAT 03/18	11:00 AM						
	11:15 AM						

- Release your mouse button to drop the appointment into place:

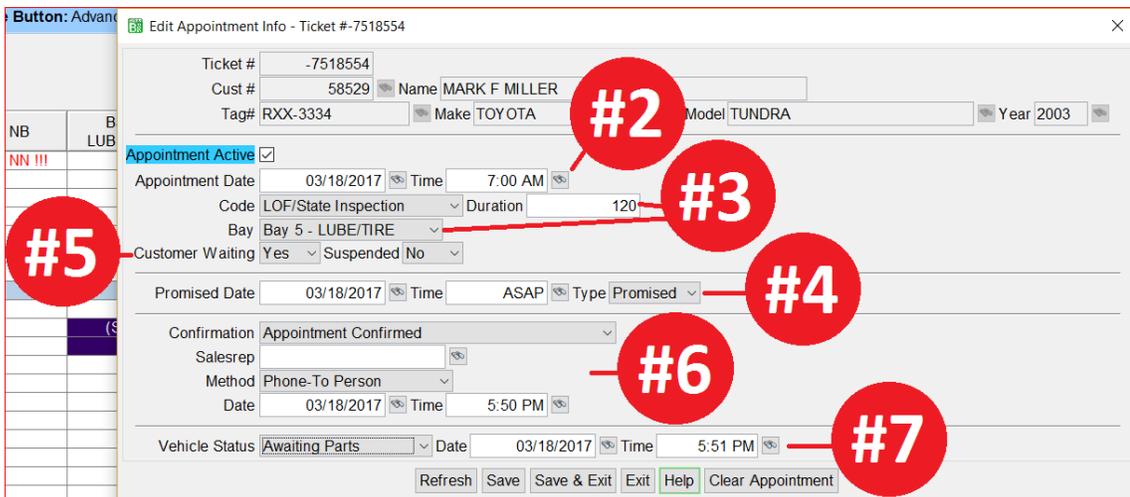
Appt Date	Appt Time	NB	Bay 1 LUBE/TIRE	Bay 2 LUBE/TIRE	Bay 3 LUBE/TIRE	Bay 4 LUBE/TIRE	Bay 5 LUBE/TIRE
SAT 03/18	6:00 AM	!!! NN !!!					
	6:15 AM						
	6:30 AM						
	6:45 AM						
SAT 03/18	7:00 AM						(L) L L L
	7:15 AM						
	7:30 AM						
	7:45 AM						
SAT 03/18	8:00 AM		(S) S			(L) L L	
	8:15 AM						
	8:30 AM						
	8:45 AM						
SAT 03/18	9:00 AM						
	9:15 AM						
	9:30 AM						
	9:45 AM			(L) L			
SAT 03/18	10:00 AM						
	10:15 AM						
	10:30 AM				(S) S		
	10:45 AM						
SAT 03/18	11:00 AM						
	11:15 AM						

**To Change the Status of a ticket:**

1. From either the Bay Management screen or the Appointment View, find your ticket. Right-click (or hit **F4**) on it and select **Edit Appointment**:



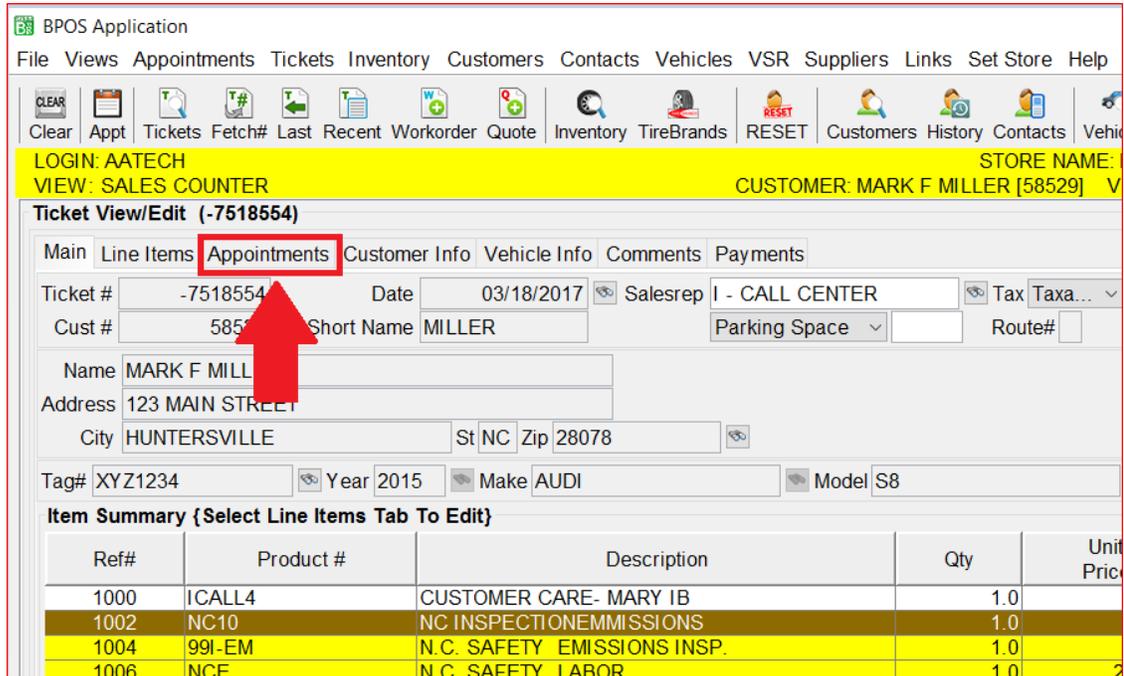
2. From here, you can update the status of the ticket. You can change the date and time of the appointment.
3. Change the **Job Code** and/or the **Bay Assignment**.
4. Change the **Promised Date** and/or **Time**.
5. Select whether or not the customer is waiting.
6. Set the **Confirmation** to note whether the appointment was confirmed or the customer was notified. You can advise which Sales rep spoke with the customer and when and method of contact.
7. Set the **Vehicle Status** to advise it is ready, on the lot, in the shop, awaiting parts, etc.:



(Continued on next page)

You can also do all of the above functions right from a customer's workorder.

1. When the ticket is open on your screen, click on the **Appointments** Tab:



BPOS Application

File Views Appointments Tickets Inventory Customers Contacts Vehicles VSR Suppliers Links Set Store Help

Clear Appt Tickets Fetch# Last Recent Workorder Quote Inventory TireBrands RESET Customers History Contacts Vehi

LOGIN: AATECH STORE NAME: [REDACTED]  
 VIEW: SALES COUNTER CUSTOMER: MARK F MILLER [58529] V

**Ticket View/Edit (-7518554)**

Main Line Items **Appointments** Customer Info Vehicle Info Comments Payments

Ticket # -7518554 Date 03/18/2017 Salesrep I - CALL CENTER Tax Taxa...  
 Cust # 585 Short Name MILLER Parking Space Route#

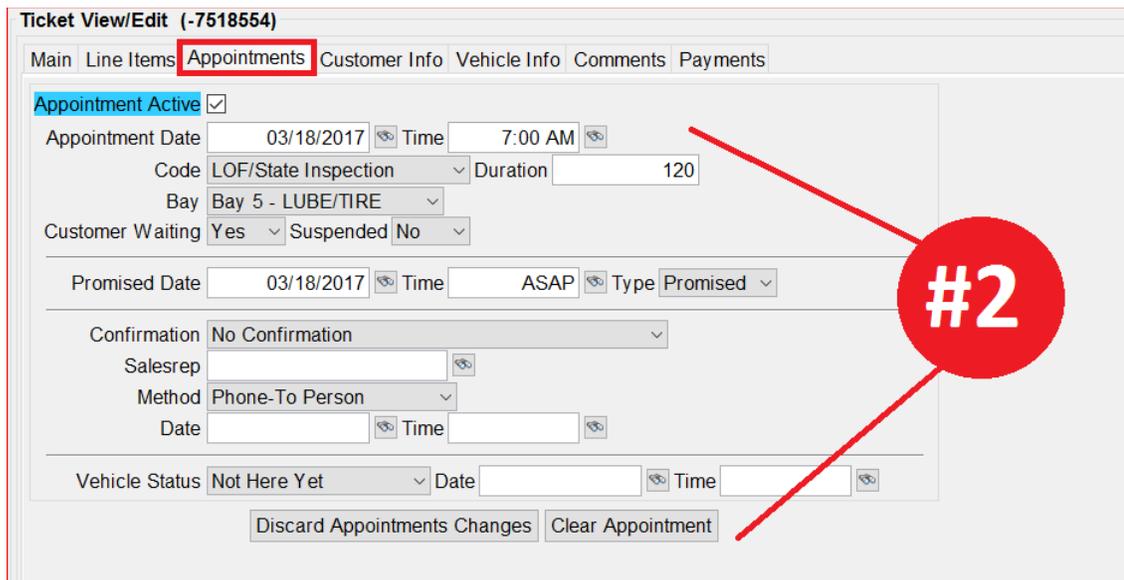
Name MARK F MILLER  
 Address 123 MAIN STREET  
 City HUNTERSVILLE St NC Zip 28078

Tag# XYZ1234 Year 2015 Make AUDI Model S8

**Item Summary {Select Line Items Tab To Edit}**

Ref#	Product #	Description	Qty	Unit Price
1000	ICALL4	CUSTOMER CARE- MARY IB	1.0	
1002	NC10	NC INSPECTIONEMMISSIONS	1.0	
1004	99I-EM	N.C. SAFETY EMISSIONS INSP.	1.0	
1006	NCF	N.C. SAFETY LABOR	1.0	2

2. Make your edits and click on the **Save** button at the bottom of your screen:



**Ticket View/Edit (-7518554)**

Main Line Items **Appointments** Customer Info Vehicle Info Comments Payments

**Appointment Active**

Appointment Date 03/18/2017 Time 7:00 AM  
 Code LOF/State Inspection Duration 120  
 Bay Bay 5 - LUBE/TIRE  
 Customer Waiting Yes Suspended No

Promised Date 03/18/2017 Time ASAP Type Promised

Confirmation No Confirmation  
 Salesrep  
 Method Phone-To Person  
 Date Time

Vehicle Status Not Here Yet Date Time

Discard Appointments Changes Clear Appointment

When you review your Appointment screen, you will be able to see at a glance, by both color codes and data, the status of any given ticket:

Appts	Appt Date	Appt Time	Ticket#	T T	C N	Customer	Vehicle	Min	Promised Time	Bay	Code
APPT(20)											
SAT 03/18											
6:00 AM											
	03/18/17	6:00 AM	-7518878	Q		JIM COLLINS	STS [NVW-8899]		EOD	NB	NO CODE
	03/18/17	6:00 AM	-7518413	Q		MIKE & DEBBIE REIF	RANGE ROVER EVOQUE [DFC-5726]		EOD	NB	NO CODE
7:00 AM											
	03/18/17	7:00 AM	-7518554	Q		MARK F MILLER	S8 [XYZ1234]	120	ASAP	5	LOF/STATE INSPECTION
	03/18/17	7:00 AM	-7517875	Q		DENNIS & KAYE CONLEY	SONATA	30	EOD	7	DIAGNOSTIC-NO START
8:00 AM											
	03/18/17	8:00 AM	-7516797	Q		REGINA TRIMAKAS	E500 [HART-H]	45	EOD	4	LOF/ROTATE-32 PT. CC
	03/18/17	8:15 AM	-7517464	Q		RICNA MOBLEY	RIO/LX/SX [ABW-3141]	30	7:00 PM	1	STATE INSPECTION
8:30 AM											
	03/18/17	8:45 AM	-7519241	Q		ED HORNE	ESCALADE [YRW-6523]	90	ASAP	7	LOF/STATE INSPECTION
9:00 AM											
	03/18/17	9:15 AM	-7518976	Q	C	CURTIS JACOBS	GRAND AM [TVY-3344]	360	EOD	11	MECHANICAL LABOR

Date	Time	Ticket #	Appt. Confirm	Name	Vehicle	Approx. time of job	Time job will be done	Bay	Job Overview
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