



TCS Scheduler

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1 Welcome & Introduction



[Setup/Configuration](#): Initial settings that should be set when you first install the software.

[Browse Event Lists](#): Browse your scheduler data in the usual browse list format.

[View Calendars](#): Browse your scheduled data using a visual calendar format.

[Calendar Update Functions](#): There are several different ways to update your scheduler event data.

[Printer Setup](#): Be sure the printer is setup properly to enable report printing.

[Printing Reports](#): Print your event data using a variety of reports.

[Printing Graphical Calendars](#): You can even print a graphical version of the scheduled data.

Calling From Other Modules: Full Integration with TCS Dealer Management System

[Parts & Service](#)
[Boat Sales - F & I](#)
[MarineTrack](#)

[System Information](#): Information about your computer, program location, memory usage, and network settings.

[Software Updates and Support](#): Misc Information. How to get support.

2 Setup/Configuration

Before using the TCS Scheduler - initial settings should be set to indicate the various parameters that TCS Scheduler should use.

Scheduler Configuration

1 2 Scheduler Configuration

Setup Your "Work Week" by selecting the first day of the week, and then select those days you are open.

Work Week Starts On:

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Select Days Open:

Select Programs to Use:

Parts Service
 FI
 MarineTrack

Select Normal Operating Hours:

Open Time:
Close Time:

Choose a Time Scale for the Calendar:

Default Show Past Events

Hide
 Display

Calendar Layout Theme:

Office 2000
 Office XP
 Office 2003
 Office 2007

System Setup Password:
Password Confirm:

Set Event Types/Color Schemes

Work Week Starts On: The Scheduler will open to a "work week" or a calendar week. Setting up your dealership's work week is as simple as selecting the days you are open, and also selecting which day of the week you want the calendar to start when in the "Work Week View".

Select Programs To Use: Check the appropriate boxes for the applications you want the Scheduler to integrate with.

System Setup Password: Enter a password to protect the System Setup window. This will stop those without the password from making any configuration changes. Both fields must match.

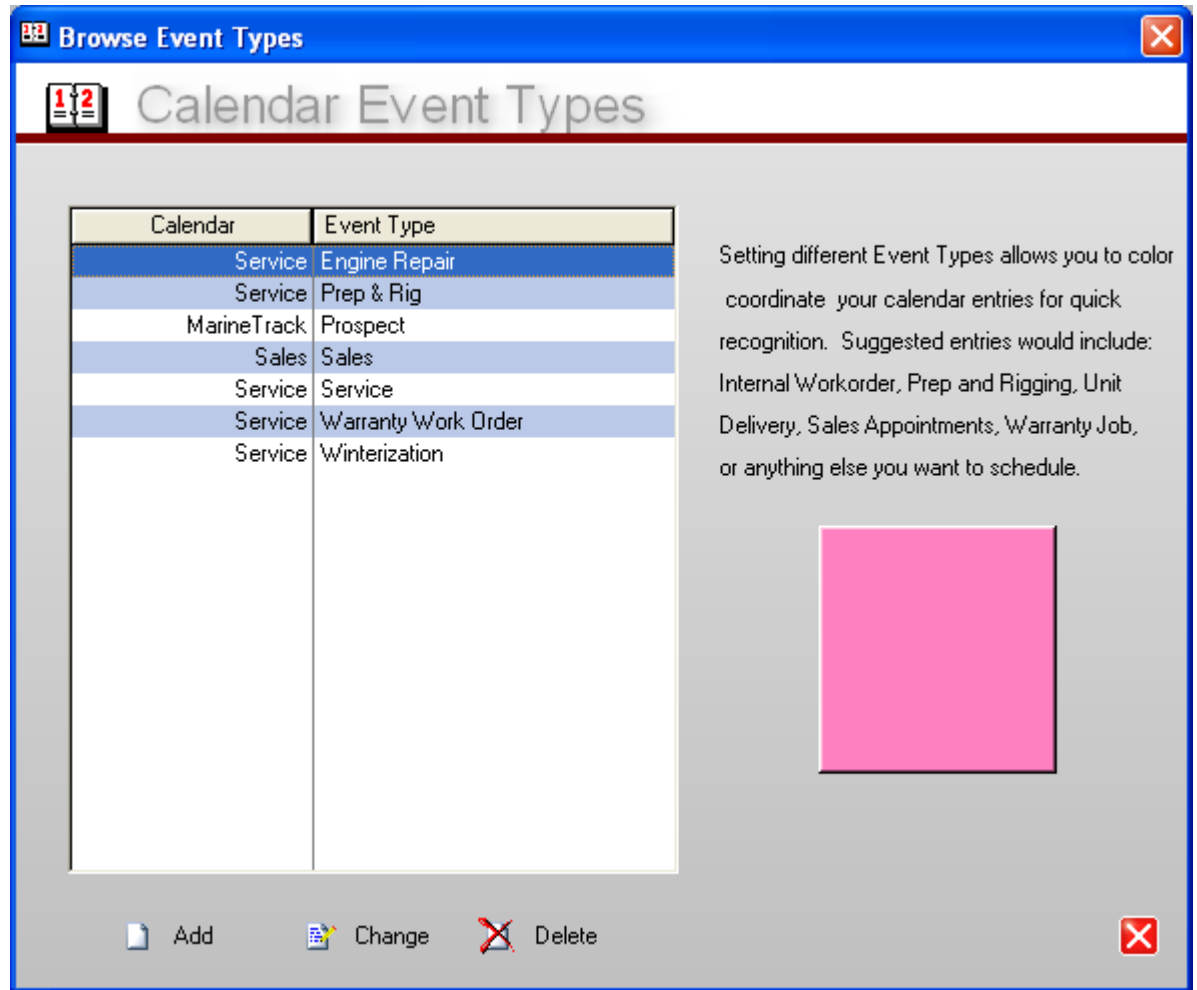
Select Normal Operating Hours: While you can still schedule outside of these limits, setting the Open Time and End Time for the day will shade this time range in the calendar. This makes it easier to schedule events within normal operating hours.

Calendar Time Scale: Events may be listed in 15 Minute, 30 Minute or 60 minute increments.

Default Show Past Events: On the Browse Event Lists, past events can be hidden or displayed. Usually, to make the list more manageable, this setting would Hide past events.

Calendar Layout Theme: There are four different themes to pick from. These will determine the way the Calendars are displayed and the coloration they contain.

Set Event Types/Color Schemes:



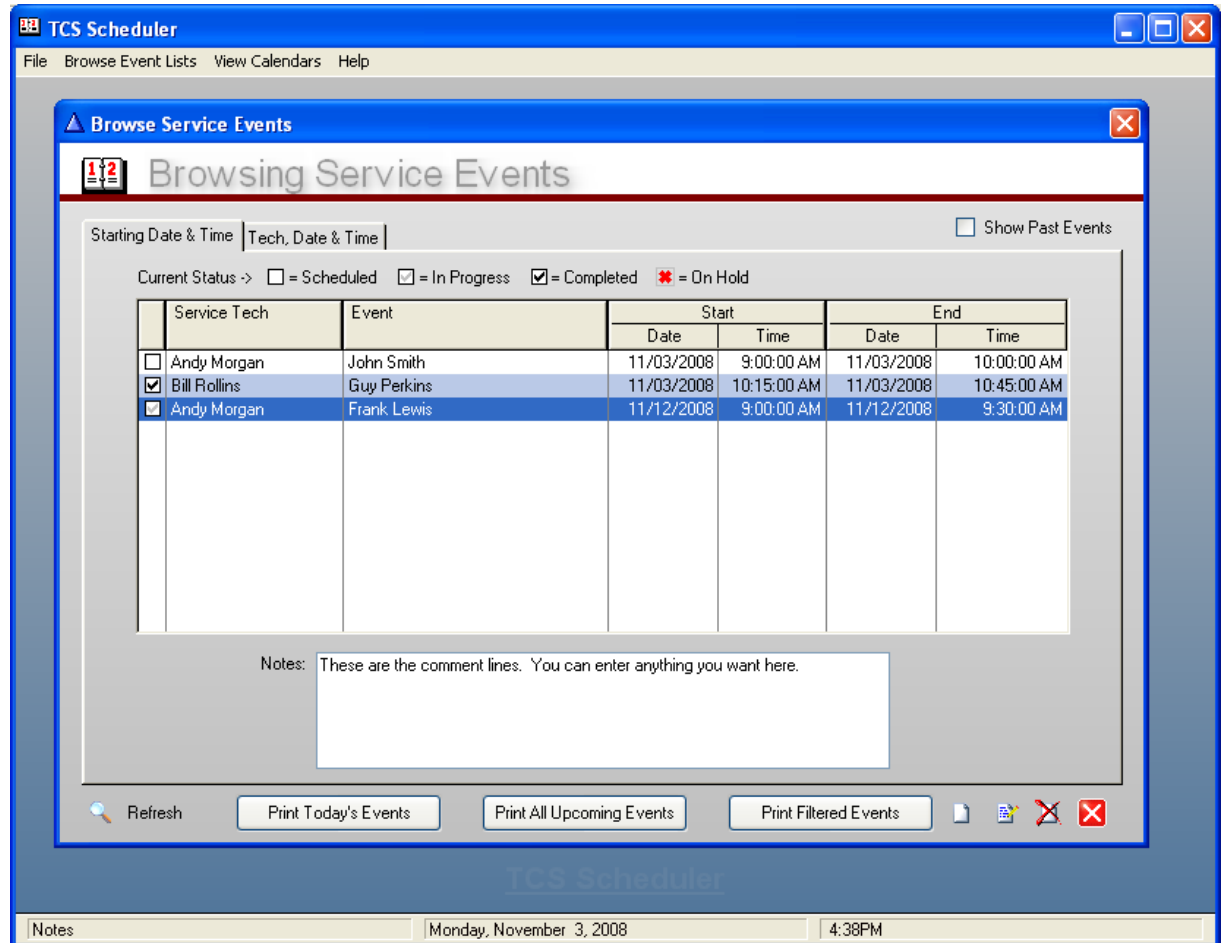
This is where you can enter "Event Types" and the coloration given to each one. A few default event types are included. You may enter as many Event Types as you like. Suggestions would be Work order, Prep & Rig, Warranty, Hull Repair, Engine Repair, Winterization, Pickup, Delivery, Boat Show, Prospect Appointment, etc...

When you enter a new Event Type, you designate which Calendar (Sales, Service, MarineTrack) the event applies, and in what color should the event be displayed.

3 Browse Event Lists

The TCS Scheduler has two different formats for browsing your scheduled events; the

[Calendar View](#), and the Browse List View below. Each event will display the Service Tech or Salespersons name, the Customers Name or Event Description, Start Date & Time, and End Date & Time. Icons at the left will be displayed indicating current status of each event.

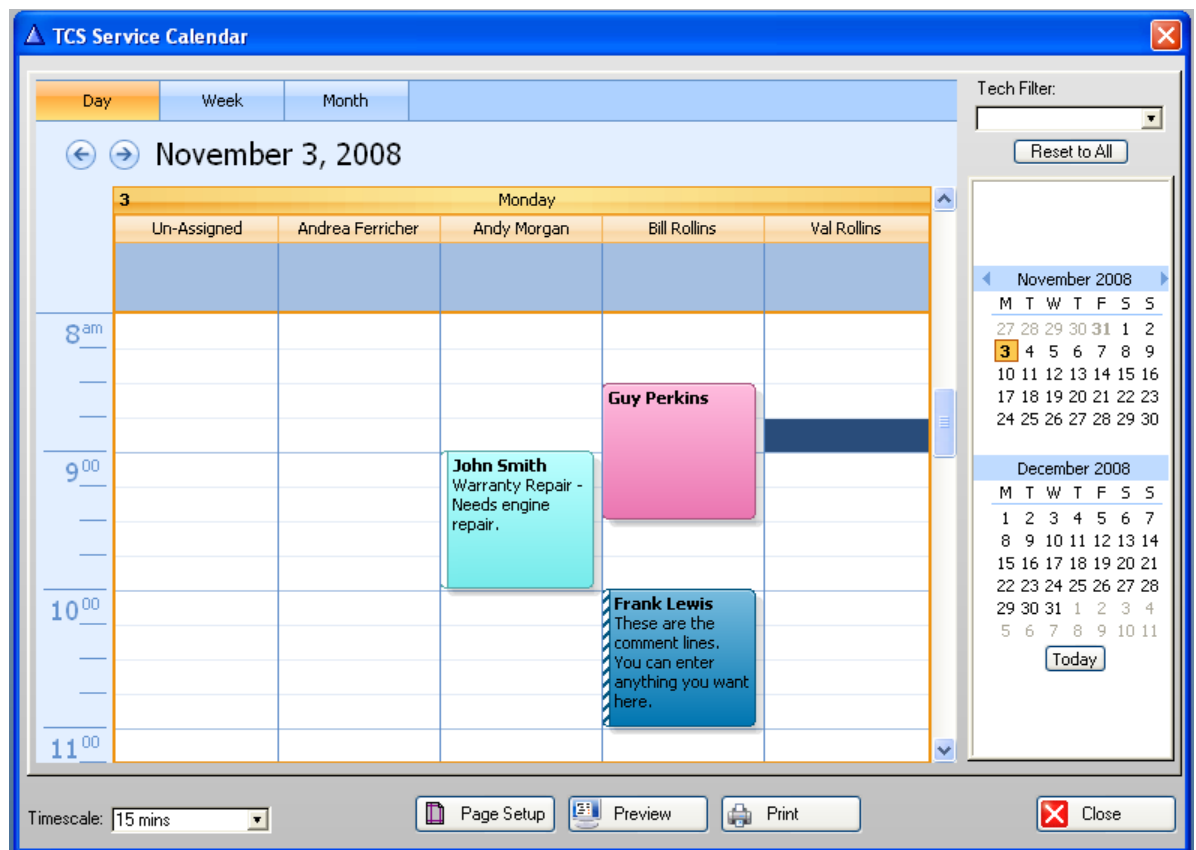


You can Insert, Change or Delete events from this screen. However, the normal usage would be to use the [Calendar View](#) for day to day use.

This screen however gives you more reporting options. See [Printing Reports](#) or [Printing Graphical Calendars](#), for information regarding reports.

4 View Calendars

The TCS Scheduler has two different formats for browsing your scheduled events; the [Browse List View](#), and the Calendar View below. Each event will be color coded and displayed based upon the event type that was selected when the event was added. The Customers Name or Event Description will be displayed in bold, along with the event notes. The coloration will also be coded on the left side of each event indicating the current status.



Status Keys: An event that has a white left border has been scheduled, an event with a checkered left border is in process, a solid event has been completed, while a purple border indicates an event is on hold.

Mouse Options: You can right-click an event and Cut/Paste, Copy/Paste, Delete, View or Insert. Double-clicking an event will open the update screen so you can view it or make any required changes. You can also drag-and-drop an event from one person to another, one time to another, or even from one date to another.

Tech or Salesperson Filter: You can limit the calendar to display a single person by selecting a name from the filter list drop down box. Doing so will allow for better display of one person events in the week or month view.

Misc Features: Events that do not have a time set, will be displayed at the very top of the calendar. If a person is away, the event will display "Away" and the TCS Scheduler will prevent you from inserting or dragging another event into that person's column. You also cannot move an event to a date that has already past.

There are several methods to viewing the calendar. Day View will show you today's scheduled events only. Week View will display the whole week (Work Week or Whole Week), Month View will display the entire month.

You can click on a date in the small calendar on the right, and the main calendar will jump to that date. You may also select a range of dates there as well. To select a different month, you can click on the current month's name.

5 Calendar Update Functions

The scheduler uses the typical update form for inserting or editing events.

Service Tech or Salesperson: Select from the available Techs or Salespeople. This data come directly from the Parts & Service, Boat Sales (F & I), or MarineTrack.

Start Date, End Date, Start Time, End Time: These can all be set manually or on the calendar by dragging and positioning. End Date is ONLY valid for an Away Event (Person is scheduled to be Away.)

Away Flag: Checking this box indicates that the person is not available. This will stop any events from being scheduled for this person. The "Away" event will be displayed at the top of the column, just below the name.

No Assigned Time: This will indicate an event that is scheduled for a particular date but without a specific time. This event will also display at the top of the column.

Current Status: Checking any of these options will display the status using a left side border on the viewable event. An event that has been Scheduled will display a white left border, an event that is In Process will have a checkered left border, a completed event has no border, while a purple border indicates an event is on hold.

Description/Name: Usually this would be the customers name. This can also be any other description for events that are not customer specific.

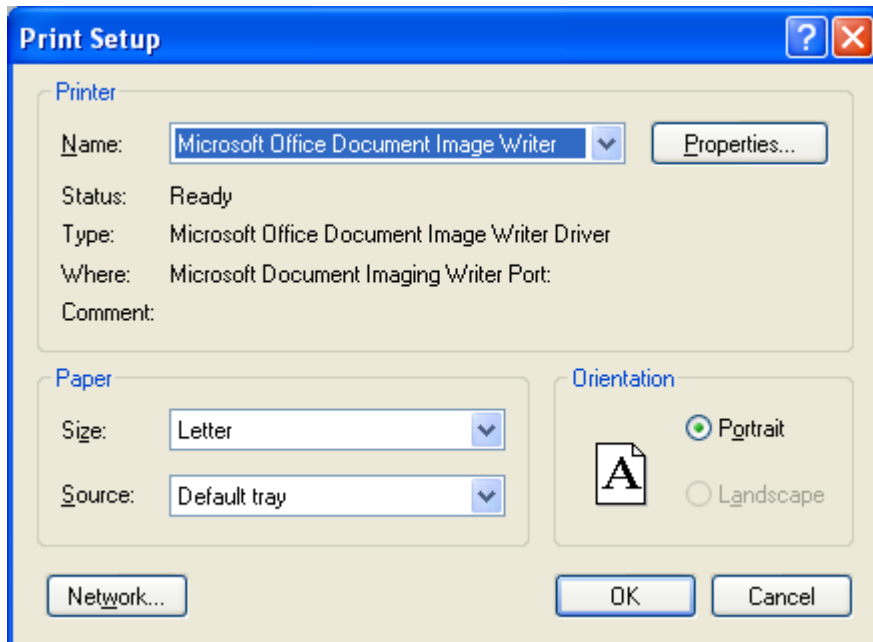
Event Type: Select one of the available Event Types. These are setup in the [System Configuration](#).

Work Order Number and Job Number: These are specific to using the Service Calendar with Parts & Service. They are used to link the Scheduler and the Work Order in Parts & Service. These are normally set when the Scheduler is called from with Parts & Service.

Comments/Notes: You may enter any text here that you like. You may click the button to bring over the Job Description form Parts & Service if you are entering a Service Event. This information is here only to help determine scheduling and does NOT replace or exchange the data with Parts & Service.

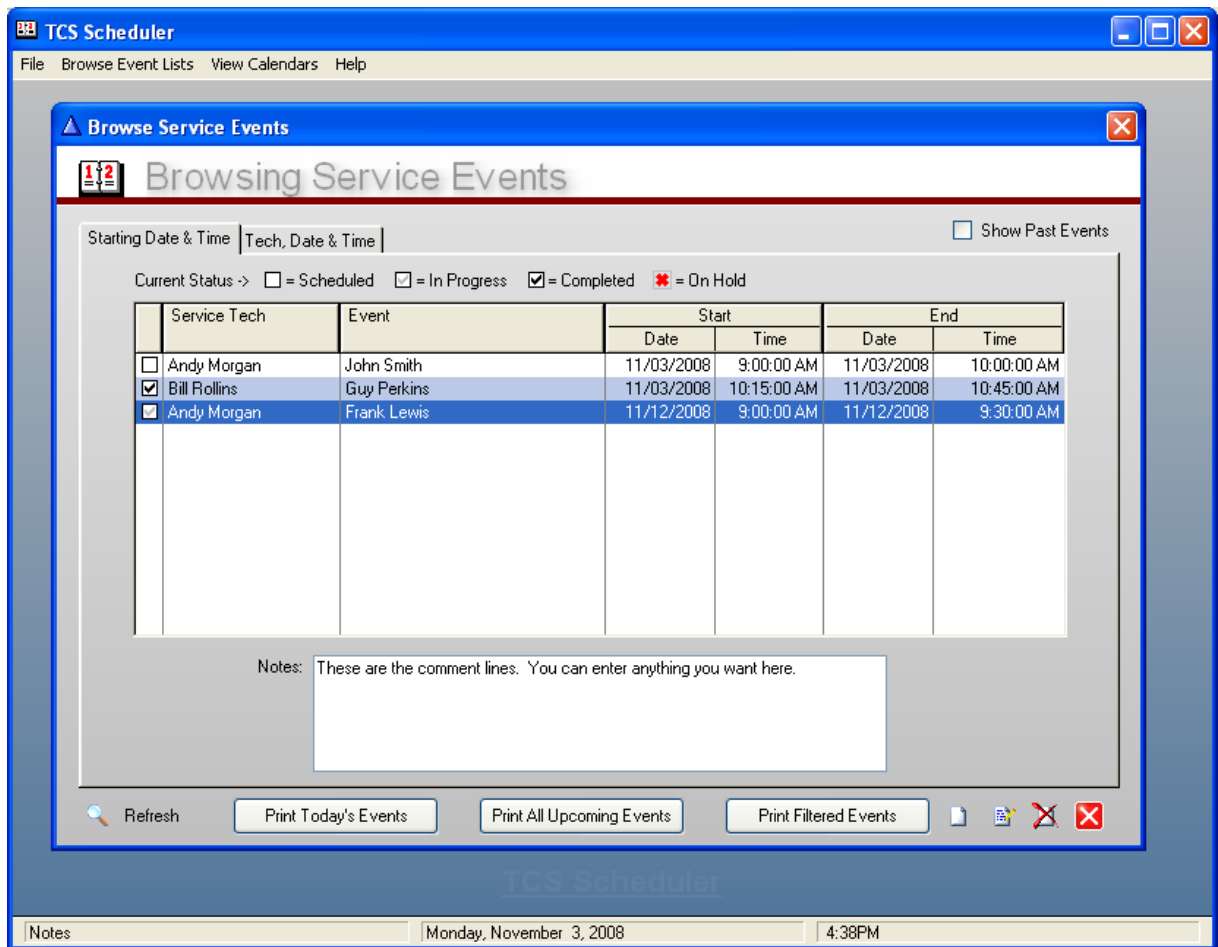
6 Printer Setup

Your typical default printer settings. The TCS Scheduler uses the "Default" printer at the time the Scheduler starts. You may make changes if needed here.



7 Printing Reports

When browsing Events in the List View, you have several options for reporting.



Print Today's Events: This will print a standard report of all events scheduled for the current date.

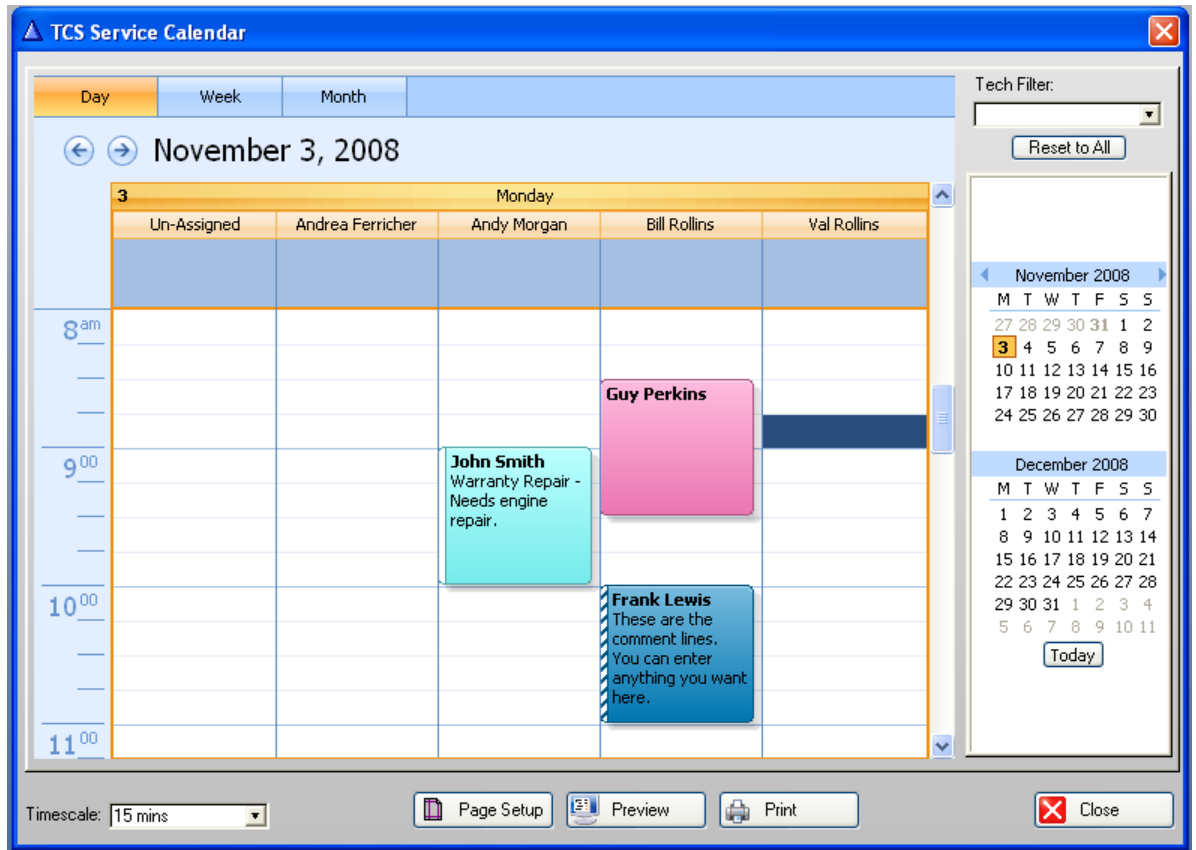
Print All Upcoming Events: This will print a standard report of all future events. This report can be very large.

Print Filtered Events: This allows you to print standard report filtered by Tech or Salesperson and date range.

See [Graphical Reports](#) for other options.

8 Printing Graphical Calendars

You can print graphical calendars from the TCS Scheduler. To do so, view the appropriate calendar.



On the window are three buttons:

- Page Setup:** Allows you to setup the way the graphical calendar is printed.
- Preview:** Displays what the printed version will look like without actually printing it.
- Print:** Prints the calendar to your selected printer.

9 CallingFromPartsAndService

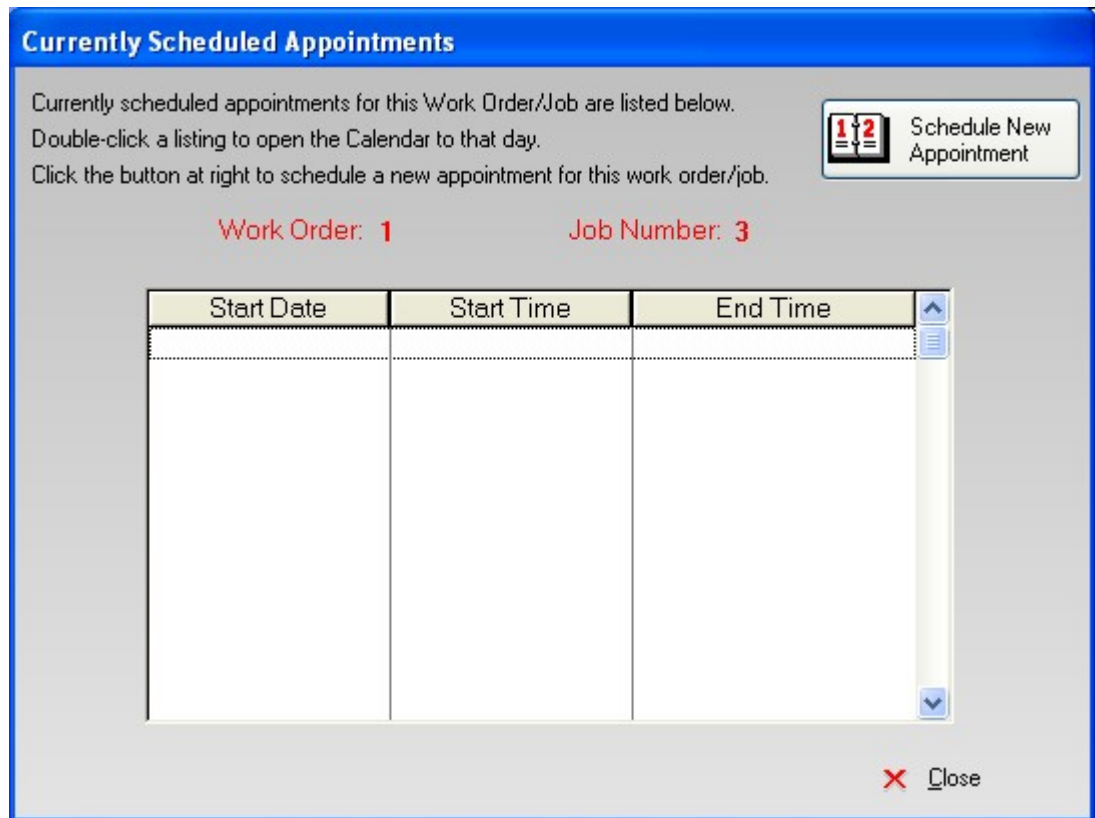
The TCS Scheduler may be called directly from Parts and Service.

There are three ways to start/call the Scheduler from with Parts and Service.

Method 1: On the Main Parts and Service application frame menu - select Scheduler. This will open the Parts and Service Scheduler to today's date. No information is passed between the applications.

Method 2: While browsing Active Work Orders - click the button labeled Scheduler at the bottom of the screen. This will assume the highlighted work order and job number 1. To schedule a different job, use the next method below.

Method 3: From within an individual Active Work order: Go to the problems Tab. Notice there is a button labeled "Scheduler". Select a specific job and then click this button. The following window will be displayed:



This window will display any events/appointments that are scheduled for the specific work/job number you previously highlighted. You can double-click a listed event and TCS Scheduler will open to the date of that event.

To schedule a new event, click the button labeled "Schedule New Appointment". This will open the TCS Scheduler to today's date. You can then select a Service Tech, Date and Time Start by double-clicking the appropriate column and row. This will automatically send over the Customer Name, Work Order Number, Job Number and Job Notes.

Note: You can also change to any other date and double-click, or click the insert button, or right-click and select Insert.

When you press save and exit or minimize the Scheduler - the above window is updated and will displayed the scheduled appointment.

10 CallingFromBoatSales

The TCS Scheduler may be called directly from Boats Sales - F & I. There are 2 ways to start/call the Scheduler from within Boats Sales - F & I.

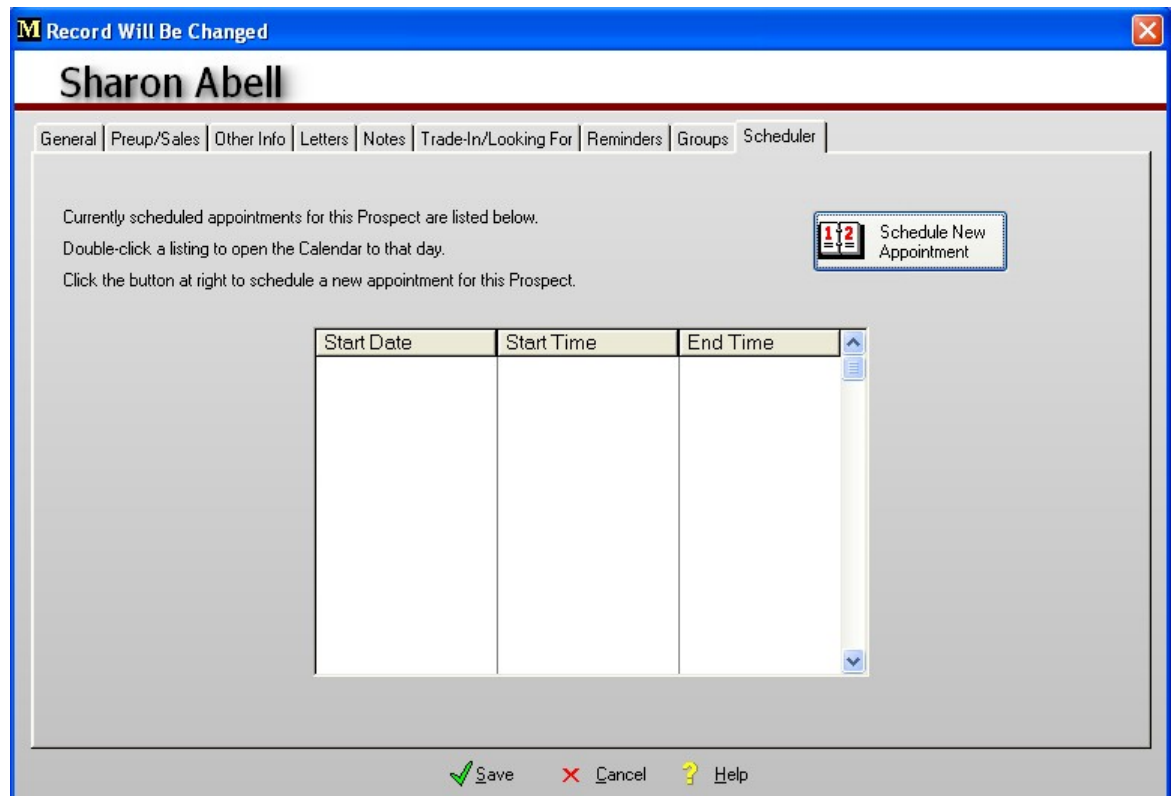
Method 1: On the Main Boats Sales - F & I application frame menu - select Scheduler. This will open the Boats Sales - F & I Scheduler to today's date. No information is passed between the applications.

Method 2: From within an Active Deal, click the button labeled "Scheduler" near the delivery date field on the general Tab. This will open the TCS Scheduler to today's date. You can then select a Salesperson, Date and Time Start by double-clicking the appropriate column and row. This will automatically send over the Customer Name.

Note: You can also change to any other date and double-click, or click the insert button, or right-click and select Insert.

11 CallingFromMarineTrack

From within MarineTrack, the TCS Scheduler is called while you are editing the customer details from the Browse Names screen. A new TAB has been added scheduler.



This window will display any events/appointments that are scheduled for the specific customer/prospect. You can double-click a listed event and TCS Scheduler will open to the date of that event.

To schedule a new event, click the button labeled "Schedule New Appointment". This will open the TCS Scheduler to today's date. You can then select a Service Tech, Date and Time Start by double-clicking the appropriate column and row. This will automatically send over the Prospect/Customer Name.

Note: You can also change to any other date and double-click, or click the insert button, or right-click and select Insert.

When you press save and exit or minimize the Scheduler - the above window is updated and will display the scheduled appointment.

12 System Information

From the Main Application frame, Go to Help --> System Information:

This screen will display various information regarding the application and your computer. This information is helpful if you need support.

13 Updates & Support

The TCS Scheduler is updated at the same time you update Parts & Service or F & I. To check for updates, go to <http://www.tcsoft.com/updates/update.htm>



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