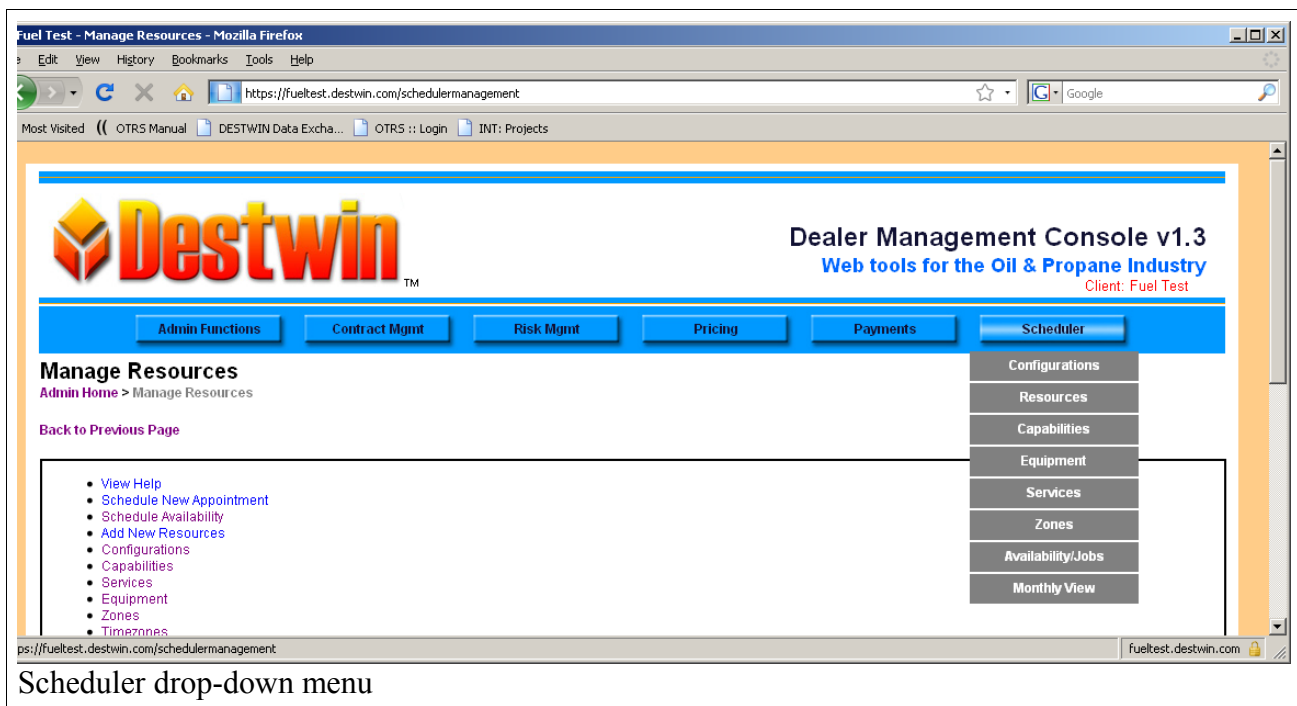


Destwin Quick Reference
Console Version 1.3
Scheduler
26-DEC-09

Section 1 – System Setup

Before using the Scheduler, system administrators must perform system setup.



Configurations – Different configuration options are set and controlled from the Configurations mnu.

Resources - Resources are the people / personnel within the organization who have capabilities and perform services or resources can be the physical assets in an organization that may be used and / or required to perform certain services, e.g. a truck.

Capabilities - Capabilities are the skills possessed by personnel. Capabilities are assigned to resources and required to complete Services. Given a specific capability or set of capabilities, personnel then can be assigned as being able to perform services. For example a capability might be the ability to drive a truck.

Equipment - Equipment are the items that are serviced by the resources of your organization, for example oil burner or hot water heater.

Services - Services are the functions personnel (Resources) perform for customers.

Zones – Zones provide a means to group geographical areas so that resources may be assigned to those areas for specific blocks of time.

Configurations

Fuel Test - Manage Configurations - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/schedulermanagement?type=configurations

Most Visited (OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

- View Help
- Schedule New Appointment
- Schedule Availability
- Add New Configurations
- Resources
- Capabilities
- Services
- Equipment
- Zones
- Timezones

#	name	value	description	
1	Allow Multiple Uses	1	If a resource can be used more than once in a timeslot, enter 1 (or 0 to disable)	Delete Clone
2	Any Zone	Any Zone	the name of the special "any zone"	Delete Clone
3	Block Length	120	Amount of time in a block. If timeslot length is 60, and block length is 120, that means a resource must have 2 back-to-back timeslots in order to fulfill a block	Delete Clone
4	Choose Resource	0	set to 1 to allow person scheduling to choose the resource (and therefore no dynamic switching of assignments), 0 to not allow it.	Delete Clone
5	Email Address	support@destwin.com	enter an email address here if you want to send an email to a user when they schedule an appointment (will be the From email), will also send an email to this address	Delete Clone
6	End Hour	17	the hour to end scheduling at, for example, 17 is 5pm, so the last appointment would have to end by then.	Delete Clone
7	Floating Zone	Floating Zone	the name of the special "floating zone"	Delete Clone
8	Manual Mode Scheduling	1	use 1 to allow manual mode of scheduling in admin screens	Delete Clone
9	Minimum Days From Last Tuneup	270	minimum number of days from the last tuneup that a customer must wait before scheduling another one	Delete Clone
10	Minimum Days in Advance	7	minimum number of days in advance that an appointment must be made. For example, if today was October 1, the the Minimum Days in Advance was set to 7, you couldn't make an appointment before October 8.	Delete Clone
11	Multiple Services	0	allows scheduling of multiple services at the same time (for multiple services per appointment)	Delete Clone
12	Search For Dates Before Slots	1	Customer enters all information before the dates are shown	Delete Clone
13	Show End Time To User	1	set to 1 so that users will see 8:00am - 10:00am on the scheduling screen instead of just 8:00am	Delete Clone
14	Start Hour	9	the earliest hour to start scheduling for	Delete Clone
15	Time Slot	30	DO NOT CHANGE WHILE LIVE DATA EXISTS. Minimum length of time to use when scheduling, between 15 and 60 minutes. Recommend a number like 15, 20, 30, or 60.	Delete Clone
16	Use Multiple Resources If Needed	1		Delete Clone
17	Use Slots As Blocks	0	set to 1 so that a resource's availability cannot be broken up. for example, a resource available from 8am-12pm where timeslot is 120 minutes, and Use Slots as Blocks is 1, means that appointments can be put in only at 8 and 10, not allowing one at 9 (which would limit appointments)	Delete Clone
18	Use Weekly Availability	0	Allows admins to quickly set 8 hour blocks of availability for resources, operating one week at a time	Delete Clone
19	Use Zone Associations	0	to determine if we are to use zone associations (for allowing resources to work in nearby zones, when resources in a particular zone are all busy)	Delete Clone
20	Use Zone Divisions	0	allow zones to be split into divisions, mainly for conversion of data if only the division is supplied, we can then convert to the zone	Delete Clone

Displaying 1 - 20 of 20

Done fueltest.destwin.com

Typical Configurations Screen

Administrators should review the configuration settings to confirm these are set appropriately for your business. To change a configuration, click on the [name](#) of the configuration. This will link to a screen where you can edit the Name, Value, or Description of that configuration.

Example: Change the Start Hour for the start time for scheduling appointments.

In the system screen above, the start hour is 9. This means that appointments may be scheduled starting at 9AM. To change this to 8, click on [Start Hour](#). This will produce the following screen:

Change the Value field from 9 to 8 and click on [Accept and Return to Previous Page](#).

We recommend you NOT change the Name field.

If you wish to add to the Description field for your own purposes you may do so but we recommend you not delete or remove the original text.

Changes made to Configurations take place and go into effect immediately.

Fuel Test - Update Configurations - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/schei

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Admin Functions Contract Mgmt Risk Mgmt

Update Configurations

Admin Home > Manage Configurations > Update Configurations

[Back to Previous Page](#)

[View Help](#)

Fill out all the fields and click 'Update' button to update record.

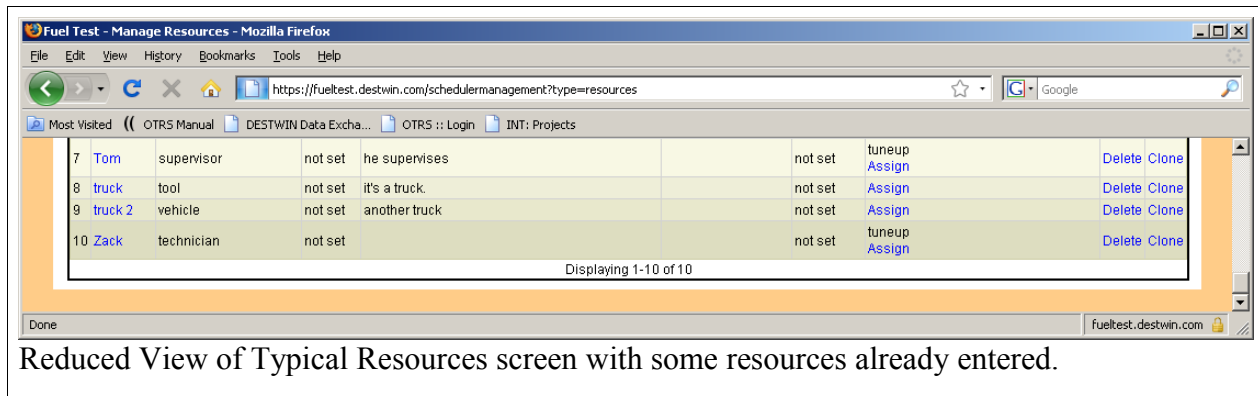
Name	Start Hour
Value	9
Description	the earliest hour to start scheduling for

[Submit and Update This Page](#)
[Accept and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Done fueltest.destwin.com

Example – Edit Start Hour

Resources



Reduced View of Typical Resources screen with some resources already entered.

Resources - Resources are the people / personnel within the organization who have capabilities and perform services or resources can be the physical assets in an organization that may be used and / or required to perform certain services, e.g. a truck.

Personnel can be set up using specific names of the people or by using generic terms such as Technician 1, Technician 2, Master Technician 1, etc.

Resources – Add a Resource.

To add a New Resource, click on the [Add New Resource](#) link.

Enter a Name for the Resource, e.g.:

- Bob Smith - if entering a personnel resource and organizing personnel by using their specific names,
- Tech 1 – if entering a personnel resource and organizing personnel by job classification,
- Truck 1 – if entering an asset resource.

Enter a Type for the Resource. The Type field provides a field for classifying the resource. For example you may have Technicians and Master Technicians and you can use the Type field to distinguish these two different types of personnel classifications.

Enter a Description. The Description field can be used to provide additional details

Destwin™

Admin Functions Contract Mgmt Risk Mgmt

Create Resources

Admin Home > Manage Resources > Create Resources

[Back to Previous Page](#)

[View Help](#)

Fill out all the fields and click 'Create' button to create record.

Name

Type

Description

Comments

Person: not set

[Submit and Update This Page](#)
[Accept and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Add New Resource Screen

about this particular resource.

Enter Comments. The Comments field is a second text field that can be used in addition to the Description field to provide a second set of detail about this particular resource.

Person – The person option provides a link to another database which is not active at this time.

Once the fields in the Create Resource screen have been populated, click on [Accept and Return to Previous Page](#).

Resources – Edit a Resource.

You may edit a resource by clicking on the the resource name in the Manage Resources screen. This will bring you to an Update Resources screen. The same fields as shown in the Create Resources screen are available in the Update Resources screen.

Resources – Assign Capabilities.

To assign capabilities to a Resource, click on the [Assign](#) link for that resource.

Fuel Test - Assign Capabilities to Resources - George - Mozilla Firefox

https://fueltest.destwin.com/schedulerassign

Most Visited ((OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin **Dealer Management Console v1.3**
Web tools for the Oil & Propane Industry
Client: Fuel Test

[Admin Functions](#) [Contract Mgmt](#) [Risk Mgmt](#) [Pricing](#) [Payments](#) [Scheduler](#)

Assign Capabilities to Resources - George
[Admin Home](#) > [Manage Resources](#) > Assign Capabilities to Resources - George

[Back to Previous Page](#)

[View Help](#)

Status: Search SQL:

Search for Capabilities to assign:

☐ Show All (remove search parameters)

☐ ID

☒ Name

Assigned Items

#	ID	Name	Description	Comments	Resources
1	1	tuneup	ability to perform a tuneup		<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert) <input type="checkbox"/>

Unassigned Items

#	ID	Name	Description	Comments	Resources
1	2	drive a truck	ability to drive a big vehicle		<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert) <input type="checkbox"/>

ne fueltest.destwin.com

Typical Assign Resource Screen

Capabilities can be assigned or un-assigned to the selected resource from within this screen. To remove an assigned capability, click in the box for the desired capability and click on the Remove Capabilities box.

Tech Note - you must have defined Capabilities in order to be able to assign capabilities to a resource.

To add an un-assigned capability, click on the box for the desired capability and then click on the Assign Capabilities box.

Multiple resources may be assigned or un-assigned by using the:

- check all
 - uncheck all
 - invert
- options to select or de-select all available capabilities.

Tech Tip – to exit the Assign Capabilities to Resources screen, use the horizontal menu bar.

Capabilities

Fuel Test - Manage Capabilities - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/schedulermanagement?type=capabilities

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Manage Capabilities
Admin Home > Manage Capabilities

[Back to Previous Page](#)

- [View Help](#)
- [Schedule New Appointment](#)
- [Schedule Availability](#)
- [Add New Capabilities](#)
- [Configurations](#)
- [Resources](#)
- [Services](#)
- [Equipment](#)
- [Zones](#)
- [Timezones](#)

#	name	description	comments	Resources/Capabilities Relations		
1	drive a truck	ability to drive a big vehicle		Frank Bob Phil Assign	Delete	Clone
2	tuneup	ability to perform a tuneup		Joe Steve Frank George Tom Bob Zack Phil Assign	Delete	Clone

Displaying 1-2 of 2

Done fueltest.destwin.com

Typical Capabilities Screen

Capabilities - Capabilities are the skills possessed by personnel. Capabilities are assigned to resources and required to complete Services. Given a specific capability or set of capabilities, personnel then can be assigned as being able to perform services. For example a capability might be the ability to drive a truck.

Capabilities – Add a Capability

To add a New Capability, click on the [Add New Capabilities](#) link.

Enter a Name for the Capability, e.g.: tuneup.

Enter a Description. The Description field can be used to provide additional details about this particular capability.

Enter Comments. The Comments field is a second text field that can be used in addition to the Description field to provide a second set of detail about this particular capability.

Once the fields in the Create Capabilities screen have been populated, click on [Accept and Return to Previous Page](#).

Capabilities – Edit a Capability.

You may edit a capability by clicking on the the capability name in the Manage Capabilities screen. This will bring you to an Update Capabilities screen. The same fields as shown in the Create Capabilities screen are available in the Update Capabilities screen.

Assigning Capabilities to Resources.

Assigning Capabilities to Resources is the same as assigning Resources to Capabilities. See the section above named **Resources – Assign Capabilities**.

Fuel Test - Create Capabilities

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/scl

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Admin Functions Contract Mgmt Risk Mgmt

Create Capabilities

Admin Home > Manage Capabilities > Create Capabilities

[Back to Previous Page](#)

View Help

Fill out all the fields and click 'Create' button to create record.

Name

Description

Comments

[Submit and Update This Page](#)
[Accept and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Done fueltest.destwin.com

Add New Capabilities Screen

Equipment

Equipment are the items that are serviced by the resources of your organization, for example oil burner or hot water heater are types of equipment that you might service. When setting up equipment it may or may not be acceptable to classify different types of equipment together. It depends on whether or not all service to all oil burners (for example) are effectively equal and if the service to two different types of oil burners takes the same amount of time or not. If not, it is necessary to set up as many different oil burners as necessary to be able to assign appropriate levels of service.

Example 1:

Oil Burner Model 111 requires 2 hours to service

Oil Burner Model 222 requires 2 hours to service

If there are no other oil burners serviced by your organization then you could have one equipment for oil burners.

Example 2:

Oil Burner Model 111 requires 2 hours to service

Oil Burner Model 222 requires 4 hours to service

You must set set up a separate Oil Burner in Equipment for each of these.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Manage Equipment

Admin Home > Manage Equipment

[Back to Previous Page](#)

- View Help
- Schedule New Appointment
- Schedule Availability
- Add New Equipment
- Configurations
- Resources
- Capabilities
- Services
- Zones
- Timezones

#	name	description	comments	Services/Equipment Relations	
1	Really Big Furnace	a bigger than normal furnace		Tuneup Assign	Delete Clone
2	Regular Furnace	a regular furnace		Tuneup Assign	Delete Clone

Displaying 1-2 of 2

Done fueltest.destwin.com

Typical Equipment Screen

Equipment – Add Equipment

To add Equipment, click on the [Add New Equipment](#) link.

Enter a Name for the Equipment, e.g.: oil burner.

Enter a Description. The Description field can be used to provide additional details about this particular equipment.

Enter Comments. The Comments field is a second text field that can be used in addition to the Description field to provide a second set of detail about this particular equipment.

Once the fields in the Create Equipment screen have been populated, click on [Accept and Return to Previous Page](#).

Equipment – Edit Equipment.

You may edit equipment by clicking on the the equipment name in the Manage Equipment screen. This will bring you to an Update Equipment screen. The same fields as shown in the Create Equipment screen are available in the Update Equipment screen.

Fuel Test - Create Equipment

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Admin Functions Contract Mgmt Risk Mgmt

Create Equipment

Admin Home > Manage Equipment > Create Equipment

[Back to Previous Page](#)

[View Help](#)

Fill out all the fields and click 'Create' button to create record.

Name

Description

Comments

[Submit and Update This Page](#)
[Accept and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Done fueltest.destwin.com

Add New Equipment Screen

Equipment – Assigning Services

The relationship between Equipment and Services is where you define the time it takes for a service to be completed for a particular piece of equipment. To assign Equipment to a Service, click on the [Assign](#) link for that equipment.

Tech Note - you must have defined Services in order to be able to assign service to equipment.

To assign Equipment to a Service, click on the [Assign](#) link for that Equipment.

The screenshot shows a web browser window titled "Fuel Test - Assign Services to Equipment - Really Big Furnace - Mozilla Firefox". The address bar shows the URL: https://fueltest.destwin.com/schedulerassign?c_id=2&search=8&search_type=name. The browser's Most Visited list includes "OTRS Manual", "DESTWIN Data Excha...", "OTRS :: Login", and "INT: Projects".

The Destwin logo is prominently displayed on the left, and the text "Dealer Management Console v1.3" and "Web tools for the Oil & Propane Industry" are on the right. Below this, a navigation bar contains buttons for "Admin Functions", "Contract Mgmt", "Risk Mgmt", "Pricing", "Payments", and "Scheduler".

The main heading is "Assign Services to Equipment - Really Big Furnace". Below it is a breadcrumb trail: "Admin Home > Manage Equipment > Assign Services to Equipment - Really Big Furnace". A "Back to Previous Page" link is also present.

A "View Help" link is located above the "Status: Search SQL:" section. This section contains a search interface with radio buttons for "Show All (remove search parameters)", "ID", and "Name". The "Name" option is selected, and a text input field is provided. "Search" and "Clear" buttons are at the bottom of the search section.

Below the search section are two tables:

Assigned Items

#	ID	Name	Description	Comments	Time	Equipment
1	1	Tuneup	Standard tuneup	internal stuff here	120	<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert)

A "Remove Services" button is located below the Assigned Items table.

Unassigned Items

#	ID	Name	Description	Comments	Equipment
1	3	Extended Tuneup	Extended tuneup service	Provides extra service beyond a standard tuneup.	<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert)

An "Assign Services" button is located below the Unassigned Items table.

The status bar at the bottom of the browser window shows "Done" and the address "fueltest.destwin.com".

Assign Services to Equipment Screen

Equipment can be assigned or un-assigned to the selected Service from within this screen. To remove an assigned Service, click in the box for the desired Service and click on the Remove Services box.

To add an un-assigned Service, click on the box for the desired Service and then click on the Assign

Services box.

Multiple Services may be assigned or un-assigned by using the:

- check all
- uncheck all
- invert

options to select or de-select all available capabilities.

Tech Tip – to exit the Assign Services to Equipment screen, use the horizontal menu bar.

Setting the Time to Service Equipment

Once a particular service has been assigned to a particular Equipment the time required to perform this service may be set.

Assign Services to Equipment - Really Big Furnace
Admin Home > Manage Equipment > Assign Services to Equipment - Really Big Furnace

[Back to Previous Page](#)

• [View Help](#)

Status: Search SQL:

Search for Services to assign:

☐ Show All (remove search parameters)

☐ ID

☒ Name

#	ID	Name	Description	Comments	Time	Equipment
1	1	Tuneup	Standard tuneup	internal stuff here	120	<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert)

#	ID	Name	Description	Comments	Equipment
1	3	Extended Tuneup	Extended tuneup service	Provides extra service beyond a standard tuneup.	<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert)

Done fueltest.destwin.com

Assign Services to Equipment screen with number field in edit mode

Click on the number field in the Time column to enter edit mode. Enter the time in minutes that it will take to complete the selected service on this piece of equipment and click on Save to save and close the edit box with the new value or Cancel to exit without saving.

Services

Services are the functions personnel (Resources) perform for customers.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Manage Services

Admin Home > Manage Services

[Back to Previous Page](#)

- [View Help](#)
- [Schedule New Appointment](#)
- [Schedule Availability](#)
- [Add New Services](#)
- [Configurations](#)
- [Resources](#)
- [Capabilities](#)
- [Equipment](#)
- [Zones](#)
- [Timezones](#)

#	name	description	comments	is_external	Services/Capabilities Relations	Services/Equipment Relations		
1	Extended Tuneup	Extended tuneup service	Provides extra service beyond a standard tuneup.	0	tuneup Assign	Assign	Delete	Clone
2	Tuneup	Standard tuneup	internal stuff here	0	tuneup Assign	Regular Furnace Really Big Furnace Assign	Delete	Clone

Displaying 1-2 of 2

Done fueltest.destwin.com

Manage Services Screen

Services – Add New Services

To add a Service, click on the [Add New Service](#) link. Enter a Name for the Service, e.g.: standard tuneup.

Enter a Description. The Description field can be used to provide additional details about this particular service.

Enter Comments. The Comments field is second text field that can be used in addition to the Description field to provide a second set of detail about this particular service.

Once the fields in the Create Services screen have been populated, click on [Accept and Return to Previous Page](#).



The screenshot shows a web browser window titled "Fuel Test - Create Services - Mozilla Firefox". The address bar shows the URL "https://fueltest.destwin.com/sched". The browser's Most Visited list includes "OTRS Manual", "DESTWIN Data Excha...", "OTRS :: Login", and "INT: Projects". The Destwin logo is prominently displayed at the top, with navigation buttons for "Admin Functions", "Contract Mgmt", and "Risk Mgmt". Below the logo, the page title is "Create Services". A breadcrumb trail reads "Admin Home > Manage Services > Create Services". A link "Back to Previous Page" is provided. A "View Help" section contains the instruction: "Fill out all the fields and click 'Create' button to create record." The form includes three text input fields labeled "Name", "Description", and "Comments". Below these is a radio button group for "Is_external" with options "Yes" and "No", where "No" is selected. At the bottom, there are three links: "Submit and Update This Page", "Accept and Return to Previous Page", and "Cancel and Return to Previous Page". The status bar at the bottom of the browser shows "Done" and the address "fueltest.destwin.com".

a

Typical Create Services Screen.

Services – Assigning Relations

There are two different relations that may be assigned to services:

1. Personnel capabilities that are required to complete the service,
2. Equipment that requires the service.

Each of these assignments are performed through the Manage Services screen.

Services – Assign Capabilities

To assign a Service to a Capability, click on the [Assign](#) link for that Service.

Fuel Test - Assign Capabilities to Services - Extended Tuneup - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/schedulerassign

Most Visited ((OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Assign Capabilities to Services - Extended Tuneup
Admin Home > Manage Services > Assign Capabilities to Services - Extended Tuneup

[Back to Previous Page](#)

[View Help](#)

Status: Search SQL:

Search for Capabilities to assign:
☐ Show All (remove search parameters)
☐ ID
☒ Name

Assigned Items

#	ID	Name	Description	Comments	Services
1	1	tuneup	ability to perform a tuneup		<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert) <input type="checkbox"/>

Unassigned Items

#	ID	Name	Description	Comments	Services
1	2	drive a truck	ability to drive a big vehicle		<input type="checkbox"/> (check all) <input type="checkbox"/> (uncheck all) <input type="checkbox"/> (invert) <input type="checkbox"/>

Done fueltest.destwin.com

Typical Assign Services Screen

Capabilities can be assigned or un-assigned to the selected Service from within this screen. To remove an assigned Service, click in the box for the desired Service and click on the Remove Capabilities box.

To add an un-assigned Capabilities, click on the box for the desired Capability and then click on the Assign Capabilities box.

Multiple Capabilities may be assigned or un-assigned by using the:

- check all
- uncheck all
- invert

options to select or de-select all available capabilities.

Services – Assign Equipment

The link and function of assigning Services to Equipment is essentially the same as was described previously under **Equipment – Assigning Services**. Please see that section of this document for additional information.

Zones

Zones provide a means to group geographical areas so that resources may be assigned to those areas for specific blocks of time. Zones are usually pre-populated in some manner by Destwin. Contact Destwin for assistance in configuring Zones.

Section 2 – Availability / Jobs

The Availability / Jobs menu within the Scheduler allows the system administrator the ability to identify what Resources are available when and to also schedule appointments for customers. This section of this guide will provide a number of examples to explain the functions within this screen.

Part 1 – Setting Availability

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Schedule Availability

Admin Home > Manage Scheduling > Schedule Availability

Back to Previous Page

View Help

Schedule New Appointment

Date(s): Saturday, December 26, 2009 [remove](#)

Add Date

Date/Week: ☒ Show Single Date(s) ☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources

Show/Assign Zone: Any Zone

Max jobs per slot: 1

Show only Service: All Services

Clicking unscheduled slot: ☒ Assign/Deassign availability in zone ☐ Schedule Appointment

[Update Chart/Settings](#) [Update Scheduled Appointments List \(below chart\)](#) updated

Color Legend

- assigned to current zone
- assigned to different zone
- scheduled in current zone
- scheduled in different zone
- scheduled for highlighted service
- unavailable

[Show Copy Options](#)

Sat, Dec 26, 2009	Copy	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
	From To	00 30	00 30	00 30	00 30	00 30	00 30	00 30	00 30
Bob	<input type="radio"/> <input type="checkbox"/>								
Frank	<input type="radio"/> <input type="checkbox"/>								
George	<input type="radio"/> <input type="checkbox"/>								
Joe	<input type="radio"/> <input type="checkbox"/>								
Phil	<input type="radio"/> <input type="checkbox"/>								
Steve	<input type="radio"/> <input type="checkbox"/>								
Tom	<input type="radio"/> <input type="checkbox"/>								
truck	<input type="radio"/> <input type="checkbox"/>								
truck 2	<input type="radio"/> <input type="checkbox"/>								

Done fueltest.destwin.com

Typical Availability / Jobs Screen before assigning availability

Setting a single Resource Availability for a single day

When this screen is accessed it displays the schedule for the current day. In this case December 26, 2009. In the example above, no resources have been made available for this day. To set resources for this day, you must first select a working zone. For example, select Any Zone from the drop down and click on Update Chart / Settings. Then to make a resource available in a given zone, click on the time block or blocks that you want to make available.

Fuel Test - Schedule Availability - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/scheduleravailability

Most Visited ((OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Schedule Availability

Admin Home > Manage Scheduling > Schedule Availability

[Back to Previous Page](#)

[View Help](#)

Schedule New Appointment

Date(s): Saturday, December 26, 2009 [remove](#)

[Add Date](#)

☒ Show Single Date(s)
☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources

Show/Assign Zone: Any Zone

Max jobs per slot: 1

Show only Service: All Services

Clicking unscheduled slot:
☒ Assign/Deassign availability in zone
☐ Schedule Appointment

[Update Chart/Settings](#) [Update Scheduled Appointments List \(below chart\)](#) [Show Copy Options](#)

set!

Sat, Dec 26, 2009	Copy	From	To	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Bob	<input checked="" type="radio"/>	<input type="checkbox"/>		00	30	00	30	00	30	00	30
Frank	<input type="radio"/>	<input type="checkbox"/>									
George	<input type="radio"/>	<input type="checkbox"/>									
Joe	<input type="radio"/>	<input type="checkbox"/>									
Phil	<input type="radio"/>	<input type="checkbox"/>									
Steve	<input type="radio"/>	<input type="checkbox"/>									
Tom	<input type="radio"/>	<input type="checkbox"/>									
truck	<input type="radio"/>	<input type="checkbox"/>									
truck 2	<input type="radio"/>	<input type="checkbox"/>									

Done

fueltest.destwin.com

Availability Screen after assigning 'Bob' to the selected zone for the selected day.

Copying an assignment from one resource to another

If resources follow similar schedules, i.e. certain multiple resources will be available in the same zones as other resources and at the same times, you can save time in your availability setup by using the copy function. In this example, let's say Bob, Frank, George, and Phil will all be available in Any Zone on this day for the same periods of time. In this case we have already set Bob's schedule so to set Frank, George, and Phil, we can copy Bob.

To do this;

1. click in the From button next to Bob, and the To button next to Frank, George, and Phil in the Copy column,
2. click on the Show Copy Options button,
3. Click on Copy.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Schedule Availability

Admin Home > Manage Scheduling > Schedule Availability

Back to Previous Page

View Help

Schedule New Appointment

Date(s): Saturday, December 26, 2009 [remove](#)

Add Date

Date/Week: ☒ Show Single Date(s) ☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources

Show/Assign Zone: Any Zone

Max jobs per slot: 1

Show only Service: All Services

Clicking unscheduled slot: ☒ Assign/Deassign availability in zone ☐ Schedule Appointment

Update Chart/Settings Update Scheduled Appointments List (below chart) updated

Color Legend

- assigned to current zone
- assigned to different zone
- scheduled in current zone
- scheduled in different zone
- scheduled for highlighted service
- unavailable

Hide Copy Options

Copy Options

Overwrite existing availability? ☒ Yes ☐ No

Copy

Sat, Dec 26, 2009	Copy	From	To	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Bob	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
Frank	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
George	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
Joe	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
Phil	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
Steve	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
Tom	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
truck	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								
truck 2	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>								

Availability Screen after copying 'Bob' to Frank, George, and Phil.

Assigning a Resource to a different zone

Other resources may be locked in to a specific zone. To assign Joe to a Zone other than Any Zone, select the appropriate Zone from the Zone drop-down menu (e.g. 2) The chart will automatically update. Then click in the time boxes when Joe will be available. In the example below we made Joe unavailable by not clicking on boxes after 3:00PM.

Destwin Dealer Management Console v1.3
Web tools for the Oil & Propane Industry
Client: Fuel Test

Schedule Availability

Admin Home > Manage Scheduling > Schedule Availability

Back to Previous Page

View Help

Schedule New Appointment

Date(s): Saturday, December 26, 2009 remove

Add Date

Date/Week: ☐ Show Single Date(s) ☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources

Show/Assign Zone: 2

Max jobs per slot: 1

Show only Service: All Services

Clicking unscheduled slot: ☒ Assign/Deassign availability in zone ☐ Schedule Appointment

Update Chart/Settings Update Scheduled Appointments List (below chart) set!

Color Legend

- assigned to current zone
- assigned to different zone
- scheduled in current zone
- scheduled in different zone
- unavailable

Hide Copy Options

Copy Options

Overwrite existing availability? ☐ Yes ☒ No

Copy

Sat, Dec 26, 2009	Copy	From	To	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Bob	<input type="checkbox"/>	<input type="checkbox"/>									
Frank	<input type="checkbox"/>	<input type="checkbox"/>									
George	<input type="checkbox"/>	<input type="checkbox"/>									
Joe	<input type="checkbox"/>	<input type="checkbox"/>									
Phil	<input type="checkbox"/>	<input type="checkbox"/>									
Steve	<input type="checkbox"/>	<input type="checkbox"/>									
Tom	<input type="checkbox"/>	<input type="checkbox"/>									
truck	<input type="checkbox"/>	<input type="checkbox"/>									
truck 2	<input type="checkbox"/>	<input type="checkbox"/>									

Done fueltest.destwin.com

Availability Screen after assigning Joe to Zone 2, viewing Zone 2.

View a different day

To view a different day,

1. Click on the [Add Date](#) link,
2. Use the calendar pop-up to choose the day you want to add to your display,
3. The display will add that day.

Fuel Test - Schedule Availability - Mozilla Firefox

file Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/scheduleraavailability#

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

[View Help](#)

[Schedule New Appointment](#)

Date(s): Saturday, December 26, 2009 [remove](#)
Monday, January 11, 2010 [remove](#)

[Add Date](#)

☒ Show Single Date(s)
☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources

Show/Assign Zone: Any Zone

Max jobs per slot: 1

Show only Service: All Services

Clicking unscheduled slot:
☒ Assign/Deassign availability in zone
☐ Schedule Appointment

[Update Chart/Settings](#) [Update Scheduled Appointments List \(below chart\)](#) updated

Color Legend

- assigned to current zone
- assigned to different zone
- scheduled in current zone
- scheduled in different zone
- scheduled for highlighted service
- unavailable

Copy Options

Hide Copy Options

Overwrite existing availability? ☐ Yes ☒ No

Copy From Date Copy To

☐ 2009-12-26 ☐

☐ 2010-01-11 ☐

[Copy](#)

Sat, Dec 26, 2009

Copy	From	To	8am	10am	11am	12pm	1pm	2pm	3pm	4pm
Bob										
Frank										
George										
Joe										
Phil										
Steve										
Tom										
truck										
truck 2										
Zack										

Mon, Jan 11, 2010

Copy	From	To	8am	10am	11am	12pm	1pm	2pm	3pm	4pm
Bob										
Frank										
George										
Joe										
Phil										
Steve										
Tom										
truck										
truck 2										
Zack										

Display after adding January 11, 2010 to the display

Note that we have not scheduled any availability yet for January 11 so the display is white (blank).

Copy One Day to Another

With Multiple days displayed, the copy options now provide the opportunity to copy one day to another. To copy one day to another,

1. Within the Copy Options box click on the Copy From circle that is your source day,
2. Click in the Copy To box that is your target day,
3. Click on the Copy button.
4. The display will update.

View Help
Schedule New Appointment

Date(s): Saturday, December 26, 2009 [remove](#)
Monday, January 11, 2010 [remove](#)

Add Date
☒ Show Single Date(s)
☐ Show Entire Week Containing Date(s)

Show only Resource: All Resources
Show/Assign Zone: Any Zone
Max jobs per slot: 1
Show only Service: All Services

Clicking unscheduled slot:
☒ Assign/Deassign availability in zone
☐ Schedule Appointment

[Update Chart/Settings](#) [Update Scheduled Appointments List \(below chart\)](#) updated

Color Legend
assigned to current zone
assigned to different zone
scheduled in current zone
scheduled in different zone
scheduled for highlighted service
unavailable

Hide Copy Options
Copy Options
Overwrite existing availability? ☐ Yes ☒ No
Copy From: 2009-12-26 Copy To: 2010-01-11
[Copy](#)

Sat, Dec 26, 2009		Copy		9am	10am	11am	12pm	1pm	2pm	3pm	4pm		
From	To	00	30	00	30	00	30	00	30	00	30	00	30
Bob	<input type="radio"/>	<input type="checkbox"/>											
Frank	<input type="radio"/>	<input type="checkbox"/>											
George	<input type="radio"/>	<input type="checkbox"/>											
Joe	<input type="radio"/>	<input type="checkbox"/>											
Phil	<input type="radio"/>	<input type="checkbox"/>											
Steve	<input type="radio"/>	<input type="checkbox"/>											
Tom	<input type="radio"/>	<input type="checkbox"/>											
truck	<input type="radio"/>	<input type="checkbox"/>											
truck 2	<input type="radio"/>	<input type="checkbox"/>											
Zack	<input type="radio"/>	<input type="checkbox"/>											

Mon, Jan 11, 2010		Copy		9am	10am	11am	12pm	1pm	2pm	3pm	4pm		
From	To	00	30	00	30	00	30	00	30	00	30	00	30
Bob	<input type="radio"/>	<input type="checkbox"/>											
Frank	<input type="radio"/>	<input type="checkbox"/>											
George	<input type="radio"/>	<input type="checkbox"/>											
Joe	<input type="radio"/>	<input type="checkbox"/>											
Phil	<input type="radio"/>	<input type="checkbox"/>											
Steve	<input type="radio"/>	<input type="checkbox"/>											
Tom	<input type="radio"/>	<input type="checkbox"/>											
truck	<input type="radio"/>	<input type="checkbox"/>											
truck 2	<input type="radio"/>	<input type="checkbox"/>											
Zack	<input type="radio"/>	<input type="checkbox"/>											

Done fueltest.destwin.com

Display after copying the daily schedule for December 26 to January 11.

Note you can copy one source day to multiple target days provided you are displaying multiple target days. So had we elected to display the week of January 11 through January 15, we could have copied December 26 to each day of that week and thus set the schedule to the full week with one copy command.

Part 2 – Scheduling an Appointment

Once you have set your resource availability you can schedule customer appointments. Note that you can only schedule customer appointments for times when resources will be actually available to do the work so you need to keep ahead of and maintain your future availability schedule.

To schedule a customer appointment, click on the [Schedule New Appointment](#) link.

Schedule Availability

[View Help](#)

If you are making an appointment for a customer in the database, you can select a customer account out of the dropdown box or type one in, to preload the schedule form.

Select an individual customer (optional)

Or search by account number: (optional)

Scheduling In Automatic Mode ([switch to Manual Mode](#))

Schedule an Appointment

Zone:

Equipment:

Service:

Preferred Time:

Enter the information for who/where the service is to be performed.
All fields with a red star are required.

*First Name:

*Last Name:

*Email:

*Daytime Phone Number:

Company or Organization:

*Street Address Line 1:

Street Address Line 2:

*City:

*State:

*Postal/Zip Code:

Country:

Send confirmation email to above address? ☐ Yes ☒ No

Send email internally? (to support@destwin.com) ☐ Yes ☒ No

Initial Schedule Availability Screen

Select the customer name or choose their account number from the drop down.

Schedule Availability

[View Help](#)

If you are making an appointment for a customer in the database, you can select a customer account out of the dropdown box or type one in, to preload the schedule form.

Select an individual customer (optional)

Or search by account number: (optional)

Scheduling In Automatic Mode ([switch to Manual Mode](#))

Schedule an Appointment

Zone:

Equipment:

Service:

Preferred Time:

Enter the information for who/where the service is to be performed.
All fields with a red star are required.

*First Name:

*Last Name:

*Email:

*Daytime Phone Number:

Company or Organization:

*Street Address Line 1:

Street Address Line 2:

*City:

*State:

*Postal/Zip Code:

Country:

Send confirmation email to above address? ☐ Yes ☒ No

Send email internally? (to support@destwin.com) ☐ Yes ☒ No

Done fueltest.destwin.com

Choose the Zone, Equipment, Service, and Preferred Time, then click on the Search for Dates button. Any available dates will be displayed based on the availability schedule. If there are no available times you may need to check and possible update your availability schedule.

Fuel Test - Schedule Availability - Mozilla Firefox

https://fueltest.destwin.com/scripts/availability-scheduler.php

Schedule Availability

[View Help](#)

If you are making an appointment for a customer in the database, you can select a customer account out of the dropdown box or type one in, to preload the schedule form.

Select an individual customer: (optional)

Or search by account number: (optional)

Scheduling In Automatic Mode ([switch to Manual Mode](#))

Schedule an Appointment

Zone:

Equipment:

Service:

Preferred Time:

Date: Monday, January 4, 2010
[Select a Date](#)

Enter the information for who/where the service is to be performed.
All fields with a red star are required.

*First Name:

*Last Name:

*Email:

*Daytime Phone Number:

Company or Organization:

*Street Address Line 1:

Street Address Line 2:

*City:

*State:

*Postal/Zip Code:

Country:

Send confirmation email to above address?
☐ Yes
☒ No

Done fueltest.destwin.com

Search results

Assuming there are available resources to perform the task on the date requested, you should see a screen that looks something like this:

Fuel Test - Schedule Availability - Mozilla Firefox

https://fueltest.destwin.com/scripts/availability-scheduler.php

Schedule Availability

[View Help](#)

If you are making an appointment for a customer in the database, you can select a customer account out of the dropdown box or type one in, to preload the schedule form.

Select an individual customer: (optional)

Or search by account number: (optional)

Scheduling In Automatic Mode ([switch to Manual Mode](#))

Schedule an Appointment

Zone:

Equipment:

Service:

Preferred Time:

Date: [Select a Date](#)

We need to schedule a 60 minute block to perform the service requested.
Please choose a time slot.

9:00am to 10:00am
9:30am to 10:30am
10:00am to 11:00am
10:30am to 11:30am
11:00am to 12:00pm
1:30pm to 2:30pm
2:00pm to 3:00pm
2:30pm to 3:30pm
3:00pm to 4:00pm
3:30pm to 4:30pm
4:00pm to 5:00pm

Enter the information for who/where the service is to be performed.

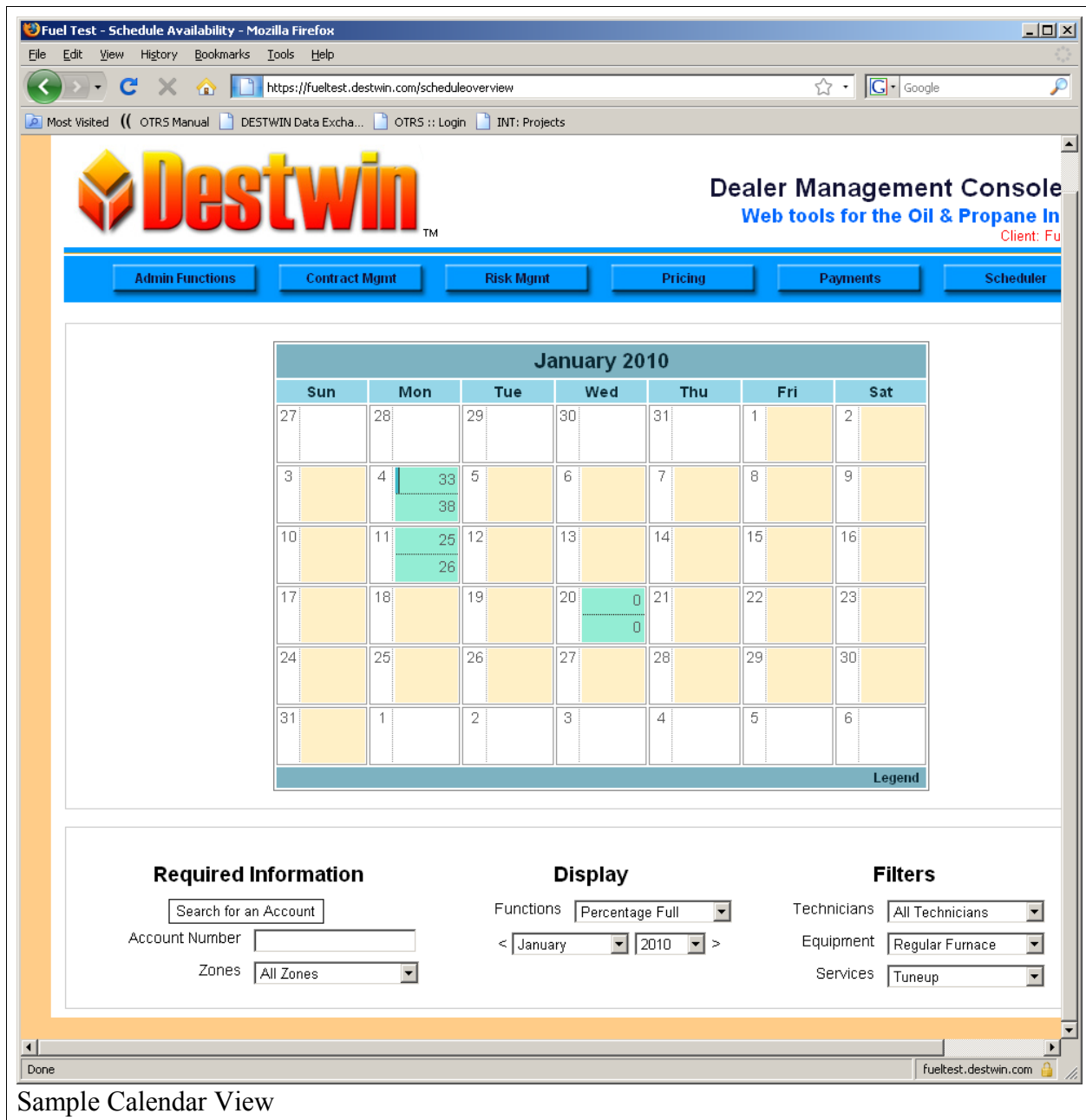
Done fueltest.destwin.com

Sample of time slots available for scheduling an appointment.

At this point you may select you time slot(s) and click on Submit.

Part 3 – the Monthly View

The Monthly View link allows you to view schedule in a monthly calendar view format.



Fuel Test - Schedule Availability - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fueltest.destwin.com/scheduleoverview

Most Visited OTRS Manual DESTWIN Data Excha... OTRS :: Login INT: Projects

Destwin™

Dealer Management Console
Web tools for the Oil & Propane Industry
Client: Fuel Test

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

January 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4 33 38	5	6	7	8	9
10	11 25 26	12	13	14	15	16
17	18	19	20 0 0	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Legend

Required Information

Search for an Account

Account Number

Zones All Zones

Display

Functions Percentage Full

< January 2010 >

Filters

Technicians All Technicians

Equipment Regular Furnace

Services Tuneup

Done

fueltest.destwin.com

Sample Calendar View

At a glance you can see what dates are available and what dates have appointments scheduled. The calendar view can be filtered to focus the schedule on a particular resource, equipment, or service.