



Online Booking Process

For any issues relating to any of the items included please contact the Pinewood Helpdesk at support.portal@pinewood.co.uk

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Online Parameters

Within Workshop > Parameters > Online Parameters you are able to set the parameters for the online bookings process. Initial set up will need to be carried out within the General option from the drop down Parameter Type.

The screenshot shows a web-based configuration interface for 'Online Parameters'. On the left is a sidebar with a 'General' tab selected. The main area is titled 'General Parameters' and contains the following settings:

- Enable Online Booking:
- Verify Existing Customers:
- Confirmation Expiry Days:
- Confirm Booking Url:
- Reject Booking Url:
- User:

At the bottom right of the main area are 'Accept' and 'Cancel' buttons.

The Enable Online Booking Parameter, will need to be ticked to enable the functionality.

Verify Existing Customers – Currently Not In Use.

Confirmation Expiry Days – The day's value set here is the number of days given for the customer to confirm the verification, before the booking request is placed into the exceptions process, for the dealer to contact the customer.

Confirm Booking URL – The website where the customer can confirm or reject the booking request created. The URL added can be your own created webpage and this URL needs to be entered here. There is also the option for a non-branded Pinewood URL, but some settings can be amended within CRM > Parameters > Communications > Portal.

Reject Booking URL - The website where the customer can reject the booking request created. The URL added can be your own created webpage and this URL needs to be entered here. There is also the option for a non-branded Pinewood URL, but some settings can be amended within CRM > Parameters > Communications > Portal.

User – The user added here, is what user name will be held against bookings created online.

Hours Availability

From the Parameter Type drop down select Hours Availability.

Online Parameters

Hours Availability	
Sunday	0.00
Monday	10.00
Tuesday	10.00
Wednesday	10.00
Thursday	10.00
Friday	10.00
Saturday	10.00

Accept Cancel

The hours availability is the number of hours reserved in the diary that will not be automatically used by online bookings, but rather allow the booking request to be made, but reviewed by the dealer before accepting the booking.

This can then be reviewed within CRM > Messages > Aftersales and actioned.

MOT Availability

Select MOT Availability from the Parameter Type List.

Online Parameters	
General	MOT Availability
Hours Availability	Sunday <input type="text" value="0"/>
	Monday <input type="text" value="5"/>
MOT Availability	Tuesday <input type="text" value="5"/>
Job Progress Categories	Wednesday <input type="text" value="5"/>
Lead Times	Thursday <input type="text" value="5"/>
Opening Hours	Friday <input type="text" value="5"/>
	Saturday <input type="text" value="9"/>

The MOT availability is the number of MOT counts reserved in the diary that will not be automatically used by online bookings, but rather allow the booking request to be made, but reviewed by the dealer before accepting the booking.

This can then be reviewed within CRM > Messages > Aftersales and actioned.

Resource Availability

This parameter enables dealers to decide the maximum duration for WUW bookings and the last collection time for collect and deliver bookings.

Online Parameters	
General	Resource Availability
Hours Availability	WUW
MOT Availability	Maximum WUW Duration <input type="text" value="0.00"/> hours
Resource Availability	Collect And Deliver
Job Progress Categories	Last Collection Time <input type="text" value="00"/> <input type="text" value="00"/>
Lead Times	
Opening Hours	
Job Type Rules	

If the Maximum WUW Duration parameter has been set and the duration of the online booking is above the hours set, there will be no availability for WUW online booking.

If the Last Collection Time has been set, there will be no availability for Collect and Deliver bookings for after the last collection time. This parameter will consider the duration of the booking as well. For example, if the last collection time is 15:00 but the workshop closed at 16:00 and the duration of the booking was 2 hours, then the last collection time would be 14:00.

If both parameters are not set or 0, the availability would not be filtered.

Opening Hours

Select the Opening Hours option from the Parameter Type drop down menu.

On this Parameter screen, you can select the Slot Lengths in minutes to be available. This is to time the slots accordingly with available service advisors and customers arriving with their vehicles.

Opening Hours – Set the opening and closing times.

Bookings per slot – This will dictate how many bookings can be accommodated within each slot. The slot length is determined by the above parameter and this will work in conjunction with the bookings per slot to offer the allowed times and slots.

This functionality will also check the load hours against jobs selected for online bookings and if this overlaps with a closing time, a booking slot within that zone will not be offered.

Within the Amendments field, you are able to add any amendments required for a date or date range and amend the bookings for slots accordingly. Select the Add new button, select the date range required and the booking slot adjustment and this will adjust the slot count for the dates selected based on what is entered.

Job Type Rules

The Job Type Rules parameters allow you to establish rules to decide whether a customer can book single or multiple operations within the same job type when creating a booking from dealer or OEM website.

Operation Type	Select Option
MOT	Multiple
Service	Multiple
Annual Check	Multiple
Other	Multiple
Recall	Multiple
Rectification	Multiple
Emission Control	Multiple
Engine Flush	Multiple
Air Conditioning Treatment	Multiple
Brake Fluid	Multiple
Bodyshop	Multiple
Warranty	Multiple
Service Plan Expiry	Multiple
Trailer Service	Multiple
User Defined Date 3	Multiple
Scheduled Interval Check	Multiple
General Follow Up	Multiple
Equipment	Multiple

By default the job type rules will be set as multiple.

If the job type for MOT is set to single, then the customer would only be allowed to select one operation with the Job Type of MOT.

If the Job Type has a rule set to multiple, then the customer will have the ability to select multiple operations of this type.

Operation types will also include the user defined vehicle dates.

The rules set within the Franchise Makes option allow you to distinguish rules between each franchise. The job type rules can be set for each make, which will be the same makes as the price list.

You are able to make changes within the All option and then subsequently make further changes by the make by selecting the desired make from the drop down box.

Operation Type	Select Option
Franchise Makes	All
	Harley Davidson
	Jaguar

This will allow you to tailor different rules for different makes if required.

If there are rules created for a particular make, then this will override the rules that have been set against the All franchise makes option.

Portal

Within CRM > Parameters > Communications > Portal > Specific Tab, you are able to set the confirm, decline and fall back text.

The screenshot shows a web interface for configuring parameters. At the top, there are two tabs: 'General' and 'Specific', with 'Specific' selected. Below the tabs is the title 'Specific Parameters'. The main section is titled 'Text For Landing Page' and contains three rows of configuration options, each with a label on the left and a text input field on the right:

- Page Type:** A dropdown menu currently showing 'Booking Verification'.
- Confirm Text:** A text input field containing 'Booking Confirmation Message'.
- Decline Text:** A text input field containing 'Booking Decline Message'.
- Fallback Text:** A text input field containing 'Booking Fallback Message'.

At the bottom right of the form, there are two buttons: 'Accept' and 'Cancel'.

The text entered is what is displayed to the customer when the verification is confirmed or declined, when the dealer is going to a Pinewood landing page, rather than a dealerships own websites landing page.

Pre – Booking Confirmation Email

Within CRM > Parameters > Communications > Emails > Content > Category drop down, select the Pre – Booking Confirmation.

Name	Amended
Pre-Verification Email	03/07/2018 15:31

Select the Add button to add a new to create a new HTML email.

Header	\$TITLE_HEADERS\$	Customer	\$CUST\$	Vehicle	\$VEH\$
Reg No	\$REG\$	Dealer	\$DEALER\$	Dealer Address	\$DEALER_ADDRESS\$
Dealer Number	\$DEALER_NUMBER\$	Contact Inc Date	\$CONTACT_INC_DATE\$	View In Browser	\$BROWSER_LINK\$
Confirm Booking Url	\$CONFIRM_BOOKING_URL\$	Reject Booking Url	\$REJECT_BOOKING_URL\$	Email Expiry Date	\$MAIL_EXPIRY_DATE\$
Unsubscribe	\$UNSUBSCRIBE\$				

The email created here using HTML is then issued to the customer to confirm or decline the booking they have selected.

If the booking is confirmed by the customer using the link they will then receive a booking confirmation email. This will contain the information regarding the booking and also any added tags within the HTML email for the Booking Confirmation email set within the CRM > Parameters > Communications > Emails. If the Job Progress link has been added, they can view the vehicle progress.

Exceptions

Within Workshop > Booking > Internet Leads you are able to view any exceptions from online bookings and process these accordingly.

Exceptions

Aftersales

Report Criteria

Name

Registration Number

Booking Date From

Exception Date From

Email

Exception Type

Booking Date To

Exception Date To

Customer	Email	Registration	Vehicle	Type
Kia Last	d.aliabyeva@gmail.com	BJ14 ZWM	DS 3 Car	Customer Not Linked To Vehicle
Asd Asd	asd@fgh.dg	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Dfg Ddfg	fdg@fg.f	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Robert Gryzanooo	gryzan@wp.pl	GJ09 YAG	Kia Cee'd SW Sportswagon	Customer Not Linked To Vehicle
Fd Dfg	dfg@fg.fgh	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Fgh Fh	ghf@gh.fh	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Aa Aa	aa@aa.pl	GJ09 YAG	Kia Cee'd SW Sportswagon	Customer Not Linked To Vehicle
Wer Wer	were@dtgh.gf	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Bhh Vvh	Ghh@gg.gg	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Bhh Gg	Vbh@hh.gg	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Dv Vvh	Vvh@gh.ch	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Sdf Sdf	sdf@gf.gffh	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Qwe Qwe	qwe@df.fdfh	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Dg Dhh	Cds@hg.gg	BJ14 ZWM	DS 3 Car	Customer Not Linked To Vehicle
Fd Df	dfg@hg.fhj	OE61 YYX	MERCEDES C-CLASS CARS (exc. Off-Ro...	Customer Not Linked To Vehicle
Sdf Sdf	sdf@fg.fgh	WP11 FFG	PEUGEOT 207 CARS (exc. Off-Road)	Customer Not Linked To Vehicle

The report will display the exceptions produced. If they are in red they have surpassed the booking required time.

You have a number of search fields, and also the Exception types. The types of exception are as below;

Exceptions

Aftersales

Report Criteria

Name

Registration Number

Booking Date From

Exception Date From

Email

Exception Type

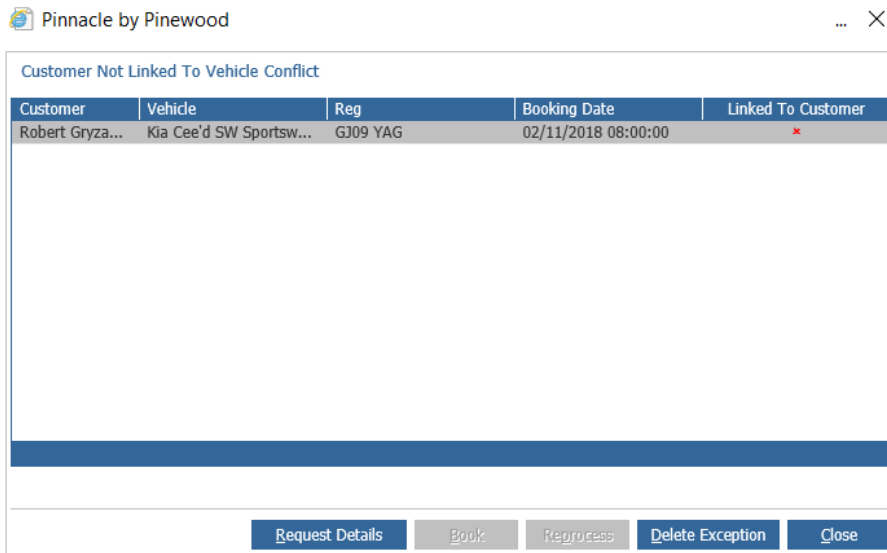
Booking Date To

Exception Date To

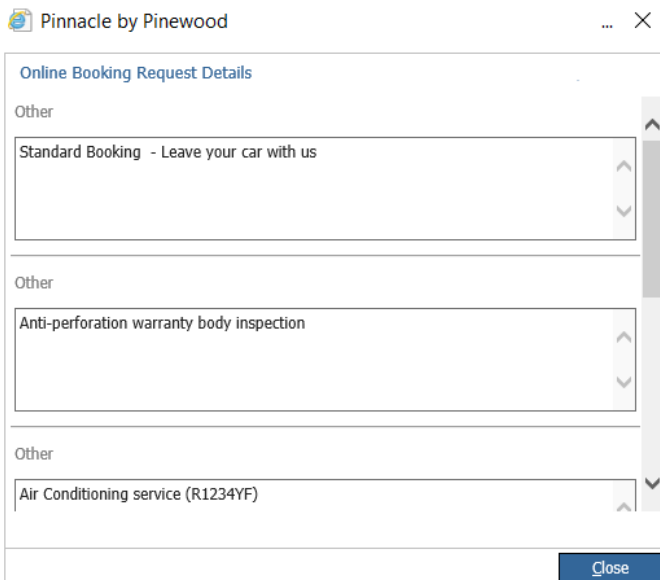
- Customer Not Linked To Vehicle
- Existing Booking
- Multiple Vehicles
- Multiple Customers
- Booking Token Expired

- Customer not linked to vehicle – If the customer is not linked to the vehicle, once this is processed within Pinewood DMS you are able to reprocess the request and book.
- Existing Booking – If there is an existing booking for the customer then this will flag as an exception.
- Multiple Vehicles – If the vehicle exists more than once then the system would be unsure which vehicle record to hold the booking against.
- Multiple Customers - If the customer exists more than once then the system would be unsure which customer record to hold the booking against. It is the email field which makes the customer unique and this is what it will look for against the customer record.
- Booking Token Expired – The verification days' set will dictate when the booking date request then expires.

If you drill into an exception, you are then able to view further information associated to the bookings and are given options to resolve the exception.



If the exception does not need any further action you can use the Delete Exception button to remove. To view the full details surrounding the booking select the Request Details option.



This will display further information regarding the booking request.

If you correct the exception held against the booking request for example the customer and vehicle are not linked. This is corrected by correcting the Owner/Driver/Keeper details. You can then use the Reprocess button and this will send a pre verification email to the customer to confirm the booking or decline.

The Book button will also highlight; you are able to then manually create a booking using this option if required.

This will create the booking using the information from the online booking request.

Aftersales Messages

For exceptions produced by bookings that have exceeded the hours or MOT counts, these will be held within CRM > Messages > Aftersales.

Enquiry Date	Customer	Source	Type	Next Contact	Assigned To
18/02/2019 17:32	Mrs Rachel Ollerton	Internet	Aftersales		

Generate the report for the dates required to view any leads that have been generated.

From the screen you have the option to Process or Reject the booking enquiry.

If you drill in to the enquiry you can view further details.

Pinnacle by Pinewood

Details

Customer: Mrs Rachel Ollerton

Enquiry Date: 18/02/2019

Enquiry Type: Aftersales

Source: [blank]

Notes: Verification Email Sent To

Buttons: Workshop Booking, Customer Record, Close Window

Online Bookings within the Diary

Once a booking has been confirmed this will then be added to the Diary.

Bookings can also be viewed within Workshop > Booking > Approve Bookings.

Pending Approved

Bookings

Search Criteria

Surname Postal Code Reg No
Company VIN Source

Search

Job Date	Customer Name	Company Name	Phone	Post Code	Registration	VIN	Source
01/01/2020		Smiths Bodyshop	01215647586	B27 6AP	RE58 HFA	JHMCN15208C738713	Pinnacle
01/01/2020		B & G Jenkins Ltd	01425558552	NN4 7PA	YE08 KPN	WDD2040082A648605	Pinnacle
01/01/2020	Mr B Buckby		01202544884	BH31 9KL	RE58 HCG	SHHFK27608U027163	Pinnacle

Amend Approve

Here the bookings can be viewed and approved with any additional work that was not added during the Online Booking process such as complimentary Vehicle Health Checks, can then be added here.

There is an option for notes only operations to be passed through, this can be utilised for additions such as any offers or loan cars attached to the booking.

It is recommended, that in using the Online Booking process that the Fixed Price Parameters are set and enabled. These can be set within Workshop > Parameters > Parameters > Fixed Price Tab. Prices stipulated online will be set prices, therefore when these are brought in to Pinewood DMS the value is held as a Fixed Price line as this was the price stipulated when booking online.

The Operations will pull through using the default cash account that has been set within the Parameters.