Manitou

Creating an Open/Close Schedule on a Dealer System Account

Creating an Open/Close Schedule within a Dealer System account makes that schedule available to link to the Dealer's customer accounts. These can be mandated or a default to start the work based on the business standards.

In order to accomplish this you must have a Dealer System Account. Please see the Quick Reference for steps to create the Dealer System Account.

How to create a link-able Open/Close Schedule:

- 1. Load your Dealer System Account.
- 2. Navigate to the Open/Close Schedules form. (OC Schedules)
- 3. Click the Plus sign on the O/C Schedules navigator to add a new schedule.
- 4. Give the schedule an ID.
- 5. Select the type:
 - Ignore = Don't link
 - Default = Allow linked selection and local edits.
 - Override = Allow linked and no local edits
- 6. Add your Open/Close Schedule.
- 7. Click Done.
- 8. Save the record.

Linking a customer to the Dealer's Linked Open/Close schedule:

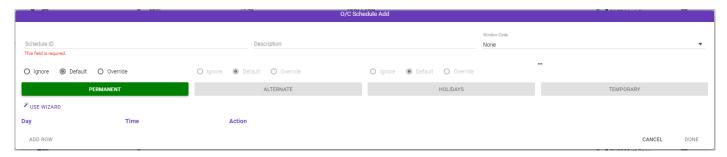
- Open a Customer record tied to the Dealer with the schedule.
- Navigate to the Open/Close Schedules (OC Schedules).
- Add a New schedule.
- Drop down the Linked Schedule list and choose the appropriate Schedule.
- The Linked schedule items are indicated by a truck.
- ٠.,
- Tie the schedule to the appropriate area.
- Save the record.



Additional Notes:

- Some example schedule IDs:
 - OC1
 - Standard
 - MAIN
- Linked Schedule types allowed:
- Permanent
- Alternate
- Holidays
- Each Schedule type may be set individually for its linking type.
- See Page 2 for visual examples.

Dealer System Account Open/Close Schedule Add



Customer account Linked Schedule added

