

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. 
- 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

O/C Schedule Add

Schedule ID

This field is required.

Description

Window Code

None

☐ Ignore ☒ Default ☐ Override

☐ Ignore ☒ Default ☐ Override

☐ Ignore ☒ Default ☐ Override

...

PERMANENT

ALTERNATE

HOLIDAYS

TEMPORARY

USE WIZARD

Day

Time

Action

ADD ROW

CANCEL

DONE

Customer account Linked Schedule added

STANDARD

Description

Standard Schedule

Show OC Schedule For

10/31/2019

Window Code

☒ Linked Schedule

PERMANENT

ALTERNATE

HOLIDAYS

TEMPORARY

DayTimeAction

Overall

Monday - 10/28/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Tuesday - 10/29/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Wednesday - 10/30/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Thursday - 10/31/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Friday - 11/01/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Saturday - 11/02/2019

04:30 May Open

06:00 Must Open

06:01 May Open/Close

23:59 Must Close

Sunday - 11/03/2019

(Nothing Set)