

# Creating an Open/Close Schedule on a Dealer System Account

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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 steps to create the Dealer System Account.

## How to create a linkable 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.

#### **Dealer System Account Open/Close Schedule Add**

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#### **Customer account Linked Schedule added**

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