

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 steps to create the Dealer System Account.

Creating a link-able Open/Close Schedule

The screenshot shows the 'O/C Schedule Add' form. At the top, there are fields for 'Schedule ID' (OCDLR), 'Description' (Dealer Standard Open/Close Schedule), and 'Window Code' (None). Below these are three sets of radio buttons for 'Ignore', 'Default', and 'Override'. The 'PERMANENT' type is selected, and the 'Default' radio button is chosen for each entry. The table below shows the following entries:

Day	Time	Description	Action
SAT	07:00	Must Open	x
SAT	07:01	May Open/Close	x
SAT	17:00	Must Close	x
SUN	05:00	May Open	x
SUN	07:00	Must Open	x
SUN	07:01	May Open/Close	x
SUN	17:00	Must Close	x

At the bottom of the form, there are buttons for 'ADD ROW', 'CANCEL', and 'DONE'.

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

OCDLR 🗑️ ✎

Description Dealer Standard Open/Close Schedule Show OC Schedule For 10/15/2024 ▼

Window Code

PERMANENT
DEFAULT

ALTERNATE
DEFAULT

HOLIDAYS
DEFAULT

TEMPORARY
APPLIES ONLY TO THIS SYSTEM ACCOUNT

Day	Time	Action
Mon	05:00	May Open
Mon	07:00	Must Open
Mon	07:01	May Open/Close
Mon	17:00	Must Close
Tue	05:00	May Open
Tue	07:00	Must Open
Tue	07:01	May Open/Close
Tue	17:00	Must Close

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

O/C Schedule Add

Linked Schedule: OCDLR - Dealer Standard Open/Close Schedule ▼ Schedule ID: OCDLR Description: Dealer Standard Open/Close Schedule Window Code: None ▼

PERMANENT

ALTERNATE

HOLIDAYS

TEMPORARY

🔗 USE WIZARD

Day	Time	Action
ADD ROW		

CANCEL DONE

- 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.

O/C Schedules +

OCDLR - Dealer Standard...

OCDLR

Description: Dealer Standard Open/Close Schedule

Window Code: Show OC Schedule For 10/15/2024

Linked Schedule

PERMANENT

ALTERNATE

HOLIDAYS

TEMPORARY

Day	Time	Action

Overall

Monday - 10/14/2024

- 05:00 May Open
- 07:00 Must Open
- 07:01 May Open/Close
- 17:00 Must Close

Tuesday - 10/15/2024

- 05:00 May Open
- 07:00 Must Open
- 07:01 May Open/Close
- 17:00 Must Close

Wednesday - 10/16/2024

- 05:00 May Open
- 07:00 Must Open
- 07:01 May Open/Close
- 17:00 Must Close

Thursday - 10/17/2024

- 05:00 May Open
- 07:00 Must Open
- 07:01 May Open/Close
- 17:00 Must Close

Friday - 10/18/2024

- 05:00 May Open
- 07:00 Must Open
- 07:01 May Open/Close
- 17:00 Must Close

More Information

- **Example schedule IDs:**
 - OC1
 - Standard
 - MAIN
- **Linked Schedule types allowed:**
 - Permanent
 - Alternate
 - Holidays
 - Each Schedule type may be set individually for its linking type.