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

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**:
   - **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 <u>tied to the Dealer</u> 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.

More Information

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