



## **SETTING UP THE SERVICE CALENDAR**

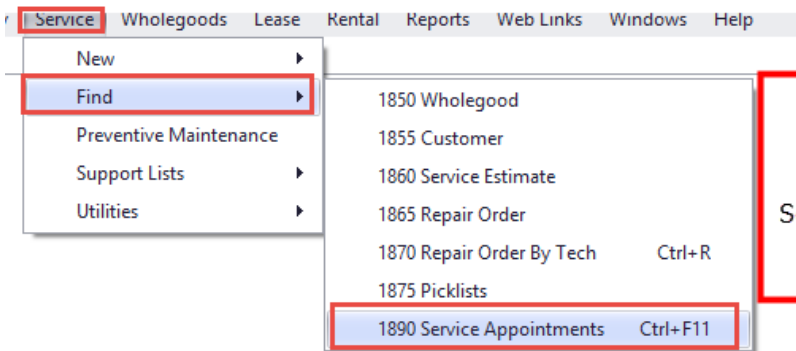
Software Development  
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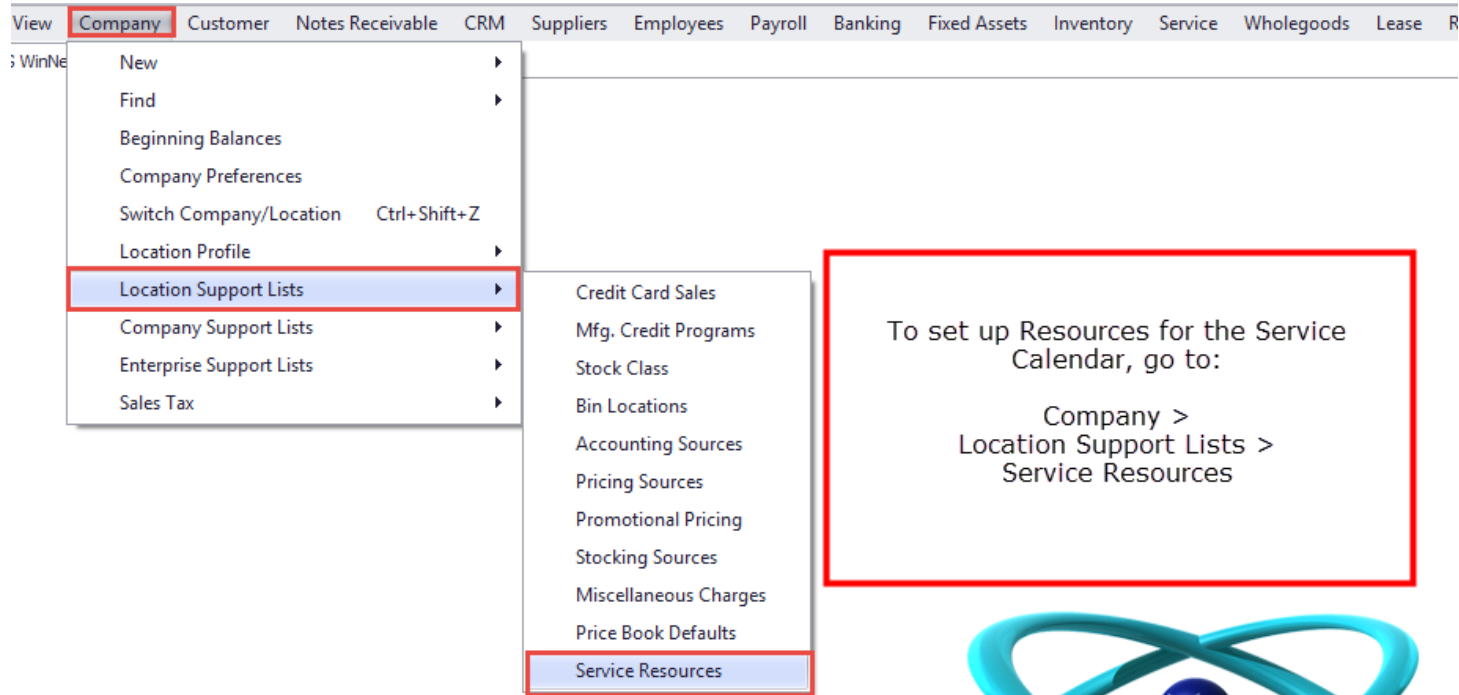
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The purpose of the Service Calendar in RIMSS is to provide a process for assigning Service Issues from Repair Orders and Tasks to Service Technicians and Service Employees today and in the future.

Prior to using the Service Calendar, Service Resources must be set up for the calendar. Service Resources are all tied to Employees. If you have a resource that you want to add to the calendar that is not an employee, you will need to set up an Employee Record for that resource.



The calendar module can be accessed through  
Service>Find>Service Appointments  
or the shortcut Ctrl+F11



To set up Resources for the Service Calendar, go to:  
Company >  
Location Support Lists >  
Service Resources



RIMSS WinNetStar | Telephony | Resources X

Save | Save and Close | **Add Resource** | Print

Drag a column header here to group by that column

Inactive	Resource Name	Current Service Tech
<input type="checkbox"/>	<input type="text" value="r@c"/>	<input type="checkbox"/>

This will bring you to the Resources List.

Click "Add Resource" to begin adding Service Resources to the Calendar.

**Employee Lookup** [Close]

System ID:  Ref ID:  Name:

Default

Drag a column header here to group by that column

Inactive	Company/Location	Employee Name	Employee ID	Job Title	Home Phone Number	Picture 1 Display	Service Tech	Service Writer	Employee ID	System ID
<input type="checkbox"/>	Hepburn Signat...	r@c	r@c	r@c	r@c	No image data	<input type="checkbox"/>	<input type="checkbox"/>	=	=
False	Hepburn Signature/...	Jackson, Moto	12578	handy man			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		65
False	Hepburn Signature/...	Ulett, Mishell	0918				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		65
False	Hepburn Signature/...	GONZALEZ, WILLIAM	0611	Controller/ ...			<input type="checkbox"/>	<input checked="" type="checkbox"/>		65
False	Hepburn Signatur									65
False	Hepburn Signatur									65
False	Hepburn Signatur									65
False	Hepburn Signatur									65
False	Hepburn Signatur									65
False	Hepburn Signature/...	HARVEY, JOE	0124				<input checked="" type="checkbox"/>	<input type="checkbox"/>		65

When you click to add a Service Resource, you will receive the pop-up for the Employee Search. You can use the pre-fetch and post-fetch filters to find the resources you want to add. You will need to click Fetch to populate the list.

Highlight/Select the Employee that you want to add and click "OK" to add them as a resource to the calendar.

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Who

RIMSS WinNetStar | Telephony Resources X

Save Save and Close Add Resource Print

Drag a column header here to group by that column

Inactive	Resource Name	Current Service Tech
<input type="checkbox"/>	RBC	<input type="checkbox"/>
<input type="checkbox"/>	SMITH, ELAINE	<input type="checkbox"/>
<input type="checkbox"/>	LION, DANIEL	<input type="checkbox"/>
<input type="checkbox"/>	MARCOS, BRIAN	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jackson, Moto	<input checked="" type="checkbox"/>

Once you have added all of the Service Resources to the Calendar and clicked "Save", the system will show which ones are marked as Service Technicians at the time they were added and which were not. Any employee can be added to the calendar, even if they are not marked as Service Technicians.

To remove Service Resources from the Calendar, you simply click the inactive box in the list and click "Save" or "Save and Close"

**Once you have added all Service Resources, you are ready to begin using the calendar, you will want to set up your Appointment Subjects. The Subject will help categorize and color code the appointments on the Service Calendar.**

Service Wholegoods Lease Rental Reports Web Links Windows Help

- New
- Find
- Preventive Maintenance
- Support Lists
- Utilities

- Operation Codes
- Rate Codes
- Accounting Codes
- Issue Codes
- Service Types
- Misc. Shop Charges
- PM Schedules
- Re-Nameable Fields
- Deleted Item Reasons
- Appointment Labels

To set up the Service Subjects, go to:

Service >  
Support Lists >  
Appointment Labels

Appointment Label Form

Id	Display Name	Menu Caption	Color
0	Service	Service	ForestGreen
1	Mobile Service	Mobile Service	LightPink
2	Shop Cleanup	Shop Cleanup	Fuchsia
3	Training	Training	Yellow
4	Transport	Transport	Fuchsia
5	PTO	PTO	DeepSkyBlue
6	Come Back	Come Back	Red
7	Lunch/Break	Lunch/Break	LightPink
8	Other Dept	Other Dept	127, 255, 212
9	Other	Other	PaleGreen
10	None	None	DarkGreen

Color selection dropdown menu:

- 127, 255, 212
- PaleGreen
- DarkGreen
- Green
- Lime
- Honeydew
- SeaGreen
- MediumSeaGreen
- SpringGreen
- MintCream
- MediumSpringGreen
- MediumAquamarine
- Aquamarine

You can set up a maximum of 10 Service Subjects.

To change the Display Name and Menu Caption, simply type the descriptions that you want in the boxes.

You can click the drop-down in the color column to choose the color you wish to assign to the Subject.

These descriptions and colors can be edited at any time, but you will need to close and re-open the calendar tab for them to take effect on existing appointments.

Appointment Label Form

Id	Display Name	Menu Caption	Color
0	Service	Service	ForestGreen
1	Mobile Service	Mobile Service	LightPink
2	Shop Cleanup	Shop Cleanup	Fuchsia
3	Training	Training	Yellow
4	Transport	Transport	Fuchsia
5	PTO	PTO	DeepSkyBlue
6	Come Back	Come Back	Red
7	Lunch/Break	Lunch/Break	LightPink
8	Other Dept	Other Dept	127, 255, 212
9	Other	Other	PaleGreen
10	New		

Save Changes dialog box:

Do you wish to save your changes?

Yes No

When finished editing, click the "X" on the top-right corner of the pop-up. Then click "Yes" to save the changes.

**Additional Items to consider in setting up to use the Service Calendar:**

- 1. You must have a Location Default Op Code and Rate Code set up for the Calendar to be able to Create an RO from an Appointment.**
- 2. The Location Default Op Code must have “Default on Repair Orders” checked. These defaults will be used every time an RO is created. If you want a different Op Code than the default, it will need to be updated on the RO after creation.**
- 3. Rate Codes are added in the following priority:**
  - a. Customer Master Rate Code Override**
  - b. Rate assigned to the Default Op Code**
  - c. Location Default Rate Code**

**Once these items are set up, you are ready to begin using the Service Calendar. Please refer to the help document “Using the Service Calendar” for additional information.**