



USING THE SERVICE CALENDAR

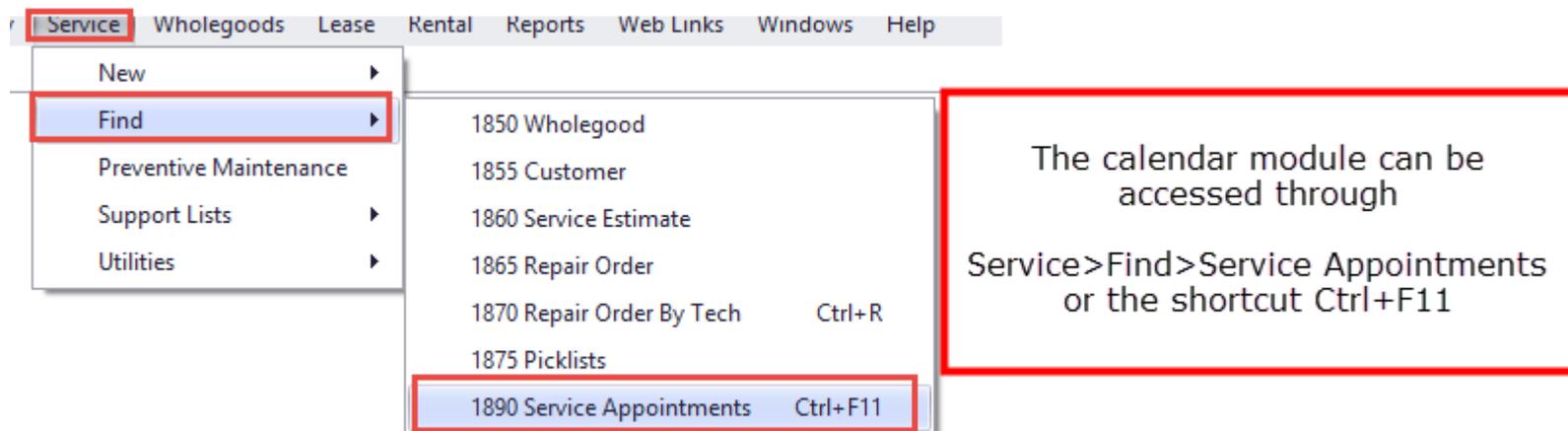
Software Development
RIMSS Business Systems Technology

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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. It is recommended that Appointment labels be set up to help categorize and color code appointments. You will also need the proper defaults set up for Op and Rate codes. You can find more information on how to set up these items in the help document "Setting up the Service Calendar".



File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Whologoods Lease Rental Reports Web Links Windows Help

RIMSS WinNetStar Telephony Service Appointments - San Antonio

Home view

Refresh New Appointment Delete Backward Forward Go to Today Zoom In Zoom Out Day View Timeline View Group by Date Group by Resource

Appointment Navigate Arrange Group By

Date Navigator

April 19, 2019

	SMITH, ELAINE Friday, April 19	LION, DANIEL Friday, April 19	Jackson, Moto Friday, April 19	MARCOS, BRIAN Friday, April 19
7 AM				
8:00				
9:00				
10:00				
11:00				
12 PM				
1:00				
2:00				
3:00				
4:00				
5:00				

1

2

3

The calendar will open with the Resources Populated.
You can add appointments to the calendar through 3 options:

1. Click New Appointment.
2. Right-Click under the Service Resource you want to assign at the time you want and choose "New Appointment".
3. Double-Click on the time under the Service Resource you want to assign the appointment.

New Appointment
Go to Today
Go to Date...
Change View To

Service - Appointment

Save & Close Create New / Goto RO

This appointment occurs in the past.

Subject: **1** Service

Wholegood: Service

Make / Model: Mobile Service

Serial Number: Shop Cleanup

Description: Training

Start time: 4/19/2019 10:00 AM

End time: 4/19/2019 11:00 AM

2 Link to Existing RO

RO #: Service Issue #: RO Date:

Service Issue Desc:

Customer: Cash Customer (61)

Resource: LION, DANIEL

Service Writer:

Service Type:

3

4 **5**

When you click to add the appointment, you will get the Service - Appointment pop-up.

1. The subject can be chosen in the drop-down box. These will automatically color-code and categorize the appointments for you.
2. If your RO is already created, you can click "Link to Existing RO" and the appointment will be auto-populated with the Customer, Wholegood, Make/Model, SN, Service Writer, Service Type, RO# and RO information as shown at the bottom.
3. If you do not have an RO created, you can populate any of the fields that you need and add a Description of the Appointment.
4. Save & Close will save then close the pop-up and populate the appointment on the calendar.
5. Create New/Go To RO will either:
 - A.** Save the appointment and Open the RO that you linked.
 - B.** Create a New RO (if one is not linked) using the Customer, Wholegood, Service Writer, Service Type, and Description (on the Service Issue). A labor line will be created if the resource is a Service Technician using the location default Op Code, Rate Code, and Accounting Code.

Linking to an RO will create all information on the appointment for you except for the Service Subject, Resource, Description (optional), and Start/End Date/Time. **You are linking directly to the specific Service Issue on the RO with each appointment.** The appointment will create a labor line using the Default Op/Rate codes for the Resource if that Resource is a Service Technician. No other information will be written to the RO from the Appointment. The RO information will display on the appointment, but does not change your Appointment Description or Date/Times.

Creating a New RO from the appointment will populate the Customer, Service Writer, Service Type, Wholegood and Description as input on the appointment. If the Service Resource chosen is a Service Tech, they system will create a Labor Line using the Default Op/Rate codes for the Resource. At this point, the Service Issue Description and Appointment Description are separate and can be edited separately.

After an RO and an Appointment are linked, no information will be written to or from the RO and the Appointment with the exception of a Labor Line (if you change the Service Resource to a different Technician). You can change the RO linked to an appointment by clicking on the Link to Existing RO button and choosing a different RO/Service Issue. This will update the Customer, Wholegood, Service Writer, and Service Type on the Appointment. It will not change the Appointment Description if you typed one on the Appointment.

You have the ability to create multiple appointments for each RO tied to individual service issues on multiple dates/times. You can also assign multiple technicians to a single service issue on multiple dates/times.

You can create appointments tied to Service Estimates only if the option to "Allow Time Entry" is checked on the Service Estimate.

You cannot link an appointment with a Service Technician assigned when that Repair Order is open on your workstation. You will need to save and close the RO before creating the linked appointment. You can re-open the RO from the appointment after linking.

Below are examples of Creating an Appointment by Linking to an Existing RO and Creating an RO from an existing appointment.

1. Example of Manually Setting up Appointment then creating RO from Appointment.

The screenshot shows a software window titled "Service - Appointment". The window has a menu bar with "Save & Close" and "Create New / Goto RO". The main area contains several fields:

- Subject:** Service (highlighted)
- Customer:** Carl Albor (1920) (highlighted)
- Wholegood:** tracteur neuf (356) (highlighted)
- Resource:** SMITH, ELAINE (highlighted)
- Make / Model:** AGCO / (highlighted)
- Service Writer:** Dale Teague (highlighted)
- Serial Number:** 1234567 (highlighted)
- Service Type:** BILLABLE CUSTOMER (highlighted)

The **Description:** field contains the text "Bringing in to diagnose sluggish start." (highlighted).

The **Start time:** field is set to 7/22/2019 at 1:00 PM (highlighted).

The **End time:** field is set to 7/22/2019 at 2:00 PM (highlighted).

At the bottom, there is a "Link to Existing RO" button and fields for "RO#", "Service Issue #:", and "RO Date:". A red-bordered text box is overlaid on the bottom right, containing the text: "Example of manually setting up an appointment. I added all of the highlighted items."

New Repair Order

File Save Save and Close Save and New Print Credit Cards Capture Signature Update Line Item Data Show Open Documents Custom Forms

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status F

Document Type Repair Order Doc. # 0 Inv. # 0 CC Auth. # Completion Status Open Project #:
 Initiation Date 7/22/2019 Customer PO # Salesman: Cust. Inv. Status Sub Project #:
 Settlement Date Service Writer Dale Teague War. Inv. Status
 Internal Memo Service Type BILLABLE CU...
 Exp. Start Date 7/22/2019 1:00 PM Exp. Comp. Date 7/22/2019 2:00 PM Extract Date 1/1/0001
 Printed Memo

Customer Name and Address	Wholegood Information	Shipping Information
Name Carl Albor Address 1 Address 2 City State Zip Code Primary Contact	WG ID (356) 7654321 Make AGCO Model Description tracteur neuf Year Odometer In 0.0 Hours In 0.0	In Service Serial # 1234567 Lic. Plate State Lic. Plate # Fleet Number Odometer Out 0.0 Hours Out 0.0
		<input type="checkbox"/> Ship To Shipping Metho Shipment Date: Address 1: Address 2: City: State:

Hide Customer Information (F9)

F2-Find F6-Add

**I dicked "Create New/Go to RO" on the appointment.
 The system created this RO for me with the information
 already populated from the appointment.**

Customer	Items	L
Customer	\$0.00	
Warranty	\$0.00	
Internal	\$0.00	
Total	\$0.00	

Customer Deposit	
Original Deposit	\$0.00
Deposit Applied	\$0.00
Unused Deposit	\$0.00

Subtotal Tax Group Create Deposit Return Deposit

New Repair Order

File Save Save and Close Save and New Print Credit Cards Capture Signature Update Line Item Data Show Open Document

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document

Add New Service Issue Add Standard Service Issue

Drag a column header here to group by that column

Service Issue Type	Issue #	Suppress Detail	Description	Cause
RC	=	<input type="checkbox"/>	RC	RC
Customer	1	<input type="checkbox"/>	Bringing in to diagnose sluggish start.	

The description I typed into the appointment populated as the Service Issue description on the New RO.

RIMSS.WinNetStar v8.0.0.908 Enterprise:The Enterprise Company:Hepburn Signature (669) Location:San Antonio (671)

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

RIMSS WinNetStar Telephony Service Appointments - San Antonio Service Repair Order - 2 X

File Save Save and Close Save and New Print Credit Cards Capture Signature Update Line Item Data Show Open Documents Custom Forms

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail On

Add New Labor Bill Estimated Hours Bill Standard Hours Bill Actual Hours Apply Discount

Drag a column header here to group by that column

Service Issue	Issue #	Technician	Op Code	Description	Rate Code	Std. Hours	Estimated Hours	Actual Hours	Billed Hours	Rate	Hourly or
Bring...	1	ELAINE SMITH	LABOR	STANDA...	Labor	0.0000	0.0000	0.0000	0.0000	\$75.00	Hourly

A labor line was added for the technician using the Default Op/Rate codes.

2. Example of Creating an Appointment by Linking to an existing RO.

The screenshot shows a software window titled "Service - Appointment". At the top, there are buttons for "Save & Close" and "Create New / Goto RO". The form contains several fields:

- Subject: Service (selected from a dropdown)
- Customer: Cash Customer (61)
- Wholegood: (empty)
- Resource: Jackson, Moto
- Make / Model: (empty)
- Service Writer: (empty)
- Serial Number: (empty)
- Service Type: (empty)

A red-bordered text box with a red arrow pointing to the "Link to Existing RO" button contains the following text:

I open the appointment by selecting the Resource and Time of the appointment which will auto-fill. I choose the Subject if I do not want the Default. I then click "Link to Existing RO".

Below the "Link to Existing RO" button, there are fields for "RO#", "Service Issue #:", and "RO Date:", followed by a "Service Issue Desc:" text area.

RO Service Issues Lookup

Drag a column header here to group by that column

Document Number	Date	Type	Status	Complaint Number	Service Issue	Customer Name	Fleet Number	Make	Stock Number	Wholegood Description	Year
=	=	RO	RO	=	RO	RO					
3	7/22/2019	Repair Order	Open	1	1:Bringing in t...	Carl Albor					
2	7/22/2019	Repair Order	Open	1	1:Bringing in t...	Carl Albor		AGCO	7654321	tracteur neuf	
1	7/22/2019	Estimate	Open	1	1:Rattle unde...	Carl Albor			12312321	TRAV	

This will bring up a list of all open Service Issues. I double-Click the one I want to choose for my appointment.

1 7/22/2019 Estimate Open 1 1:Rattle unde... Carl Albor

Service - Appointment

Save & Close Create New / Goto RO

Subject: Service Customer: Carl Albor (1920)

Wholegood: TRAV Resource: Jackson, Moto

Make / Model: /RANGER 500 Service Writer:

Serial Number: 1211212 Service Type:

Description:

Start time: 7/22/2019 5:00 PM

End time: 7/22/2019 6:00 PM

Link to Existing RO

RO #: 1 Service Issue #: 1 RO Date: 7/22/2019

Service Issue Desc: 1:Rattle under the hood. Need diagnosis and estimate for repair.

The Repair Order will populate the information from my RO onto the appointment. I can add additional notes to the Appointment description if desired. If not, I can just Save&Close.

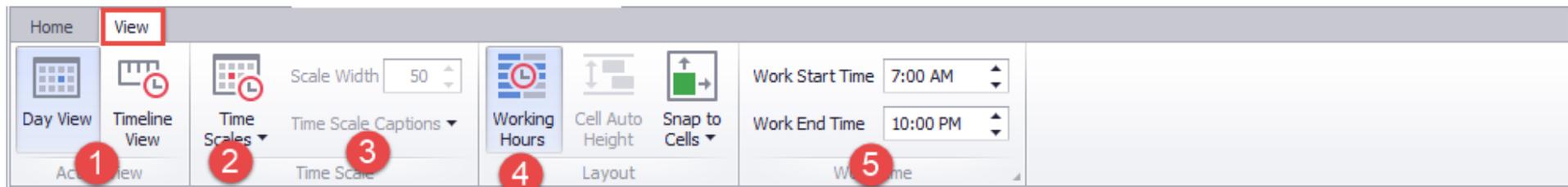
Additional Menu Options

The screenshot shows the top menu bar of a calendar application. The 'View' tab is highlighted in red. Below the tabs are several groups of icons: 'Appointment' (Refresh, New Appointment, Delete), 'Navigate' (Backward, Forward, Go to Today, Zoom In, Zoom Out), 'Arrange' (Day View, Timeline View), and 'Group By' (Group by Date, Group by Resource). A red arrow points from the 'View' tab to the 'Appointment' group.

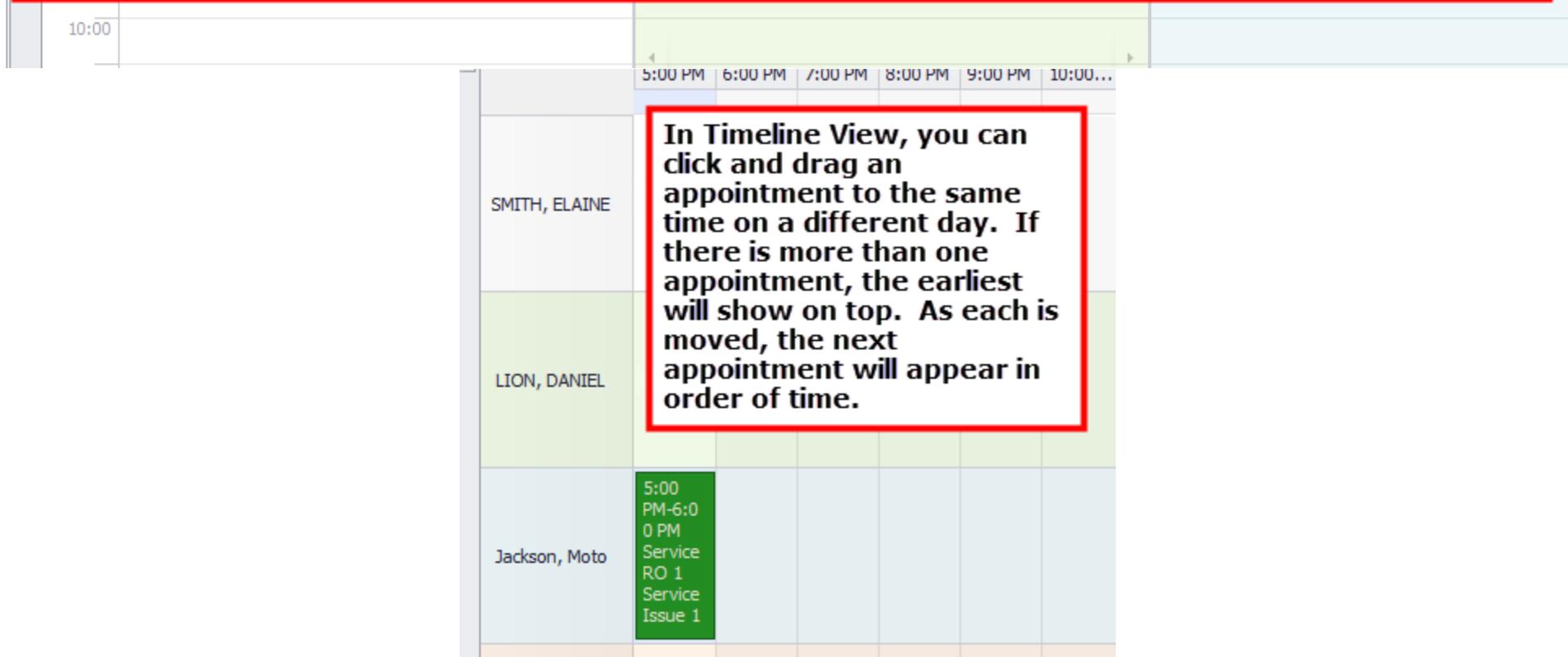
The menu at the top of the calendar has two tabs. The Home tab gives basic navigation and view options. The View tab allows you to set more advanced options on the calendar view. The calendar defaults to the Home menu tab when opening. You can toggle between the menus while working in the calendar by clicking on Home or View.

This screenshot is similar to the one above but includes numbered callouts (1-8) in red circles pointing to specific icons: 1. Refresh, 2. New Appointment, 3. Delete, 4. Backward, 5. Go to Today, 6. Zoom In, 7. Day View, 8. Timeline View. A red box highlights the 'Group by Date' and 'Group by Resource' icons, with an arrow pointing to a text box on the right that reads: "Grouping options slightly change the way the header shows on the calendar."

1. Refresh will update the calendar with any changes since you opened the tab.
2. New Appointment will open the pop-up to create a new appointment.
3. You can delete an appointment after selecting it on the calendar.
4. Backward/Forward will move you one day/time period forward or backward on the Calendar.
5. Go To Today will bring the calendar to the current date.
6. Zoom In/Zoom Out will change the amount of detail shown (hours/days/weeks/months)
7. Day View allows you to see all Resources across the top and the hours down the left side for the current day.
8. Timeline View shows all resources on the left side and days/weeks across the top for a multi-day view.



1. You have the options to switch between Day and Timeline view on this menu.
2. You can choose Time Scales depending on the view.
- a. Day View - you can change the increments per hour detail view (from 5 minutes to 1 hour)
 - b. Timeline View - you can change the increments to per day or week.
3. You can adjust the Scale Width and Captions (Header Detail) in Timeline View.
4. Working Hours will toggle Day View between a 24 hour day and the specified hours of your work day.
5. Work Start/End Time - specify the hours shown on the calendar when "Working Hours" is turned on.



Home View

Refresh New Appointment Delete Backward Forward Go to Today Zoom In Zoom Out Day View Timeline View Group by Date Group by Resource

Appointment Navigate Arrange Group By

Date Navigator July 22, 2019

	SMITH, ELAINE	LION, DANIEL	Jackson, Moto
	Monday, July 22	Monday, July 22	Monday, July 22
7 AM			
8:00			
9:00			
10:00			
11:00			
12 PM			
1:00	1:00 PM-2:00 PM Service		
2:00			
3:00			

previous Appointment next Appointment

In Day View, you can click and drag the start or end time to change the start or end time. You can also move the entire appointment to a different time with a click-drag.



RIMSS WinNetStar | Telephony | Service Appointments - San Antonio

Home | View

Day View | Timeline View | Time Scales | Scale Width: 50 | Time Scale Captions | Working Hours | Cell Auto Height | Snap to Cells

Active View | Time Scale | Layout

Date Navigator

July 2019

SU	MO	TU	WE	TH	FR	SA
27	30	1	2	3	4	5 6
28	7	8	9	10	11	12 13
29	14	15	16	17	18	19 20
30	21	22	23	24	25	26 27
31	28	29	30	31		

August 2019

SU	MO	TU	WE	TH	FR	SA
31				1	2	3
32	4	5	6	7	8	9 10
33	11	12	13	14	15	16 17
34	18	19	20	21	22	23 24
35	25	26	27	28	29	30 31
36	1	2	3	4	5	6 7

Today

The Date Navigator will pop out if you hover over the file tab on the left side of the calendar. You can pin this on the page by clicking on the pin on the top right of the Date Navigator.

You can use this to navigate to a specific date.

Additionally, you can highlight a date range to show more than one day on the Day View. You will have to select a single day on the Date Navigator to return to the normal Day View.

LION, DANIEL	Jackson, Moto
Monday, July 22	Monday, July 22

If you Right-Click on the service calendar, you have the options to start a New Appointment, Go to Today's date, Pop up a Date Navigator, or change from Day View to Timeline View.

- New Appointment
- Go to Today
- Go to Date...
- Change View To ▶

If you Right-Click on an appointment, you have the options to Open the appointment, Change the Subject/Color (Label As), or Delete the Appointment.

- Open
- Label As ▶
- Delete