RIMSS

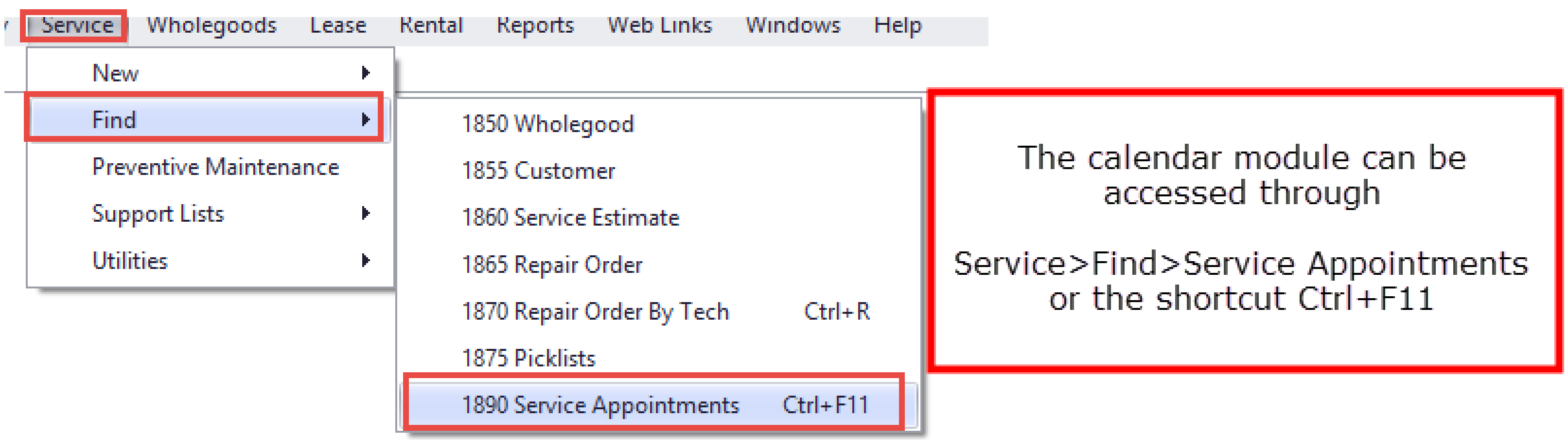
WinNet Star Advanced Enterprise System

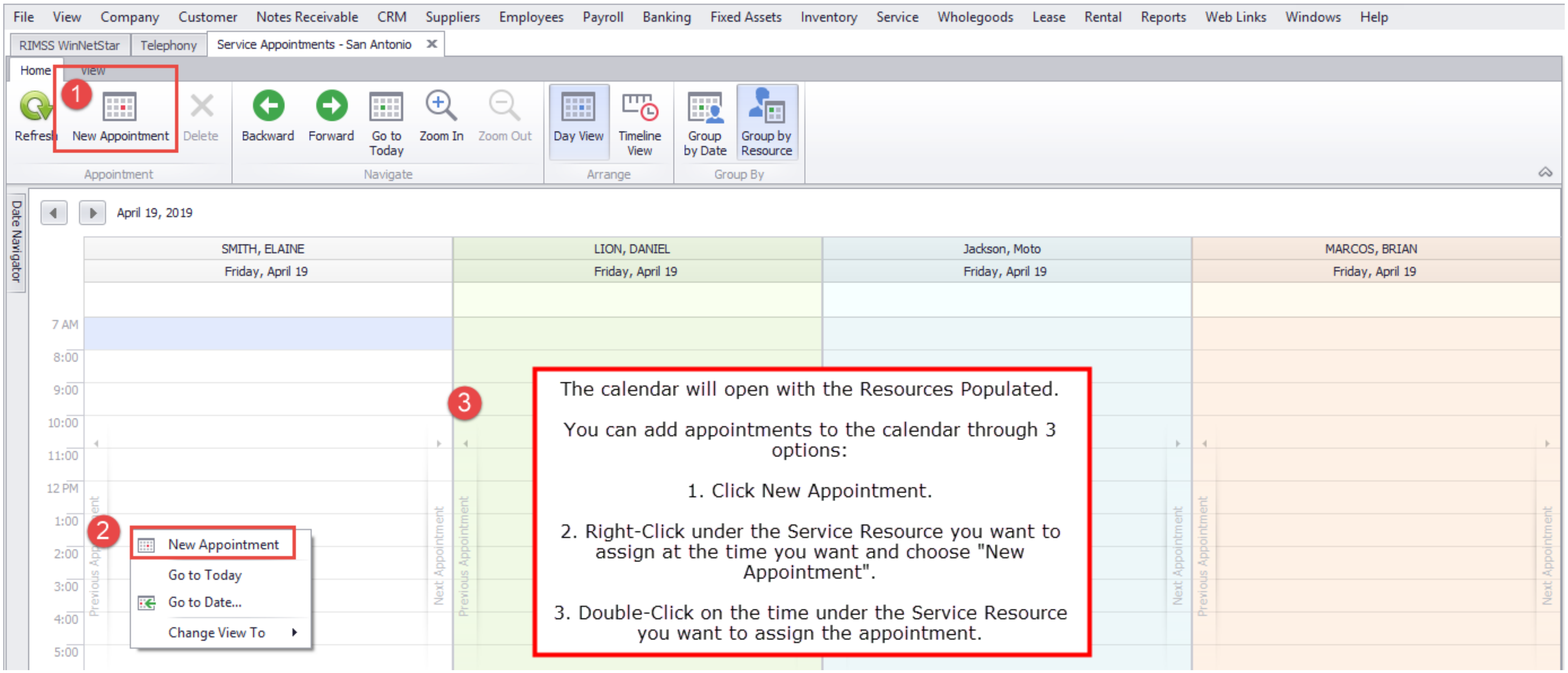
USING THE SERVICE CALENDAR

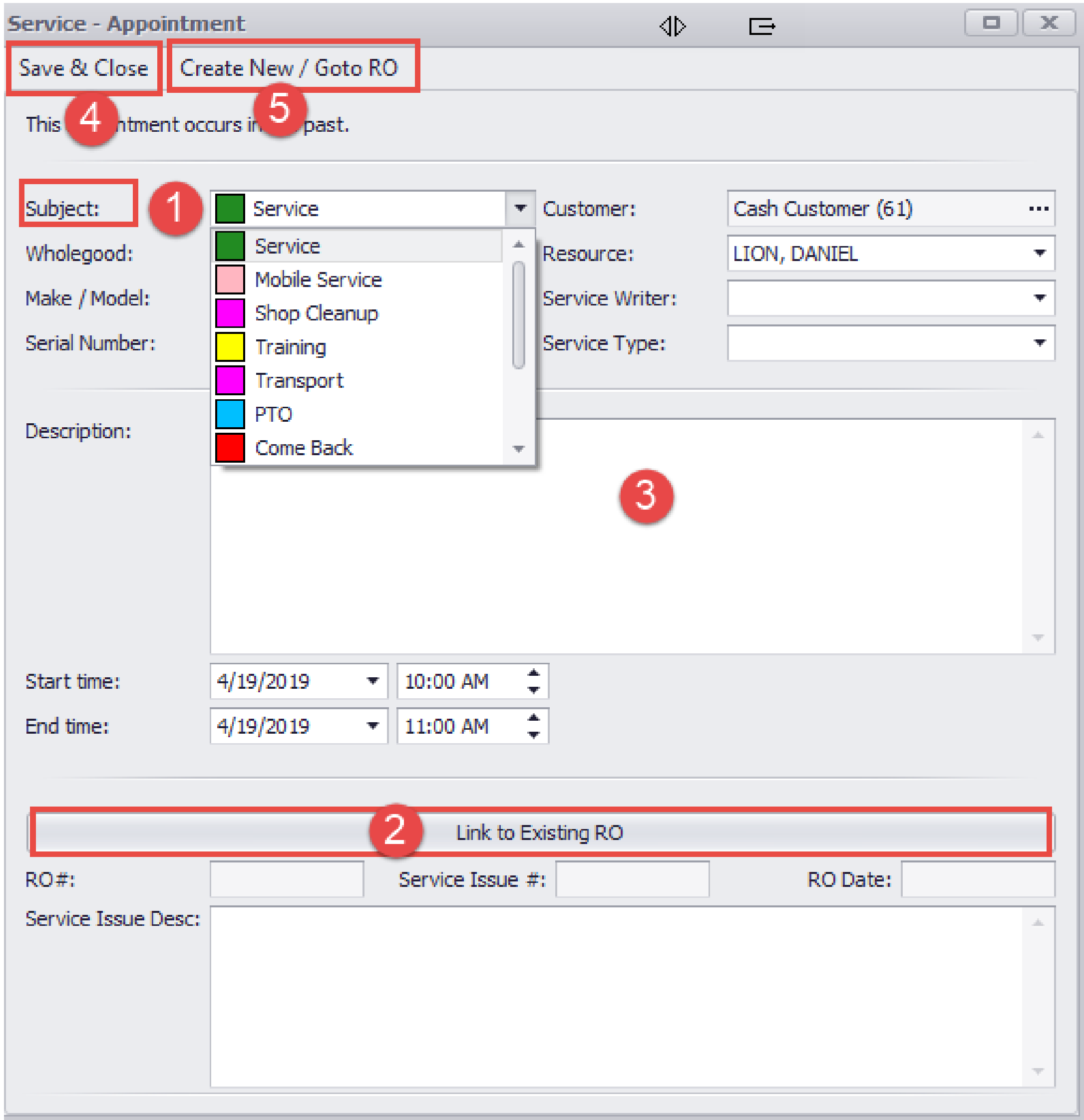
Software Development
RIMSS Business Systems Technology

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 Wholegoods Lease Rental Reports Web Links Windows Help
RIMSS WinNetStar
Telephony
Service Appointments - San Antonio
Home
View
1
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
LION, DANIEL
Jackson, Moto
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
2
New Appointment
Go to Today
Go to Date...
Change View To
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.
Previous Appointment
Next Appointment



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.

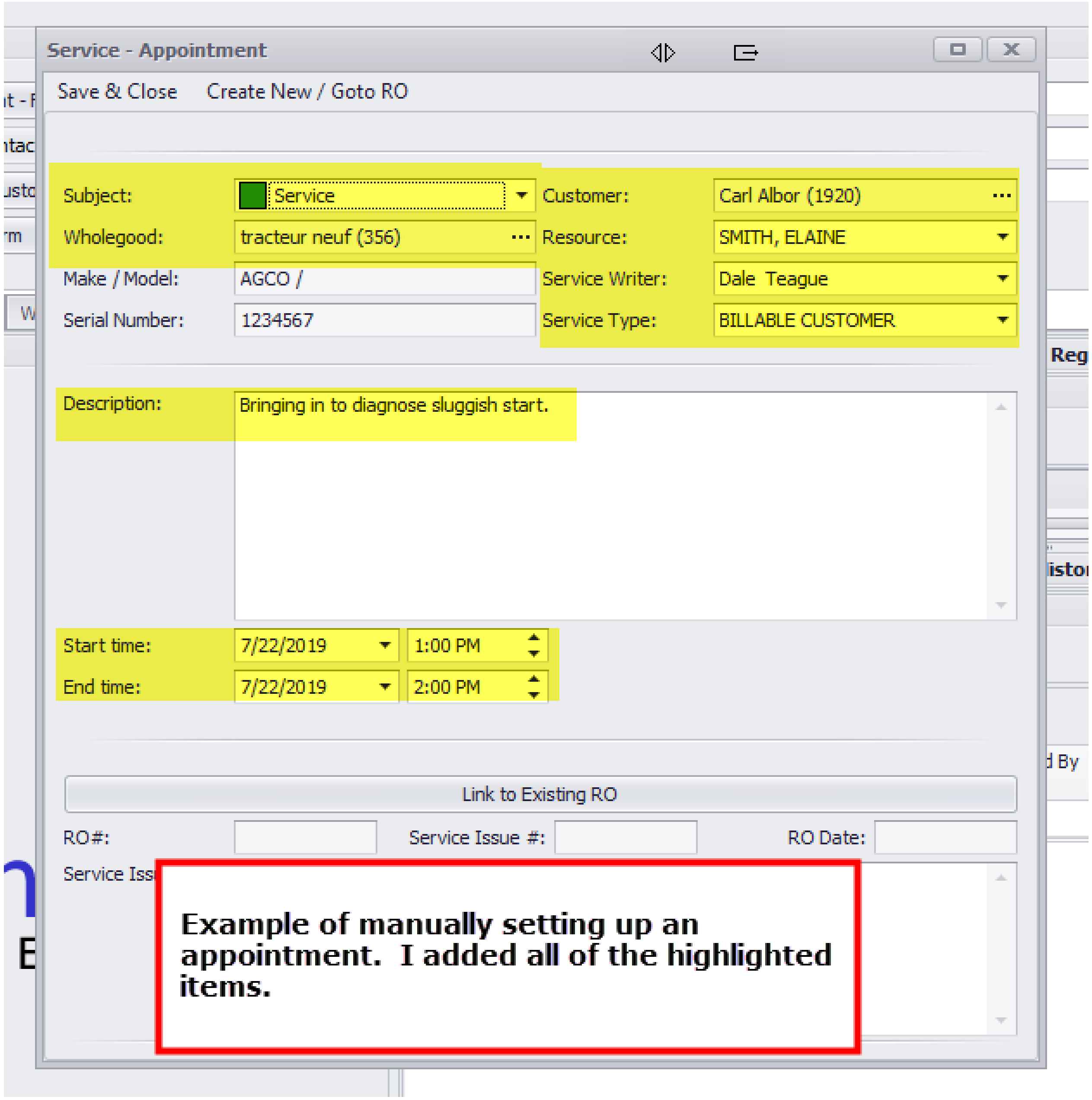
You have the ability to create multiple appointments for each RO tied to individual service issues on multiple dates/times. You can also assign multiple technicians to a single service issue on multiple dates/times.

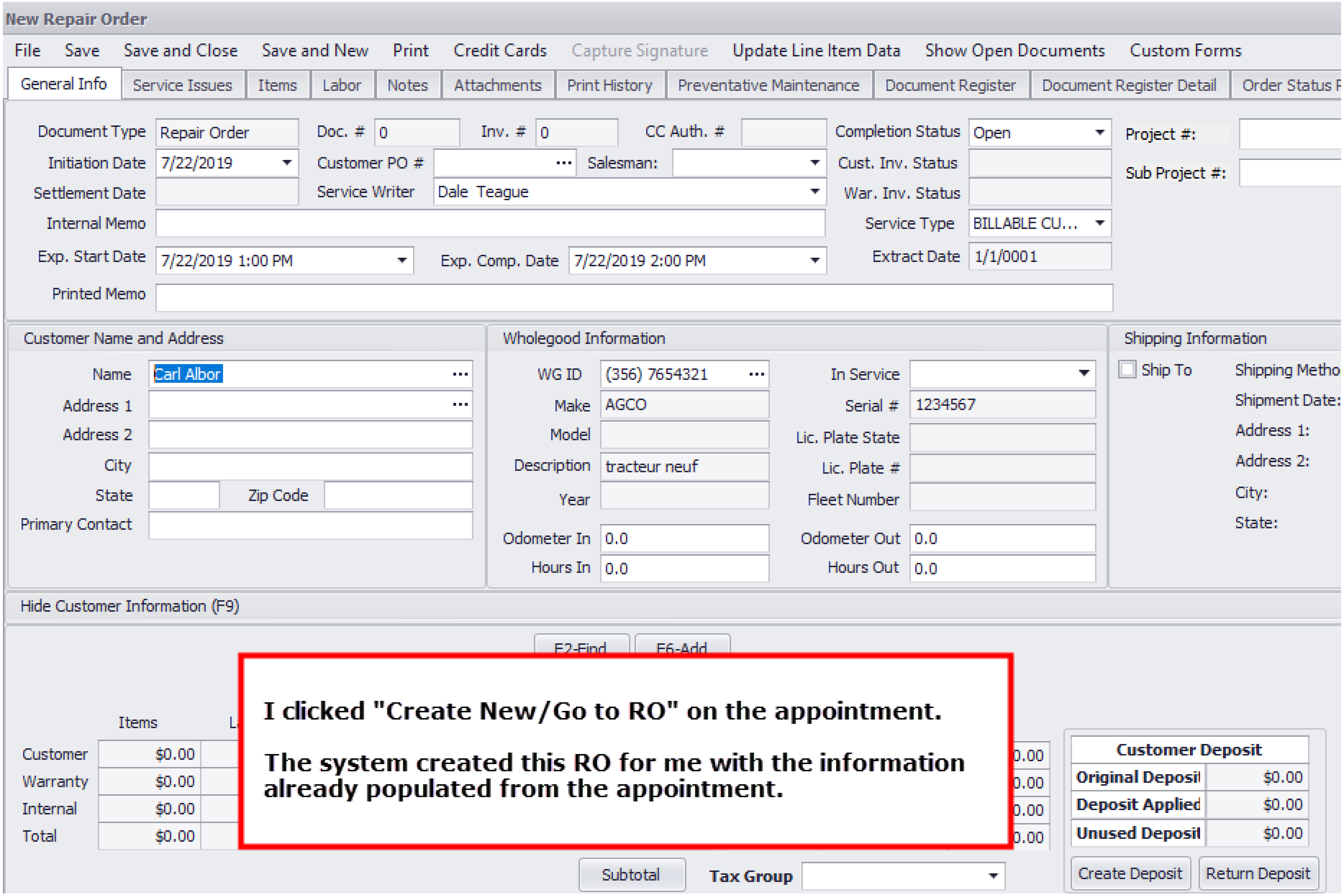
You can create appointments tied to Service Estimates only if the option to "Allow Time Entry" is checked on the Service Estimate.

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.**

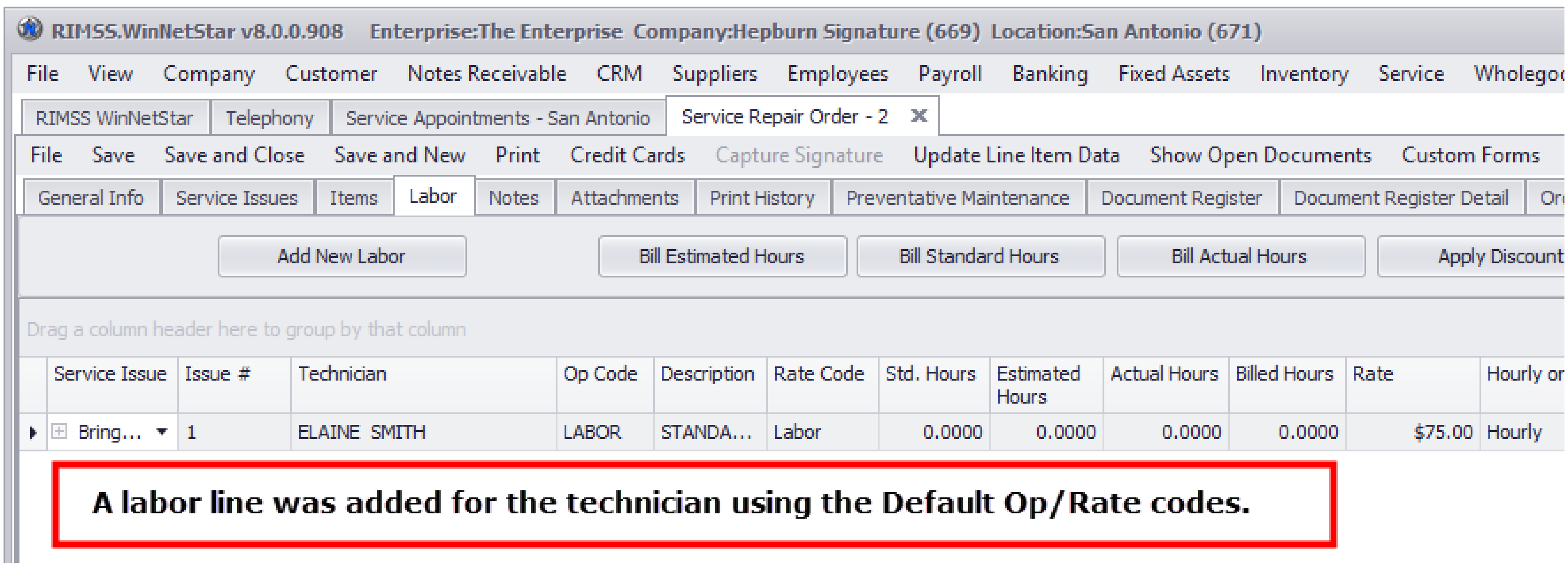




I clicked "Create New/Go to RO" on the appointment.

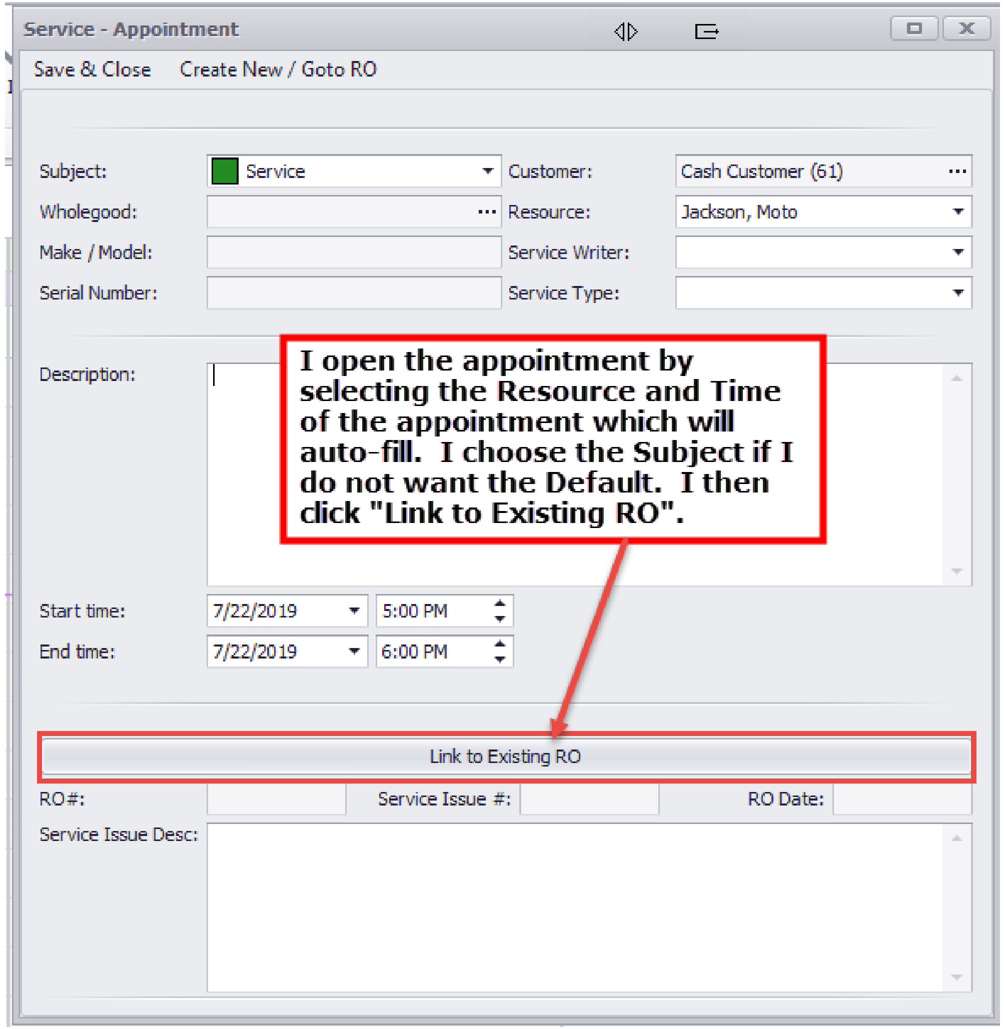
The system created this RO for me with the information already populated from the appointment.

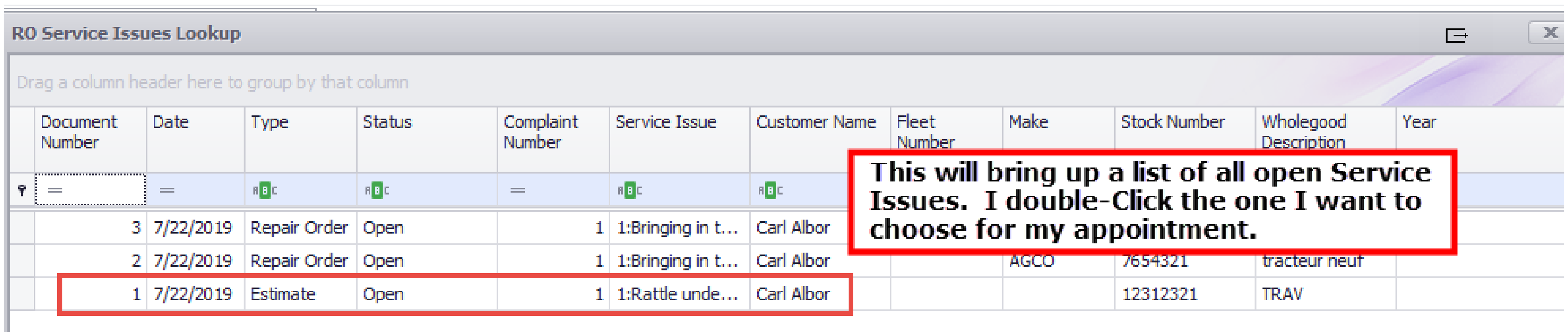
The description I typed into the appointment populated as the Service Issue description on the New RO.

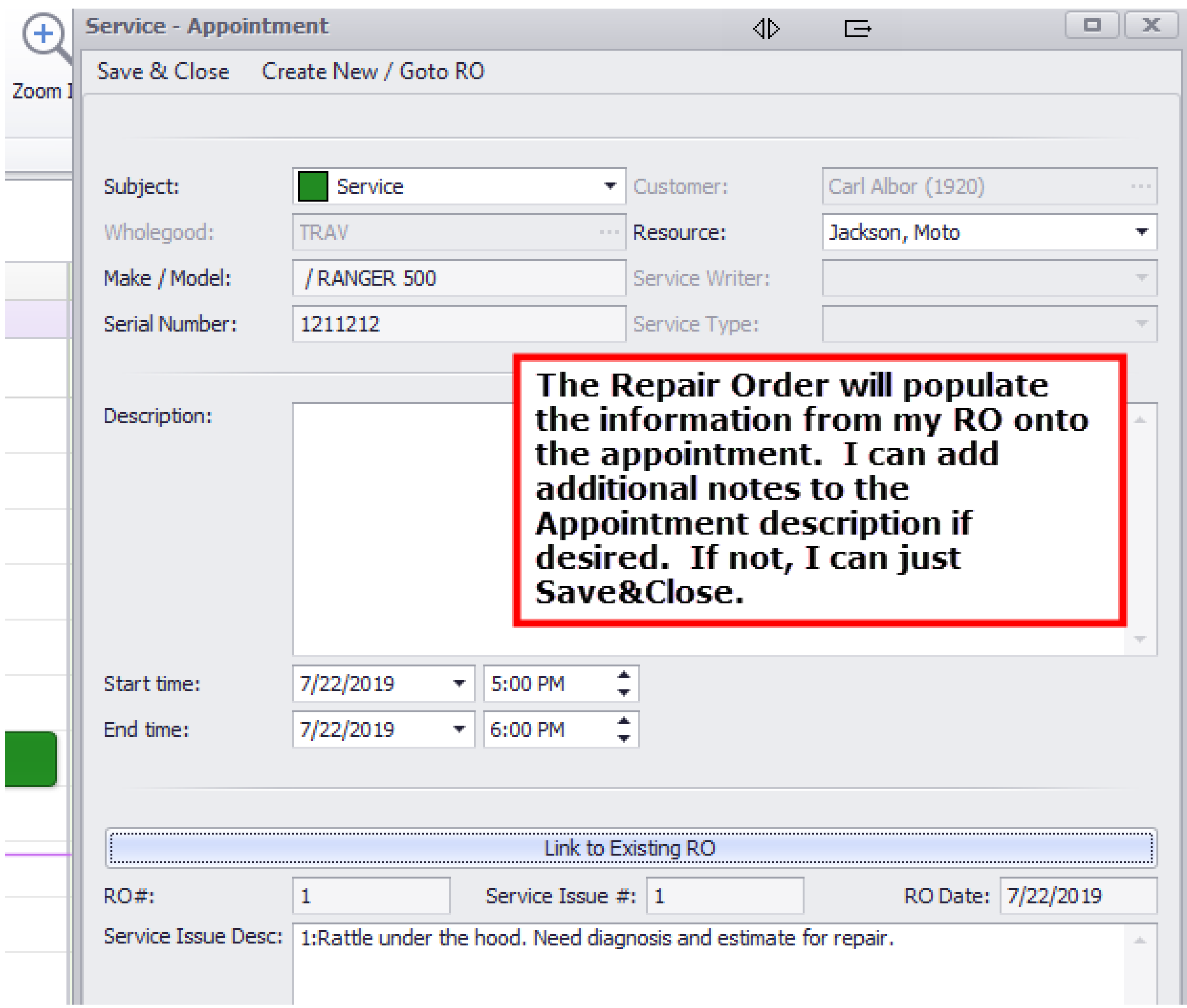


A labor line was added for the technician using the Default Op/Rate codes.

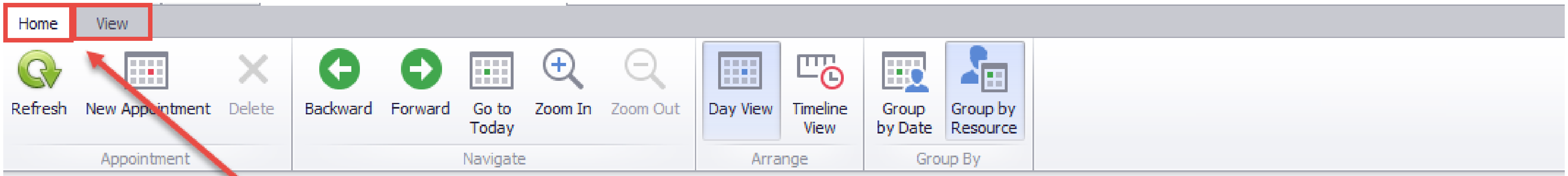
2. Example of Creating an Appointment by Linking to an existing RO.



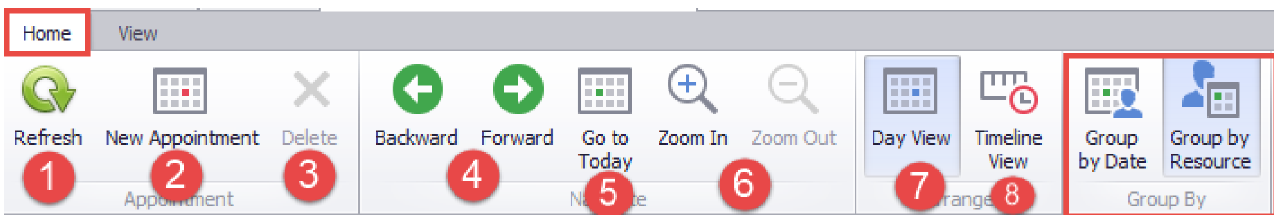

RO Service Issues Lookup
Drag a column header here to group by that column
Document Number
Date
Type
Status
Complaint Number
Service Issue
Customer Name
Fleet Number
Make
Stock Number
Wholegood Description
Year
3 7/22/2019 Repair Order Open 1 1:Bringing in t... Carl Albor
2 7/22/2019 Repair Order Open 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.


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:
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.
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.

Additional Menu Options

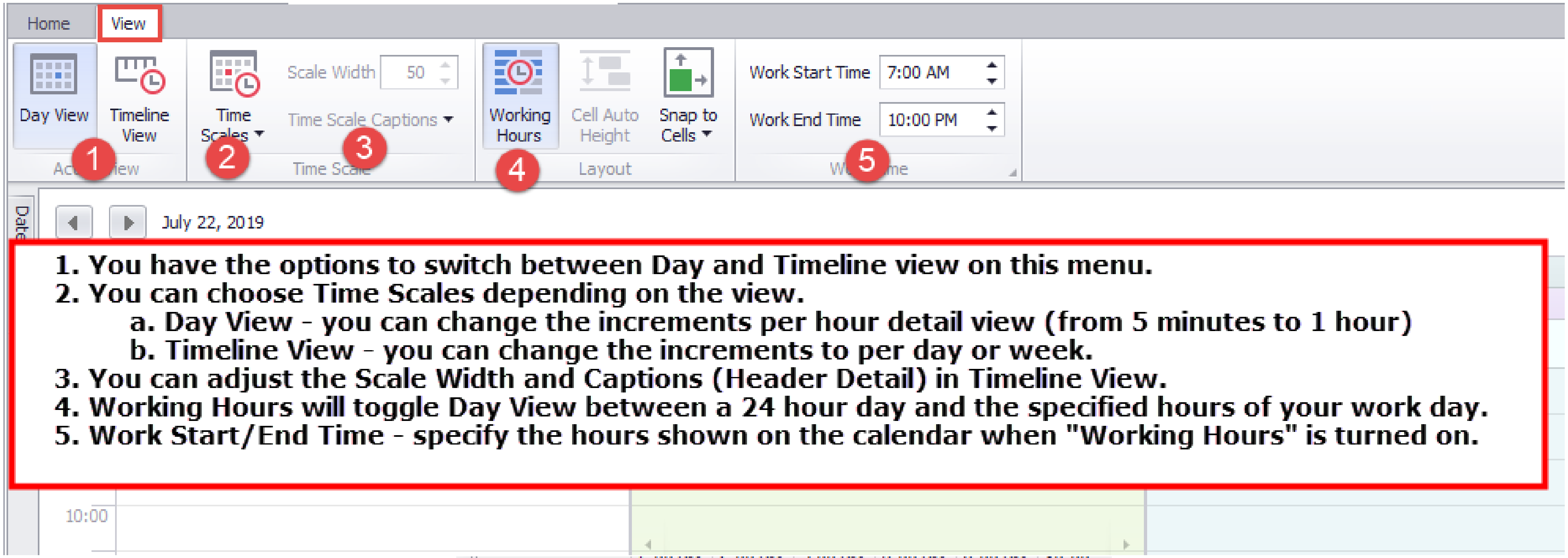


The menu at the top of the calendar has two tabs. The Home tab gives basic navigation and view options. The View tab allows you to set more advanced options on the calendar view. The calendar defaults to the Home menu tab when opening. You can toggle between the menus while working in the calendar by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

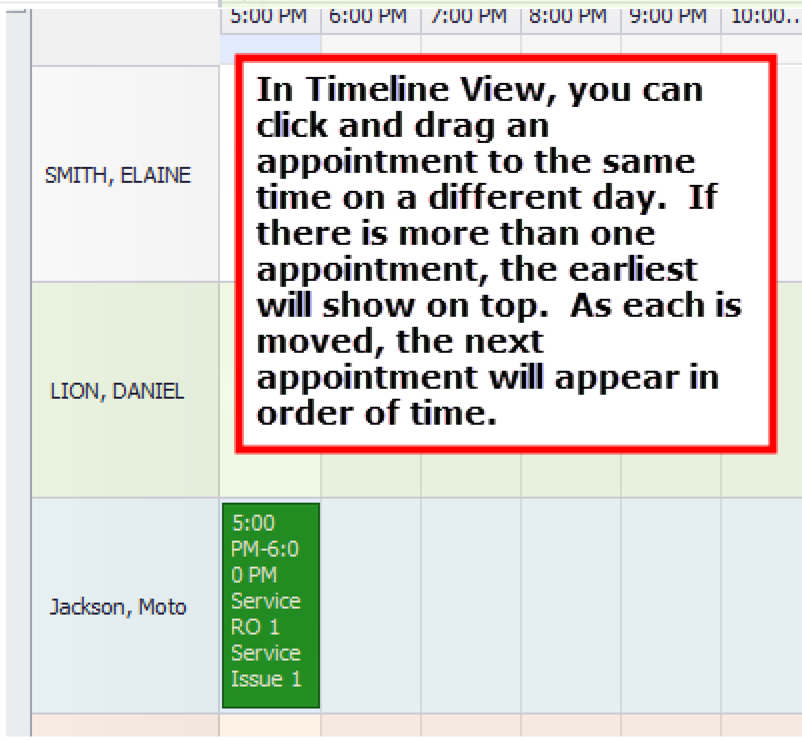


Grouping options slightly change the way the header shows on the calendar.

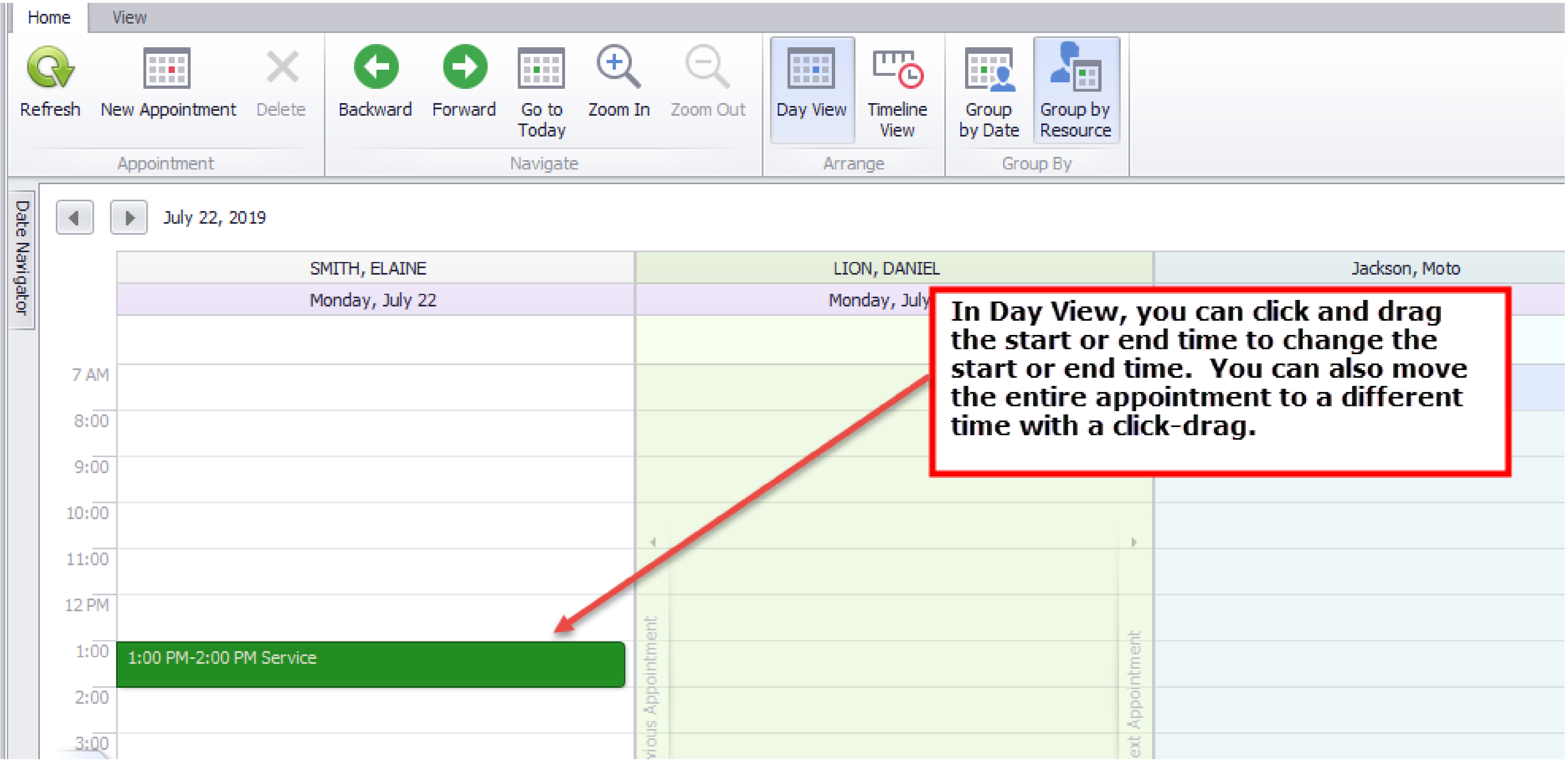
1. Refresh will update the calendar with any changes since you opened the tab.
2. New Appointment will open the pop-up to create a new appointment.
3. You can delete an appointment after selecting it on the calendar.
4. Backword/Forward will move you one day/time period forward or backword on the Calendar.
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.

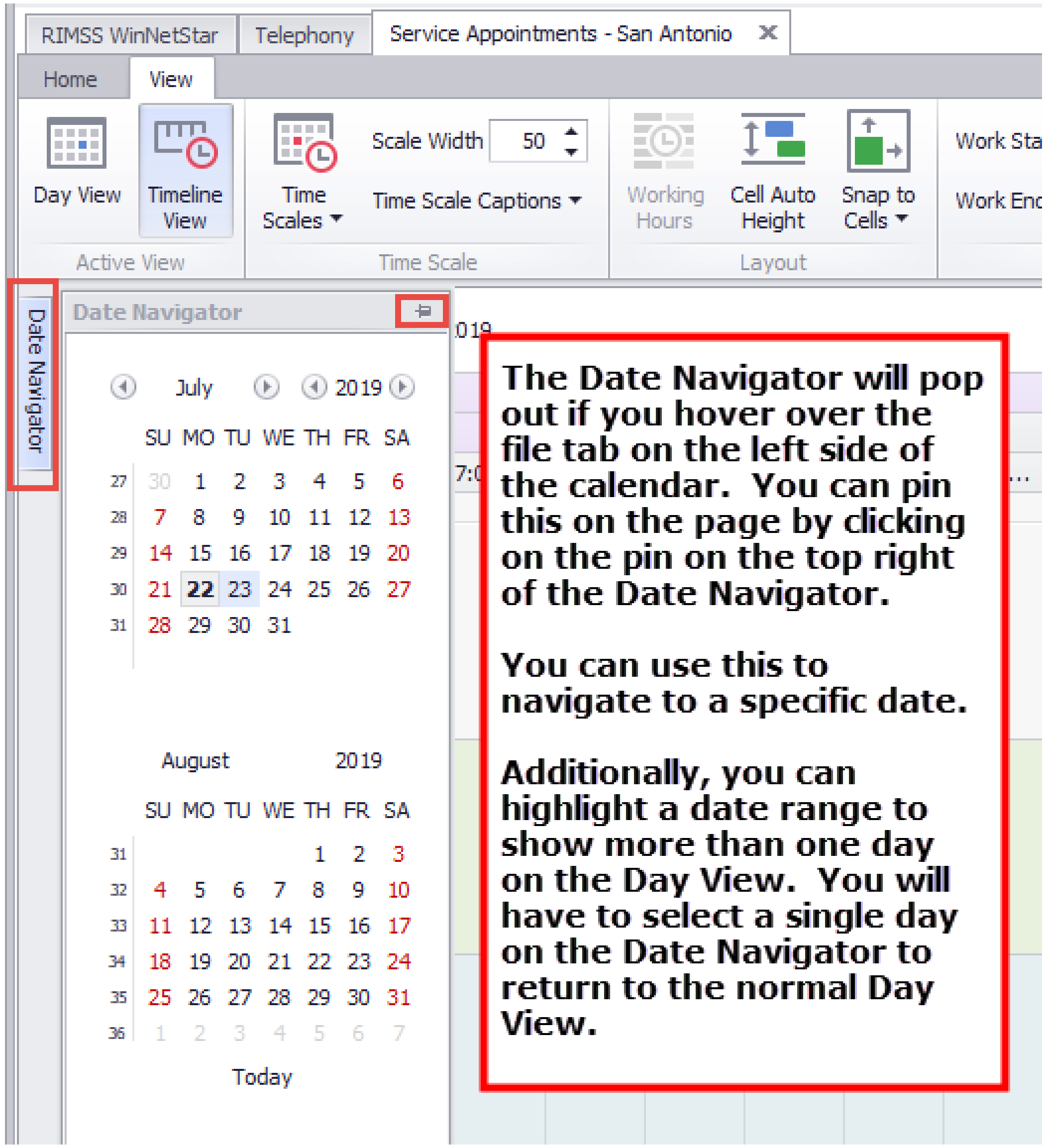


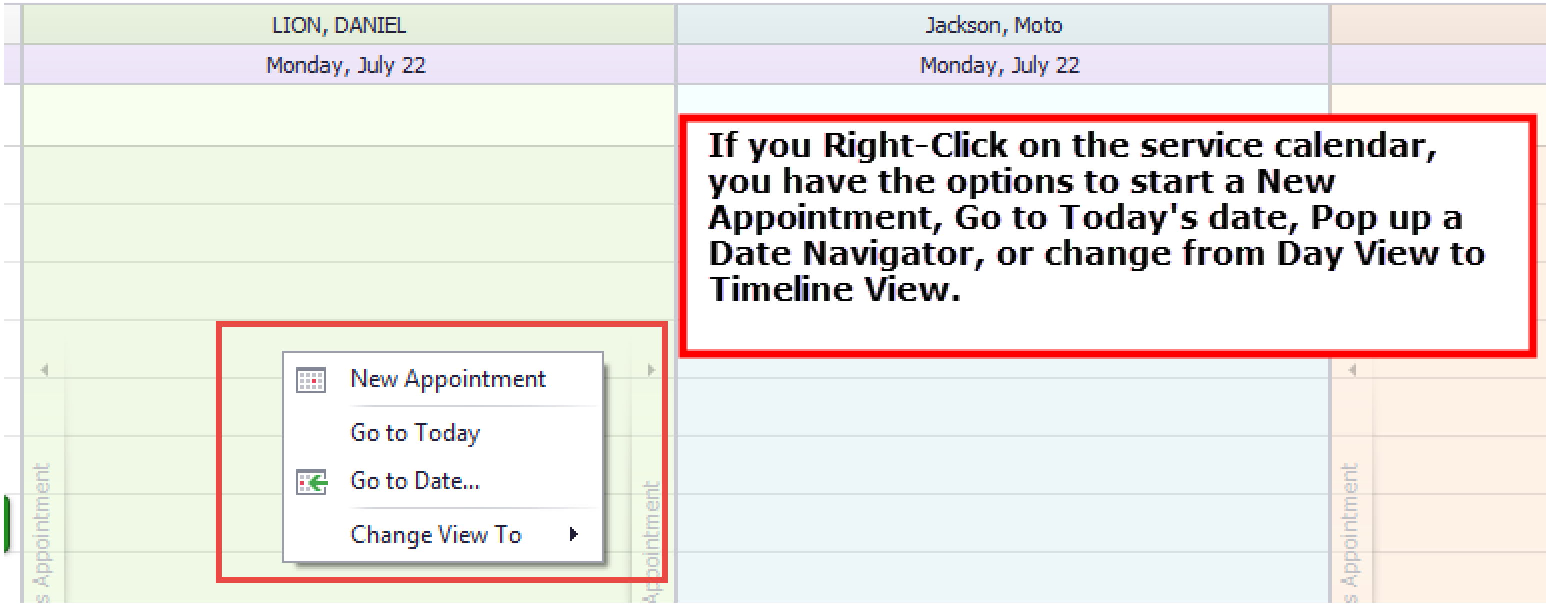
1. You have the options to switch between Day and Timeline view on this menu.
2. You can choose Time Scales depending on the view.
    a. Day View - you can change the increments per hour detail view (from 5 minutes to 1 hour)
    b. Timeline View - you can change the increments to per day or week.
3. 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.

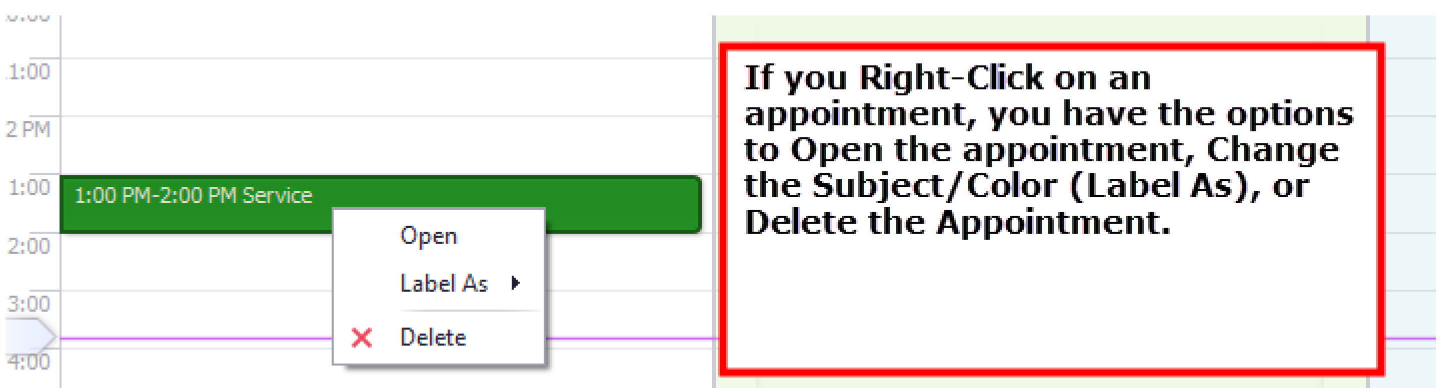


In Timeline View, you can click and drag an appointment to the same time on a different day. If there is more than one appointment, the earliest will show on top. As each is moved, the next appointment will appear in order of time.


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
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.
7 AM
8:00
9:00
10:00
11:00
12 PM
1:00
2:00
3:00
1:00 PM-2:00 PM Service


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
August
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
Monday, July 22
Jackson, Moto
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


1:00
2 PM
1:00
2:00
3:00
4:00
1:00 PM-2:00 PM Service
Open
Label As
Delete
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.