

Planning

Tasks automatically on 'on hold' based on certain status

As of this release (06/21), there is a new configuration available that allows tasks to be automatically set to 'on hold' status based on a certain status in the file. To set this up you can go to System - General Settings. Here you can find the following configuration option:

ATR_STATUSES_TO_HOLD_TASKS

In this configuration you get the option to select statuses. When you are going to use these statuses in the file, the tasks will automatically be set to on hold.

Configuration Editor [Edit]

Category
general

Description
Change the tasks of a file to "on hold" when a job changes to one of these statuses.

Name
ATR_STATUSES_TO_HOLD_TASKS

Value

|
Appointment
Awaiting Approval
Awaiting Estimate
Awaiting Parts
Completed

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If you would like to add a certain status to this, you can go to System - Lists- Status in PlanManager. Here you can add/delete/edit statuses.

After the configuration you will see that after selecting this status in the file (don't forget to press save) the tasks will automatically be set to status 'on hold'.

The screenshot shows the PlanManager interface. At the top, there are sections for 'Vehicle details', 'Comments / Damage', and 'Damage flow: Standard'. On the right, there are fields for 'Off site date', 'Current Task' (set to 'Unknown'), and 'Status' (set to 'Awaiting Parts'). Below this is a 'Tasks' table with columns for Type, Work Units, Minutes, Rate, Amount, and Status. The table lists five tasks: Disassembly, Bodywork, Preparation, Paintwork, and Assembly, all with a status of 'On Hold'. A 'Total' row shows 56,0 WU, 5h30, and € 0,00. A 'New Task' button is on the left, and a 'New Activity' button is on the right. A sidebar on the right shows 'Results: Viewing item' and 'Job Order' with the number 240. A link 'Apply a new rate to all tasks' is at the bottom right.

| Type | Work Units | Minutes | Rate | Amount | Status |
|--------------|----------------|-------------|--------|---------------|---------|
| Disassembly | 15,0 WU | 90 min | € 0,00 | € 0,00 | On Hold |
| Bodywork | 8,0 WU | 45 min | --- | € 0,00 | On Hold |
| Preparation | 15,0 WU | 90 min | --- | € 0,00 | On Hold |
| Paintwork | 8,0 WU | 45 min | --- | € 0,00 | On Hold |
| Assembly | 10,0 WU | 60 min | --- | € 0,00 | On Hold |
| Total | 56,0 WU | 5h30 | | € 0,00 | |

ATTENTION: If you use a status in the file (that sets the tasks to 'stopped' automatically) a corresponding planning of these tasks will also be deleted. It is not possible to restore this planning. You will have to reschedule the file yourself.

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