

2022-04 April

Changes to 'Workshop control report'

There have been a number of changes made to the current workshop control report (located in Report > Operational > Workshop control report). The changes that have been made are:

Job	Registration	Make	Insurer	Total	Strip	Panel work	Preparation	Paint	Refit	Polishing	Final Quality check	Est Comp Date	Days on site	Parts	
2120	YB68UPP	MERCEDES-BENZ	GP Insurance	2.43 Hours (37%)	0.45 Hours GP		0.45 Hours AK	0.45 Hours	0.45 Hours	0.45 Hours	0.18 Hours	07-04-2022	0	0/0	
Total 07-04-2022				2.43 Hours (37%)	0.45 Hours	0 Hours	0.45 Hours	0.45 Hours	0.45 Hours	0.45 Hours	0.18 Hours				
2121	RK65JZT	VOLKSWAGEN	GP Insurance	5.46 Hours (72%)	1.01 Hours ME			2.94 Hours ME	1.5 Hours		0.02 Hours	08-04-2022	1	0/0	
2122	DY68MDN	VAUXHALL	GP Insurance	7.64 Hours (15%)	1.13 Hours GP			4.41 Hours	2.1 Hours			08-04-2022	0	0/0	
Total 08-04-2022				13.1 Hours (39%)	2.14 Hours	0 Hours	0 Hours	7.35 Hours	3.6 Hours	0 Hours	0.02 Hours				
Total				15.53 Hours	2.58 Hours		0.45 Hours	7.8 Hours	4.05 Hours	0.45 Hours	0.2 Hours				

1. A filter in the top left of the report to filter by registration number. A partial registration can be user when searching for a registration number to filter the results.
2. A filter in the top left of the report to filter by location. The default location see will be the location that the current logged in user is set to in Maintenance > Organisation > Personnel.

3. Report headers frozen when scrolling. When scrolling down the report to see all results (if they go further than what is visible on screen) then the report headers now stay visible at the top of the screen. This has resolved a previous bug in the report.

4. Courtesy car icon. If the tick box for 'Rental needed' is selected within the job, a courtesy car icon will be displayed in the report again the job.

5. Technician initials. The initials of the technician working on/that complete the task are now displayed in capital letters in order to appear more clearly. They were previously in lower case.

6. Tasks with no time allocated. The report will now show tasks that are on the RO estimate. For example, if there is a quality control task on the RO estimate with no time allocated, the quality control task will now show on the report as a required task for the job. Previously, if a task had no time allocated, it would not show on the report.

7. Total hours grouped by day. There is now a summary of the total overall and task related hours by day (ECD) within the report.

8. Work and paint categories. The report will now only show the tasks that are linked to the task types 'Work' and 'Paint'. Previously, all task types other than 'Not productive' were being displayed which meant that report was unlikely to fit on one screen.

New config AEG_INSURER_IMPORT_BY_CODE

A new config has been created in order to minimize the risk of duplicate insurers records being created from the AEG link. When this config is enabled, there is a box within the insurer record for 'AEG code'. If the AEG code entered in this box matches the AEG code within the AEG assessment, the system will apply that PlanManager insurer record to the job, regardless of how the Insurer is entered in the AEG assessment.

Insurer Editor

Name	<input type="text" value="GP Insurance"/>	Informex nr	<input type="text" value="GRGINS"/>
Number	<input type="text" value="GPINS"/>	Iban	<input type="text"/>
Address	<input type="text" value="The Forum, Station Road"/>	Bic	<input type="text"/>
Town	<input type="text" value="RG7 4RA"/>	VAT Percentage	<input type="text"/>
	<input type="text" value="Reading"/>	Invoice Term	<input type="text" value="40"/>
County/Province	<input type="text" value="Berkshire"/>	Rebate scheme	<input type="text" value="5% Parts"/>
Country	<input type="text" value="United Kingdom"/>		
Language	<input type="text" value="English (GB)"/>		
Customer Type	<input type="text" value="select a clienttype"/>		
VAT Number	<input type="text"/>		
	<input type="text"/>	AEG Code	<input type="text"/>

With this config enabled, if there is no AEG code in PlanManager that matches AEG assessment, then no insurer will be applied to the PlanManager job from the AEG assessment. The search function can be used in the job to choose the appropriate insurer.

Insurer	
Search	<input type="text" value="gp"/> 
Customer Number	<input type="text" value="GPINS, GP Insurance, The Forum, Station Road"/>
Name	<input type="text"/> 

New calendar icon in the job list

A new calendar icon is added into the job list next to the ECD (estimated completion date) if the ECD is set before the end of the planning.

Job List Order list Job Queue Deliveries Offer Requests Stock Scale DMS Albatros Calendar

Filter Reset Export

Autobus UK Tax 381 type a registration type a person name

type a model name type a make name type a bay tag number type a VIN number

Advanced

Planning

Priority vehicles	In	Out
This Week	1	
11-04 Week +1	0	08:11:00

New Quick appointment insurer 1 item

Job	Creation Date	Make	Registration	Owner	Status	Est Comp Date	Estimate Total Value	Estimated Hours
381	22-03-2022	VOLKSWAGEN	ANBENS	George	Planned	08-04-2022, 08:30	€ 762.50	12h30

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