

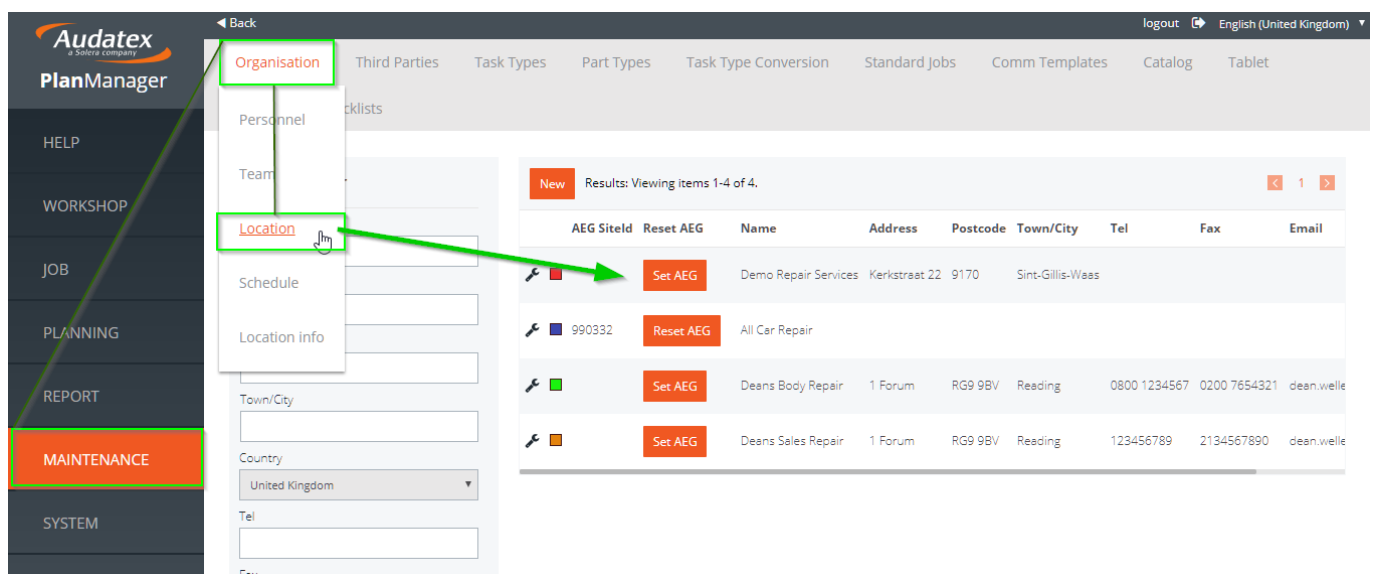
Audatex

How to set up the link in PlanManager with Audatex.

How to set up the link in PlanManager with Audatex.

To be able to use Audatex-Integration within PM(PlanManager), you first have to create a link for each of the PM location with the “Auda Enterprise Gold” system user login for the corresponding site (each AEG site will need to have a specific system user created for this particular purpose).

To link the AEG site with the PM location, within PM go to “Maintenance - Organisation - Location”, choose the concerned location, and click on “Set AEG”.

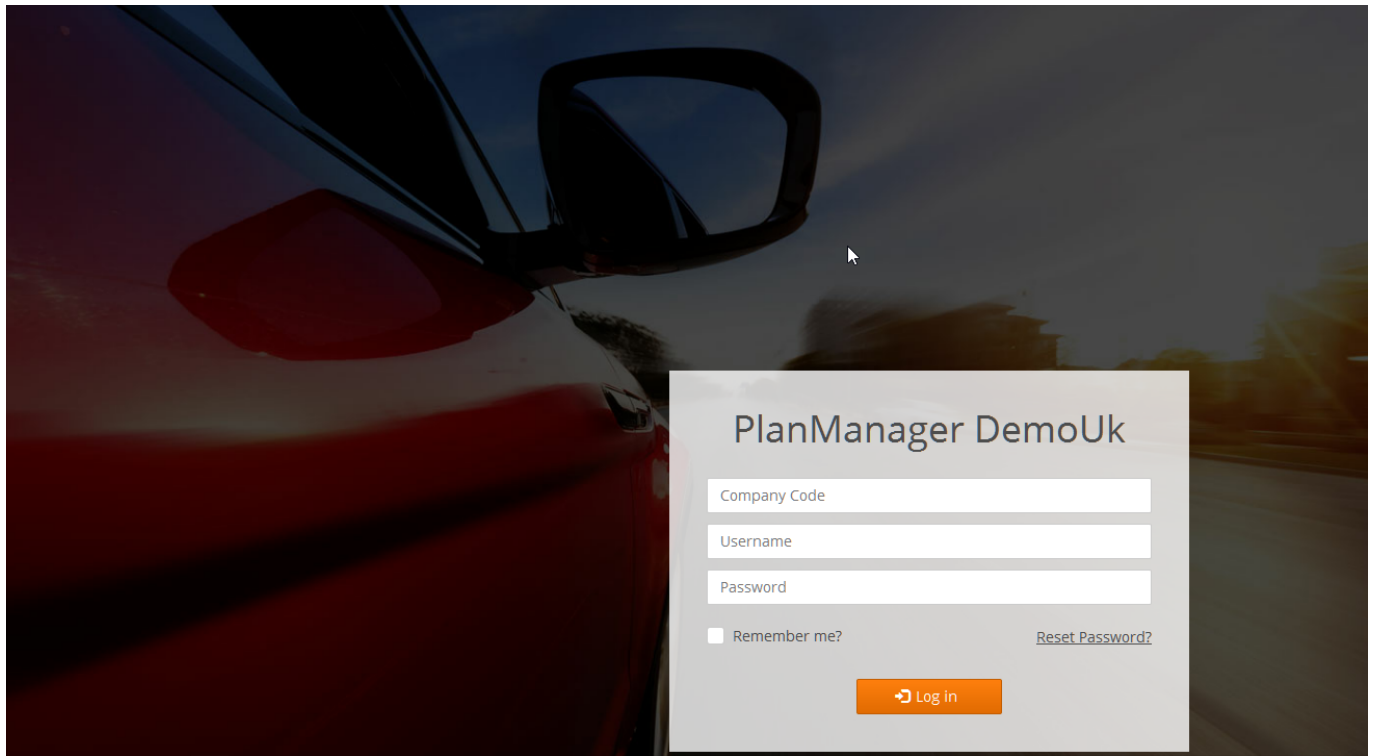


The screenshot shows the Audatex PlanManager interface. On the left, a navigation menu is visible with 'MAINTENANCE' highlighted. A dropdown menu is open under 'Location', showing options like 'Organisation', 'Personnel', 'Team', 'Location', 'Schedule', and 'Location info'. A green arrow points from the 'Location' option in the dropdown to a 'Set AEG' button in a table. The table lists AEG sites with columns for AEG SiteId, Reset AEG, Name, Address, Postcode, Town/City, Tel, Fax, and Email.

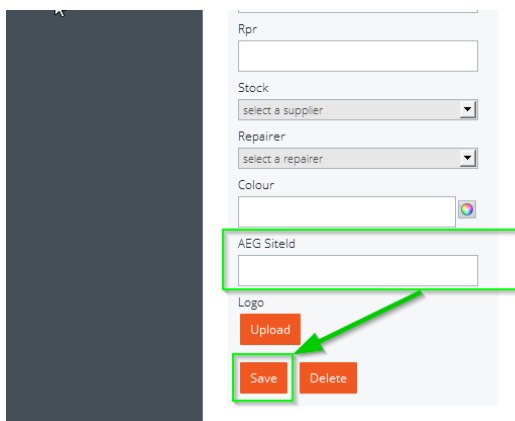
| AEG SiteId | Reset AEG | Name | Address | Postcode | Town/City | Tel | Fax | Email |
|------------|-----------|----------------------|---------------|----------|------------------|--------------|--------------|------------|
| | Set AEG | Demo Repair Services | Kerkstraat 22 | 9170 | Sint-Gillis-Waas | | | |
| 990332 | Reset AEG | All Car Repair | | | | | | |
| | Set AEG | Deans Body Repair | 1 Forum | RG9 9BV | Reading | 0800 1234567 | 0200 7654321 | dean.welle |
| | Set AEG | Deans Sales Repair | 1 Forum | RG9 9BV | Reading | 123456789 | 2134567890 | dean.welle |

You will be redirected to the following page, where you can fill in the necessary data. It's very important to use the set up system user for this Site, not one of the individual logins:

Audatex



Once you've done that, you need to fill in the AEG UserId, on the bottom left of the first page ("Maintenance - Organisation - Location").



Once this done, your link with Audatex will be active.

Unique solution ID: #1658
Author: Jean-Marie
Last update: 2017-09-05 15:03