

# Versions

## 2020-07 July

### Report

A new planning report “Planning In / Out V2” was developed. You can find this via Report - Operational - Planning In / Out V2. This report was developed based on the “Planning In / Out” report. Additional data was added to the new report. Here you can find the job number, appointment type and whether a rental car is needed or not.

Current Activities

Priority vehicles

Appointment repair

select a location

Job Admin

<

30-06-2020

30-06-2020

>

Today

|

[This Week](#)

Vehicles entering today

1

Job	Plate	Planned	Arrival	Appointment type	CCar	In	Prt
<div><div></div><div></div></div> 13827	1WPF439	No (0/0)	30-06-2020 08:00				

Vehicles leaving today

0

Job	Plate	End	Appointment type	CCar	Out

### Expected delivery date

The expected delivery date field has been added to the orders made via bestparts and the order platform.

### Self Service Portal

Various functionalities have been added to the Self Service Portal. From now on it is possible to let the customer indicate whether they want a rental car or not. An additional functionality was also added that makes it possible for the customer to sign the repair agreement via the Self Service Portal. The standard repair agreement document will be used for this.

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Do you have an estimate? Make an appointment online for the repair!

For this function you must have a job number that is linked to your registration plate. The job number can be found on the estimate or on the document "approval repair". If you do not have a job number, please contact the repairer.

Registration plate \*

1XYZ789

Job number \*

13835

Chosen appointment date

23/07/2020

☐ Do you want a rental car?

Please read this document and place your signature in the appropriate box

Your web browser doesn't have a PDF plugin.

[click here to download the PDF file.](#)

Signature \*

It's also possible to receive communications from the Self Service Portal. To activate the communications you can go to Communication - Settings (in PlanManager)


Inbox Settings		
General	Notify job admin on	Notify job admin on
Popup bottom right <input checked="" type="checkbox"/>	Status change <input checked="" type="checkbox"/>	Appointment date first set <input type="checkbox"/>
E-mail reply <input checked="" type="checkbox"/>	All Parts In <input type="checkbox"/>	Appointment date change <input type="checkbox"/>
E-mail not delivered <input checked="" type="checkbox"/>	Ubench warnings <input type="checkbox"/>	Vehicle in date set <input type="checkbox"/>
SMS reply <input checked="" type="checkbox"/>	AXA claim state changed <input type="checkbox"/>	Predicted end date first set <input type="checkbox"/>
SMS not delivered <input checked="" type="checkbox"/>	Selfserviceportal: est. appointment <input checked="" type="checkbox"/>	Predicted end date change <input type="checkbox"/>
Scheduled report ready <input checked="" type="checkbox"/>	Selfserviceportal: appointment repair <input checked="" type="checkbox"/>	Signoff date set <input type="checkbox"/>
		Pickup date set <input type="checkbox"/>
Albatros	Other	
Errors <input checked="" type="checkbox"/>	New smart expertise added to Informex queue <input checked="" type="checkbox"/>	
Estimation created <input checked="" type="checkbox"/>	Planning end changed <input type="checkbox"/>	
Estimation changed <input checked="" type="checkbox"/>		
Estimation state changed <input checked="" type="checkbox"/>		

## Email communication when status changes

It is now possible to have an automatic mail sent when changing the status of the

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job. To set this you can go to System - Lists - Status.

**PlanManager**

COMMUNICATION

HELP

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JOB

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REPORT

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General settings

Customized settings

Lists

Usergroups

ATR Stop reason













Status

Rental type

Document Category

Repair type

Damage cause

	Name
	BASFKPI_COMPANY_IDENT
	BASFKPI_PASS
	BASFKPI_SAPCODE
	BASFKPI_USER
	INSPECTOR_APP_MAINTENAN
	FILE_SAVE_ODBC_FILE
	INVOICE_ODBC_FILE
	ORDER_PURCHASE_AMOUNT_ODBC_FILE
	FORCE_LOGIN_AFTER_MOBILE_UPDATE
	ADDRESS_MULTI_FIELDS
	ADVANCED_FILE_STATUS_NOTIFICATIONS
	AGENT_TABLE_COLUMNS

You can select a template that will be sent automatically when changing the status. The template will always be sent by email, to the party indicated in the

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Automatic communication on status change

<input type="checkbox"/> Estimate by email	<div>^</div> <div></div> <div>v</div>
<input type="checkbox"/> Invitation initial damage assessm't web	
<input type="checkbox"/> Invitation initial damage assessment (te	
<input type="checkbox"/> Invitation repair appointment (web)	
<input type="checkbox"/> Invoice email	
<input type="checkbox"/> Offer Confirmation	
<input type="checkbox"/> Offer Request	
<input type="checkbox"/> Order	
<input type="checkbox"/> Payment car repair	
<input type="checkbox"/> Reminder 1	

It is also possible to have an SMS sent when changing a status. This is only possible via templates created with the type "SMS".

communication template.

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Naam											
SMS vertraging herstelling											
Onderwerp											
Herstelling - vertraging											
<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;"> <span>B I U</span> <span>[List Icons]</span> <input type="text" value="Font Size..."/> <input type="text" value="Font Family"/> <input type="text" value="Font Formaat"/> <span>[More Icons]</span> </div> <p>Beste klant, uw wagen [Make] [Model] - [Licenseplate] zal later klaar zijn dan voorzien. De nieuwe voorziene datum is [PredictedEnd] om [PredictedEndTime]. Dank u voor het begrip, [Location].</p>	<table border="1" style="width: 100%; border-collapse: collapse; background-color: #007bff; color: white;"> <tr><td style="padding: 5px;">Nummerplaat</td><td style="padding: 5px;">Merk</td></tr> <tr><td style="padding: 5px;">Model</td><td style="padding: 5px;">Kilometerstand</td></tr> <tr><td style="padding: 5px;">Chassisnummer</td><td style="padding: 5px;">Taken</td></tr> <tr><td style="padding: 5px;">Onderdelen</td><td style="padding: 5px;">Bestel</td></tr> <tr><td style="padding: 5px;">Bloknummer</td><td style="padding: 5px;">Dossier</td></tr> </table> <div style="margin-top: 5px;"> <div style="background-color: #d3d3d3; padding: 5px; margin-bottom: 5px; display: flex; justify-content: space-between;"><span>Sms</span><span>▼</span></div> <div style="background-color: #d3d3d3; padding: 5px; margin-bottom: 5px; display: flex; justify-content: space-between;"><span>Verstuur naar</span><span>▼</span></div> <div style="background-color: #d3d3d3; padding: 5px; margin-bottom: 5px; display: flex; justify-content: space-between;"><span>Bestuurder</span><span>▼</span></div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <input type="checkbox"/> CC         </div> <div style="background-color: #d3d3d3; padding: 5px; display: flex; justify-content: space-between;"><span>Selecteer een afdrukbaar bestand</span><span>▼</span></div> </div>	Nummerplaat	Merk	Model	Kilometerstand	Chassisnummer	Taken	Onderdelen	Bestel	Bloknummer	Dossier
Nummerplaat	Merk										
Model	Kilometerstand										
Chassisnummer	Taken										
Onderdelen	Bestel										
Bloknummer	Dossier										
<div style="display: inline-block; background-color: #a9a9a9; padding: 5px 15px; margin-right: 10px; cursor: pointer;">Verwijderen</div> <div style="display: inline-block; background-color: #007bff; color: white; padding: 5px 15px; cursor: pointer;">Bewaren</div>											

**Important! You can only send an automatic email to customers who have checked the checkbox 'email' at Maintenance - Third Parties - Customers. This was added conforming the GDPR regulations. To send an SMS, the checkbox "SMS" must be checked.**

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Owner Editor

Name

test

Lastname

219

Address

Address2

Postcode

Town

County/Province

Country

Belgium

Phone

Fax

Mobile

037271212

Blocked

Contact

Show identity card

Email

support@insypro.com

External Ref

Caps Code

Eligiblenumber

VAT Number

VAT Percentage

0 %

Customer Type

select a client type

Legal Personality

juridical

Title

Iban

Bic

Language

Nederlands (BE)

Repairer

select a repairer

Rebate scheme

select a rebate scheme

Pricing

select a pricing

Invoice Term

Internal Ledger

- Select One -

Display Comment

Comment

Save

Delete

Link To Albatros

Privacy

Communication

Receive

SMS

Mailings

Email

Survey

Papermail

It is now possible to give the block numbers a color. To set this you can go to System - Customized settings - Day colors.

PlanManager

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Day

Tuesday

Colour

Save

Custom Fields

Shortcut

Translation

Integrator options

API Plugins

Day colors

Colour	Day
	Monday
	Tuesday
	Wednesday
	Thursday
	Friday
	Saturday
	Sunday

Here it is possible to give a specific color to every day. This is similar to the

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functionality to assign a color to a task type. The color indication of the block number will also be displayed on the WORKSHOP. Below you can find an example of the display on the WORKSHOP.

The screenshot shows the PlanManager WORKSHOP interface. On the left is a sidebar with navigation options: COMMUNICATION, HELP, WORKSHOP (selected), JOB, PLANNING, and REPORT. The main area is titled 'Running Tasks' and displays four task cards. Each card has a color-coded circle (black, yellow, green) and a red triangle icon. The tasks are: Road test, Disassembly, Disassembly, and Preparation. Each card lists details like Block/Job, Registration, Model, Owner, and Start time. An 'Info' link is at the bottom of each card.

Task	Color	Block/Job	Registration	Model	Owner	Start
Road test	Black	---	/ 54	68BH	---	22/05/2020 13:00
Disassembly	Yellow	---	/ 13579	1WPF439	V Dries	22/05/2020 13:00
Disassembly	Green	---	/ 13586	1UHR763	Delodder Tony	22/05/2020 13:00
Preparation	Green	---	/ 13591	1DIET008	Vandenuecker D...	22/05/2020 13:00

The day colors are also visible in the job itself. The color is based on the predicted end date entered in the job.

The screenshot shows the PlanManager JOB interface for Job # 13741. The top navigation bar includes Job List, Winformex, Order list, Job Queue, Deliveries, Offer Requests, Stock, Ubench, Vat Book, DMS, Albatros, Carpass, and Calendar. The main area displays job details in a form. The 'Location' is 'Insypro SGW'. The 'Registration' is 'ERGERG'. The 'Key Tag Number' is '13741'. The 'Est Appointment / In' is '27-05-2020 10:00'. The 'Appointment repair' is '27-05-2020 10:00'. The 'Vehicle In' is '13741'. The 'Vehicle In date' is '27-05-2020 10:00'. The 'Ready to start' is '27-05-2020 10:00'. The 'Planning' is 'Unknown -> Unknown'. The 'Start / End' is 'Unknown -> Unknown'. The 'Est Comp Date' is '28-05-2020 08:00'. The 'Owner' is 'Dries Vandenuecker'. The 'Driver' is 'Dries Vandenuecker'. The 'Insured Party' is 'Dries Vandenuecker'. The 'Referred By' is 'Dries Vandenuecker'. The 'Insurer' is 'Dries Vandenuecker'. The 'Engineer' is 'Dries Vandenuecker'. The 'Repairer' is 'Dries Vandenuecker'. The 'Broker' is 'Dries Vandenuecker'. The 'Direct payment' is 'Dries Vandenuecker'.

These colors are now also visible in the report (Report - Operational) "Overview Statusses Vehicles In" and "Overview repair phase vehicles present". The advantage is that bodyshop can work by color. This provides a visual overview of which car

The screenshot shows the PlanManager REPORT interface. The top navigation bar includes Filter, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, and Report. The main area displays a calendar view of vehicle status. The calendar shows dates from Monday to Sunday. The status of vehicles is indicated by colored circles: red for 'New', yellow for 'Appointment', green for 'Planned', blue for 'On Hold', and purple for 'Merged'. The calendar shows the following status for each day: Monday (New, Appointment, Planned, On Hold, Merged), Tuesday (New, Appointment, Planned, On Hold, Merged), Wednesday (New, Appointment, Planned, On Hold, Merged), Thursday (New, Appointment, Planned, On Hold, Merged), Friday (New, Appointment, Planned, On Hold, Merged), Saturday (New, Appointment, Planned, On Hold, Merged), and Sunday (New, Appointment, Planned, On Hold, Merged).

must be ready on which day.

Unique solution ID: #2494

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