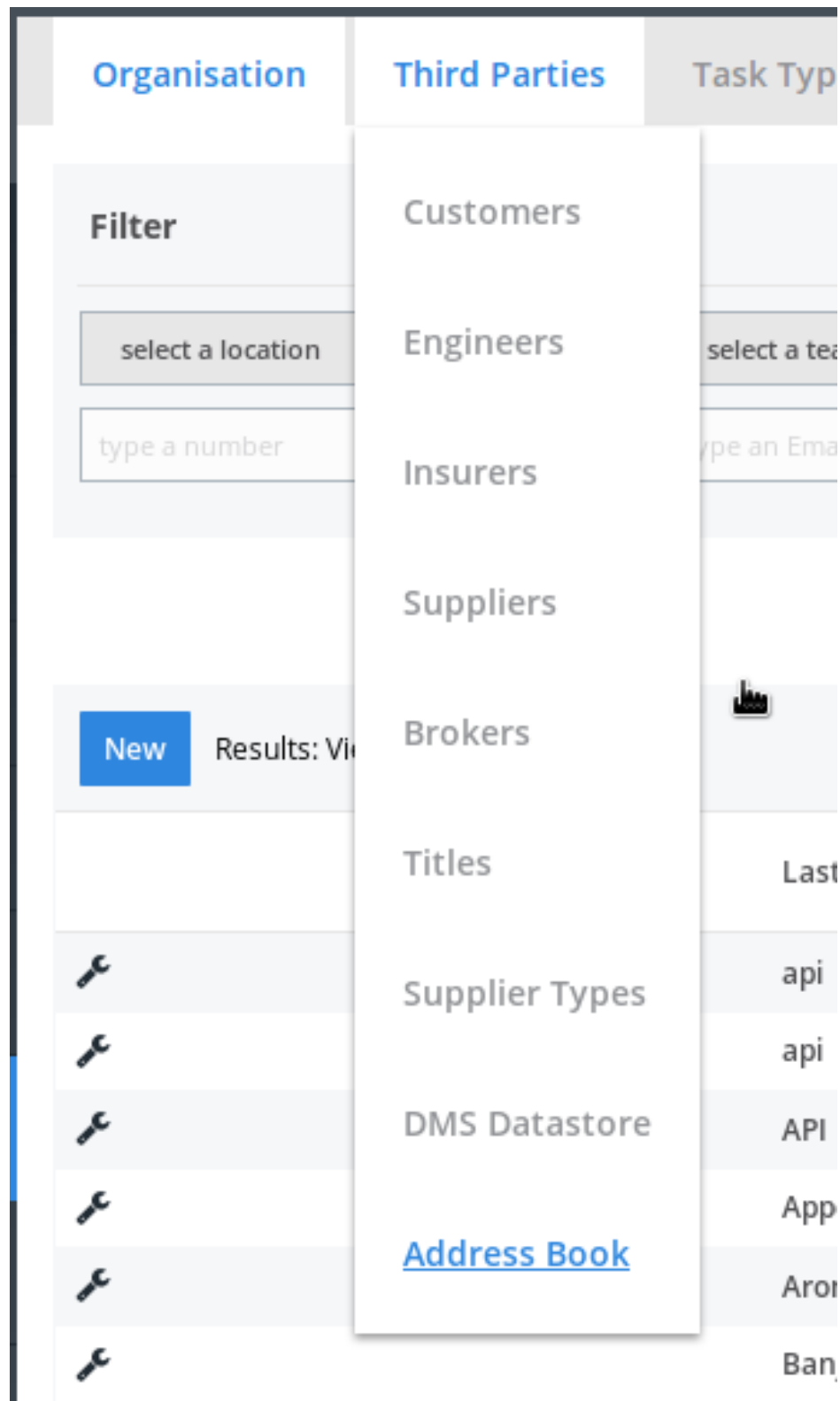# Versions
2020-08 August

Adress book

An option was added to create an address book in PlanManager. You can check the address book going to Maintenance - Third parties - Address book. If this option is not visible, you can activate it by changing the rights of the user groups. To do this you can go to System - User Groups - and select a user group. Then click "Maintance" -> "Third Parties" -> "Address Book" and check all boxes here

Versions

If an e-mail address / mobile number that is not yet known in the address book, is used in communications within PlanManager, this will automatically be added in the address book. Note, this is only the case when the party is "Other" in the communication.

You can also add / edit the address book manually. As soon as the e-mail address / mobile number is known in the address book, this will be automatically proposed as soon as you start entering the name or e-mail address in the communication, to complete this automatically.

Internal communication to your own user

From now on it is possible to send an internal note to yourself as a reminder. This was not possible in the past and you would received an error message. For example, that internal note can be used to remind you of a "to do" by a certain time.

Multi select filter on multiple pages

It is now possible to filter the order page on multiple sites, statuses, suppliers and types using the multi-select filter.

A multi-select filter was also added on the planning so you can filter at multiple locations.

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Additional filters on the order page

Additional filters were added on the order page. It is now also possible to filter on the appointment date and on the 'vehicle in' checkbox (under the button 'Advanced').


The appointment date and the 'vehiclein' checkbox were also added to the order summary (as additional columns).

Report Analysis by brand / customer type - export functionality

An extra export function has been added to the ratio report. You can find this report by going to Report - Dashboard. This report can only be exported if the filter "make" is selected. For the time being, no export to Excel can be done by "type of customer".
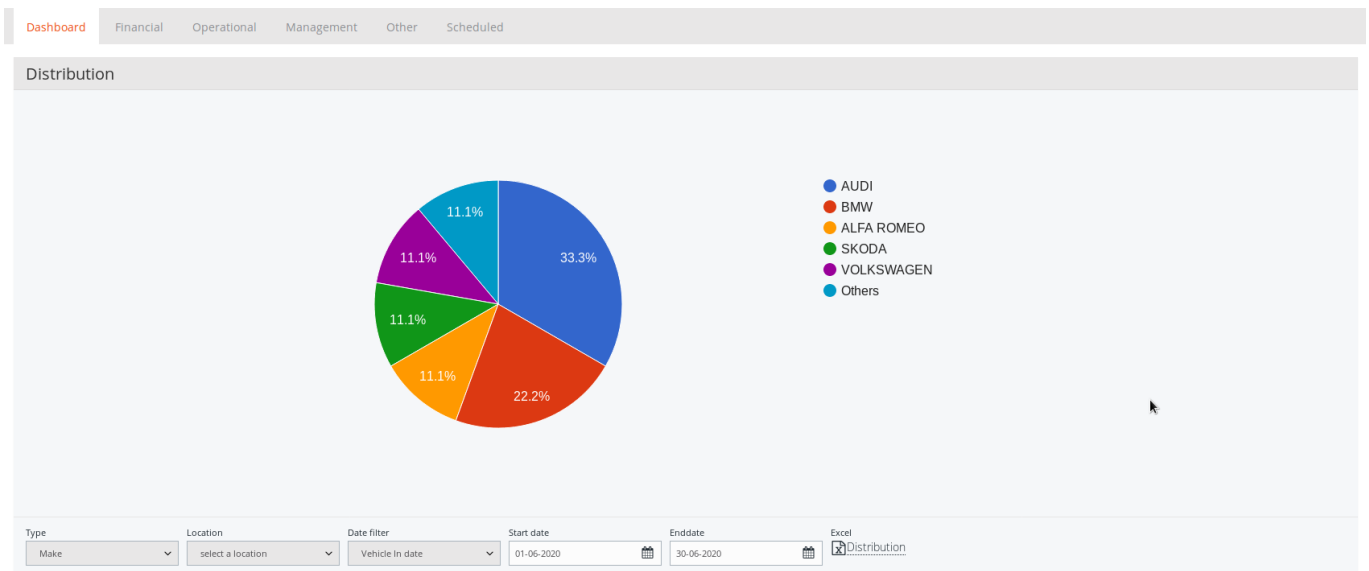
Self Service Portal block time locks for appointment

From this release it is possible to block certain days or half days so that no arrangements for making an appointment can be scheduled.

For this you need to create an extra "virtual" user to enter closing days (full or half

days) of the bodyshop by scheduling an absence for this virtual user. This ensures that customers cannot book appointments for those specific dates. To set this up you can go to Administration - Organisation - Personnel. Click on "new" here to create a new user.

First name = identical name of the location for which the Self Service Portal has been activated

Last name (important that it is exactly the same) = SSPAbsenceConfig

You should also link a weekly schedule to this user. If you now plan a holiday for this user, for example, on 15/08/20 (public holiday), customers cannot make appointments for this day.

Additional option PLAN_BLOCK_ENTRY

Sometimes it happens that automatic rescheduling creates a conflict between the planned end date in the job and the end date of the planning. To draw the user's attention to this, you can use a new option that displays an icon in such a case. To this end, an additional option was added in the configuration of the PLAN_BLOCK_ENTRY: "Estbefore planning". When the planned end date is before the end of the schedule, this option will show an icon in the schedule.

You can activate it via System - General settings - Options – PLAN_BLOCK_ENTRY.

Filter calendar

An extra filter has been added to the calendar. It is now also possible to filter the file owner with the calendar, so that you can see all files for that specific person or persons in the calendar (multi-select possible).

Versions

Stock orders

An adjustment has been made so that the parts delivered from our own stock are also included in the list of ordered and delivered parts on the file screen (bottom right).

This is to provide a more complete overview of the ordered parts for the relevant file.

Planning rental car for logistics

With the rental car planning, an extra option was added if you hover over the rental block with the mouse pointer and click it with the right mouse button. If information is entered in the logistics popup in the file, you will be able to click directly from the menu shown in the replacement vehicle planning to the logistics popup of the relevant file. In the case of pickup & delivery services, this gives a good overview of who drove the car.
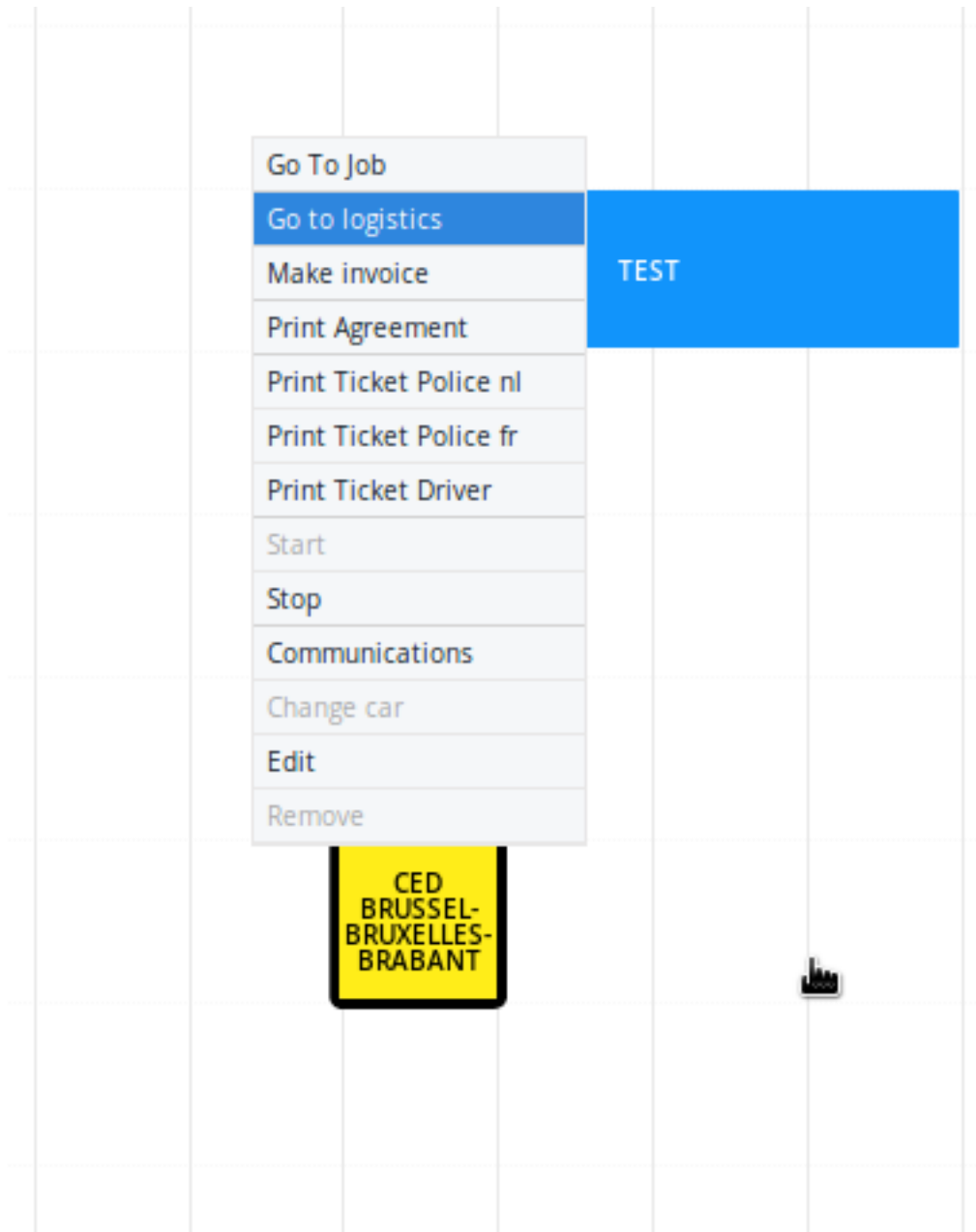
New staff planning

You can find the annual schedule at Maintenance - Organisation - Personnel - "select a staff member". An extra button was added to the weekly schedule: advanced.
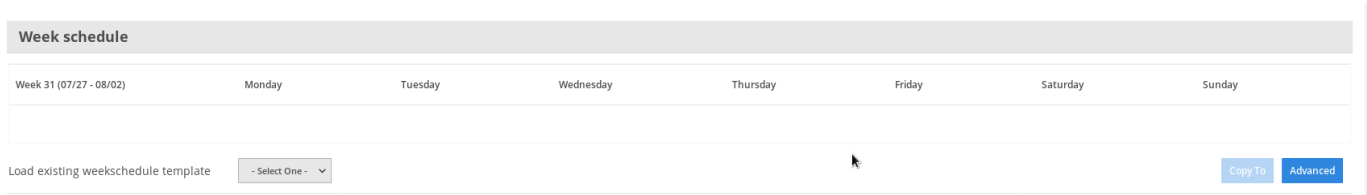
Under this advanced button the ability to work with different schedules has been added. This can be useful if you work in different shifts. You can add a new schedule by going to Maintenance - Organisation – Schedule.

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This person is using the timeschedule "**Personal Schedule - Gebruiker Garage 1**". Click here to change this timeschedule.

Week 31 (07/27 - 08/02)	Monday	Tuesday	Wednesday	Thursday	Friday	Saturd
Standard	08:30 - 17:00	08:30 - 17:00	08:00 - 16:30	08:30 - 17:00	08:00 - 16:00	
Lunch Break	12:00 - 13:00	12:00 - 13:00	12:00 - 13:00	12:00 - 13:00	12:00 - 13:00	

Load existing weekschedule template: Personal Schedule - Gebruiker Garage 1

- moth8-17 br12-13 fr8-12
- Standaard 2
- Avond demo
- 7-16
- 4/5 vrijdag
- Standaard 38U.
- 4/5 Maandag
- Personal Schedule - Gebruiker Garage 1

You can enter the timetable per week, but also per day. If you want to enter per day, press left on the line of the week schedule. An arrow will appear in front of the line.

If you press the right side of the line, an arrow will appear behind the line. This allows you to apply the hour schedule per week.

Unique solution ID: #2519
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