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

Organisation	Third Parties	Task Typ
Filter	Customers	
select a location	Engineers	select a tea
type a number	Insurers	/pe an Ema
	Suppliers	
New Results: Vie	Brokers	<u>ستار</u>
	Titles	Last
₽ ^C	Supplier Types	api
r		api
r	DMS Datastore	API
J [€]		App
r	<u>Address Book</u>	Aroi
r		Ban

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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.

Address Book	Filter			Reset
Description		type an e-mail	type a telephone number	
Email				
Phone number		Description 🗠	Email	Phone number
	×		jonesie@insypro.com	

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.

Filter						R	Reset Export	type a job number		
select a location	~	select a supplier	~	select a status	~	select a type	~	Order From Stock		
AI APS	Î	type a registration		type an Order number			ime			
Body Shop Systems										
Bodyshop A										
Bodyshop B	н.									
Carrosserie Demo JM										<
FRITS TEST										×.
Garage A		Creation Date	Job	Make	Model	s	Supplier	Sale Value	Status	Repair appointm
Garage B		creation bate v	100	Make	WIDGET	2	uppliel	Sale value	Status	керап арропти
GEELS AUTOVERHUUR		27-07-2020 10:24	1051	7 🕥	4 SERIES RO	ADSTER S	Supplier English	€ 552,42	Partially received	22-07-2020
HAIL SOLUTIONS	10	23-07-2020 16:12	1052	-		,	Atk Carparts	€ 0,00	Ordered	24-07-2020
Innovative Systems Provider byba		25-07-2020 10:12	1052.	2		,	tik carparts	€ 0,00	ordered	24-07-2020

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

Current Activities Refresh	28-07-2020 🛗 Per	sonnel: Personnel								select a location V	â
		Monday 27-0	7-2020			Tuesday 28-	-07-2020			V APS	
KK K N M	Occupancy 7u / 145u (5%)	Av. Hours 137.28u	** 34	In/Out 2 1	Occupancy 8u / 152u (5%)	Av. Hours 144.02u	6 32	In/Out 1 0	Occupancy / 1u / 152u (1%)	Body Shop Systems Bodyshop A Bodyshop B	Out 1
select a team 🗸	08 09 10 11	12 13 14 15	16 17	18 19 20 21	08 09 10 11	12 13 14 1	5 16 17 18	19 20 21	08 09 10 11 12	1 🔲 Carrosserie Demo JM	20
										FRITS TEST	
APTAIN KIRK										Garage A	
										Garage B	1
CHEL PLATINI								•		GEELS AUTOVERHUUR	
								~~~~		HAIL SOLUTIONS	
HN TRAVOLTA										Innovative Systems Provider byba	

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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').

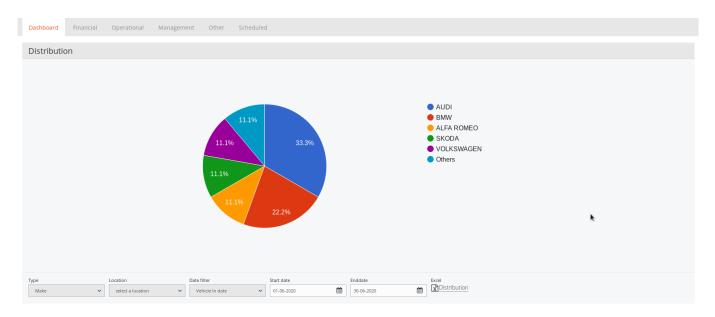
Filter			Reset Expo	type a job number
select a location 🗸	select a supplier 🗸 🗸	select a status	select a type	✓ Order From Stock
type a job number	type a registration	type an Order number	type a part number or name	
Advanced				
	< Creation Date	> C Preferred	Supply Date	
Repair appointment	> Vehicle In			

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

Results: Vie	ewing items 1-1	5 of 16462.						k		1 2 3 4	5 6 7 8 1098 🔰
		Number	Creation Date 🕈	Job	Make	Model	Supplier	Sale Value	Status	Repair appointment	Vehicle In
r		16861	27-07-2020 10:24	10517	٢	4 SERIES ROADSTER	Supplier English	€ 552,42	Partially received	22-07-2020	Yes
ŗ	$\otimes$	16860	23-07-2020 16:12	10522			Atk Carparts	€ 0,00	Ordered	24-07-2020	Yes
r	8	16859	21-07-2020 15:52	10517 O 4 SERIES ROADSTER AV		Atk Carparts	€ 0,00	Created	22-07-2020	Yes	

#### **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  $_{Page \; 3 \; / \; 7}^{Page \; 3 \; / \; 7}$ 

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 $\label{eq:URL: http://faq.insypro.com/index.php?action=artikel&cat=32&id=1219&artlang=endertered article art$ 

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.

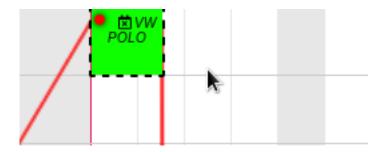
First name = identical name of the location for which the Self Service Portal has been activated

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).

< July 2020 >	Sun	Mon	Tue	Wed	Thu	Fri	Sat
<b>1</b> July 2020				1	2	3	4
MO TU WE TH FR SA SU			08:00 Job : 13827 / 1WPF439	08:00 Job : 13776 / 6-PMH-376	08:00 Job : 13763 / 1-JTL-785	08:00 Job : 13832 / 1WPF439	
1 2 3 4 5				08:00 Job : 13826 / UGIGGIY	08:00 Job : 13769 / 7-APE-652		
6 7 8 9 10 11 12							
13 14 15 16 17 18 19	5	6	7	8	9	10	11
20 21 22 23 24 25 26	2	00:00 Job : 13842 / 1ABC123	17:00 Job : 13767 / 1-JTL-785		00:00 Job : 13838 / NUNUNU	00:00 Job : 13847 / 1UKC640	
27 2 29 30 31		08:00 Job : 13829 / 0107JUL	17.00300.1570771-312-705	-	08:00 Job : 13798 / ZA00001	08:00 Job : 13709 / 1UKC640	
		08:00 Job : 13830 / 3006JUN			+2 more	+2 more	
elect a location 🗸 🗸	- 12	13	14	15	16	17	18
ob Admin 🗸 🗸	12	15	14	08:00 Job : 13850 / 1WPF439	08:00 Job : 13840 / BJBUUB		
				00.00 00 1 10000 1 1111 100	00.00 job - 100407 0j0000	10:00 Job : 13677 / LOGISTICS / Ken	
ann Appelmans						+19 more	
Autotechnica API							
Brian Verschoore	19	20	21	22	23	24	25
Céline Janssens				×	08:00 Job : 13819 / BATCH-175		
Dries Vandenneucker							
Dua Lipa							
Etka COMBox	26	27	28	29	30	31	
innovationgroup api					08:00 Job : 13788 / 1-JTL-785		
isi Iglo					08:00 Job : 13797 / 1-JTL-785		
Jerry V					+2 more		
JM Smets							

### **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).

1									[DAT: 128452	285] [€5 237,3	7] 1	•	+	•)	i)	Î	🗸 Planning	🗸 RO	× Invoi	ce
New	Task			Tasks				K 1	>	New Activity	Results	No items fou	nd.							< >
	۵	Туре	Work Units	Minutes	Rate	Ar	nount	Status												
ŗ		Mechanics	2,0 WU	12 min	€ 65,	00 €	13,00	Planned												
ŗ		Disassembly	52,4 WU	314 min	€ 65,	00 €:	340,60	Planned												
r		Disassembly	6,0 WU	36 min	€ 65,	00 €:	39,00	Planned		Results: Viewir	ng items 1-2	of 2.							<	1 >
۶¢,		Preparation	55,2 WU	331 min	€ 65,	00 €:	358,80	Planned		Job Order	Estimat	e number.	Numb	er	Descriptio	'n	Quant.	Recvd. 🛆	Status	
r		Paintwork	29,8 WU	178 min	€ 65,	00 €	193,70	Planned		183			AU000	003	Lamp H4		1	1	Received (1	/1)
۶¢		Assembly	78,6 WU	471 min	€ 65,	00 €	510,90	Planned		184			MA00		Kit Collag	e PAN VR		6	Received (	
		Total	224,0 WU	22h22		€ ·	1 456,00													
							Apply a ne	w rate to all ta	sks											
New	Part			Parts				123	>											
۵	Number	Name		Price	Quant.	Used quant.	Total	Replace												
ŗ	31376417	KABELSET PARKEE	RHULP A.	€ 38,00	1		€ 38,00	Yes												
r	39841354	ACHTERKLEP		€ 895,00	1		€ 895,00	Yes												
ŗ		REPARATIESET, BE	STAAT UIT:		1		€ 0,00	Yes							k					
r	31299177	LIJMSET ACHTERR	UIT	€ 40,00	1		€ 40,00	Yes												

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.

Go To Job Go to logistics	
Make invoice	TEST
Print Agreement	
Print Ticket Police nl	
Print Ticket Police fr	
Print Ticket Driver	
Start	
Stop	
Communications	
Change car	
Edit	
Remove	
CED BRUSSEL- BRUXELLES- BRABANT	

### 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.

Week schedule							
Week 31 (07/27 - 08/02)	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Load existing weekschedule template	- Select One - 🗸 🗸			)	÷.		Copy To 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.

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

	7 - 0	8/02)				Ν	/lond	lay					1	ueso	lay						Wed	nesda	у					Thu	rsday	'					Frid	ay			Sat
tandard						C	8:30	- 17:0	)0				(	)8:30	- 17:0	00					08:00	) - 16:	30					08:3	0 - 17	7:00					08:0	00 - 1	16:0	)	
unch Break						1	2:00	- 13:0	00					2:00	- 13:0	00					12:00	) - 13:	00					12:0	0 - 13	8:00					12:0	00 - 1	13:0	)	
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February				02	03	04	05				09			H	13 10			16 13		H	19 16		21 18		23 20		-	26 23	27 24	28 25	29 26		31 28	29					
February March				02	03	-			04	05			08	H					14	15	16					21	22					27		29 28	29	30	) З	1	
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March						01	02 01 05	03 02 06	04 03 07	05 04 08	06 05	07 06 10	08 07	09 08 12	10 09 13	11 10	12 11	13 12 16	14 13 17	15 14	16 15 19	17 16	18 17	19 18 22	20 19	21 20	22 21 25	23 22 26	24 23	25 24	26 25	27 26	28	28	29 31	30	) 3	1	
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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.

<ul> <li>standard 500.</li> </ul>	WOIT	Tue	wea	mu	111	Jui	Jun	
→ 🗖 4/5 Maandag	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Personal Schedule - Gebruiker Garage 1	Mon	Tue	Wed	Thu	Fri	Sat	Sun	

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.

4/5 Maandag	Mon	Tue	Wed	Thu	Fri	Sat	Sun	←
🔲 Personal Schedule - Gebruiker Garage 1	Mon	Tue	Wed	Thu	Fri	Sat	Sun	

Unique solution ID: #2519 Author: Glenn De Landtsheer Last update: 2020-07-30 16:22