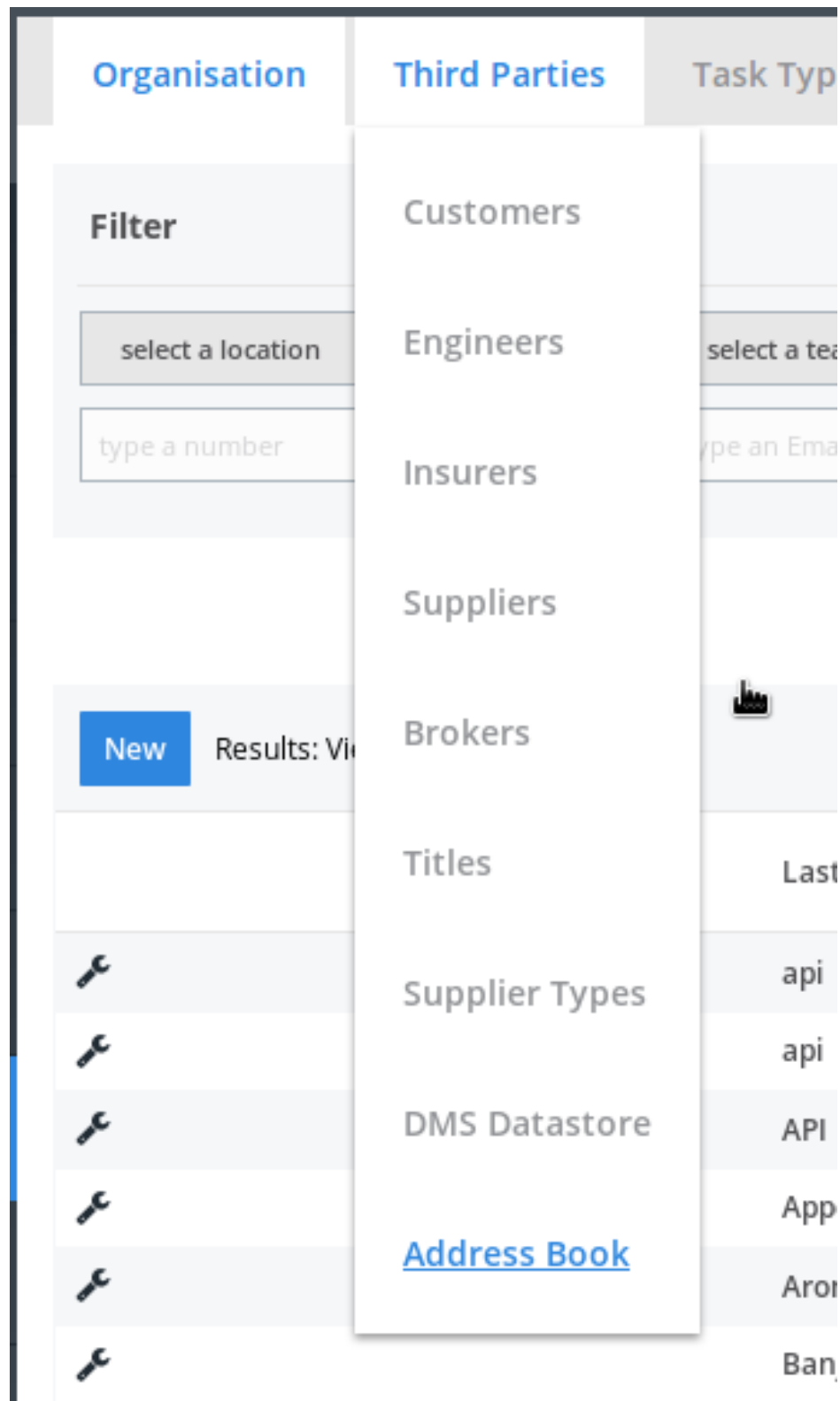


Versions

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.

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.

Creation Date	Job	Make	Model	Supplier	Sale Value	Status	Repair appointment
27-07-2020 10:24	10517		4 SERIES ROADSTER...	Supplier English	€ 552,42	Partially received	22-07-2020
23-07-2020 16:12	10522			Atk Carparts	€ 0,00	Ordered	24-07-2020

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

select a team	08	09	10	11	12	13	14	15	16	17	18	19	20	21
CAPTAIN KIRK														
MICHEL PLATINI														
JOHN TRAVOLTA														

Versions

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

Export

select a location

select a supplier

select a status

select a type

type a job number

type a registration

type an Order number

type a part number or name

Advanced

Supplier Invoice Nr

< Creation Date >

< Preferred Supply Date >

< Repair appointment >

☐ Vehicle In

type a job number

Order From Stock

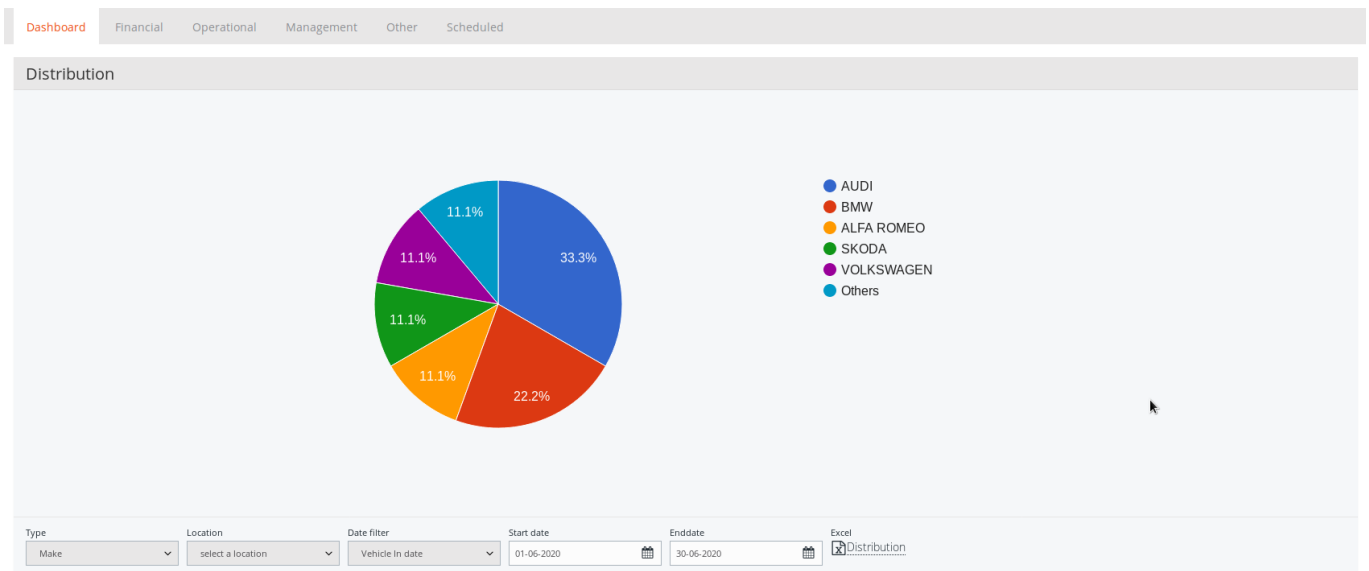
The appointment date and the 'vehiclein' checkbox were also added to the order summary (as additional columns).

Results: Viewing Items 1-15 of 16462.

		Number	Creation Date	Job	Make	Model	Supplier	Sale Value	Status	Repair appointment	Vehicle In
		16861	27-07-2020 10:24	10517		4 SERIES ROADSTER...	Supplier English	€ 552,42	Partially received	22-07-2020	Yes
		16860	23-07-2020 16:12	10522			Atk Carparts	€ 0,00	Ordered	24-07-2020	Yes
		16859	21-07-2020 15:52	10517		4 SERIES ROADSTER...	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

Versions

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

MONTH WEEK DAY LIST < >							JULY 2020						
< July 2020 >							Sun	Mon	Tue	Wed	Thu	Fri	Sat
MO	TU	WE	TH	FR	SA	SU	28	29	30	1	2	3	4
6	7	8	9	10	11	12			08:00 Job : 13627 / 1WPF439	08:00 Job : 13776 / 6-PMH-376	08:00 Job : 13763 / 1-JTL-785	08:00 Job : 13832 / 1WPF439	
13	14	15	16	17	18	19				08:00 Job : 13826 / UGIGGIY	08:00 Job : 13769 / 7-APE-652		
20	21	22	23	24	25	26	5	6	7	8	9	10	11
27	28	29	30	31				08:00 Job : 13842 / 1ABC123	17:00 Job : 13767 / 1-JTL-785		08:00 Job : 13838 / NUNUNU	08:00 Job : 13847 / 1UKC640	
								08:00 Job : 13829 / 0107JUL			08:00 Job : 13798 / ZA00001	08:00 Job : 13709 / 1UKC640	
								08:00 Job : 13830 / 3006JUN			+2 more	+2 more	
							12	13	14	15	16	17	18
										08:00 Job : 13850 / 1WPF439	08:00 Job : 13840 / BJBUUB	10:00 Job : 13677 / LOGISTICS / Kem	
												+19 more	
							19	20	21	22	23	24	25
											08:00 Job : 13819 / BATCH-175		
							26	27	28	29	30	31	1
											08:00 Job : 13788 / 1-JTL-785		
											08:00 Job : 13797 / 1-JTL-785		
											+2 more		
							2	3	4	5	6	7	8

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

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[DAT: 12845285] [€ 5 237,37]

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🗑

✓ Planning

✓ RO

✕ Invoice

New Task

Tasks

⏪ 1 ⏩

△	Type	Work Units	Minutes	Rate	Amount	Status
🔧	Mechanics	2,0 WU	12 min	€ 65,00	€ 13,00	Planned
🔧	Disassembly	52,4 WU	314 min	€ 65,00	€ 340,60	Planned
🔧	Disassembly	6,0 WU	36 min	€ 65,00	€ 39,00	Planned
🔧	Preparation	55,2 WU	331 min	€ 65,00	€ 358,80	Planned
🔧	Paintwork	29,8 WU	178 min	€ 65,00	€ 193,70	Planned
🔧	Assembly	78,6 WU	471 min	€ 65,00	€ 510,90	Planned
	Total	224,0 WU	22h22		€ 1 456,00	

[Apply a new rate to all tasks](#)

New Activity

Results: No items found.

⏪ 1 ⏩

Results: Viewing items 1-2 of 2.

⏪ 1 ⏩

Job Order	Estimate number.	Number	Description	Quant.	Recvd. △	Status
183		AU00003	Lamp H4	1	1	Received (1/1)
184		MA00013	Kit Collage PAN VR	6	6	Received (6/6)

New Part

Parts

⏪ 1 2 3 ⏩

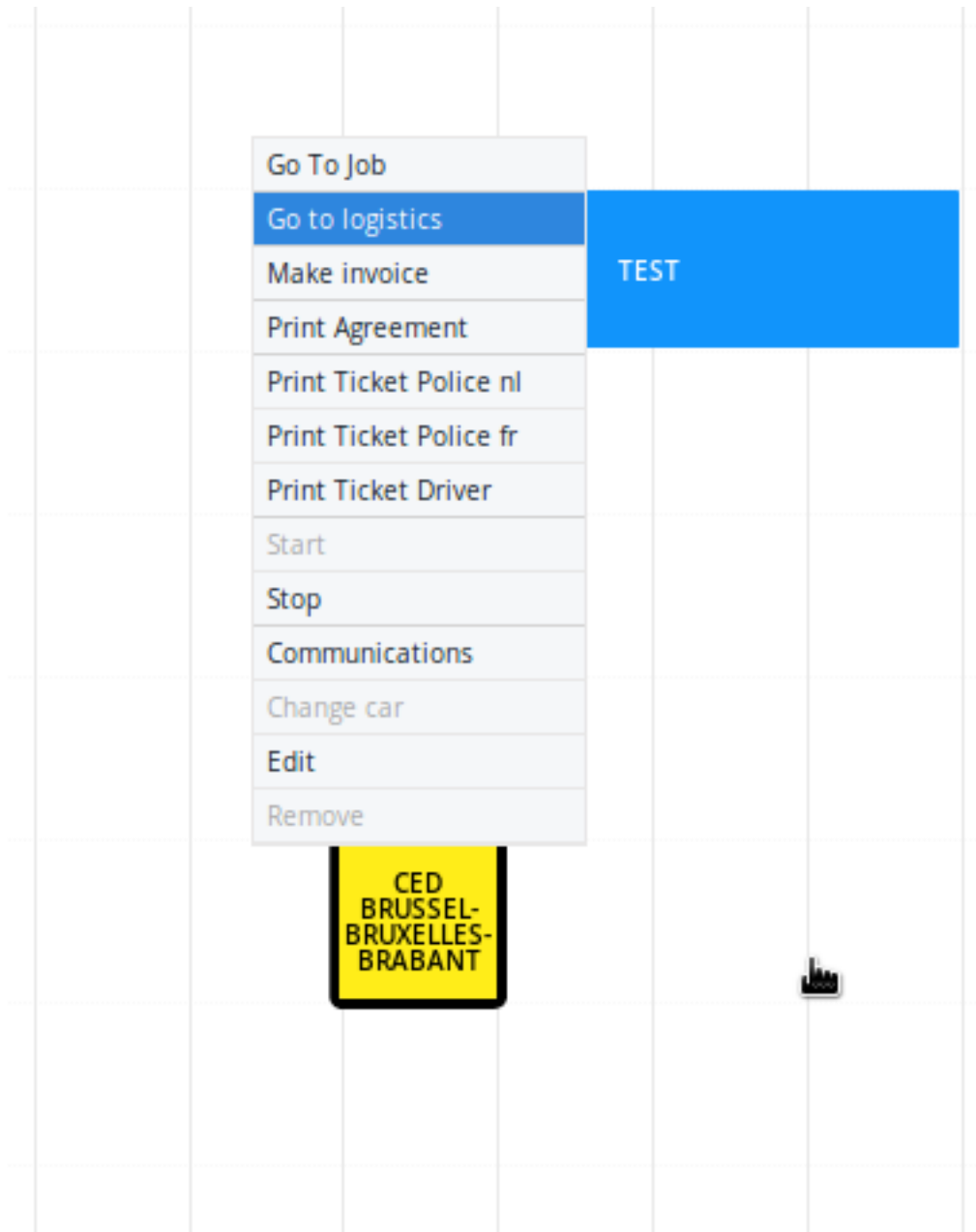
△	Number	Name	Price	Quant.	Used quant.	Total	Replace
🔧	31376417	KABELSET PARKEERHULP A.	€ 38,00	1		€ 38,00	Yes
🔧	39841354	ACHTERKLEP	€ 895,00	1		€ 895,00	Yes
🔧	---	REPARATIESET, BESTAAT UIT:	---	1		€ 0,00	Yes
🔧	31299177	LIJMSET ACHTERRUIT	€ 40,00	1		€ 40,00	Yes

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

Planning rental car for logistics

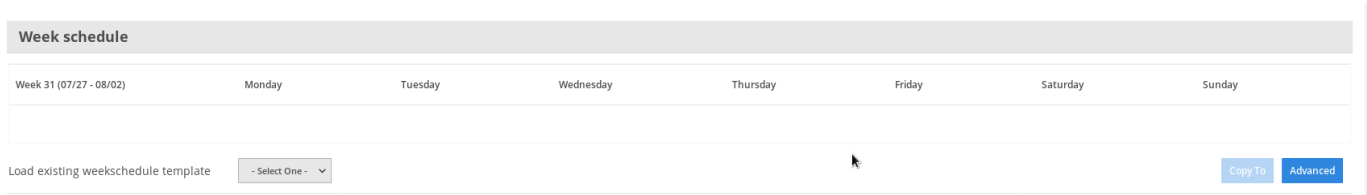
With the rental car planning, an extra option was added if you hover over the rental block with the mouse pointer and click it with the right mouse button. If information is entered in the logistics popup in the file, you will be able to click directly from the menu shown in the replacement vehicle planning 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.

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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.

