

Versions

2020-12 December

Deleting an order

An adjustment has been made so that it is no longer possible to delete an order that has already been communicated. If the order has the status: ordered, partially received, received or cancelled, it is no longer possible to delete the order completely. The reason for this is that during the automatic ordering process, updates are also sent from the supplier's programme. If you are going to send a digital order and then delete it, updates will still be sent. These updates then cause error messages because PlanManager can no longer retrieve the order. As soon as the order has received the status 'ordered', it is no longer possible to change the order to 'creation' or 'created'. Exceptions to this are the orders that come in via the paint computer. These can still be removed.

Extra configuration RO

! This configuration can only be used by users of the Self Service Portal.

An extra configuration has been added so that you can now choose whether you want to have the HO signed in the Self Service Portal. You can use the following config: SELF_SERVICE_PORTAL_SIGN_RO. This configuration cannot be set per location. This is a global setting for the entire database.

Additional columns export job list

An adjustment was made to the export of the job list. It is now possible to add the following data to the filters and columns:

- Estimate total value
- Estimated hours
- Invoiced hours
- Estimation of labour value
- Other hours
- Allocated hours
- Invoiced labour value

These data are also included in the export of the dossier list. IMPORTANT: if you do not always need these data, it is best not to add them by default in the columns/filters. As a large amount of data needs to be exported, this can cause some delay in the export if you always start exporting all this data.



AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP
Estimation total	Invoice total	Creditnote total	Result	Invoices	Repair type	Estimate Total Value	Estimated Hours	Invoiced Hours	Estimate labour value	Remaining Hours
			0				00:00	00:00		

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Discount reporting

A new report was added which makes it possible to view the discount/file. You can find this report under Report - Financial – Rebate per customer.

Dashboard	Financial	Operational	Management	Other	Scheduled
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Rebate per customer  																													
<div><div>Filter</div><div><div>Location</div><div>select a location</div></div><div><div>Date</div><div><input checked="" type="radio"/> vehicle in <input type="radio"/> Off site date <input type="radio"/> Invoice Date</div></div><div><div>From</div><div>01-11-2020</div></div><div><div>Until</div><div>03-12-2020</div></div><div>Filter</div></div> <div><div>2 items</div><div><div>Job</div><div>Owner</div><div>Make</div><div>Model</div><div>Registration</div><div>Status</div><div>Duration</div><div>Invoice amount before rebate</div><div>Invoice amount after rebate</div><div>Rebate Percent</div></div><table><tr><td>14006</td><td>Dries Best VDFIN ...</td><td></td><td></td><td>WPG</td><td>Invoiced</td><td>0h00</td><td>€ 92,00</td><td>€ 78,20</td><td>15,00 %</td></tr><tr><td>14020</td><td>Dries Vandenneucker</td><td></td><td></td><td>INS-650-2</td><td>Invoiced</td><td>0h00</td><td>€ 170,00</td><td>€ 158,00</td><td>7,06 %</td></tr></table></div>										14006	Dries Best VDFIN ...			WPG	Invoiced	0h00	€ 92,00	€ 78,20	15,00 %	14020	Dries Vandenneucker			INS-650-2	Invoiced	0h00	€ 170,00	€ 158,00	7,06 %
14006	Dries Best VDFIN ...			WPG	Invoiced	0h00	€ 92,00	€ 78,20	15,00 %																				
14020	Dries Vandenneucker			INS-650-2	Invoiced	0h00	€ 170,00	€ 158,00	7,06 %																				

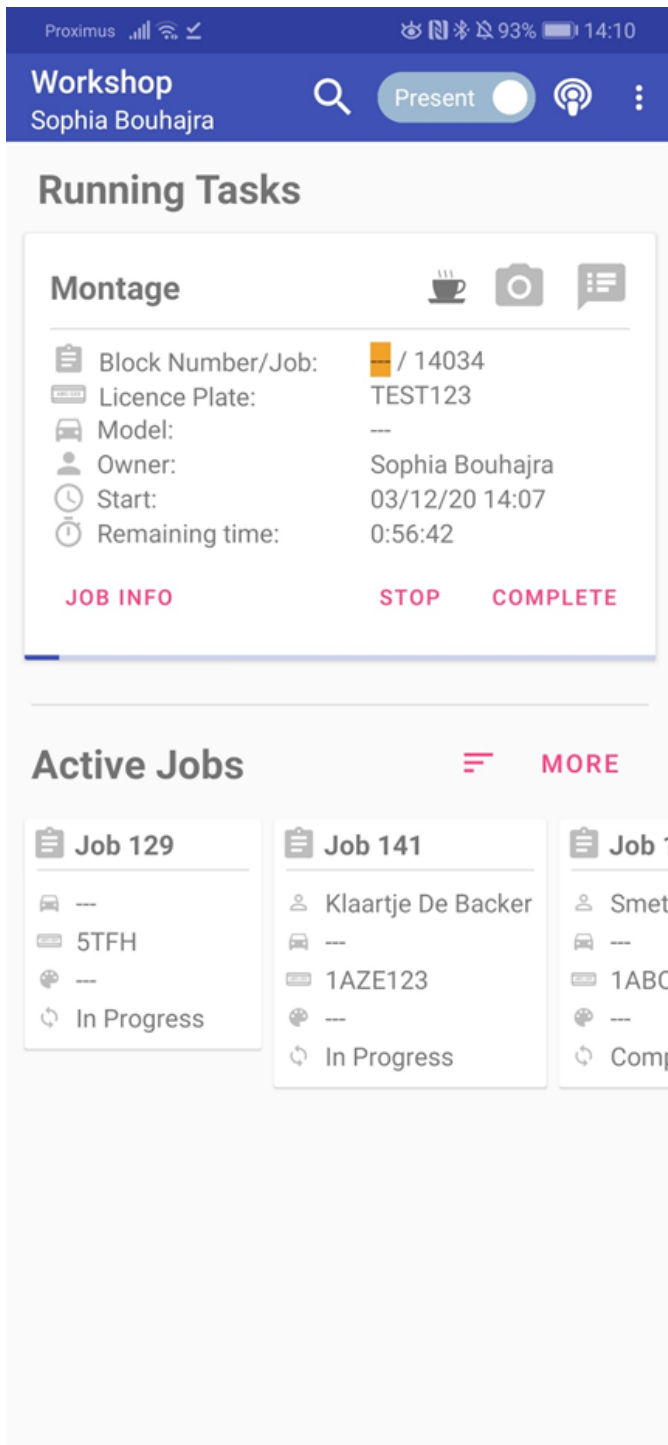
This report has been created so that an overview can easily be made of the discounts given per job. The report can be filtered by period, location, date of vehicle arrival, date of invoice and pick-up date. It is possible to export this report to excel. An example of the export can be found below:

A	B	C	D	E	F	G	H	I	J	K
Job	Customer	Make	Model	Registration	Status	Duration	Invoice amount before rebate	Rebate Percentage	Rebate Amount	Invoice amount after rebate
14006	Dries Best VDFIN (EOC Greenfish)			WPG	Invoiced	0:00	EUR 92,00	15,00 %	€ 13,80	EUR 78,20
14020	Dries Vandenneucker			INS-650-2	Invoiced	0:00	EUR 170,00	7,06 %	€ 12,00	EUR 158,00

Workshop application & coffee icon

From the next release of the workshop application, an extra waiting icon (coffee cup) will appear for both the current and planned tasks. The coffee cup icon indicates that the customer is waiting for the car to be repaired.

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Author: Sophia Bouhajra
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