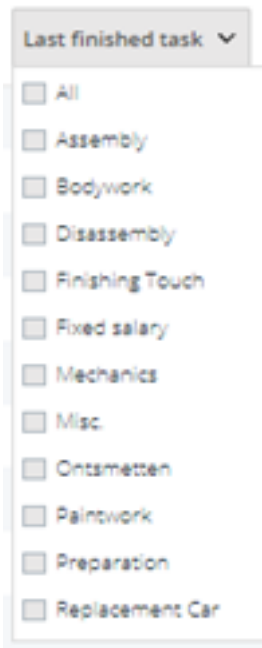


# Versions

## 2021-05 May

### Job list - Last completed task

As indicated in the previous release note, it was made possible to display the last finished task on the job screen. From this release it is also possible to export this field with an export of the job list. More information about how to add the field to the job list can be found in our April release note. To filter easily on the field, a drop-down menu was also added.



This dropdown menu is only visible if you have added the field of the last completed task to the job screen.

### Job status after credit note

As of this release, an adjustment has been made so that the status of a job will be automatically adjusted when creating a credit note. Here is an example:

Job A – status delivered – invoice for €100 – status invoiced (the job will be automatically placed on this status after creation of an invoice) – creation of a credit note for the full amount (€100) – the status invoiced will be restored to status delivered.

So, if you create a credit note for the full amount of the invoice, the status invoiced will automatically be adjusted to the status that the job had before it was invoiced.

### Invoicing work third parties

If you go to work third parties in the job, you will see that from now on it is possible to draw up an invoice from this screen. This ensures that you have a better overview and that the invoicing can be faster.

# Versions

Below you can find an example:

The screenshot shows a software interface titled "Subcontracted" with a close button (X) in the top right corner. Below the title bar is a "New" button and a list of items. The first item in the list is "test" with an expected delivery date of "28-04-2021" and a description of "Change windshield". Below the list is a form titled "Edit: test Change windshield". The form has two columns. The left column contains fields for "Supplier" (test), "Phone", "Fax", "Task" (Work third party), "Start date" (28-04-2021), "Expected delivery" (28-04-2021), and "Description" (Change windshield). The right column contains fields for "Estimated cost" (€ 80), "Invoiced cost" (€ 85), "Invoice number", "Reinvoice amount" (€ 175), "Estimation" (None), and "Comments". At the bottom of the form are buttons for "Save", "Remove", "Purchase Invoice", "Sale Invoice", and "Communication". The "Sale Invoice" button is highlighted with a red circle.

## Purchase invoice quantity configuration

A new configuration was added that makes it possible to pin the quantities to a purchase invoice as soon as an order line is associated with it. You can activate this feature by setting the following configuration: `LOCK_LINKED_PURCHASE_INVOICE_LINES`.

## Insurer - Excess invoice

From now on it is possible to create an excess invoice from the popup of the insurer. You can create the excess invoice by pressing the following icon:

# Versions

Insurer

Search

Customer Number

7

Name

CITROEN ASSURANCE C/O AXA

Legal Personality

juridical

Title

Address

BLD DU SOUVERAIN 25

Address2

Postcode/Town

1170

BRUXELLES

County/Province

Phone

078/15.24.40

Fax

Mobile

Email

VAT liable

☒

VAT Number

Comment

Damage claim number

Excess

Policy number

Greencard date

Inherited Recovery

☐

Note

Cover survey

Repairduration

English excess

☐

Damage claim state

- Select One -

Please send the invoice to this party.: No

## Job invoicing status

PlanManager will automatically change the status of the job when an invoice is created. The job will then be given the status "invoiced". An adjustment has been made so that the job is only, automatically, changed to status 'invoiced' if a main invoice is created. When creating an excess invoice, for example, the status will not automatically be adjusted to "Invoiced".

## UK wip dates and vault

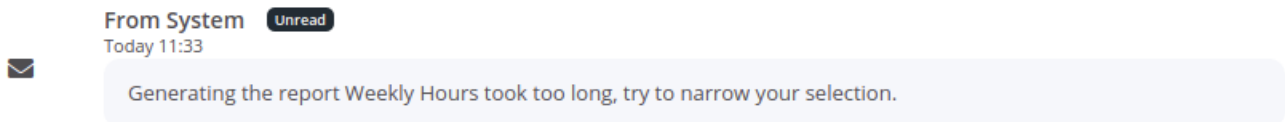
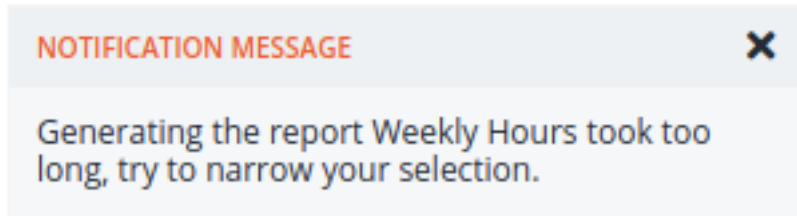
This release we have made some changes to the UK work in progress report. You can find this report by going to Report- Financial – Work in progress UK. We have added 2 additional fields to this report: Vehicle in data and the pickup date. We only show the jobs that are not in the vault. From this release it is also possible to export the work in progress report with the cost for the following task types: Strip, Panel, Preparation, Painting, Polishing, Refit, Quality Control.

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# Versions

## Scheduled Reports

an adjustment was made to the planned reports. Starting with this release, a scheduled report that takes longer than 15 minutes to load will be automatically stopped. You will see the following message appear:



Unique solution ID: #3494  
Author: Sophia Bouhajra  
Last update: 2021-05-03 16:23