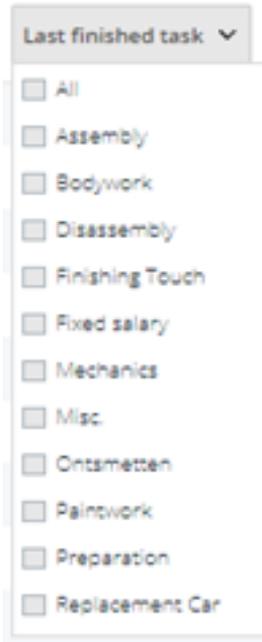


# Versions

## 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 for managing subcontracted work. The main window is titled "Subcontracted" and contains a table with columns for Supplier, Expected delivery, and Description. Below the table is an "Edit" form for "test Change windshield". The form includes fields for Supplier (test), Phone, Fax, Task (Work third party), Start date (28-04-2021), Expected delivery (28-04-2021), and Description (Change windshield). On the right side, there are fields for Estimated cost (€ 80), Invoiced cost (€ 85), Invoice number, Reinvoice amount (€ 175), Estimation (None), and Comments. At the bottom, there are buttons for Save, Remove, Purchase Invoice, Sale Invoice, and Communication. The Sale Invoice button is circled in red.

## 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	<input type="text"/>	Damage claim number	<input type="text"/>
Customer Number	<input type="text" value="7"/>	Excess	<input type="text"/>
Name	<input type="text" value="CITROEN ASSURANCE C/O AXA"/> <span>🔧</span>	Policy number	<input type="text"/>
Legal Personality	<input type="text" value="juridical"/>	Greencard date	<input type="text"/> <span>📅</span>
Title	<input type="text"/>	Inherited Recovery	<input type="checkbox"/> <input type="text"/>
Address	<input type="text" value="BLD DU SOUVERAIN 25"/>	Note	<input type="text"/>
Address2	<input type="text"/>	Cover survey	<input type="text"/>
Postcode/Town	<input type="text" value="1170"/> <input type="text" value="BRUXELLES"/>	Repair duration	<input type="text"/>
County/Province	<input type="text"/>	English excess	<input type="checkbox"/>
Phone	<input type="text" value="078/15.24.40"/>	Damage claim state	<input type="text" value="- Select One -"/> <span>▼</span>
Fax	<input type="text"/>		
Mobile	<input type="text"/>		
Email	<input type="text"/>		
VAT liable	<input checked="" type="checkbox"/> <input type="text" value="VAT Number"/> <span>🔍</span>		
Comment	<input type="text"/>		

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".

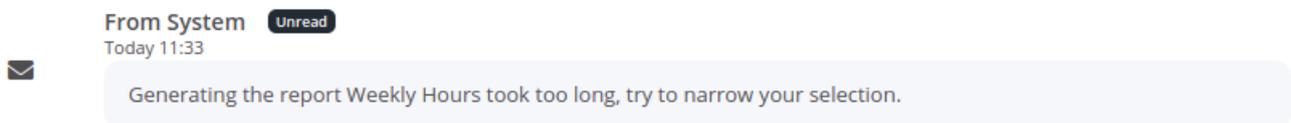
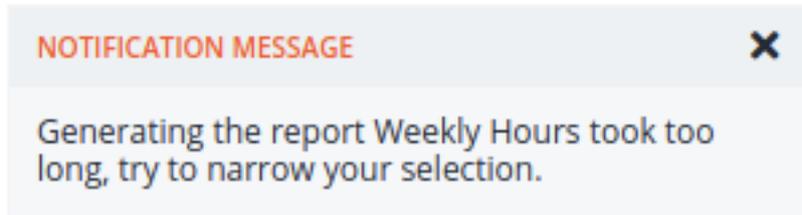
## UK wip dates and vault

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.

# 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