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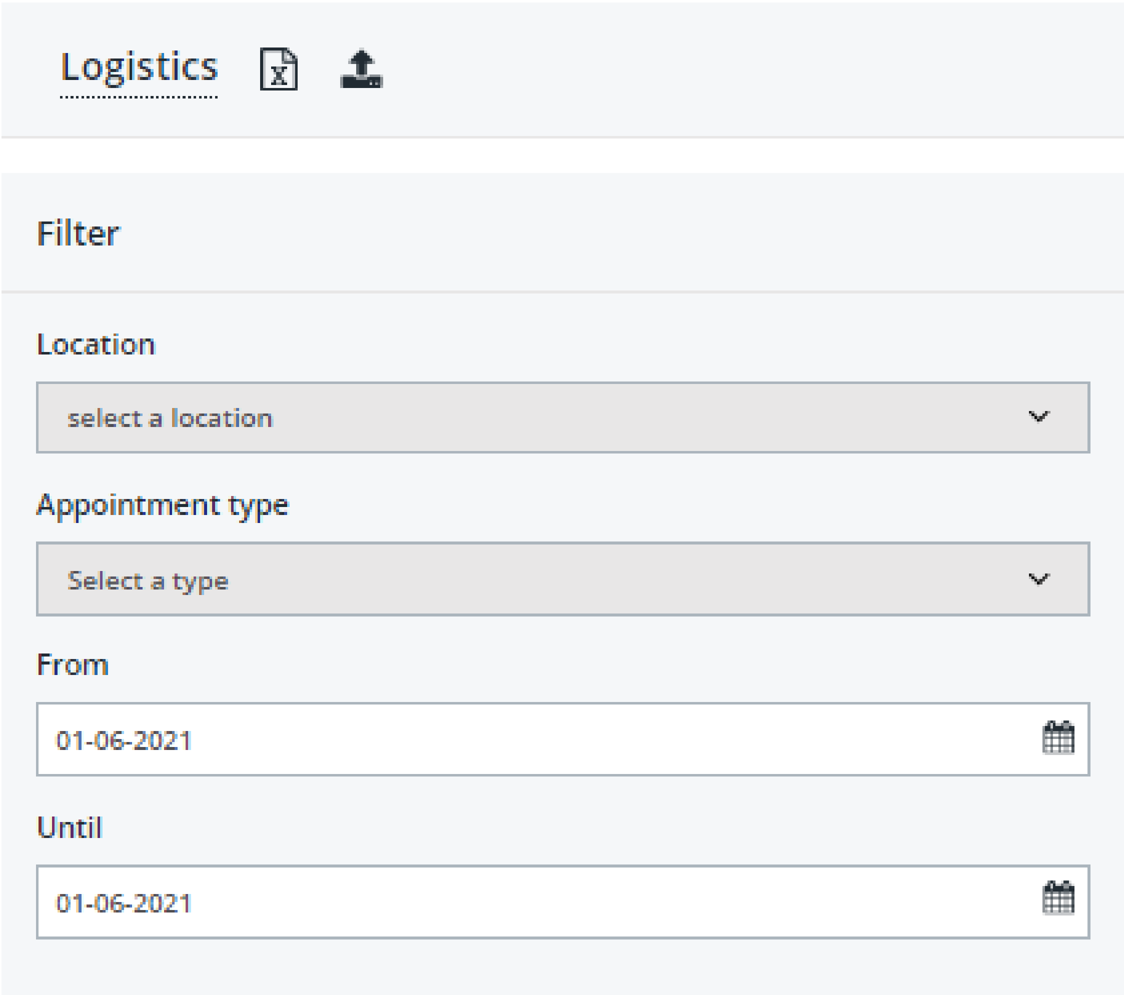
2021-06 June

Additional filter logistics report

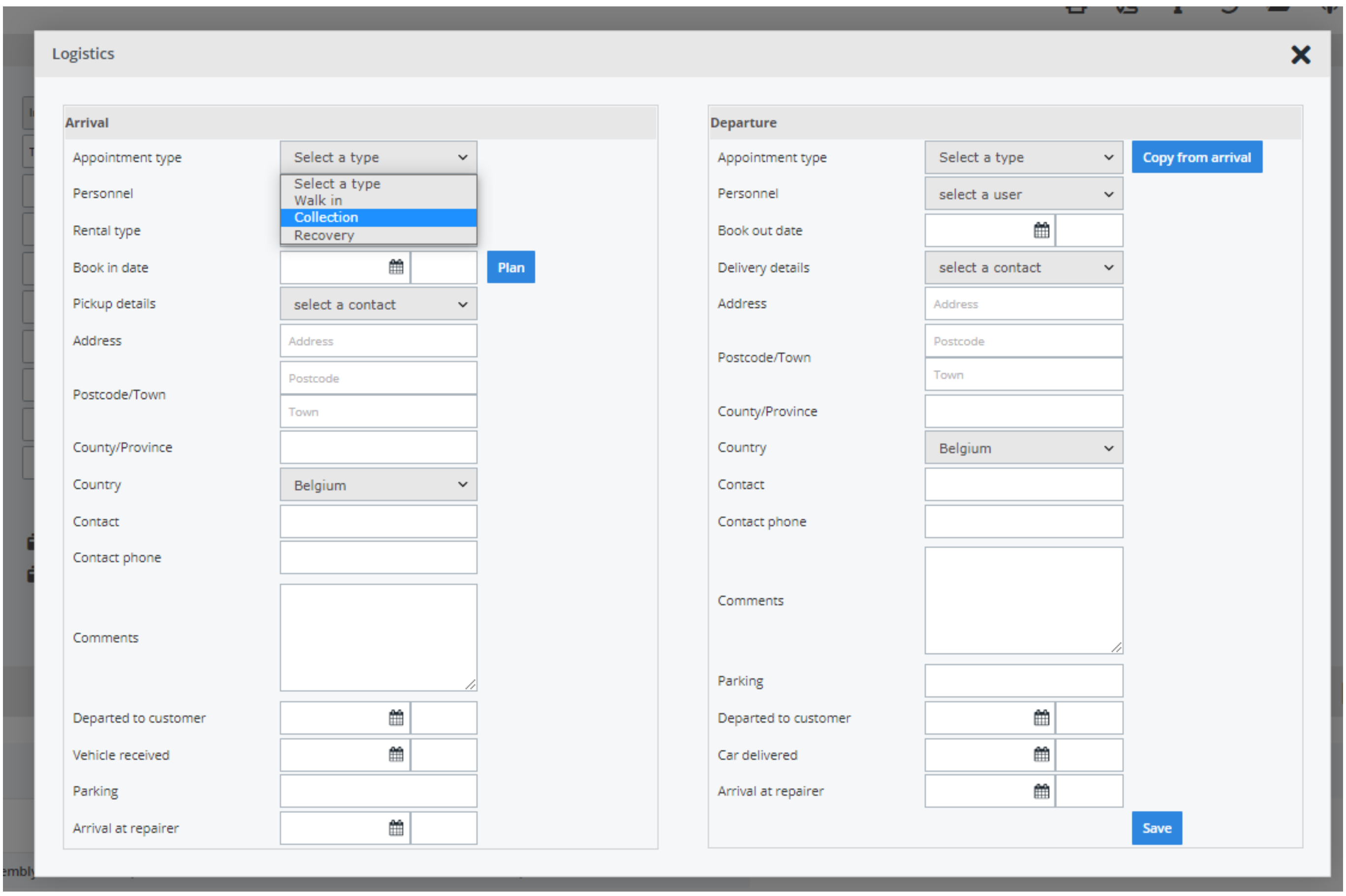
As of this release, it will be possible to also filter by type in the logistics report.

You can find this report by going in PlanManager to Report - Operational - Logistics. The filter appointment type has been added here.



The appointment type itself can be indicated in the logistic popup in the file. In the file click on the following icon to open the logistic popup:

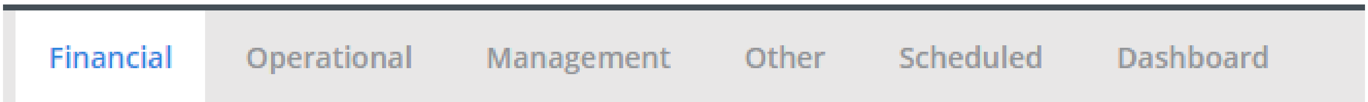
The appointment type can be selected from the dropdown menu both on arrival and departure.



More information on the operation of the logistic function can be found in our FAQ/previous release notes.

Adjustment of display of reports

An adjustment was made to the display of the reports. In the past, when pressing 'Report', some reports were automatically displayed. The reports from this page, also called the Dashboard, were moved. You can now find these as the 4th option in the row: Financial - Operational - Management - Dashboard.



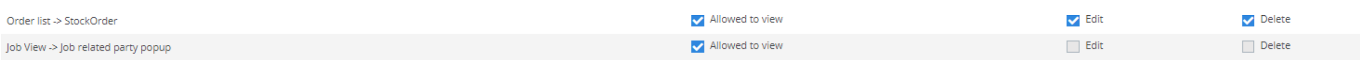
Adjustment accounting link Snelstart

An adjustment was made to the existing accounting link with Snelstart so that it is now also possible to export foreign invoices (to 0%). This is an underlying adjustment that is not visible to the user.

Extra permissions - modify customer data

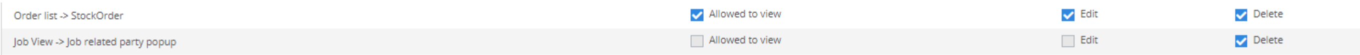
An extra functionality has been added that makes it possible to determine which users can edit customer data in a file. You can find these rights under System - User Groups - 'Select a User Group' - File - File Screen- 'Job related Party Popup'.

1. Job related party popup - View permissions

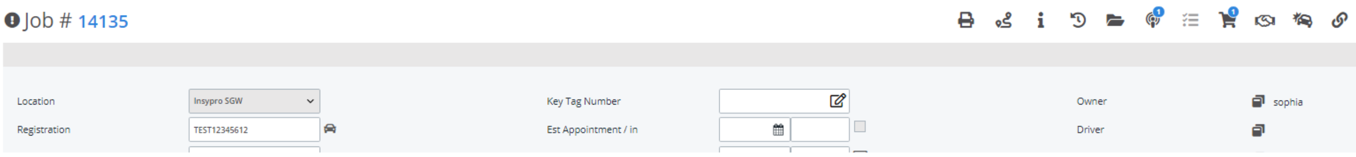


You can select another party by using the search field or you can blank the third party field. You cannot change customer data here. You can only load another customer using the search field.

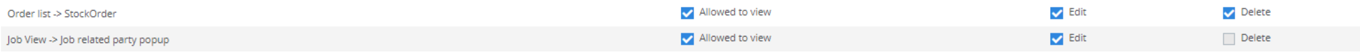
2. Job related party popup - all permissions unchecked



You can view the different parties in a file, but you cannot open the customer data/other party data popup. It is not possible to modify the data of the parties. So, if you don't want a particular user to see the customer data/data of a third party, you can turn off all rights. If these rights are off, the user will only see the name of the party, but no info like the address, phone number, email address, ...



3. Job related party popup -> Edit rights on-> here you can edit customer data/ data of the parties in a file.



4. Job related party popup - Delete rights on -> no extra functionality provided behind these rights.

Additional logging of deletion activities

As of this release, additional logging has been added regarding deletion of activities in the file. Previously there was a log that showed that a certain activity was deleted, however there was no task type included. In the past the log had the following format:

staff member [day: start time → end time].

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This has been changed so that the logs now also show which activity (+ which task) was removed from the file. From now on, the log is composed of the following format:

staff member / task type [day: start time → end time]

If the task changes, this information can also be found in the logs:

In the 'reason' column you can find the task before modification, in the 'value' column you can find the task after modification. So if there would be an adjustment to a certain activity whereby the task would also be changed, you can find this from now on also in the logs.

⊗	02-06-21 09:02:00	14135	sophia	ACTIVITY_CHANGED	Sophia Bouhajra	test test / Montage[2021-06-02: 08:00 -> 0...	test test / Voorbereiding[2021-06-02: 08:0...

In the example below, the task preparation was modified to the task assembly. A log will be created with activity modified with in the 'reason' column preparation and in the 'value' column assembly. In both logs this info will be displayed based on the new format (staff member/task type [day: start time → end time]).

You can find the logs by going to System - Logs. The modification/deletion of activities can also be found in the case logs.

Create new inspector3 job

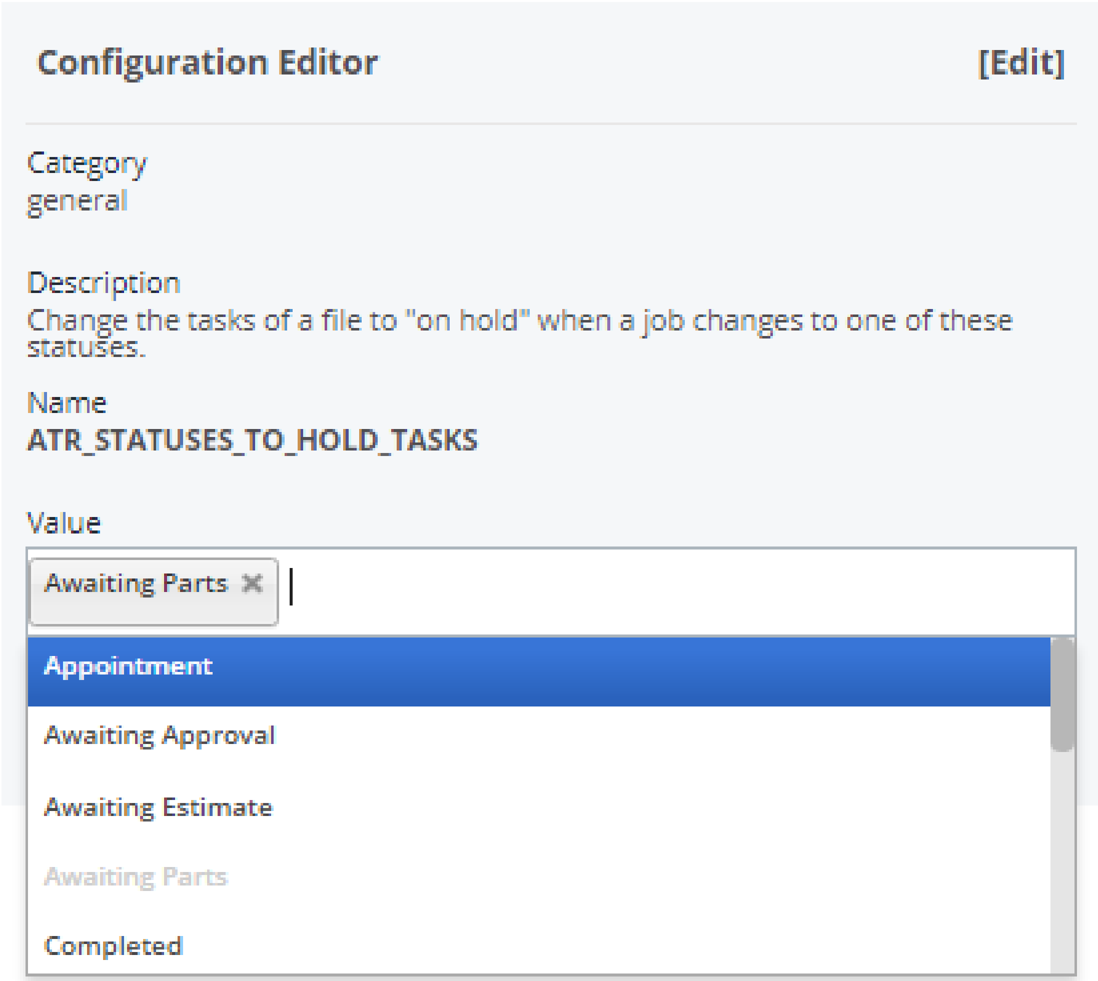
An extra functionality has been added that makes it possible to create a new file based on an old, existing file when looking up a certain license plate. This feature has been added and will be available from the new inspector3 update.

Tasks automatically on ‘on hold’ based on certain status

As of this release, there is a new configuration available that allows tasks to be automatically set to 'on hold' status based on a certain status in the file. To set this up you can go to System - General Settings. Here you can find the following configuration option:

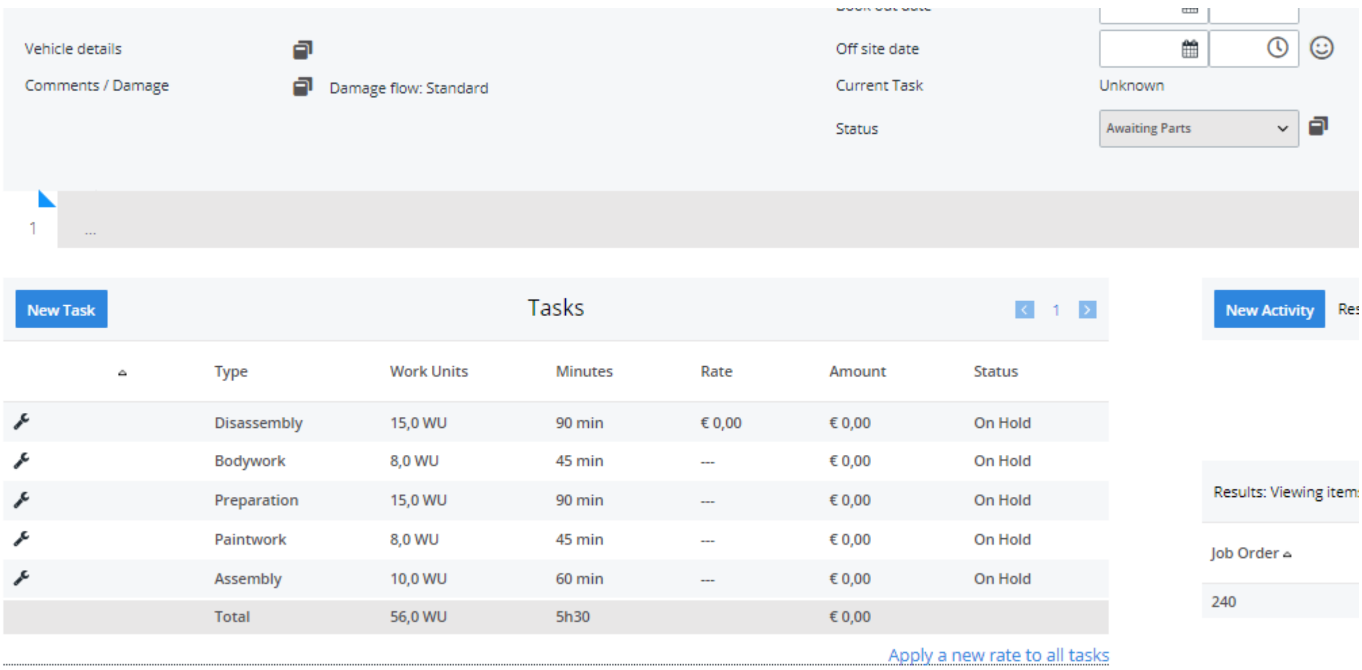
ATR_STATUSES_TO_HOLD_TASKS

In this configuration you get the option to select statuses. When you are going to use these statuses in the file, the tasks will automatically be set to on hold.



If you would like to add a certain status to this, you can go to System - Lists- Status in PlanManager. Here you can add/delete/edit statuses.

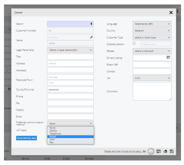
After the configuration you will see that after selecting this status in the file (don't forget to press save) the tasks will automatically be set to status 'on hold'.



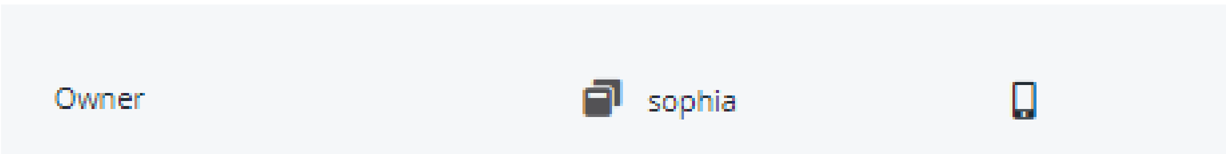
ATTENTION: If you use a status in the file (that sets the tasks to 'stopped' automatically) a corresponding planning of these tasks will also be deleted. It is not possible to restore this planning. You will have to reschedule the file yourself.

Communication preferences of parties

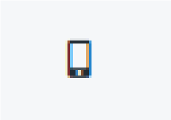
An extra function has been added to PlanManager that makes it possible to set a preference for communication with the owner/director/.... . You can find this function in the file by opening the popup of the owner/manager .... open:

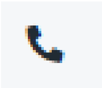


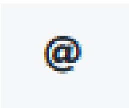
In this popup you will find a dropdown menu with possible communication options. You can indicate per party which communication option is preferred. Once you have indicated this preference, you will notice that an icon will appear next to this party. This icon was added to be able to visually and quickly see the communication preference without having to open the party's popup.

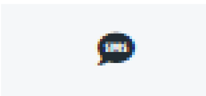


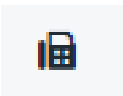
Below you can find an overview of the possible options:

Mobile/ GSM

Phone

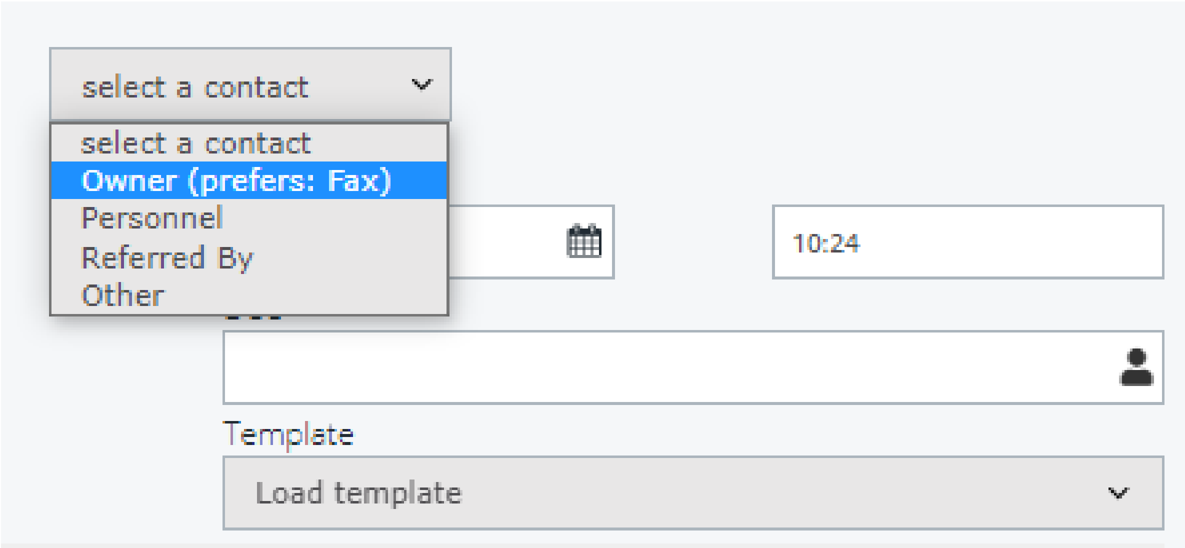
 Email

SMS

FAX

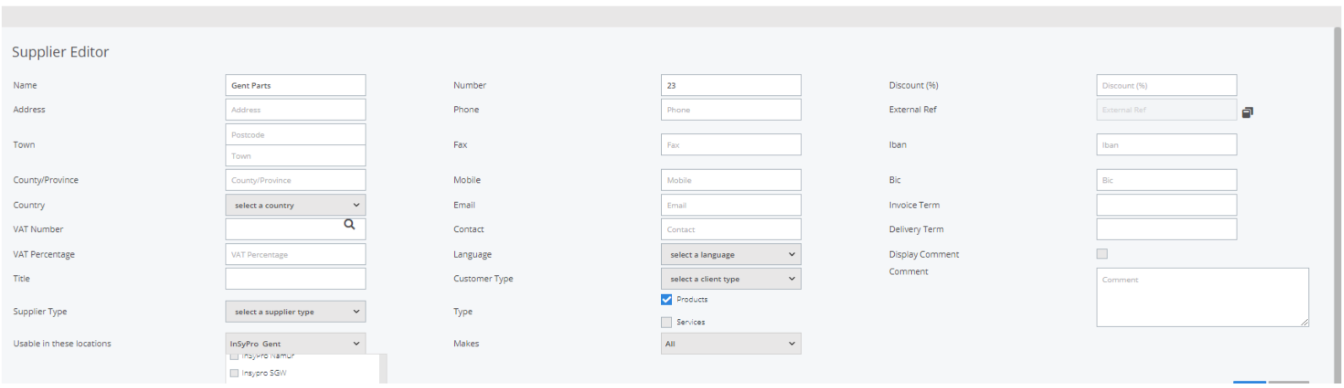
The communication preferences have fixed icons and cannot be changed.

Once you have defined the communication preferences, and you go to send a communication in this particular file, you will see that in the drop menu of the parties, the communication preference is mentioned in brackets.



Linking a supplier to a location

A new field has been added in Management - Third Parties - Suppliers. By means of this field you can indicate at which location you use this supplier. This is a multi-select field so you can link multiple locations to a particular supplier.



The advantage of this is that you can then show a certain list of suppliers per location. The users will not have to search in a list of suppliers that are not applicable for their specific location. If no location has been set, the supplier will always be presented in the order screen.

Furthermore you can now also indicate at the supplier whether a certain brand should be ordered via this supplier:

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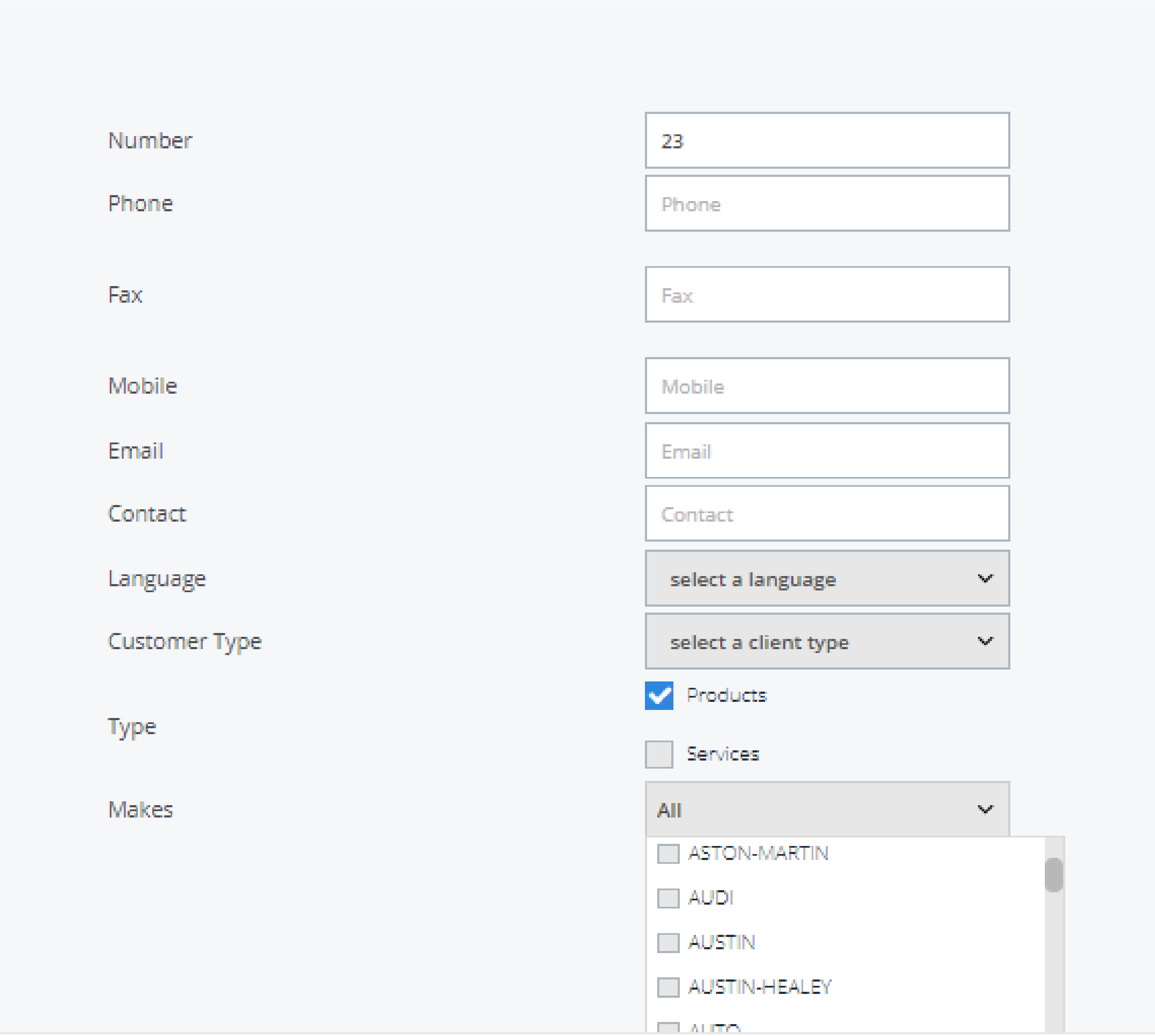
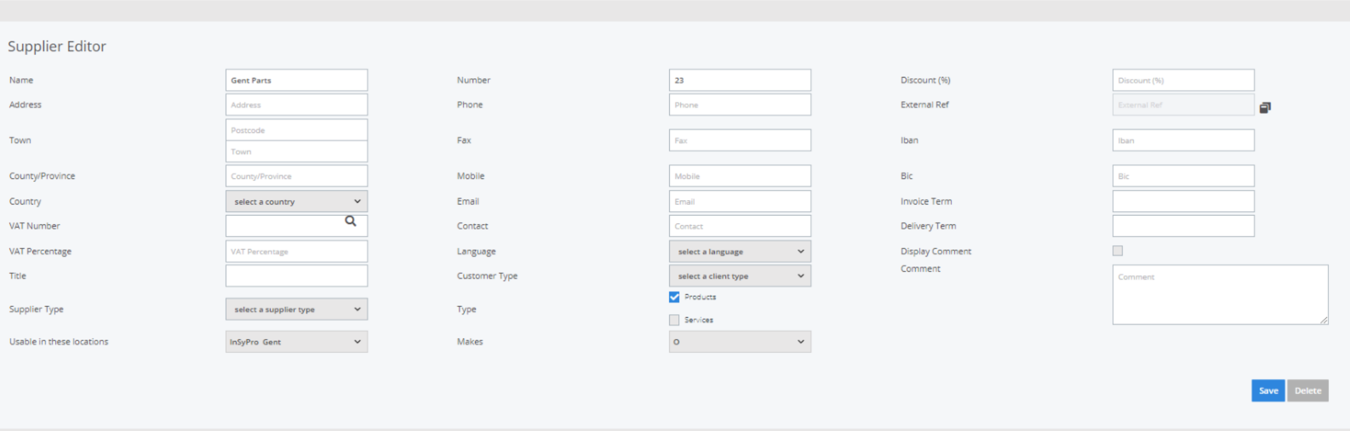
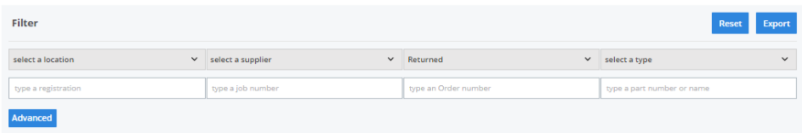


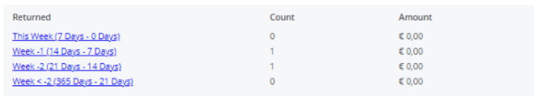
If you enter e.g. the brand 'O' here and you have a file with the brand 'O' then PlanManager will automatically suggest this supplier ('Gent Parts') in the list.



Deliveries - returned report

An extra report/tablet was added to the deliveries screen. On the right side you can now find an overview of the articles/parts that have been returned and for which no credit note has been received yet. This table was added to the delivery screen to have a quick and clear overview of which items have not yet been credited.





Backorder Orderlines

A new configuration was added so orderlines can be set to the status backorder.

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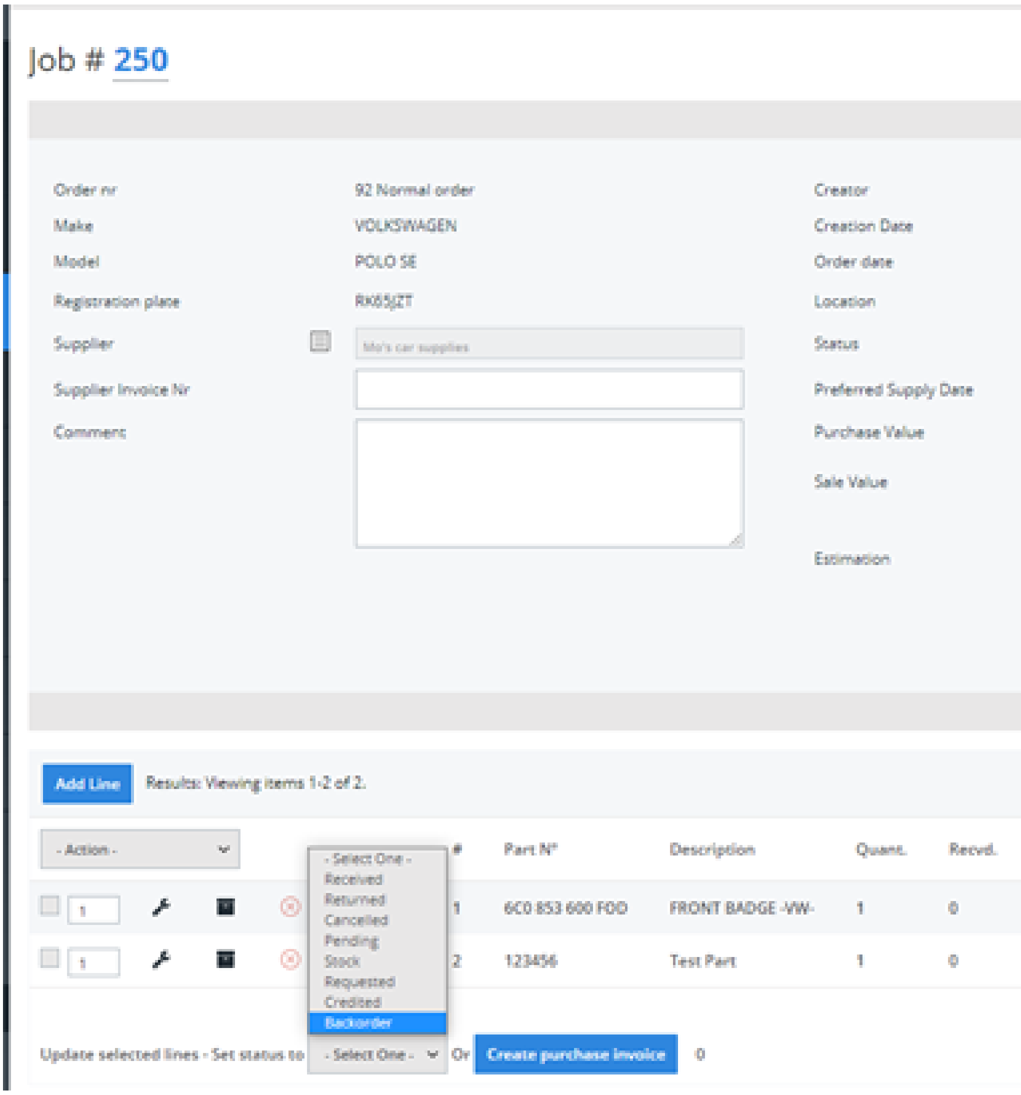
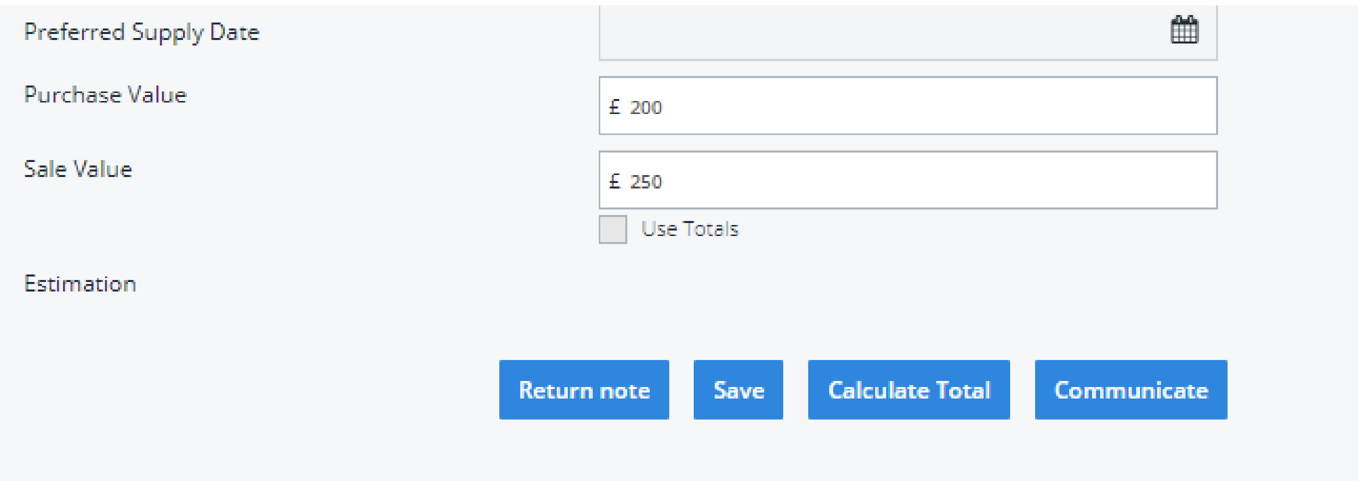
You can find this going by going to System – General Settings – AUTO_SET_ORDERLINE_TO BACKORDER. This config will set the status of orderlines, that not have been delivered yet, to backorder (automatically)

When this config is set to ‘no’ you can manually set the order lines to backorder using the drop down menu in the order itself:



Orders – Return Note

An extra functionality has been added to the order screen.
As soon as you place certain items on the 'returned'
status, you will get the option to print a document for this. This document can be sig
ned by the supplier as proof that the goods have
been returned. You can print the document by pressing the 'return note button
in the order screen.



An example of the document can be found below:

Audatex UK Test

Solera | Audatex

The Forum, Station Road
Reading RG7 4RA

RETURNS NOTE		
Job :	342	Audatex
Registration:	YB68UPP	
Order no:	90	
Supplier invoice no:	2345	

Description	Number	Received	Returned	Value	Comment
Front Bumper	23456	0	1	£ 160.00	

Printed on:
02-06-2021 13:54

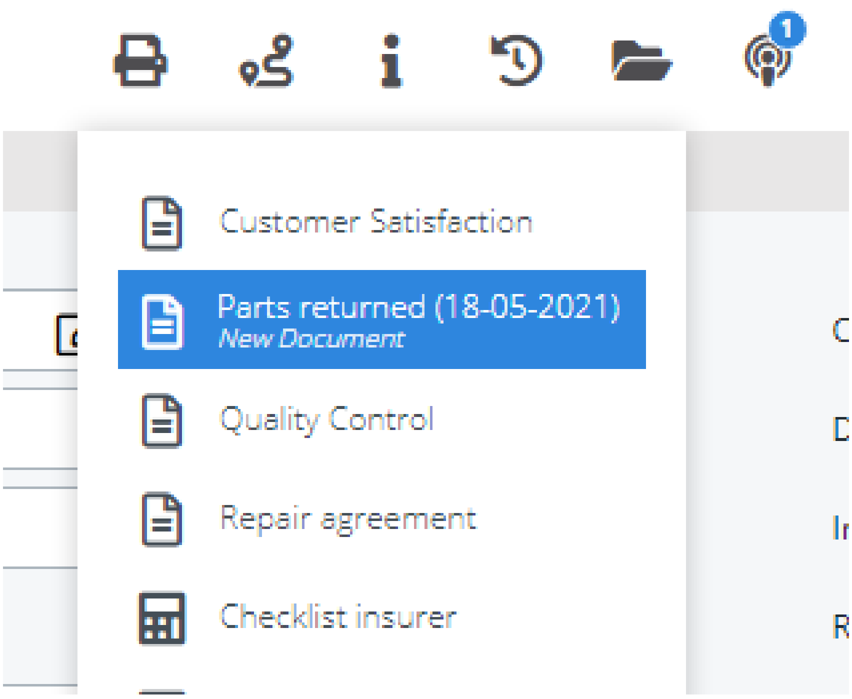
Date Collected:

Audatex UK Test

Audatex

It is not possible to personalise this document. As soon as the document is printed, this will also be visible under the printer icon in the file.

Versions



Additional configuration credit note order lines

When a certain item
is added to a purchase credit note, the item will automatically be set to the status "credited" based on the following configuration:

AUTO_SET_ORDERLINE_TO_CREDITED

Unique solution ID: #3507
Author: Sophia Bouhajra
Last update: 2021-06-07 09:52