



# Versions

## 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.


**Logistics**  

**Filter**


**Location**  

select a location 


**Appointment type**  

Select a type 

**From**  

01-06-2021 

**Until**  

01-06-2021 

The appointment type itself can be indicated in the logistic popup in the file. In the

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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.

Logistics

Arrival

Appointment type

Select a type

Select a type

Walk in

Collection

Recovery

Personnel

select a user

Rental type

select a contact

Book in date

Pickup details

select a contact

Address

Address

Postcode/Town

Postcode

Town

County/Province

Country

Belgium

Contact

Contact phone

Comments

Departed to customer

Vehicle received

Parking

Arrival at repairer

Plan

Departure

Appointment type

Select a type

Copy from arrival

Personnel

select a user

Book out date

Delivery details

select a contact

Address

Address

Postcode/Town

Postcode

Town

County/Province

Country

Belgium

Contact

Contact phone

Comments

Parking

Departed to customer

Car delivered

Arrival at repairer

Save

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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.

Financial	Operational	Management	Other	Scheduled	Dashboard
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## 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.

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## 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

Order list -> StockOrder	<input checked="" type="checkbox"/> Allowed to view	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete
Job View -> Job related party popup	<input checked="" type="checkbox"/> Allowed to view	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete

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

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Order list -> StockOrder	<input checked="" type="checkbox"/> Allowed to view	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete
Job View -> Job related party popup	<input type="checkbox"/> Allowed to view	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete

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, ...

Job # 14135

Location

Insypro SGW

Key Tag Number

Owner

sophia

Registration

TEST12345612

Est Appointment / in

Driver

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

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Order list -> StockOrder

☒ Allowed to view

☒ Edit

☒ Delete

Job View -> Job related party popup

☒ Allowed to view

☒ Edit

☐ Delete

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...
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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]).

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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.



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**Configuration Editor** **[Edit]**

Category

general

Description

Change the tasks of a file to "on hold" when a job changes to one of these statuses.

Name

ATR\_STATUSES\_TO\_HOLD\_TASKS

Value

Awaiting Parts ✕

Appointment

Awaiting Approval

Awaiting Estimate

Awaiting Parts

Completed

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'.

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Vehicle details

Comments / Damage

Damage flow: Standard

Off site date

Current Task

Status

Unknown

Awaiting Parts

1

...

New Task

Tasks

< 1 >

	Type	Work Units	Minutes	Rate	Amount	Status
	Disassembly	15,0 WU	90 min	€ 0,00	€ 0,00	On Hold
	Bodywork	8,0 WU	45 min	---	€ 0,00	On Hold
	Preparation	15,0 WU	90 min	---	€ 0,00	On Hold
	Paintwork	8,0 WU	45 min	---	€ 0,00	On Hold
	Assembly	10,0 WU	60 min	---	€ 0,00	On Hold
	Total	56,0 WU	5h30		€ 0,00	

New Activity

Res:

Results: Viewing item:

Job Order

240

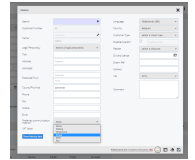
[Apply a new rate to all tasks](#)

**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.

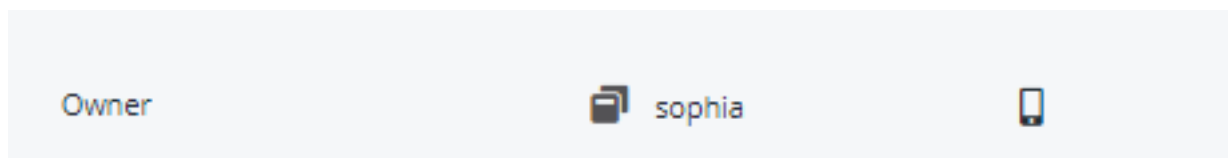
## Communication preferences of parties

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:

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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:

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Mobile/ GSM



Phone



Email



SMS

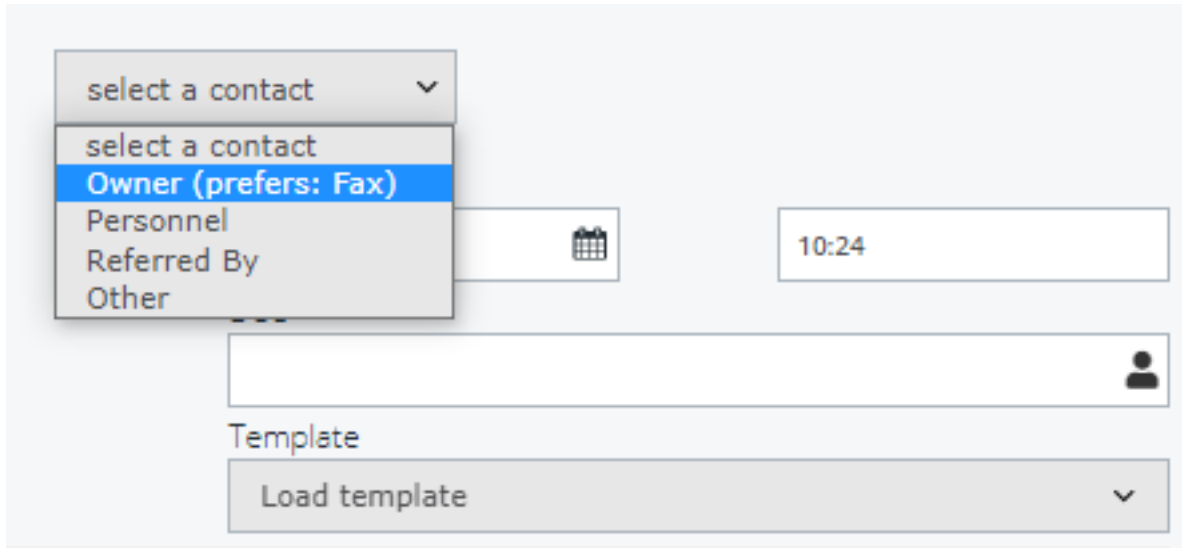


FAX

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.

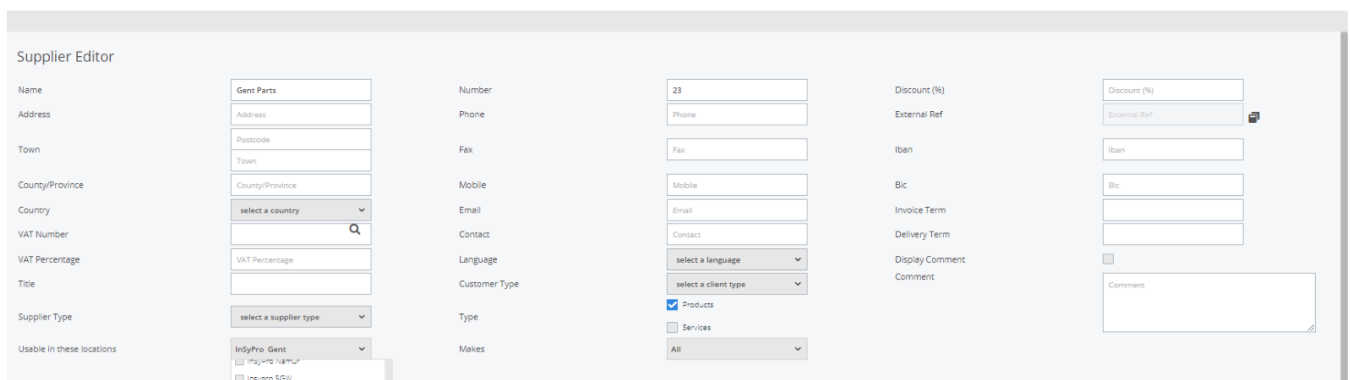
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A screenshot of a web interface showing a dropdown menu for selecting a contact. The menu is open, displaying options: "select a contact", "Owner (prefers: Fax)", "Personnel", "Referred By", and "Other". The "Owner (prefers: Fax)" option is highlighted in blue. To the right of the menu is a calendar icon and a time display showing "10:24". Below the menu is a text input field with a user icon on the right. At the bottom, there is a "Template" section with a "Load template" button and a dropdown arrow.

## 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.



A screenshot of the "Supplier Editor" form. The form is divided into several sections for data entry. On the left, there are fields for Name, Address, Town, County/Province, Country (with a "select a country" dropdown), VAT Number, VAT Percentage, Title, Supplier Type (with a "select a supplier type" dropdown), and Usable in these locations (with a multi-select dropdown showing "IndyPro - Gent" and "IndyPro - SGIV"). The middle section contains fields for Number, Phone, Fax, Mobile, Email, Contact, Language (with a "select a language" dropdown), Customer Type (with a "select a client type" dropdown), Type, and Makes. The right section includes fields for Discount (%), External Ref, Iban, Bic, Invoice Term, Delivery Term, Display Comment, and Comment (with a text area). The form is styled with a light blue background and white input fields.

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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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Number	<input type="text" value="23"/>
Phone	<input type="text" value="Phone"/>
Fax	<input type="text" value="Fax"/>
Mobile	<input type="text" value="Mobile"/>
Email	<input type="text" value="Email"/>
Contact	<input type="text" value="Contact"/>
Language	<input type="text" value="select a language"/>
Customer Type	<input type="text" value="select a client type"/>
Type	<input checked="" type="checkbox"/> Products <input type="checkbox"/> Services
Makes	<div><div>All</div><div><input type="checkbox"/> ASTON-MARTIN <input type="checkbox"/> AUDI <input type="checkbox"/> AUSTIN <input type="checkbox"/> AUSTIN-HEALEY <input type="checkbox"/> AUTO</div></div>

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.

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Supplier Editor

Name

Gent Parts

Address

Address

Town

Town

County/Province

County/Province

Country

select a country

VAT Number

VAT Percentage

VAT Percentage

Title

Supplier Type

select a supplier type

Usable in these locations

InfoPro Gent

Number

23

Phone

Phone

Fax

Fax

Mobile

Mobile

Email

Email

Contact

Contact

Language

select a language

Customer Type

select a client type

Type

☒ Products

☐ Services

Makes

O

Discount (%)

Discount (%)

External Ref

External Ref

Iban

Iban

Bic

Bic

Invoice Term

Delivery Term

Display Comment

☐

Comment

Comment

Save

Delete

## 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.

Filter

Reset

Export

select a location

select a supplier

Returned

select a type

type a registration

type a job number

type an Order number

type a part number or name

Advanced

Returned	Count	Amount
<a href="#">This Week (7 Days - 0 Days)</a>	0	€ 0,00
<a href="#">Week -1 (14 Days - 7 Days)</a>	1	€ 0,00
<a href="#">Week -2 (21 Days - 14 Days)</a>	1	€ 0,00
<a href="#">Week -3 (28 Days - 21 Days)</a>	0	€ 0,00

## 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)

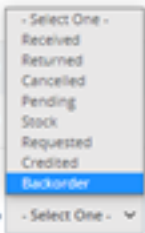
When this config is set to 'no' you can manually set the order lines to backorder using the drop down menu in the order itself:

Job # **250**

Order nr	92 Normal order	Creator
Make	VOLKSWAGEN	Creation Date
Model	POLO SE	Order date
Registration plate	RK65JZT	Location
Supplier	<input type="text" value="Mo's car supplies"/>	Status
Supplier Invoice Nr	<input type="text"/>	Preferred Supply Date
Comment	<input type="text"/>	Purchase Value
		Sale Value
		Estimation

**Add Line** Results: Viewing items 1-2 of 2.

- Action -	#	Part N°	Description	Quant.	Recvd.
<input type="checkbox"/> 1	1	6C0 853 600 F00	FRONT BADGE -VW-	1	0
<input type="checkbox"/> 1	2	123456	Test Part	1	0

Update selected lines - Set status to  Or **Create purchase invoice** 0

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## 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 signed 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.

Preferred Supply Date	<input type="text"/>
Purchase Value	<input type="text" value="£ 200"/>
Sale Value	<input type="text" value="£ 250"/>
	<input type="checkbox"/> Use Totals
Estimation	
<div><button>Return note</button><button>Save</button><button>Calculate Total</button><button>Communicate</button></div>	

An example of the document can be found below:

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Audatex UK Test



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

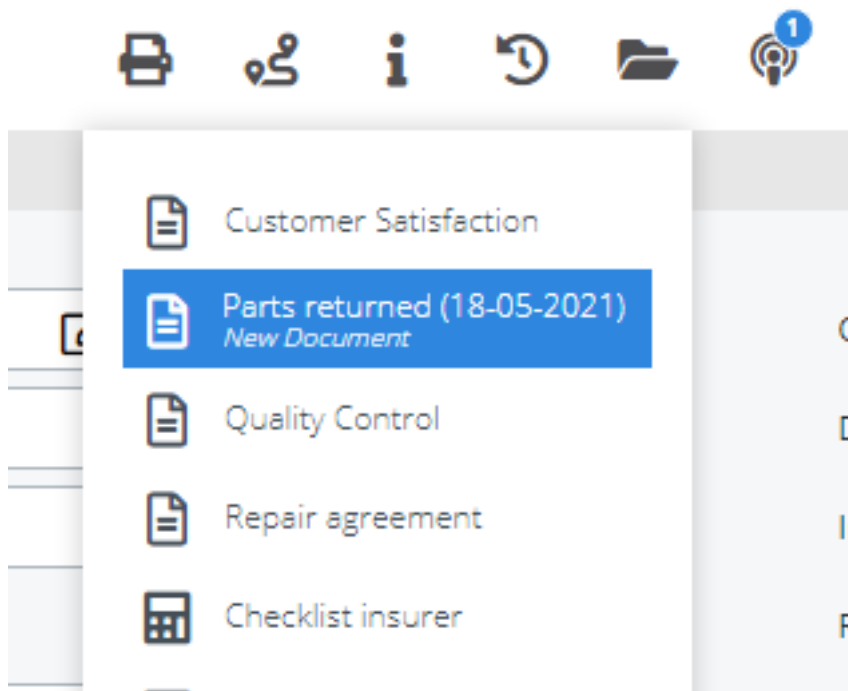
Date Collected:  
\_\_\_\_\_

\_\_\_\_\_  
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.

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## 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