

Versions

2022-04 April

Changes to 'Workshop control report'

There have been a number of changes made to the current workshop control report (located in Report > Operational > Workshop control report). The changes that have been made are:

| Job | Registration | Make | Insurer | Total | Strip | Panel work | Preparation | Paint | Refit | Polishing | Final Quality check | Est Comp Date | Days on site | Parts |
|------------------|--------------|---------------|--------------|---------------------|------------------|------------|------------------|------------------|------------|------------|---------------------|---------------|--------------|-------|
| 2120 | YB68UPP | MERCEDES-BENZ | GP Insurance | 2.43 Hours (37%) | 0.45 Hours GP | | 0.45 Hours AK | 0.45 Hours | 0.45 Hours | 0.45 Hours | 0.18 Hours | 07-04-2022 | 0 | 0/0 |
| Total 07-04-2022 | | | | 2.43 Hours (37%) | 0.45 Hours | 0 Hours | 0.45 Hours | 0.45 Hours | 0.45 Hours | 0.45 Hours | 0.18 Hours | | | |
| 2121 | RK65JZT | VOLKSWAGEN | GP Insurance | 5.46 Hours (72%) | 1.01 Hours ME | | | 2.94 Hours ME | 1.5 Hours | | 0.02 Hours | 08-04-2022 | 1 | 0/0 |
| 2122 | DY68MDN | VAUXHALL | GP Insurance | 7.64 Hours (15%) | 1.13 Hours GP | | | 4.41 Hours | 2.1 Hours | | | 08-04-2022 | 0 | 0/0 |
| Total 08-04-2022 | | | | 13.1 Hours (39%) | 2.14 Hours | 0 Hours | 0 Hours | 7.35 Hours | 3.6 Hours | 0 Hours | 0.02 Hours | | | |
| Total | | | | 15.53 Hours | 2.58 Hours | | 0.45 Hours | 7.8 Hours | 4.05 Hours | 0.45 Hours | 0.2 Hours | | | |

1. A filter in the top left of the report to filter by registration number. A partial registration can be user when searching for a registration number to filter the results.
2. A filter in the top left of the report to filter by location. The default location see will be the location that the current logged in user is set to in Maintenance > Organisation > Personnel.

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3. Report headers frozen when scrolling. When scrolling down the report to see all results (if they go further than what is visible on screen) then the report headers now stay visible at the top of the screen. This has resolved a previous bug in the report.
4. Courtesy car icon. If the tick box for 'Rental needed' is selected within the job, a courtesy car icon will be displayed in the report again the job.
5. Technician initials. The initials of the technician working on/that complete the task are now displayed in capital letters in order to appear more clearly. They were previously in lower case.
6. Tasks with no time allocated. The report will now show tasks that are on the RO estimate. For example, if there is a quality control task on the RO estimate with no time allocated, the quality control task will now show on the report as a required task for the job. Previously, if a task had no time allocated, it would not show on the report.
7. Total hours grouped by day. There is now a summary of the total overall and task related hours by day (ECD) within the report.
8. Work and paint categories. The report will now only show the tasks that are linked to the task types 'Work' and 'Paint'. Previously, all task types other than 'Not productive' were being displayed which meant that report was unlikely to fit on one screen.

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New config AEG_INSURER_IMPORT_BY_CODE



A new config has been created in order to minimize the risk of duplicate insurers records being created from the AEG link. When this config is enabled, there is a box within the insurer record for 'AEG code'. If the AEG code entered in this box matches the AEG code within the AEG assessment, the system will apply that PlanManager insurer record to the job, regardless of how the Insurer is entered in the AEG assessment.

Insurer Editor

| | | | |
|-----------------|----------------------------------|----------------|----------------------|
| Name | GP Insurance | Informex nr | GRGINS |
| Number | GPINS | Iban | |
| Address | The Forum, Station Road | Bic | |
| Town | RG7 4RA | VAT Percentage | |
| | Reading | | |
| County/Province | Berkshire | Invoice Term | 40 |
| Country | United Kingdom | Rebate scheme | 5% Parts |
| Language | English (GB) | | |
| Customer Type | select a clientype | | |
| VAT Number | <input type="text"/> | | |
| | <input type="button" value="Q"/> | | |
| | | AEG Code | <input type="text"/> |

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With this config enabled, if there is no AEG code in PlanManager that matches AEG assessment, then no insurer will be applied to the PlanManager job from the AEG assessment. The search function can be used in the job to choose the appropriate insurer.

| Insurer | |
|-----------------|---|
| Search | <input type="text" value="gp"/>  |
| Customer Number | <div>GPINS, GP Insurance, The Forum, Station Road</div> <input type="text"/> |
| Name | <input type="text"/>  |

If you would like to know more information or would like to enable this config please contact planmanager@audatex.co.uk

New calendar icon in the job list

A new calendar icon is added into the job list next to the ECD (estimated completion date) if the ECD is set before the end of the planning.

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Job List

Order listJob QueueDeliveriesOffer RequestsStockScaleDMSAlbatrosCalendar

Filter

Autobus UK Taxi

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type a registration

type a person name

type a model name

type a model name

type a bay tag number

type a VIN number

Advanced

Reset

Export

Planning

Priority vehicles

This Week

11-04 Week +1

In

1

0

Out

11-11-10

100 1-11-10

New

Quick appointment requester

1 item

Job

Creation Date

Make

Registration

Owner

Status

Est Comp Date

Estimate Total Value

Estimated Hours

381

22-03-2022

VOLKSWAGEN

ANDREWS

George

Planned

08-04-2022, 09:30

£ 762.50

12h30

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