

Claims

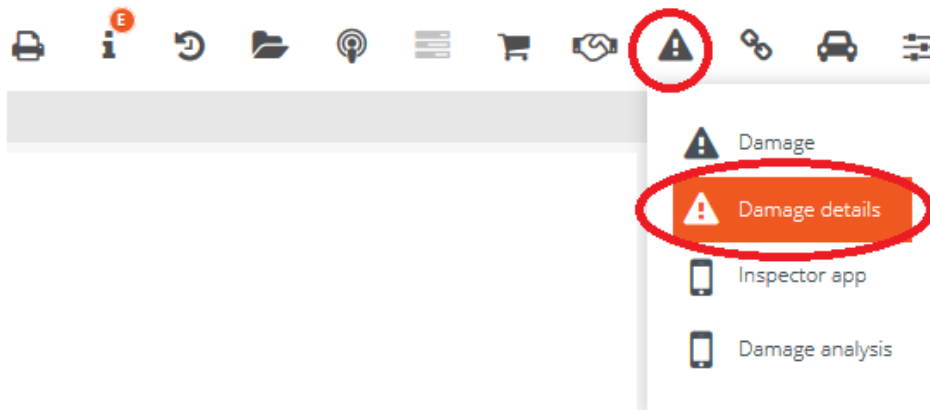
How to work with the damage flow

The bodywork of today is confronted with the emergence of new repair methods. Not only do they have technical implications, but there are also consequences for timing, human resources and planning. To integrate these different methods (classic repair, smart repair, one day repair, ...) and follow-up in PlanManager, extra functionality is provided.

If you goes to file -> a job and then choose Damage -> Damage details. Then you'll see - like the screen below - the damage with the details.

Here you can choose which type of damage is involved, you can choose the initial point of contact, indicate the damaged areas, indicate the shock direction, whether there is a total loss, what the expected liability is and whether or not an expert is requested.

Claims



Damage details

Damage flow type

1 day

Smart

Standard

Initial point of contact

Choose the first point of application

Shock direction

Damaged areas

☐ Undercarriage ☐ Top

Total loss

No

Yes

Expected

Liability

0%

50%

100%

Request expert

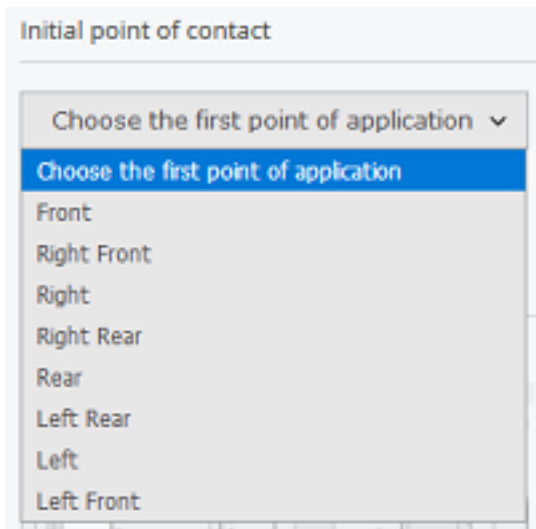
☐ Yes

☐ No

Save

Claims

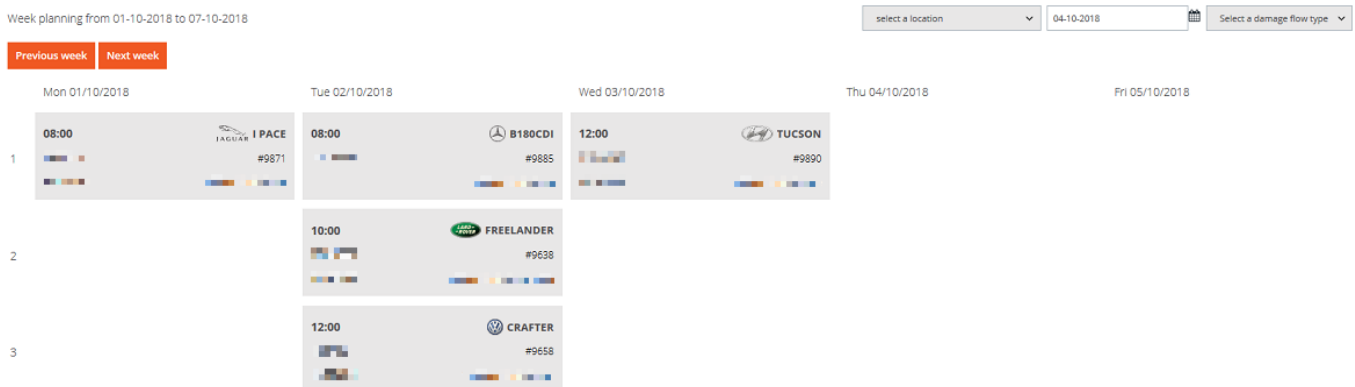
Choices of the initial point of application:



The screenshot shows a dropdown menu titled "Initial point of contact". The menu is open, displaying a list of options: "Choose the first point of application" (highlighted in blue), "Front", "Right Front", "Right", "Right Rear", "Rear", "Left Rear", "Left", and "Left Front".

When everything is filled in as desired, click on "Save"

If you then enter an appointment date in the file, it will appear in Planning -> Damage flow



The screenshot shows the "Week planning" interface for the week from 01-10-2018 to 07-10-2018. At the top, there are filters: "select a location", "04-10-2018", and "Select a damage flow type". Below these are buttons for "Previous week" and "Next week". The main area displays a calendar grid with appointments for each day. For example, on Monday 01/10/2018, there is an appointment at 08:00 for a JAGUAR I PACE (#9871). On Tuesday 02/10/2018, there are appointments at 08:00 for a B180CDI (#9885), 10:00 for a FREELANDER (#9638), and 12:00 for a CRAFTER (#9658). On Wednesday 03/10/2018, there is an appointment at 12:00 for a TUCSON (#9890). The appointments are color-coded and include a small bar chart.

There you can filter the calendar by location (1), date (2) and the damage flow type (3):



The screenshot shows the filter controls at the top of the planning interface. There are three main filter boxes: "select a location" (labeled with a red 1), "04-10-2018" (labeled with a red 2), and "Select a damage flow type" (labeled with a red 3). Each box has a dropdown arrow on the right.

As mentioned earlier, there are standard 3 types of damage flows included in PlanManager, but you can create, modify or delete them yourself.

To do this go to System -> lists (1) -> Damage flow type (2). Then fill in the desired name and color. A matching color for that type of damage can be selected (4).

If everything is the way you want it then click on save (5)

If you want to restart then click on New (3) and the fields will be cleared.

Claims

General settings

Customized settings

1 Lists

Usergroups

ATR Stop reason

Status

Document Category

2

Damage flow type

Damage Flow Type Editor

Name

Colour



A color picker interface with a large square color field on the left, a vertical gradient bar in the middle, and a panel on the right containing RGB and HSB value inputs. The RGB values are R: 255, G: 0, B: 0. The HSB values are H: 0, S: 100, B: 100. A hex code input shows #FF0000. An 'ok' button is at the bottom right of the panel.

3

New

Name En

Standard

1 day

Smart

4



5

Save

Delete

Claims

You can also set how many repairs can be done on one day. For example, there can be done many more smartrepairs per day than repairs that take a whole day.

To set this up, go to System -> Lists -> Repair type.

Here you will see the following field:

PlanManager

COMMUNICATION

HELP

WORKSHOP

JOB

PLANNING

REPORT

MAINTENANCE

SYSTEM

RENTAL

Back

General settings Customized settings **Lists** Usergroups

Repair Type Editor

Name
1 day

Colour
4286f4

Max. repairs/day

ATR Stop reason

Status

Document Category

Repair type

PS

Edit

Mon Tue Wed Thu Fri Sat Sun

5 4 6 6 4 5 2

Bodyshop

Edit

Mon Tue Wed Thu Fri Sat Sun

5 4 6 6 4 5 2

Bodyshop B

Edit

Mon Tue Wed Thu Fri Sat Sun

5 4 6 6 4 5 2

Demo JM

Edit

Mon Tue Wed Thu Fri Sat Sun

5 4 6 6 4 5 2

As an example, the 1-day repair has been selected. The list (1) shows the location (there may be several locations in your management with different capacities) and in the field (2) you can enter the

Claims

number of maximum repairs. To adjust this number first click Edit, make the adjustments and then choose save.

Unikátní ID: #2094

Autor: Jean Claude

Aktualizováno: 2019-10-08 11:34