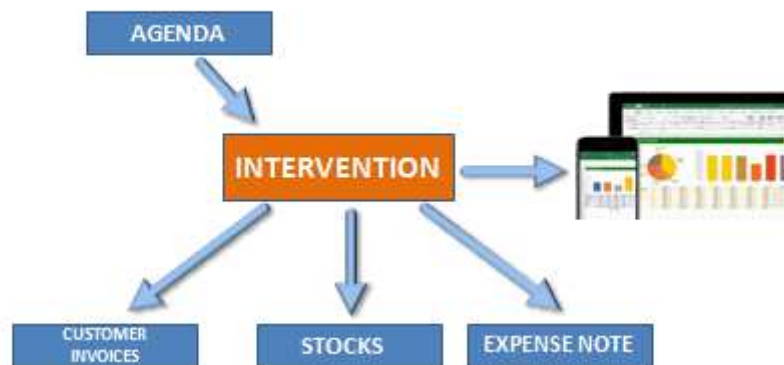The " Interventions Enhanced" module has been designed for all companies whose management of customer interventions represents an essential part of their work activity.

Flow management starts from the planning of interventions on the agenda. The events are transformed into interventions and these can both give rise to customers invoices and move the warehouses in relation to the material used in the intervention.

Optionally, the intervention can generate the operator's expense report.

Installation and configuration

The installation of the " Interventions Enhanced" module follows the standard Dolibarr methods, then download the package and install it in the usual way.

There are a number of configuration parameters to be set before using the module. These are

- The indicator that allows you to define whether or not you want to create expense reports at the same time as accounting for interventions
- The indicator that allows you to define whether or not VAT should be included in the prices of the expense reports
- Finally, in order to use the features for accessing interventions via Google maps, it is necessary to enter the Google API Key
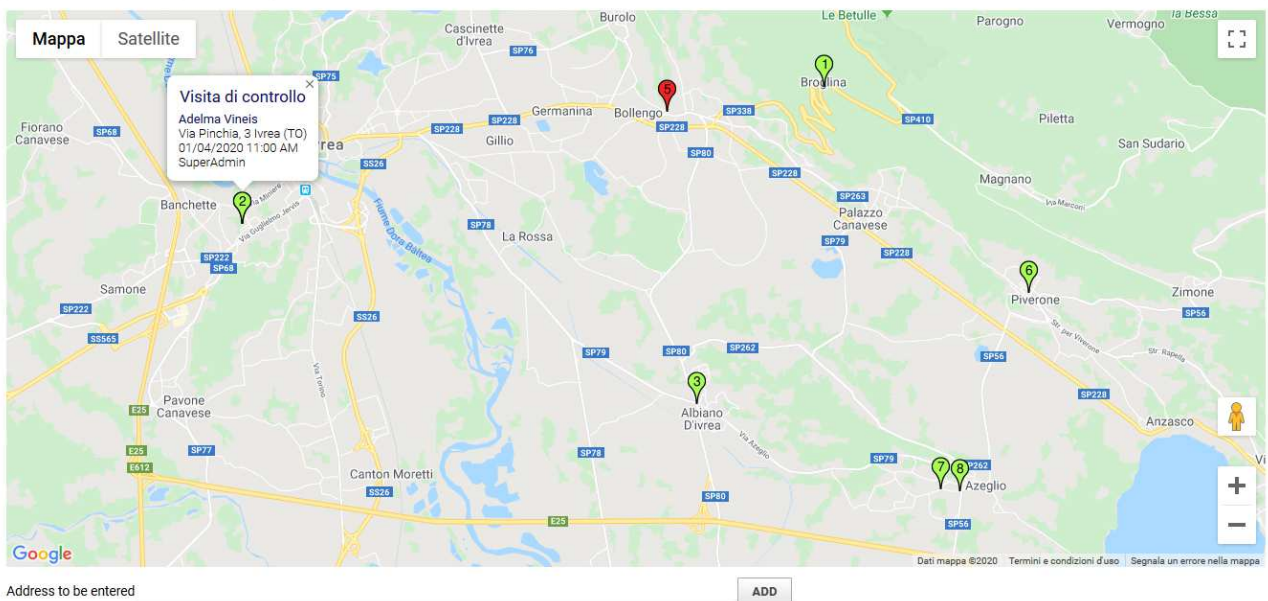
New features on the agenda

A number of new features have been added to the agenda:

- a button that allows you to view the geographical location of the interventions of the period / operator.

Notice how:

. interventions are numbered in temporal order

. the interventions take on the color assigned to the operator (user)

. by clicking on the icon you can access the details of the intervention

. it is possible, in the lower section of the window, to enter a new address and display it on the map together with the rest. This facilitates the assignment of a new intervention to the most suitable operator.

- a button that allows you to view the map of the best road route from the address associated with the operator to that of the intervention (in the absence of this, to the customer's address)
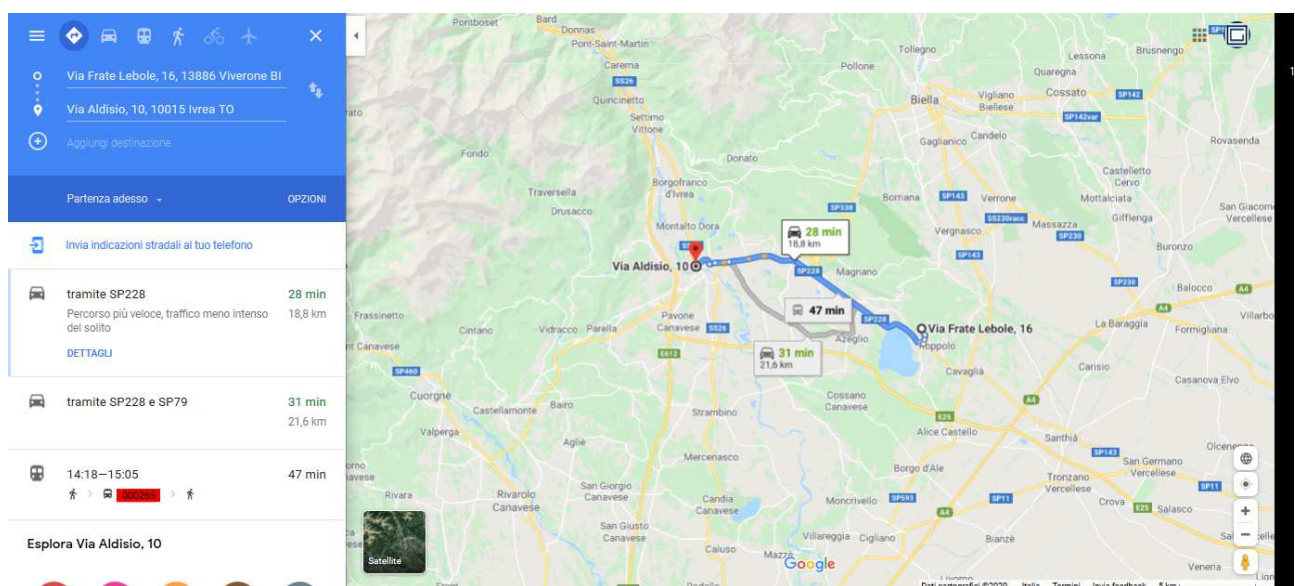
Creation of an intervention from the agenda

After creating the event, it is possible from the latter to create:

. a new line of detail of the intervention

. a new invoice line

This through the new button [Create Intervention]

In this phase, the following indications should be taken into account:

- the interventions shown in the list are only those in the "Draft" or "Validated" status
- the "Create Intervention" button is active only if an intervention has been indicated and if the event is not in the "Done" state
- expense reports, if enabled, are assigned to the owner of the event
- for the automatic generation of expense reports, each operator (user) must be associated with his supervision. Only the supervisor can generate the note
- if there are notes for the service, these will be reported in the intervention

Reporting of the intervention

The intervention sheet presents the new tab [Invoice] where you can:

- modify or integrate the data from the events that have been accounted for the intervention.
  It is possible to insert, in this phase, the materials that were used during the interventions.
- after the intervention has been validated, generate the discharges of the material
- after the intervention has been validated, create the invoice or, alternatively, close the intervention without issuing an invoice