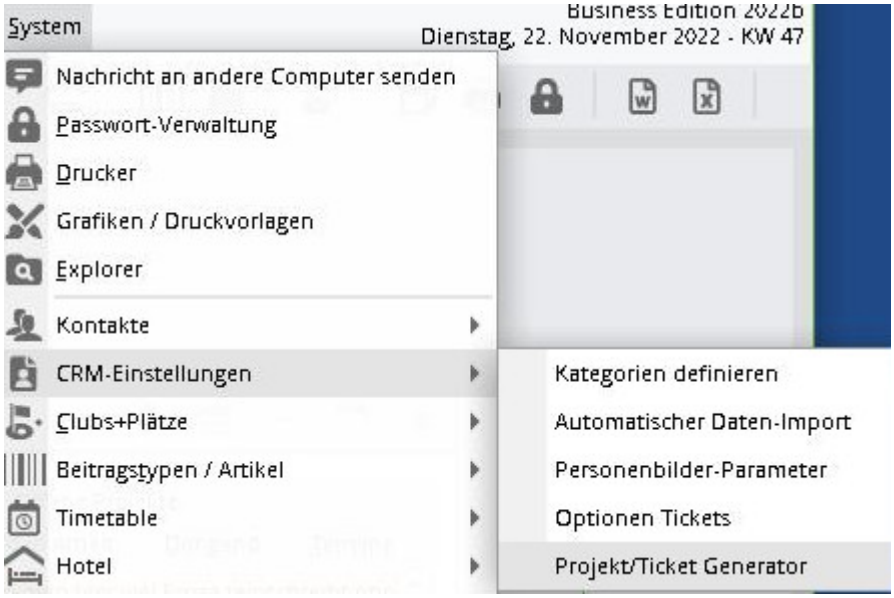
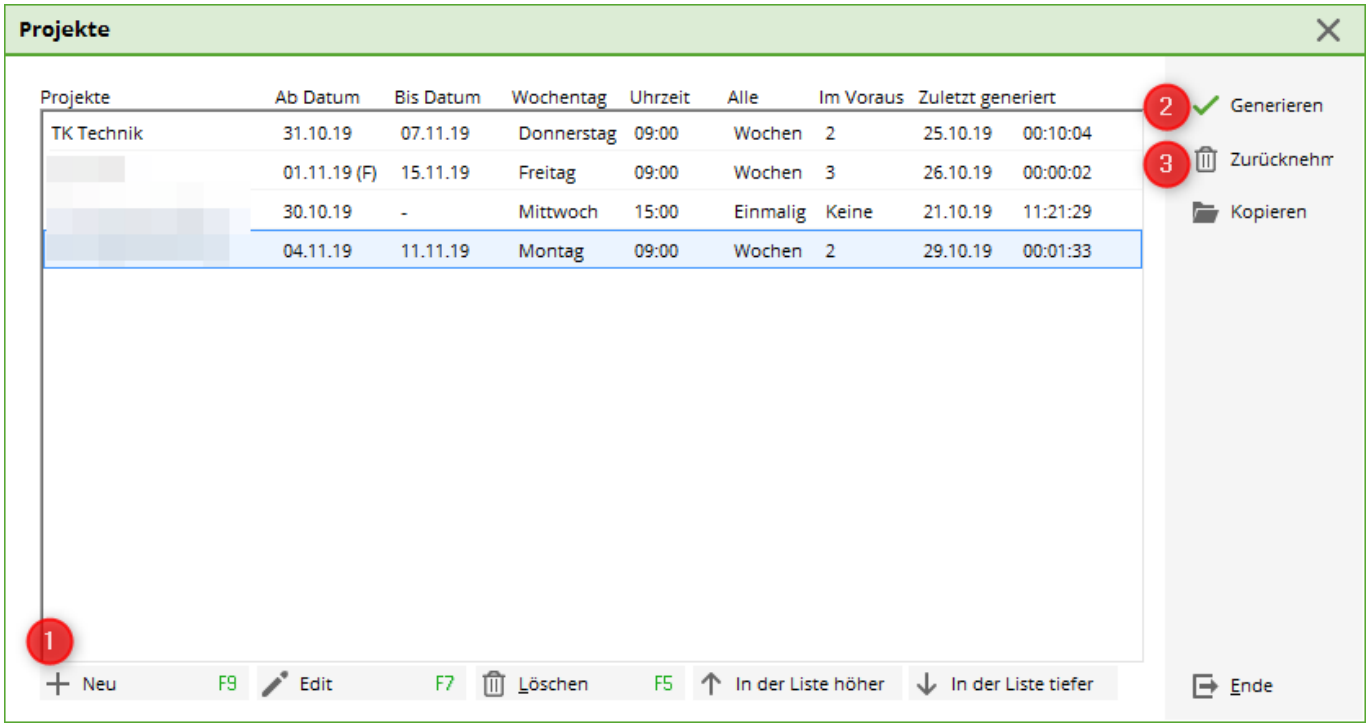
Project/Ticket Generator

The project or ticket generator can be called up under ***System / CRM Settings / Project/Ticket Generator***.



Main window

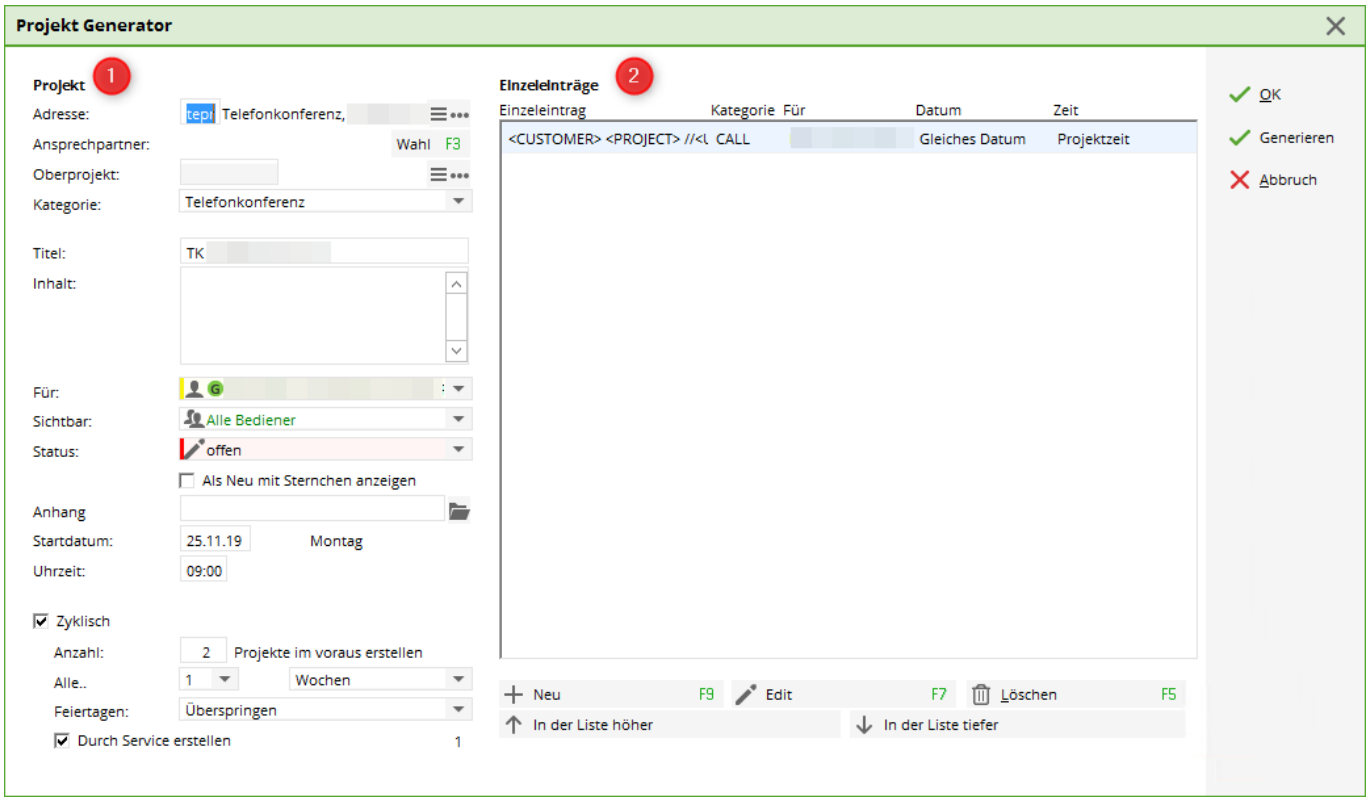


- 1. open a configuration window for a new project.
- 2. you can create the selected project manually here.
- 3. you can delete created projects from the system here.

Please note:

- (F) after the date means that this day is a public holiday.
- Under the All column you can see whether it is automatic. So either once or weeks/months
- Under the Last generated column, there is NO distinction as to whether it was created manually or automatically.

1st configuration window



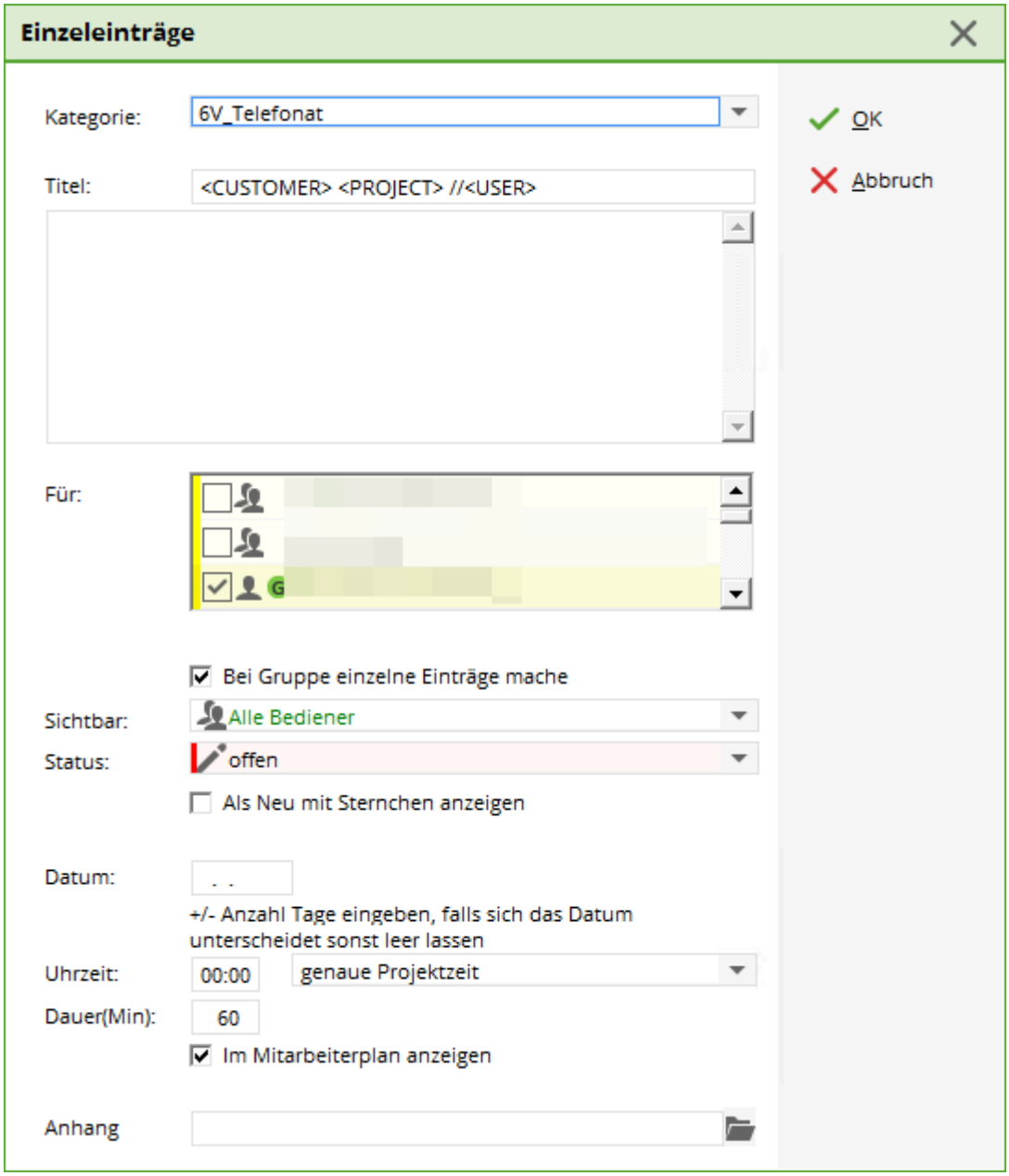
1. you can configure the project here. You can define the automatic mode further down.

Please note:

- The option „Show as new with asterisk“ means that if it is ticked, it will appear in the appointment window with the star icon.
- Cyclically determines the automatic. Then you can decide whether it should be done weekly or only every x weeks. With the option „Create by service“ it is automatically checked and created in the service.

2. list of all individual entries for the project. Individual entries can be added using the „New“ button.

Individual entry

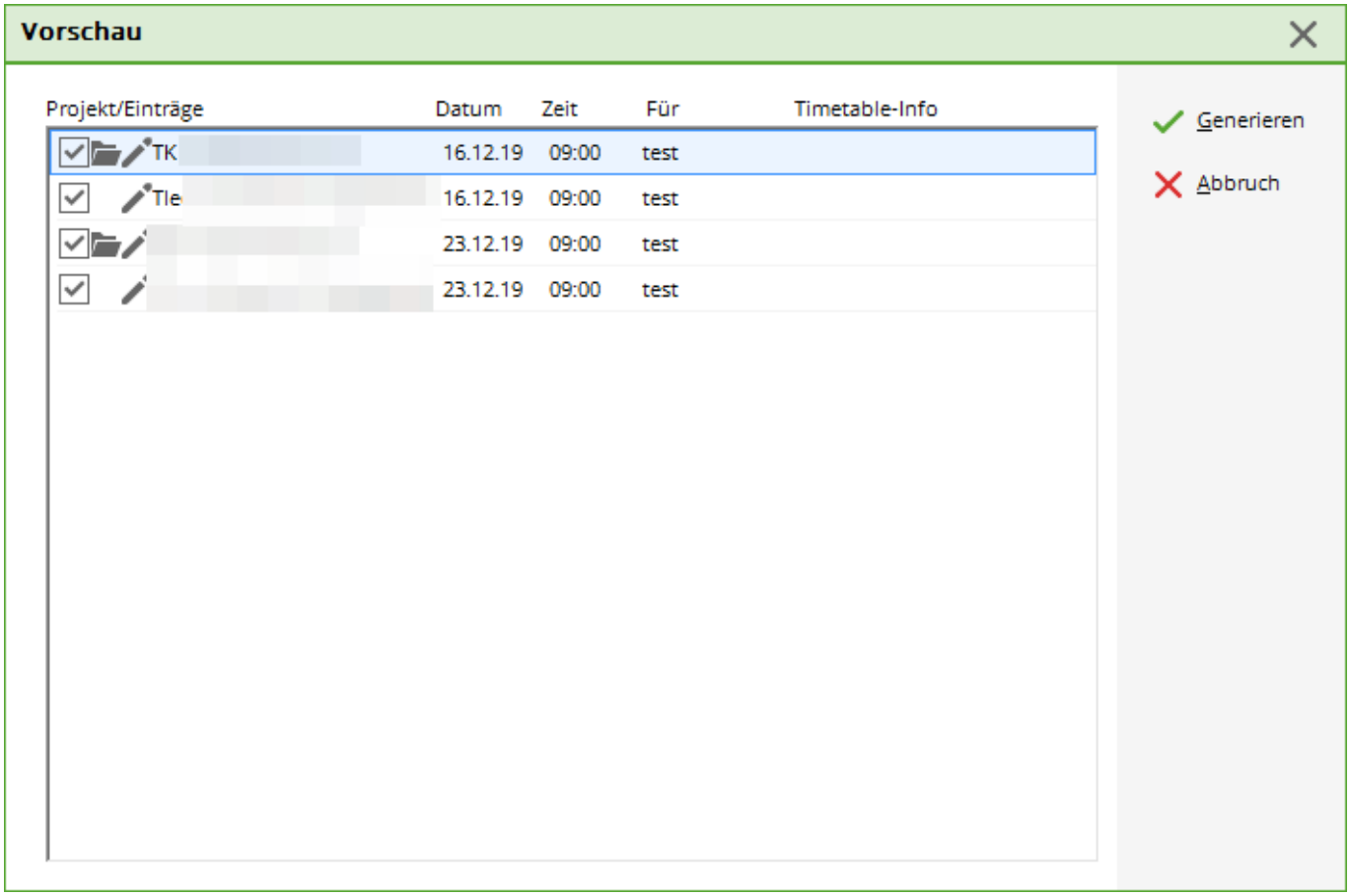


In this window you can configure the desired individual entry/entries. Please note:

- You can either select a group under „For“ and the individual entry will be created for the group or you can also tick the box „Make individual entries for group“ and an individual entry will be created for each member of the group.
- If you tick „As new with asterisk“, the individual entry is not displayed in the appointment window until the resubmission date.

2. generate

Once you have selected a project and clicked on generate, the preview appears. It looks something like this:

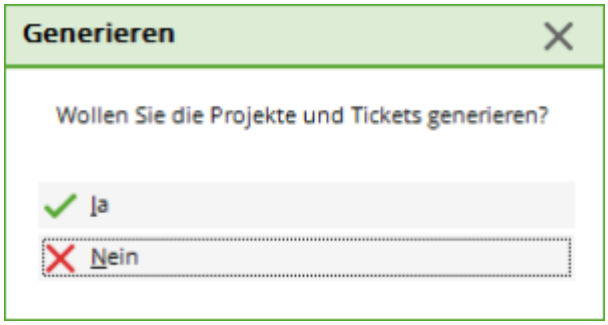


The icon indicates whether it is a project (folder) or a ticket (status icon). If a project or ticket should not be created (for example, holidays), you can remove the tick on the far left and the project or ticket will not be created.

Nothing is displayed under Timetable info if everything is OK, otherwise there are 3 possible indications.

- „No TT entry is made“ („Show in employee schedule“ not ticked)
- „Collision !!!!!“ (TT entry collides with existing appointment, if confirmed anyway, it is entered as a filter)
- „No timetable area available“ (No TT entry possible, although „Show in employee schedule“ is ticked)

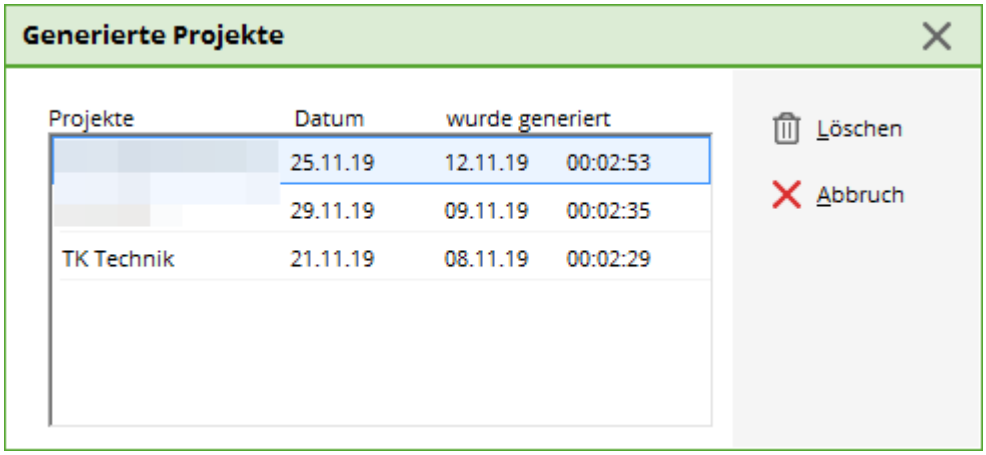
To continue, click on Generate. A final window appears.



Confirm with Yes and the projects / tickets are then generated. If you select No, the process is cancelled and nothing is generated.

3. cancel

Generated projects can be deleted here. All associated tickets and timetable entries are then also deleted. Select the desired project and press the Delete button.



The list only contains the projects that were generated in the last seven days. After that, the generated projects no longer appear in the list.