



PlanningPME

Schedule easily

Options available in the « Task » window

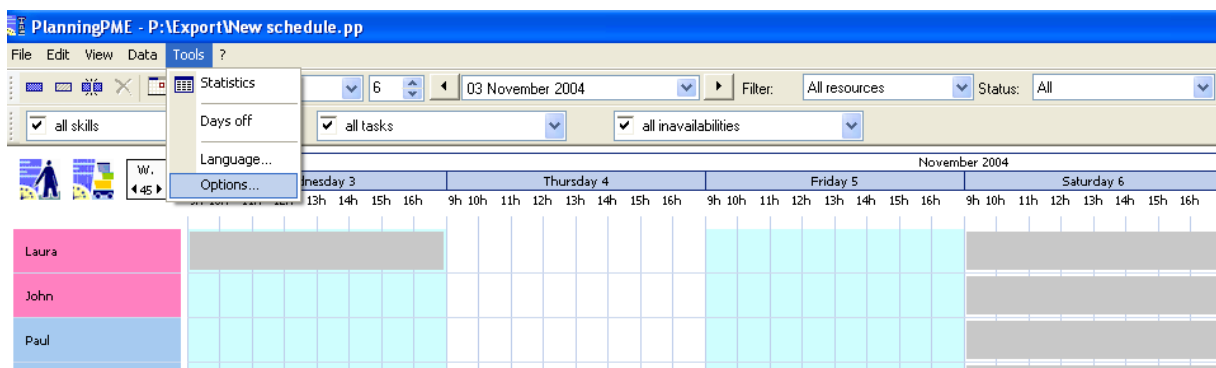
I. Description of this feature

This function allows you to do the set-up of your software in function of your activity :

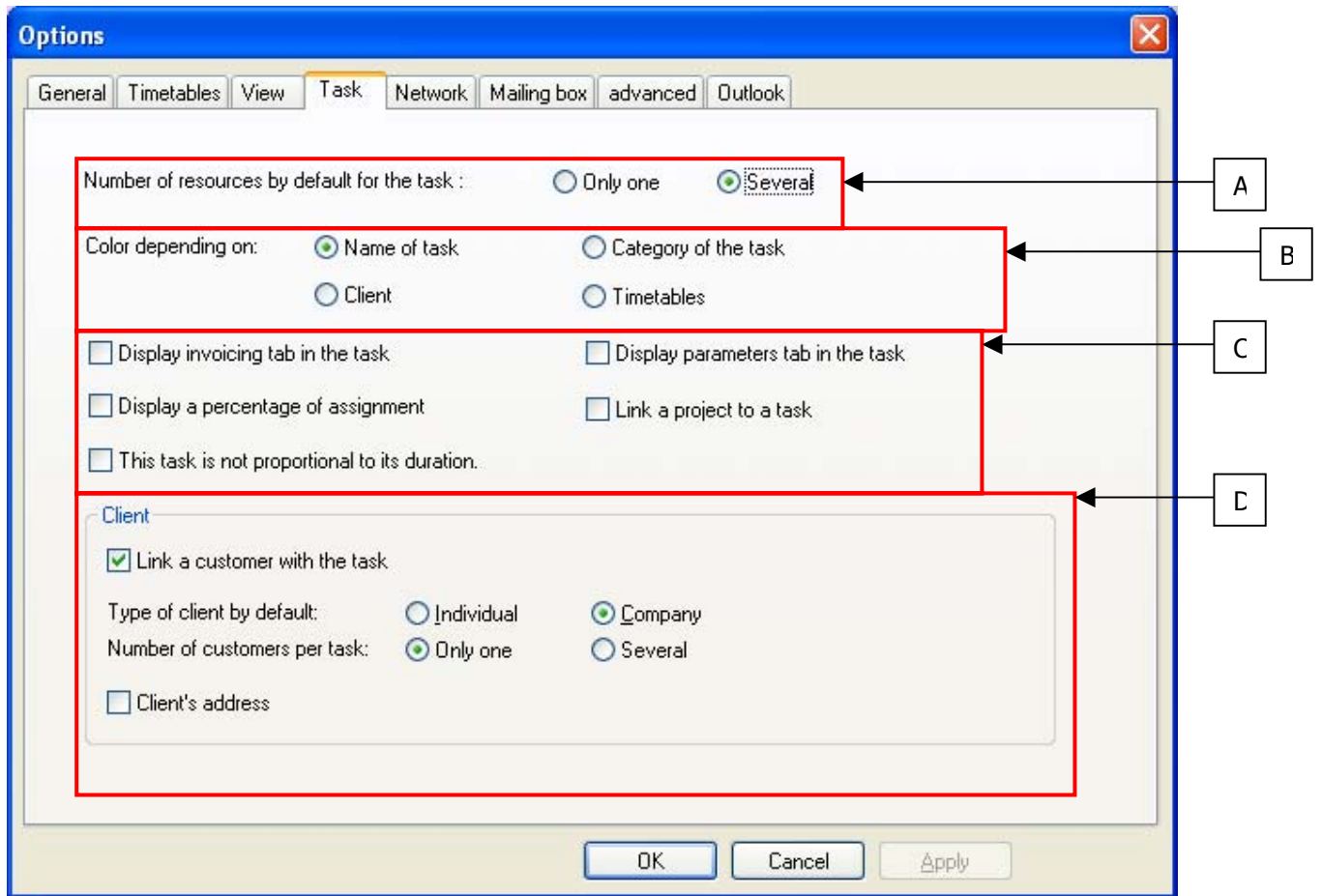
- Display the task color in function of the task label, the client or the task category
- Display the tabs « billing » or « parameters » in the « Task » window
- Affect a percentage of assignment
- Link a client to the task with additional options
- Display tasks on all day whatever their duration

II. How to use this function?

From PlanningPME, go to the menu « Tools » ->« Options » and choose the tab “Task”.



The following window appears.



Find the description of those different points below.

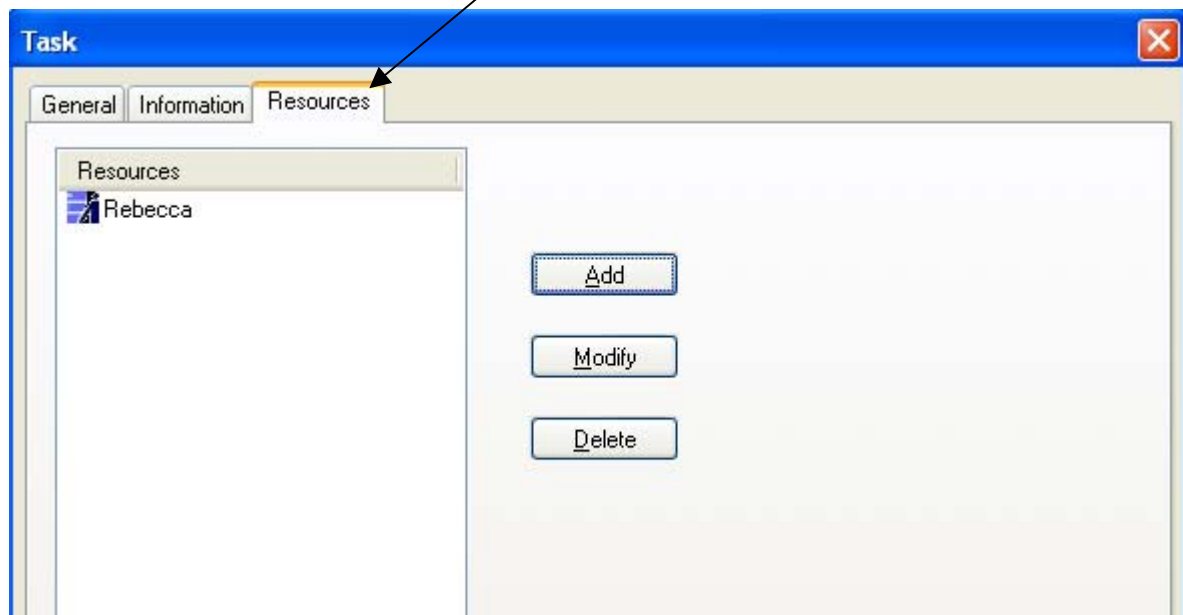


Point A.	Number of resources by default for the task : <input checked="" type="radio"/> Only one <input type="radio"/> Several
-----------------	---

Choose if you prefer one or several resources for each task by default.

If you choose « Several », the tab « resources » will appear by default in the « Task » window.

The tab « Resources » appears by default if you choose « Several »



You can, of course, decide to assign a task to only one person even if you chose the option « Several ».

Point B.	Color depending on: <input checked="" type="radio"/> Name of task <input type="radio"/> Category of the task <input type="radio"/> Client <input type="radio"/> Timetables
-----------------	---

On the schedule, each task is represented by a colored rectangle.

This colour depends on 3 types of fields :

- *Task label*
- *Category of the task*
- *Client*
- *Timetables*

So, in order to recognize easily all tasks associated to a client, you can choose to display tasks depending on the client colour.



To choose your clients, task label, Timetables and category colours, have a look at functions cards 4, 5, 8 and 18.

Point C.	<input type="checkbox"/> Display invoicing tab in the task	<input type="checkbox"/> Display parameters tab in the task
	<input type="checkbox"/> Display a percentage of assignment	<input type="checkbox"/> Link a project to a task
	<input type="checkbox"/> This task is not proportional to its duration.	

You can add specific tabs in the « Task » window

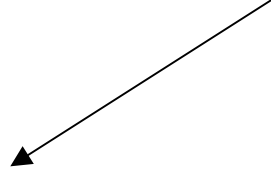
Display invoicing tab in the task

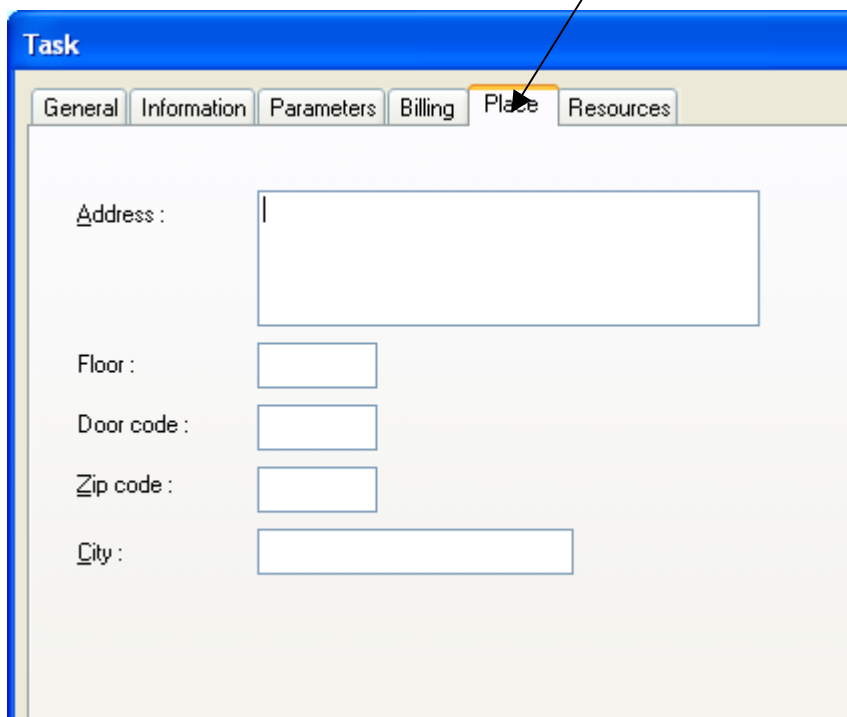
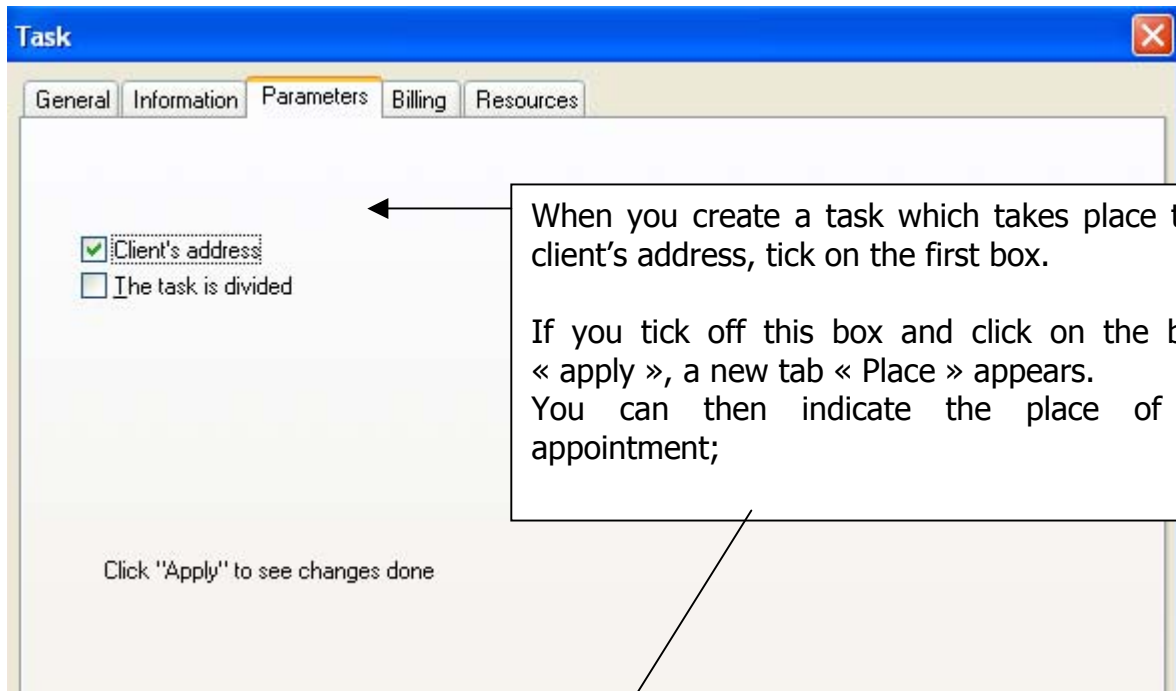
When you create a task, a tab « Billing » will appear on the task window :

Follow your invoices easily entering different parameters

Display parameters tab in the task

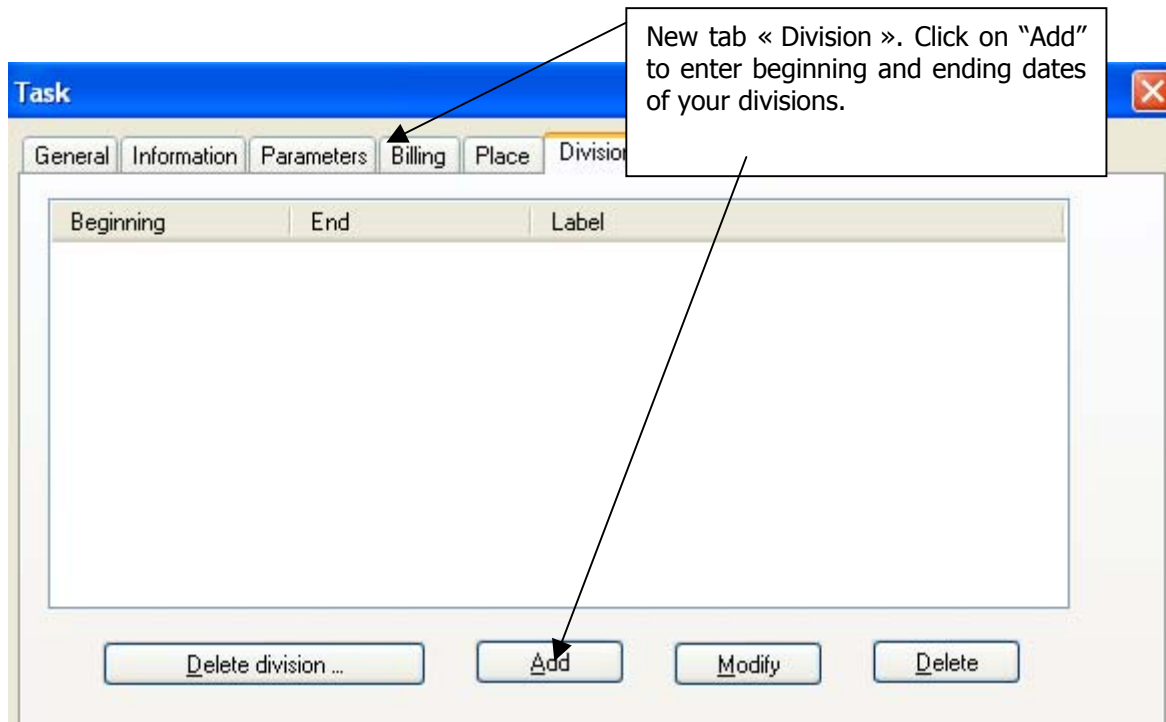
New tab « Parameters »







From this tab « Parameters », you can also decide to split the task ticking on the box « The task is divided » then « Apply ». The Tab « Division » appears on your task window.





Display a percentage of assignment

Ticking on this option, a percentage appears on the task window :

Link a project to a task

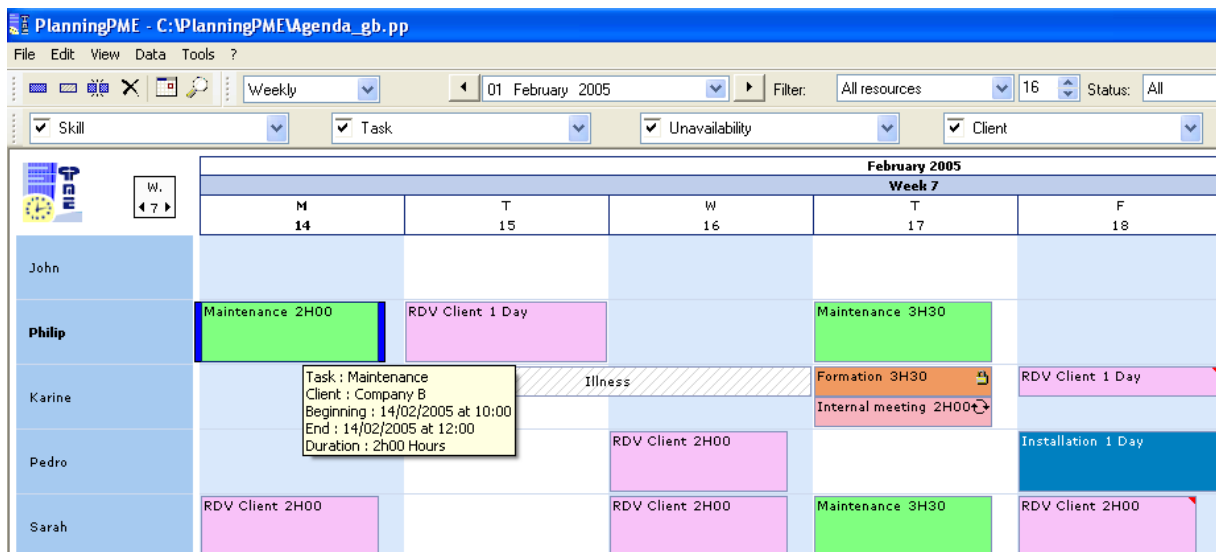
Ticking on this option, you will be allowed to assign a project to a task :

You will have an information in your task window. You will also have a project filter.

This task is not proportional to its duration

If you tick on this option, all the tasks on your schedule will appear on the whole day even if the duration of the task is only one hour!

Example:





Point D.	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Client</p> <p><input checked="" type="checkbox"/> Link a customer with the task</p> <p>Type of client by default: <input type="radio"/> Individual <input checked="" type="radio"/> Company</p> <p>Number of customers per task: <input checked="" type="radio"/> Only one <input type="radio"/> Several</p> <p><input checked="" type="checkbox"/> Client's address</p> </div>
-----------------	--

Ticking on « Link a customer with the task », you will be have the possibility to assign a client for each task.

N.B : You can click on the orange icon to create new clients or on the glass to search for a client.

Then you can choose :

- If your clients are mostly societies or individuals
- If you link one or more clients to a task

ticking on « Several », a tab « Clients » will appear in your « task » window :



So, you have access to a lot of fields available in the « Task » window that you will need or not for your activity. You can decide to have them appeared or not!

IV. Contact PlanningPME

For any help or information about the software PlanningPME, the team of TARGET SKILLS is at your entire disposal.

PlanningPME

Schedule easily

<http://www.planningpme.com>

TARGET SKILLS

support@planningpme.com

Tél : +33 (0)1 69 44 00 49

Fax : +33 (0)1 69 44 03 49