Interventions

Fix Me! A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the forum.

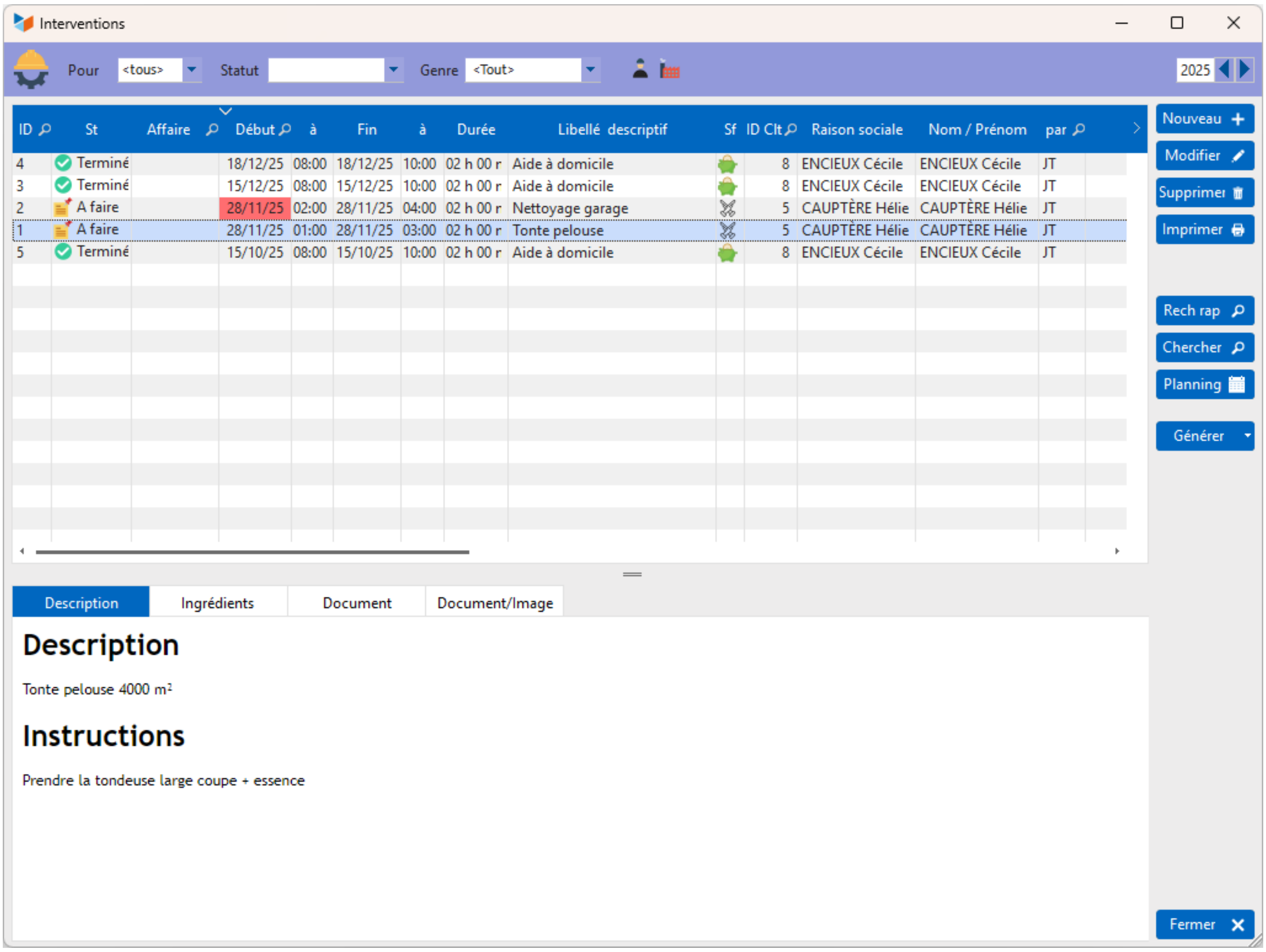
An intervention is an operation you carry out for a contact (usually one of your customers), usually outside the company. For example, a technician carrying out a maintenance operation on a customer's installation.

Intervention recording enables you to :

- Produce an intervention sheet which you can give to your customer when the intervention is due (so that he can validate his request), or done (so that he can validate the intervention), depending on your management process. You can have the technician responsible for the intervention and/or the customer sign it, on your computer, or on mobile or smartphone (via l'extension INTERWEB).
- keep track of ingredients consumed during the intervention, whether billable or not
- automatically bill the customer, based on a selection of intervention sheets, according to time spent and/or billable ingredients consumed.

List of interventions

Access : *Activities → Interventions*



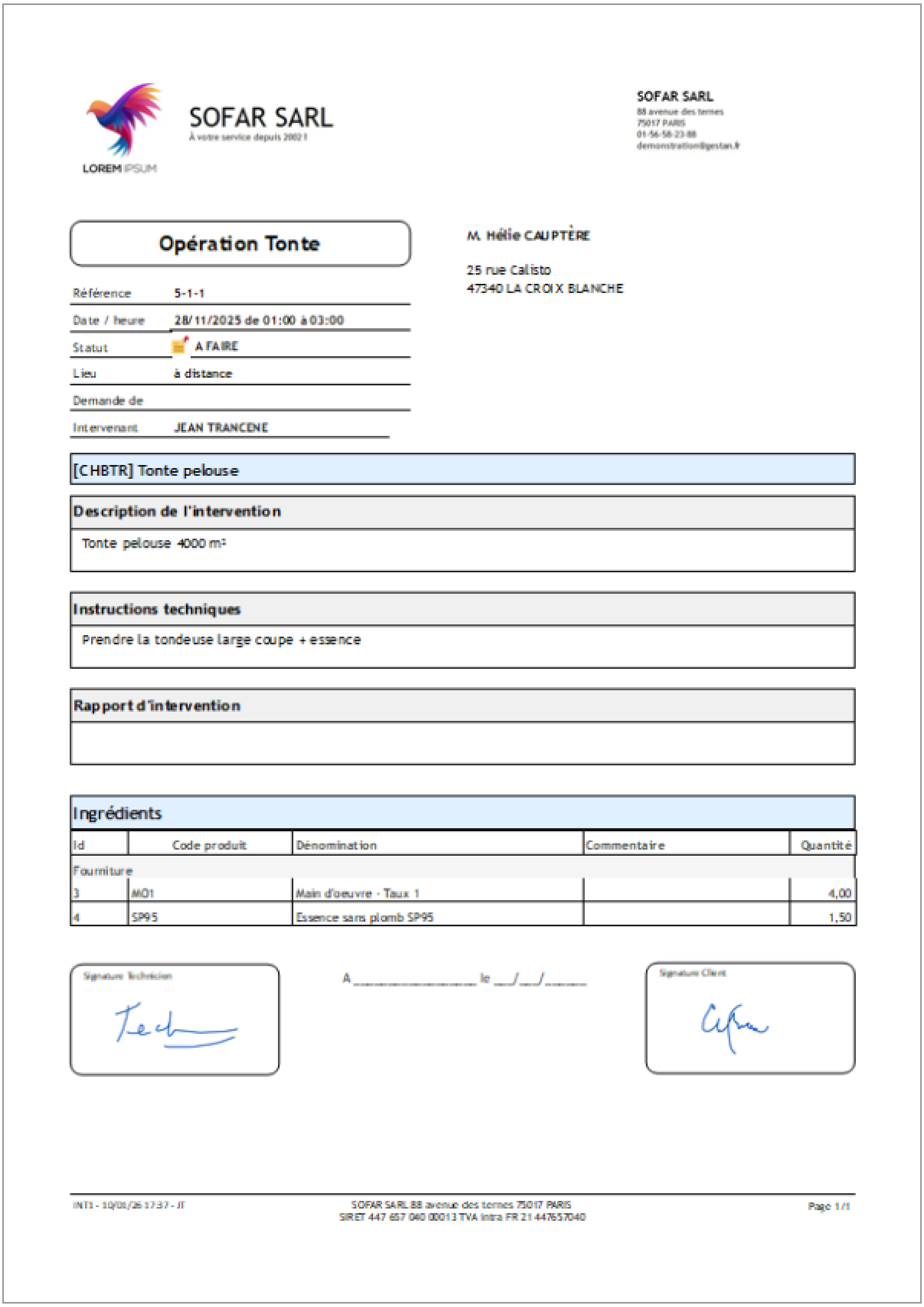
The lower part of the intervention list features:

- a **Ingrédients** tab. This displays the ingredients (products) consumed in the course of the activity, and allows you to specify which are billable and which are not.
- a **Documents** tab to link any document (contract, GTCs, work order, etc.).
- a **Documents/Images** tab to link before/after photos, for example, for the selected job.

The **Generate** button lets you :

- generate a document (quote, order, invoice, BL) for a job or a period of time
- a request for quotation for the ingredients of the job
- a supplier order for the ingredients of the intervention.

The **Print** button prints the intervention sheet, according to the printing options chosen in the general settings.



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demonstration@gestan.fr

Opération Tonte

M. Hélie CAUPTÈRE

25 rue Calisto
47340 LA CROIX BLANCHE

Référence	5-1-1
Date / heure	28/11/2025 de 01:00 à 03:00
Statut	A FAIRE
Lieu	à distance
Demande de	
Intervenant	JEAN TRANCENE

[CHBTR] Tonte pelouse

Description de l'intervention

Tonte pelouse 4000 m²

Instructions techniques

Prendre la tondeuse large coupe + essence

Rapport d'intervention

Ingrédients

Id	Code produit	Dénomination	Commentaire	Quantité
Fourniture				
3	MO1	Main d'oeuvre - Taux 1		4,00
4	SP95	Essence sans plomb SP95		1,50

Signature Technicien

A ________________ le ___/___/______

Signature Client

INT1 - 10/01/26 17:37 - JT
SOFAR SARL 88 avenue des ternes 75017 PARIS
SIRET 447 657 040 00013 TVA intra FR 21 447657040
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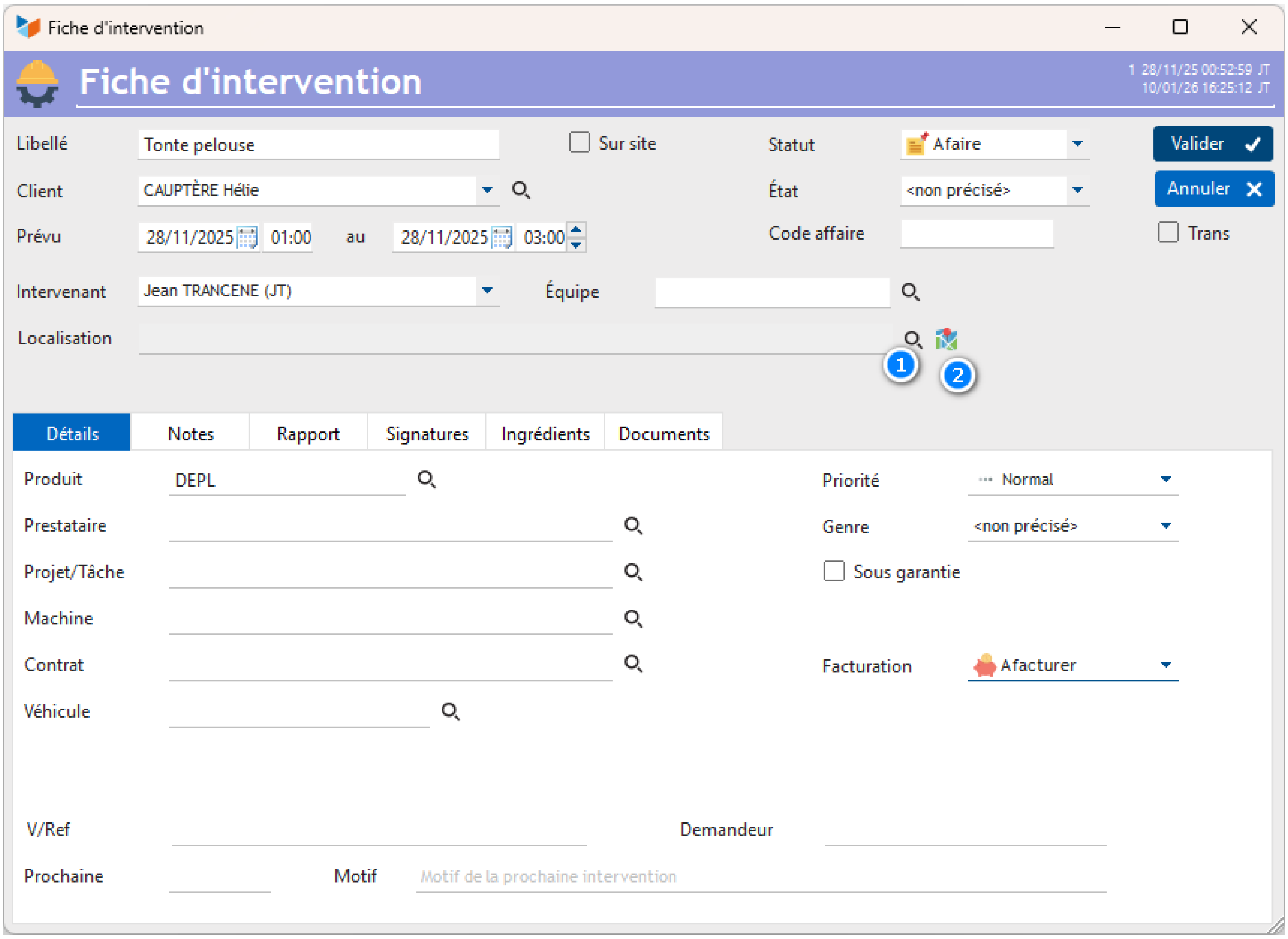
Depending on the general settings, you can choose whether or not to print the technician and/or customer signatures on standard intervention sheets, as well as the list of ingredients.

Intervention sheets are often specific to each company. If the standard form is not suitable for your activity, it can be replaced by any other model.

The intervention form



The intervention includes date/time limits for its completion.

Intervention duration is calculated in gross hours: It does not take into account break times, conventional day lengths, or individualized day schedules (this is important if you are billing a product linked to the intervention, and this product is billed by the day or by the hour).

The intervention is attached to a **client**.

The **Title** field is used to indicate the general nature of the intervention.

The **product** allows you to match a job to a product, if required. This may be useful when automatically generating an invoice from a selection of job cards (the product code is not displayed if you are not using a product catalog).

The **Dde** field can be used to specify the person who requested the intervention. It will be printed on the **INT1** job form report.

You can specify a **type** of intervention (if you have set up at least one).

The **Intervenor** is the main user performing the intervention, while the **Team** field allows you to specify any other intervenors.

You can indicate the date of the **next call** and its **reason**.

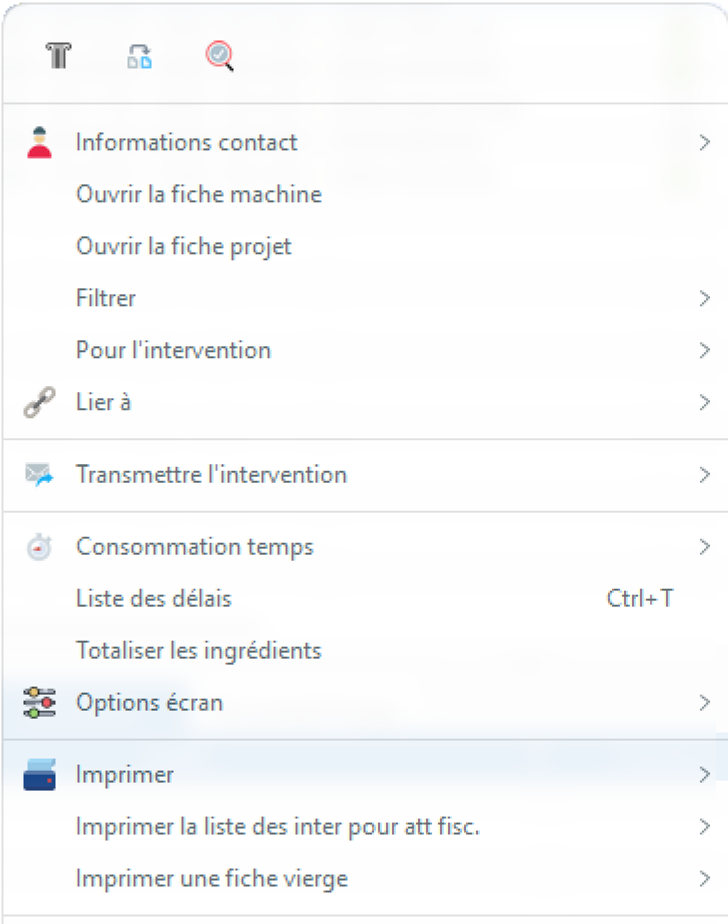
Finally, you can indicate the **location** of the intervention, when it is not at the customer's main address.

The **Signatures** tab is used to record the customer's and/or technician's signature. Once signed, signatures cannot be deleted, except by a Gestan administrator or a user with signature deletion privileges.

The **Ingredients** tab is used to record ingredients consumed or billable to the customer for the intervention.

The check mark **Transmitted** indicates that the job has been transmitted to the customer. It is set to “Transmitted” if sent by e-mail.

Intervention list context menu



Available features include:

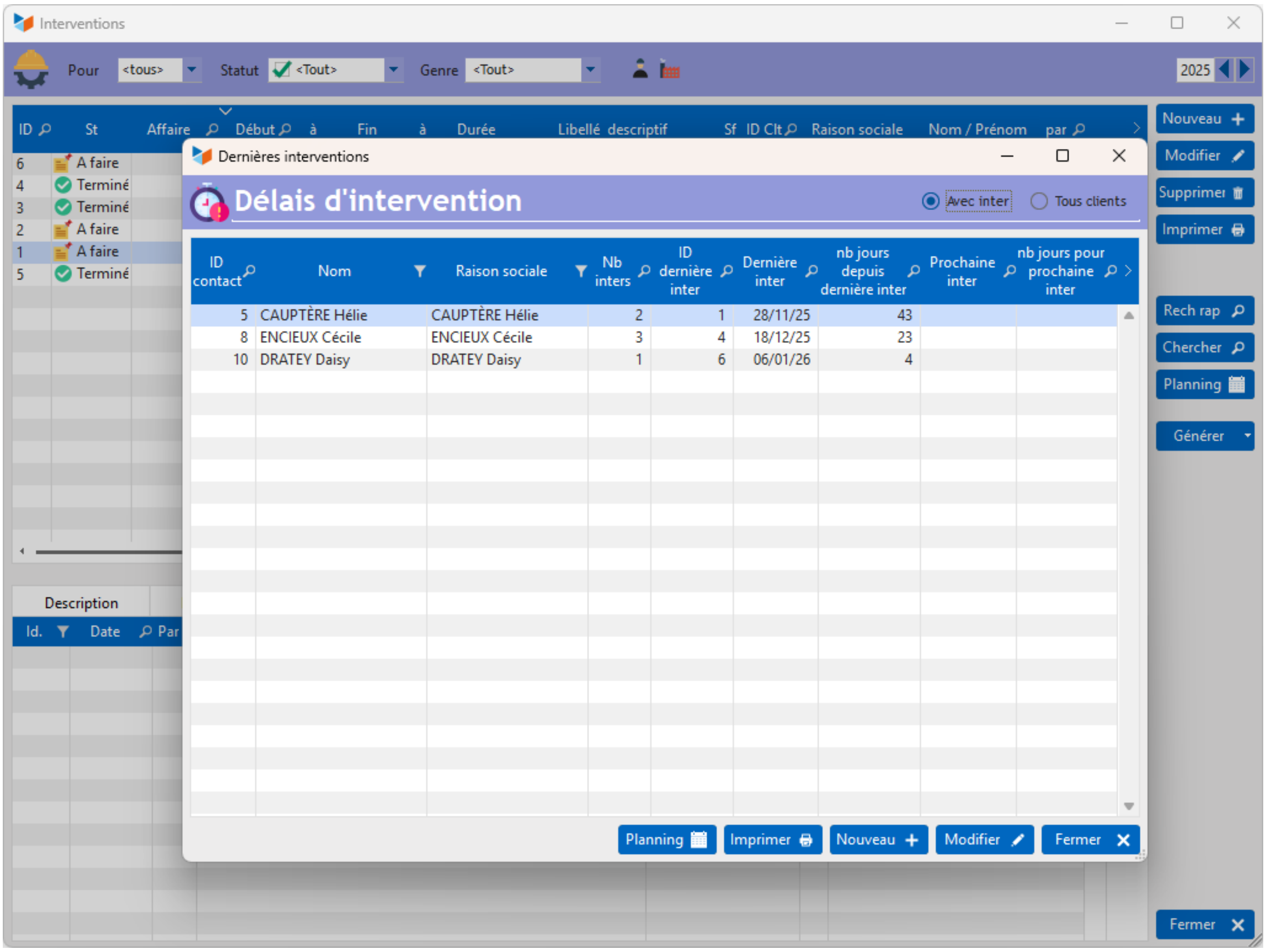
- **Contact information → Show map** displays the contact's position on a map, and/or the route to get there. This program is based on the Google Maps API, which has become chargeable since 2018…
- **Send SMS** allows you to send an SMS to the contact attached to the intervention (subject to the opening of an SMS account).
- It is possible to automatically generate **hourly consumptions**, for the user linked to the intervention, and also, if applicable, for the whole team that intervened. The consumption(s) generated will have a duration of the default intervention duration, and will be dated for the day

of generation. The intervention must be linked to a project and a task

The list of available printouts includes the following reports:

- **INT1**, which is the standard intervention sheet. You can print it blank, or with your customer's contact details. This allows you to fill it out in pencil in the field, then save it in Gestan when you get back to the office.
- **INT2**, which shows the list of interventions over a date range.
- **INT4**, which shows total hours consumed over a date range
- **MAC4**, which is an acceptance slip. When your customer hands over equipment for repair, for example, you can indicate the operation to be carried out on this voucher, and have it signed by both you and your customer.
- **INT3**, which is the list of operations carried out for all or some customers. This is the tax certificate required for personal services.

The **List of deadlines** option displays a table summarizing the delay information for the interventions below.



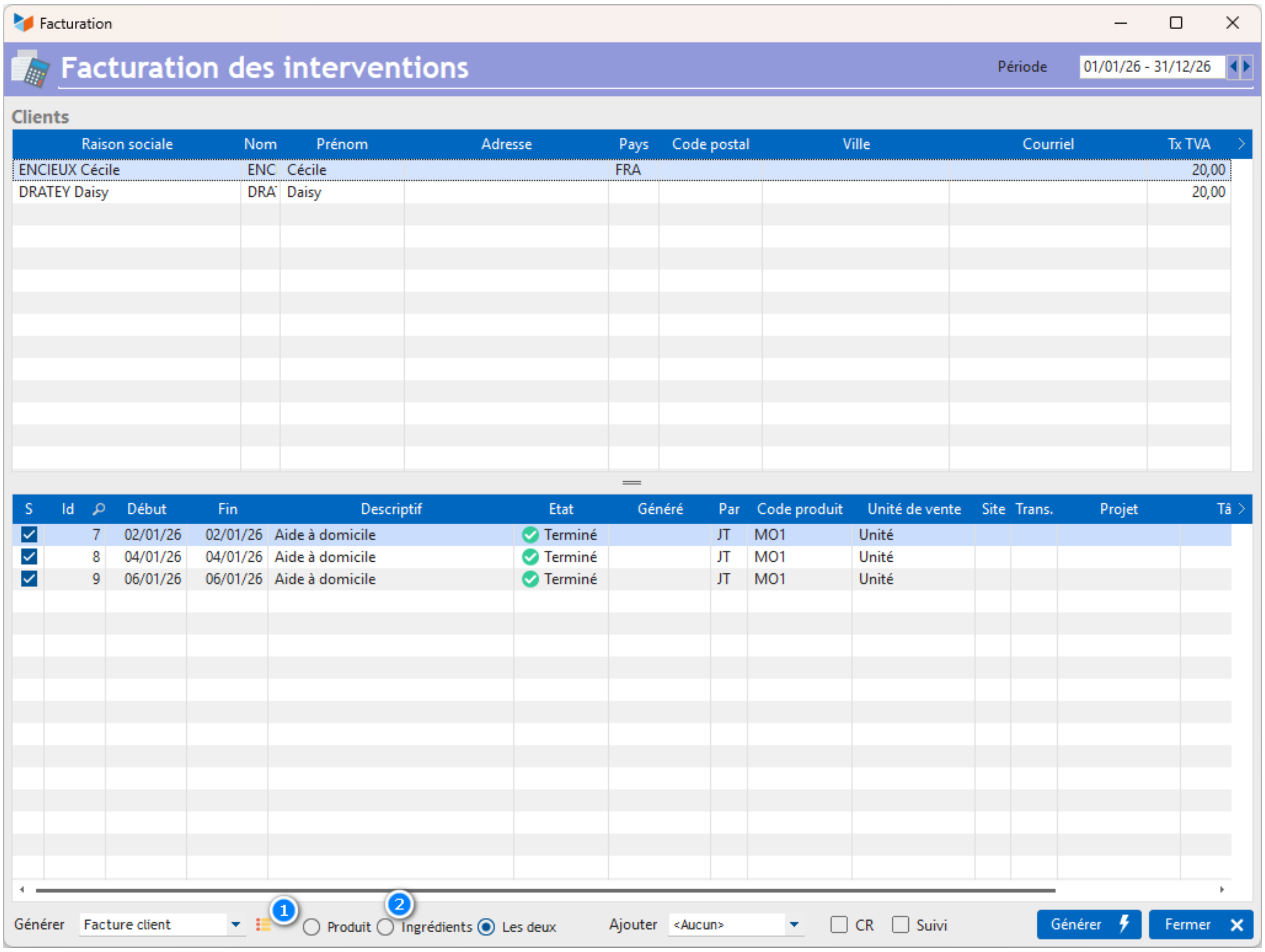
This screen lets you easily display customers in order of delay since the last intervention: the longer the delay, the more likely it is that you'll need to contact these customers.

Invoicing of interventions

Invoicing of interventions is carried out from the interventions table, using the **Generate** button, and two possible options:

- Document for an intervention: in the case where you wish to bill only one intervention
- Parts for a period: in the case where you wish to invoice interventions for a month, a week, or any other period.

This is the billing screen for a period.



The screen displays at the top all the customers who have been the subject of at least one intervention during the period considered.

In the lower part the interventions carried out are displayed, which are pre-selected when their status is completed. You can select them for billing, or not, using the checkbox in column **S**. You can use the context menu of the table at the bottom to add or modify interventions for the selected client.

Before issuing invoices, it is strongly recommended to check the interventions taken into account for the period.

On this screen, you can specify:

- the **document to generate**: you can generate customer invoices, but also quotes, customer

orders, and delivery notes.
- what you want to invoice: the **product** linked to the intervention, the **ingredients**, or **both**.
- if you check the box **Addition CR**, then the wording of the intervention will be added to the product wording
- if you check the **Monitoring** box, then the code of the person responsible for the intervention will be used as the person responsible for tracking the part. Otherwise, it will be the logged in user.

Then when everything is correct, click on the **Generate** button to generate the chosen parts.

Tips and tricks

The numbering of intervention sheets has the same particularities as that of parts (see Numbering of parts).

You can automatically generate intervention sheets from actions, from the right click on the list of actions.

The comment area allows free entry with formatting. You can simply copy and paste from any document (Open Office, Office, website, etc.). If you copy and paste using Ctrl-C, the formatting will also be copied. In case you don't want to, use the small “Paste” button on the comments area toolbar, or the shortcut Ctrl+Shift+V.

For recurring interventions, for example you are always going to wash Madame So-and-so's tiles on the 3rd of the month, you can automatically generate the corresponding intervention sheet, see Planned actions .

If you want to call the intervention sheets by another name: via Tools > Translations > Miscellaneous labels, select the item FINTR, and translate *“Intervention sheet”* by *“Order of work”*, for example.

You can automatically invoice interventions with variable durations, provided that you have linked them with products billable in hours, half-days, or days (see Calculation mode).

Other Activity articles

Action planning
Actions
Agenda of actions
Ingredients
Intervention planning
Interventions
Personal service tax certificate
Planned actions
Typical process and steps

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Last update: **2025/06/24 21:16**