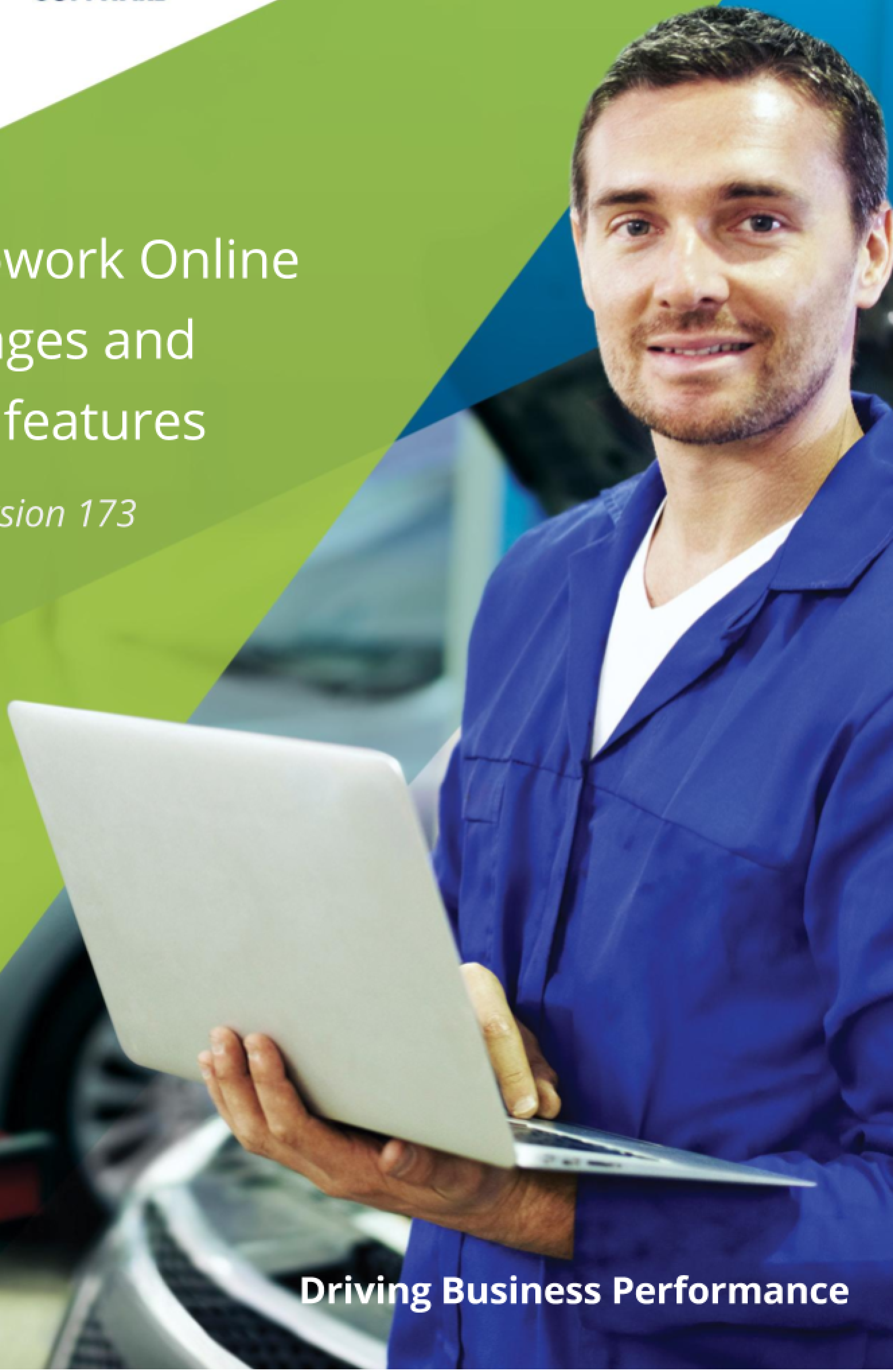
Rev 2

Autowork Online changes and new features

For version 173



Driving Business Performance

Contents

Introduction

In the new version of Autowork Online, several changes have been made to the layout of the main document screen. The aim of these changes is to streamline the workflow, leading to an easier to use, and more efficient software solution.

A number of new features have also been added in order to facilitate this, the largest change being the new **job grouping** feature: Job grouping in essence, replaces the old links for adding parts, labour, and other items to a document with a single button which achieves all of the above. The changes also result in a cleaner, easier to use interface.

Job groupings further enhance existing functionality by allowing the operator to group part and labour items together into a single job within the document. For example, you may have a job for changing a customer's brake pads and discs; the job group would include the parts for the pads and discs, and the labour for fitting them.

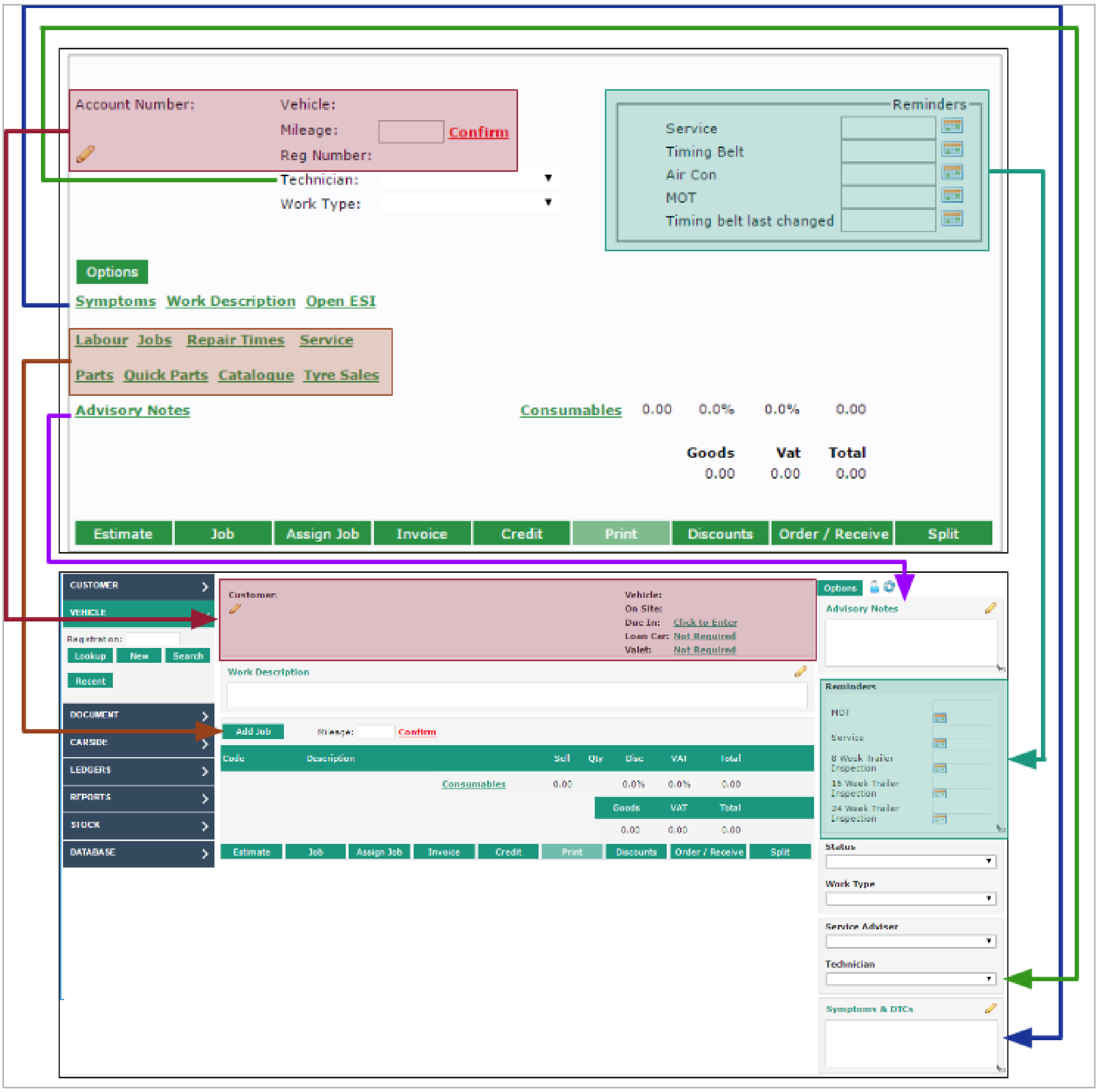
As well as the new job grouping feature, there are also numerous other smaller changes: Users can now enter a service advisor in the documents tab, search an internal database of DTCs, book a vehicle in from the document tab, and view the status of all outstanding documents in the Work in Progress (WIP) tab.

Benefits

- New enhanced and streamlined document screen - work faster and more efficiently
- Group parts and labour - documents are cleaner and easier to read, for you, and your customers
- Specify a service adviser - giving your customers a single point of contact for all queries
- Technician efficiency - Keep track of your technicians' timekeeping performance and margins
- Search a built-in database of DTCs - no more searching the internet, or messy spreadsheets
- Book in a vehicle from the document tab - including options for loan cars, valeting, and more
- New Work in Progress (WIP) tab - see the status of all documents relevant to *you* at a glance

Screen layout changes

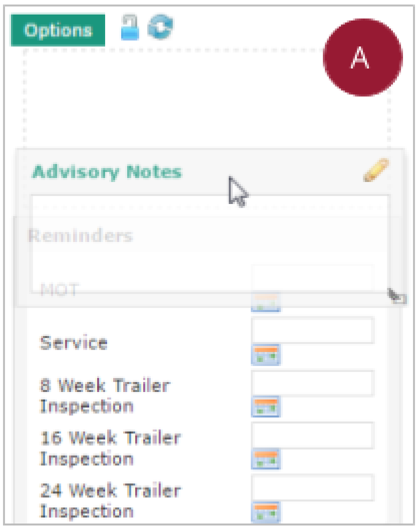
The illustration below outlines the changes to the main Autowork Online Document screen. The main change is that the **Labour**, **Jobs**, **Repair Times**, **Service**, **Parts**, **Quick Parts**, **Catalogue**, and **Tyre Sales** links have all been combined into the Add Job button. This is described in more detail later in the document.

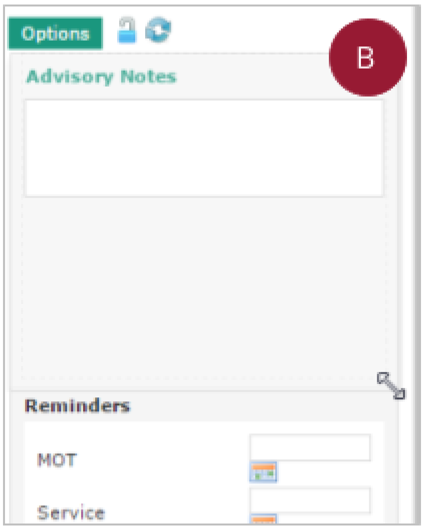


New features

Movable panels

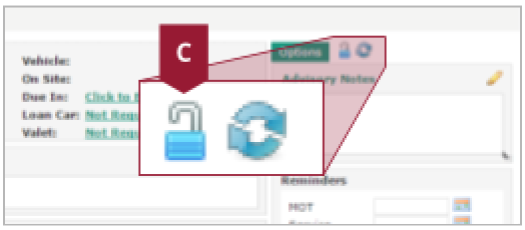
In the new version of Autowork Online, it is possible to arrange the panels that make up the right-hand sidebar (for example **Reminders**). This Is done by clicking and dragging the panel by its header, and then dropping it in the correct position (A). The panels can also be resized by clicking and dragging their lower-right hand corner (B).





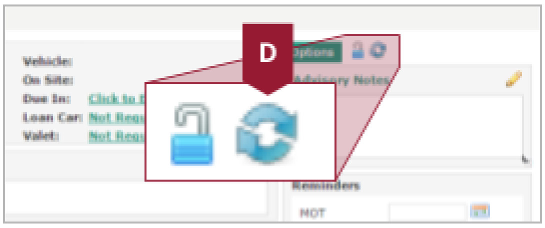
Locking the panels

It is also possible to lock the panels into their new arrangement, preventing users from moving them by accident. This is done by clicking the **Lock** button (C) at the top of the side bar. Clicking the button again will unlock the panels.



Restoring the default layout

If you would like to restore the default layout for the sidebar panels, simply click the **Reset** button (D), and then agree to the prompt.



Job groupings

A new feature has been added to Autowork Online version 173 which will allow the grouping of jobs and labour charges within a document. For example, the parts and labour for a particular job could all be grouped together in a job group. This makes the document clearer and easier to understand for the customer, as they can see at a glance what a particular job costs. The new version also increases productivity and efficiency, as it allows whole jobs groups to be deferred if required.

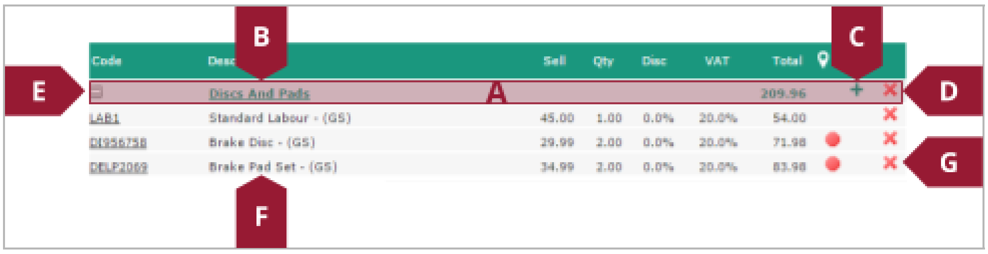
Job group types

There are several different types of job group available, these are:

- Blank - Inserts a new blank job group
- Jobs - adds a pre-defined custom job
- Labour - adds a labour charge
- Repair times - add a OEM-supplied labour time from the catalogue
- Service - add a service schedule
- Parts - add a part
- Quick parts - quickly add part from a list of commonly sold items
- Catalogue - add a part from a catalogue lookup
- Tyre sales - look up and add tyres to the document

Please note, even though the new feature has been added, all of the above items (other than “Blank”) work in an almost identical way to the old version of Autowork Online. It would be possible to use the new system in a way that is very similar to the old system. This would be achieved by creating a new job group, and then manually adding parts and labour to it. Even though it is possible to use the system in this way, it is not recommended, as making full use of the new features will prove more efficient once they have been learned.

Job grouping screen elements explained



A. Job header

B. Job description

C. Add button - adds a new item to the job

D. Delete/defer job button - deletes/defers the whole job

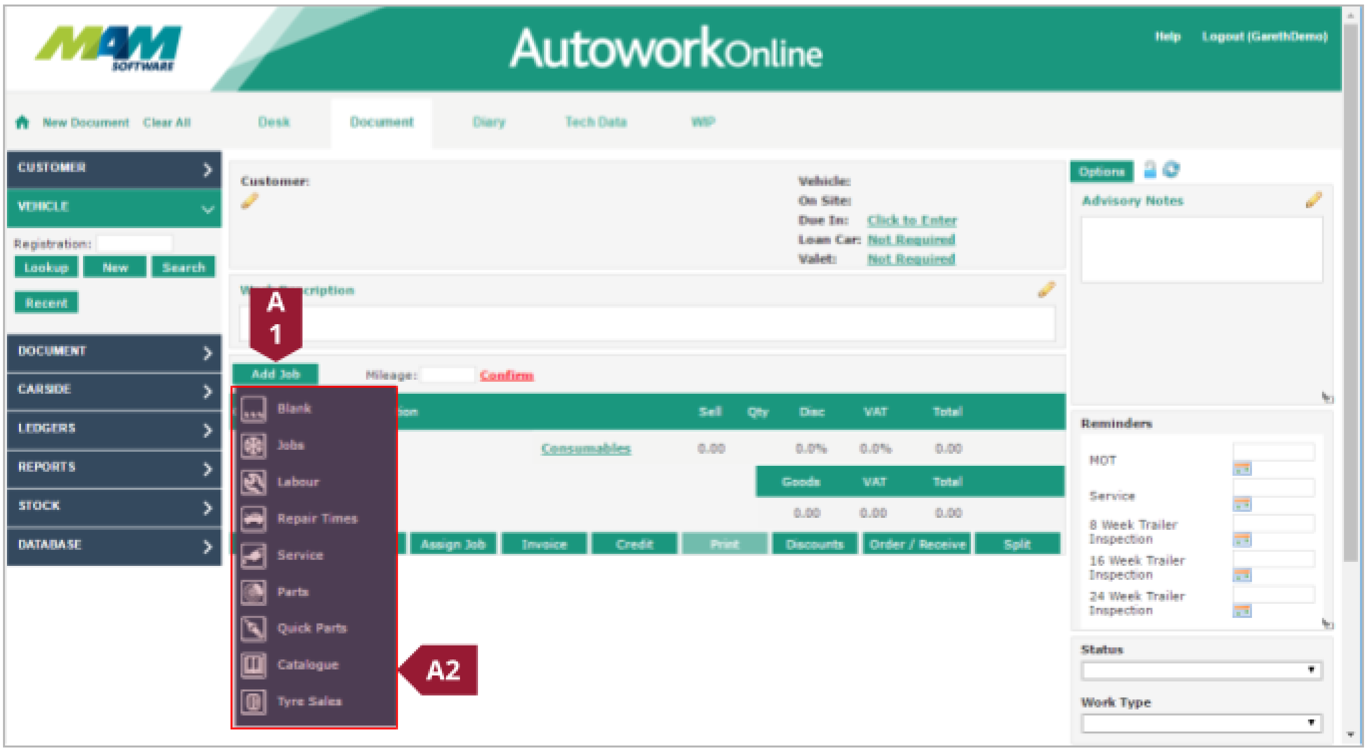
E. Minimise button - collapses the job

F. Line description

G. Delete item button - deletes the selected item only

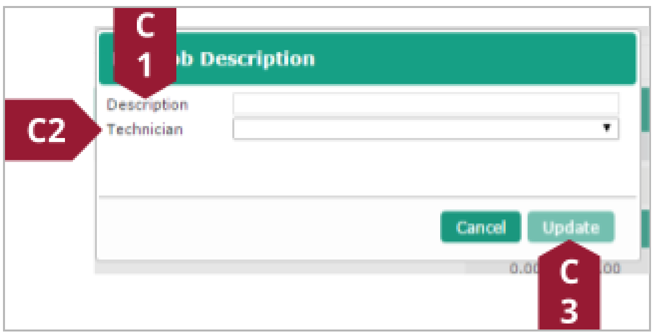
Creating a new job group

A. In the new system, the Add Job button replaces the separate buttons for **Jobs**, **Labour**, **Repair Times**, **Service**, **Parts**, **Quick Parts**, **Catalogue**, and **Tyre Sales**. Clicking the **Add Job** button (A1), will open a menu (A2), clicking any option within the menu, and then going through the same process as on the old system will add a job grouping of the desired type. For example, selecting the **Jobs** option, then choosing a pre-set quick job for changing brake pads and discs will add a job containing the required parts and labour.



B. The only exception to the above is the new Blank option, this adds a blank job group, which can be added to using the instructions in the [Adding an item to an existing job group section](). To add the new blank job, click the **Add Job** button (A1), and then select **Blank** (A2) from the menu.

C. Enter a description for the job into the **Description** text field (C1), select the technician assigned to that particular job from the **Technician** dropdown menu (C2), and then click the **Update** button (C3) to add the blank job.



Adding an item to an existing job group

To add an item to an existing job, simply click the **Add** button in the **Job Header** (see the *Job grouping screen elements explained* section for details) this will open the **Add Job** menu, and items can be added using the same process as in the *Creating a new job group* instructions.

Please note: Since the new **Package Jobs** feature was added in version 175, it is no longer possible to add a **Job** in this way. This is because the Package job must be kept on its own separate job group in order for the pricing to be correctly calculated.

Moving an item from one job group to another

An item can be moved from one job group to another by simply clicking it, and then dragging it to the required job group.

Renaming a job/assigning a job to a different technician

The name and technician assignments against a job group can be changed by simply clicking the **Job Name** link in the job header (see the *Job grouping screen elements explained* section for details). This will open the same screen as in point C of the *Creating a new job group instructions*, and the details can be amended in the same way.

Removing an item from a job group

To remove an item from a job group, simply click the **Delete Item** button (see the *Job grouping screen elements explained* section for details), and then either click the **OK** Button to delete it, or the **Cancel** button to go back.

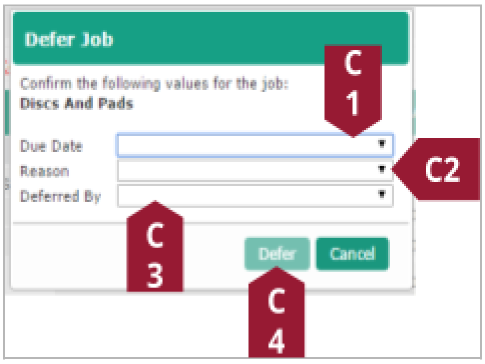
Deferring an entire job group

When a customer has been provided with an estimate for particular job, it may be that they want to proceed with parts of it, but defer others. For example, if the customer had come in to have new discs fitted, but during the process of this, it was found that their tyres were near the legal limit. The customer could choose to leave the tyres until a later date. The defer feature would allow the user to send the customer a notification to remind them of the deferred work. The process to defer work is as follows:

A. Once a job group has been added to the document, and then either a job or estimate generated, clicking the **Delete** button (see the *Job grouping screen elements explained* section for details) in the job header will trigger a prompt.

B. In this prompt, clicking the **Delete** button (B1) will delete the whole job group, clicking the **Defer** button (B2) will defer the job, and clicking the **Cancel** button (B3) will not delete the item.

C. Clicking the **Defer** button will cause a second prompt with several dropdown menus on it to pop up: **Due Date** (C1) sets the number of weeks to wait before sending a reminder to the customer, **Reason** (C2) sets the reason for the customer deferring the work (for example - a lack of funds), and **Deferred By** (C3) sets the operator who processed the transaction. Set all the dropdown menus to an appropriate setting, and then click the **Defer** (C4) button to defer the job group.



Please refer to the *Deferred work* section for further information on setting up and using this feature.

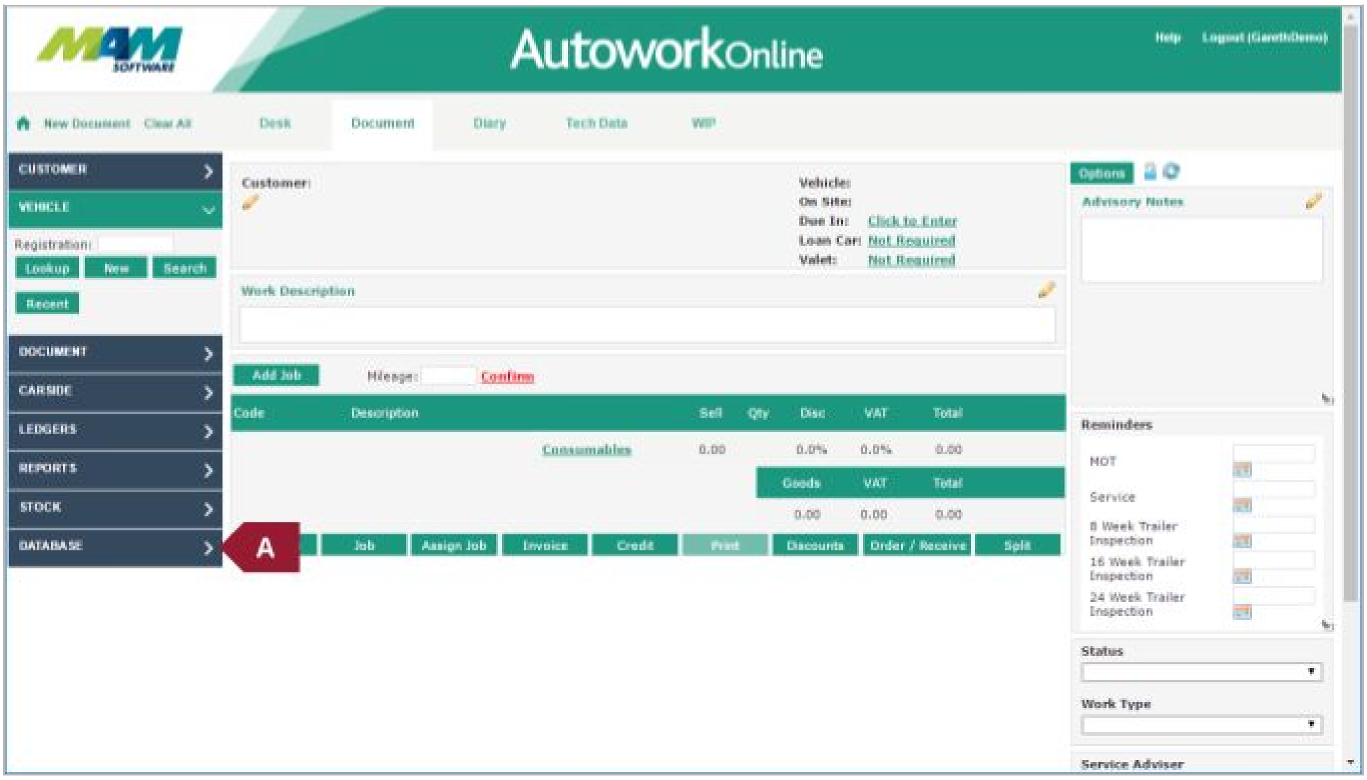
Deferred work

For instructions on how to defer work, see the *[Deferring an entire job group](#)* section.

Deferred job reason codes

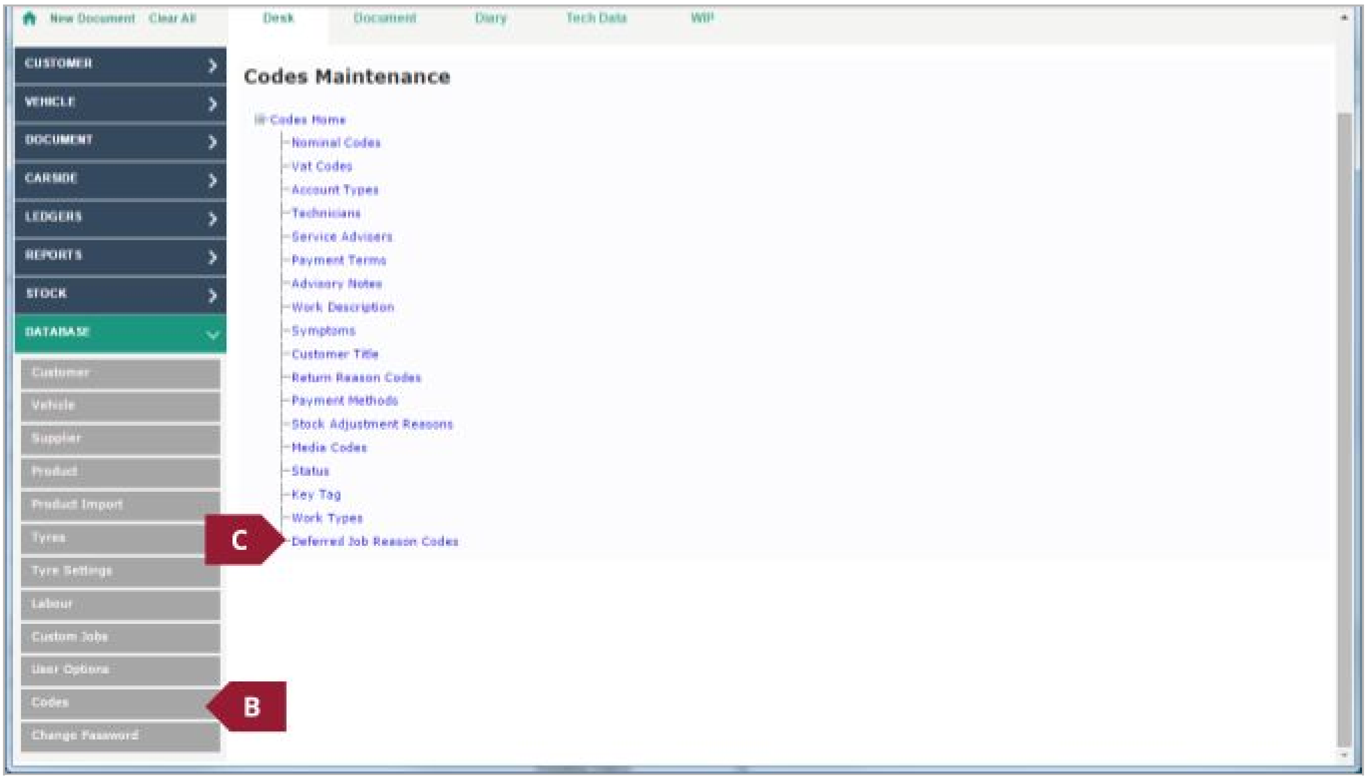
Deferred job reason codes can be customised as required, this is done using the following process:
Adding a new code

A. Click the **Database** menu button

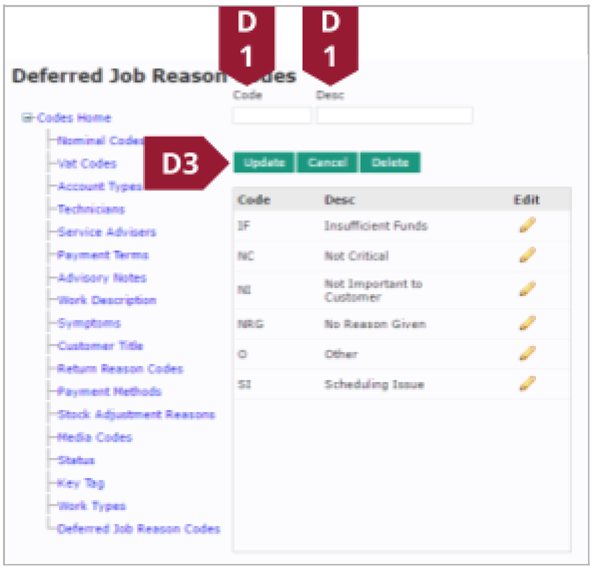


B. Click the menu option for **Codes**

C. Click the link for **Deferred Job Reason Codes**



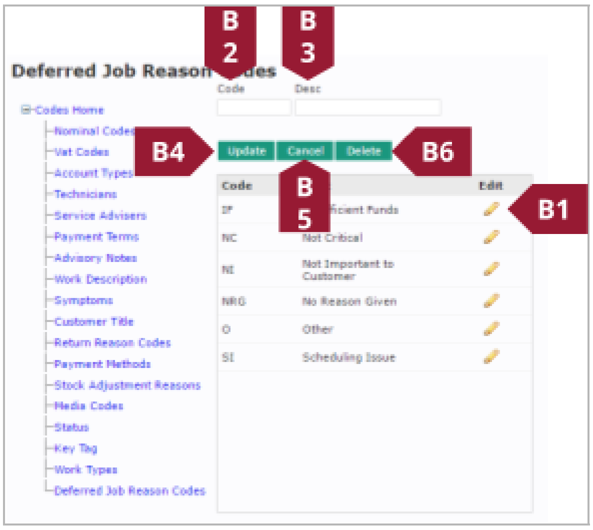
D. Enter a code and description into the **Code** (D1) and **Desc** (D2) text fields respectively, then click the **Update** button (D3) to confirm the changes.



Modifying or deleting an existing code

A. Access the Deferred job reason codes screen, as per steps A to C in the *Adding a new code* instructions

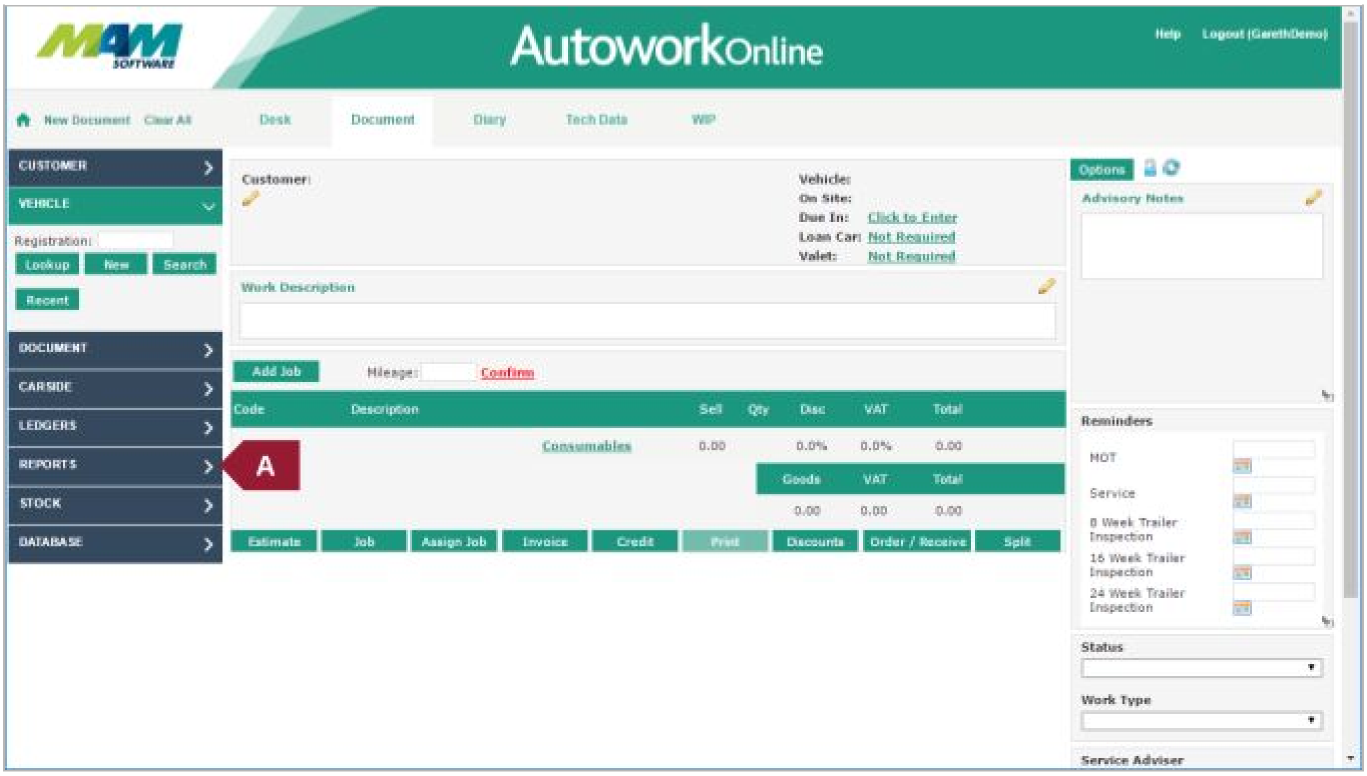
B. Click the **Edit** button (B1) against the code that you would like to edit, modify the contents of the **Code** (B2) and **Desc** (B3) text fields, and then click the **Update** (B4) button to make the changes. Alternately, the **Cancel** button (B5) can be clicked to reject the changes, or the **Delete** button (B6) can be clicked to delete the code entirely.



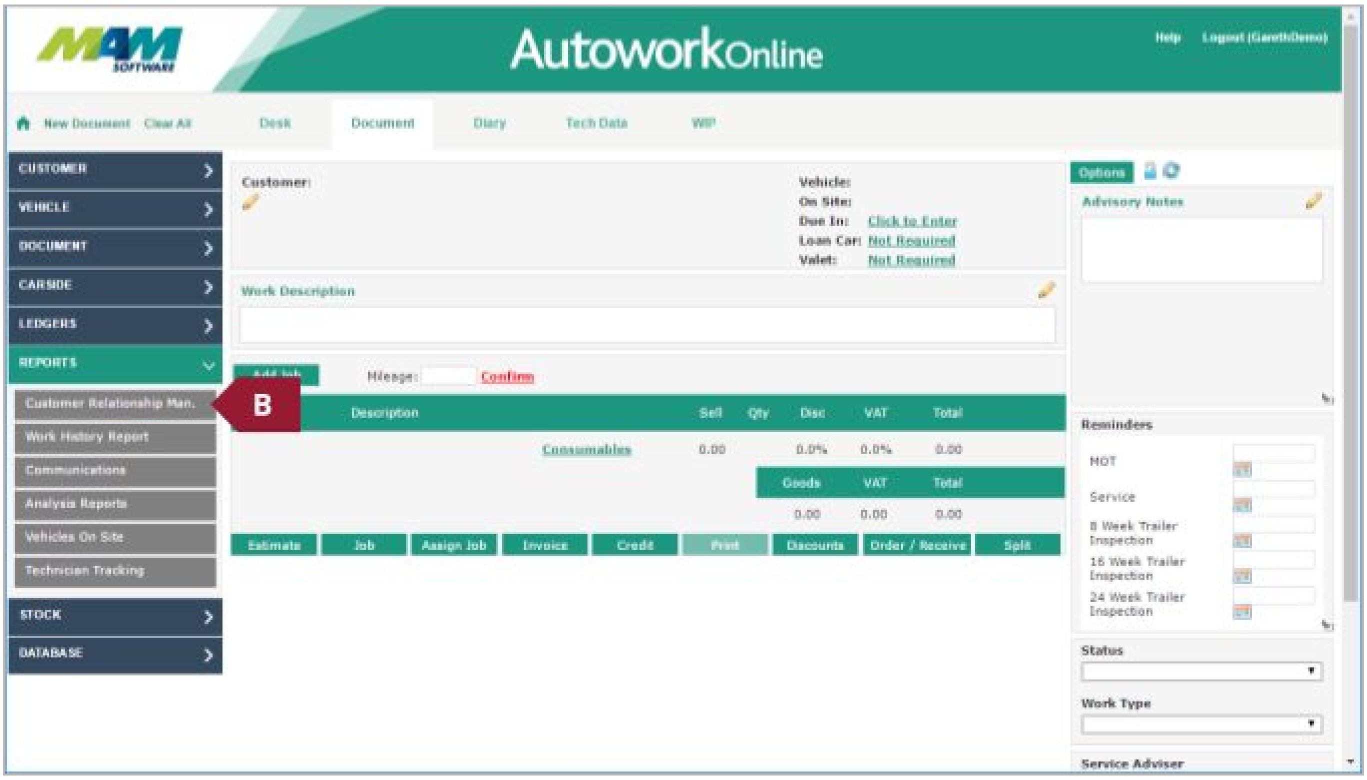
Reporting on deferred work

It is possible to show a list of current outstanding deferred work between two dates, this is achieved as follows:

A. Click the **Reports** menu button



B. Click the **Customer Relationship Man.** menu option



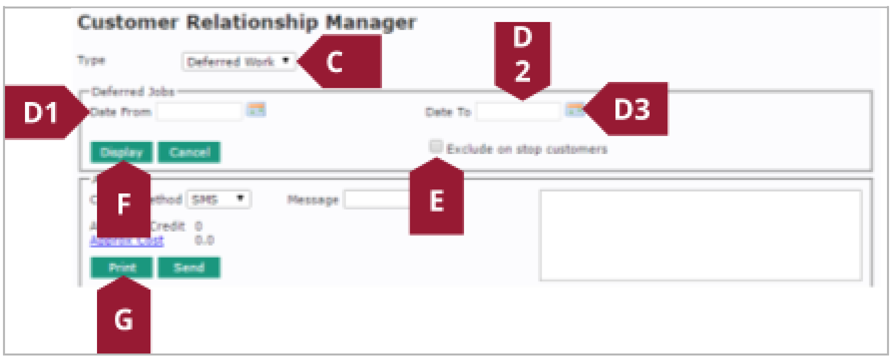
C. Select the option for **Deferred work** from the **Type** dropdown menu

D. Either manually enter a date into the **Date From** (D1) and **Date To** (D2) text fields, or click the **Calendar** button (D3) next to each field to set this using a calendar screen. Note that it is also possible to leave both fields blank, so that all records will be shown

E. *Optionally, check the **Exclude on Stop Customers** checkbox if required*

F. Click the **Display** button to display the report on screen.

G. *Optionally, click the **Print** button to print out the contents of the report*



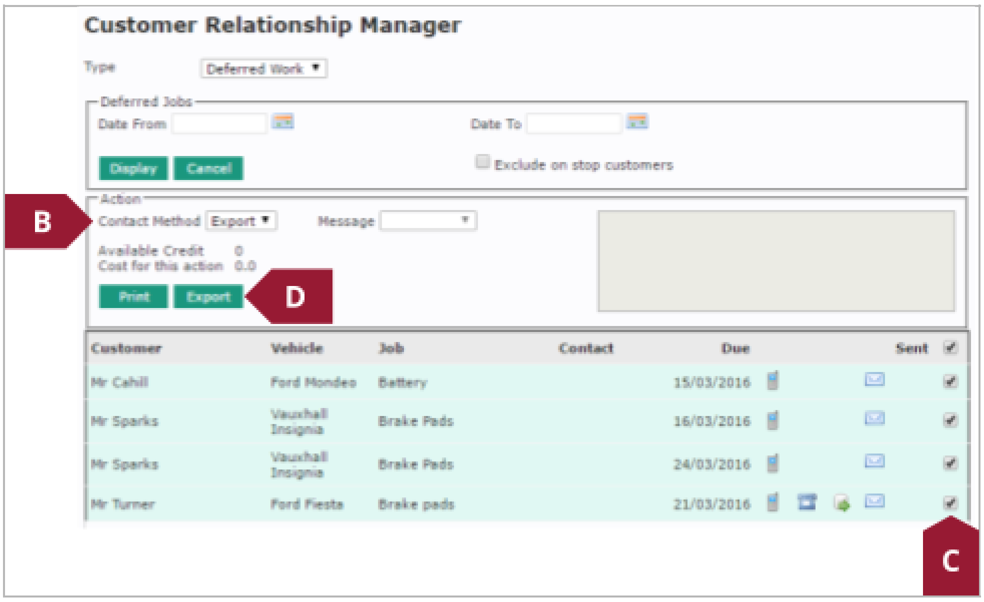
Exporting a list of deferred work

A. Generate a deferred work report as per steps A to F of the *Reporting on deferred work* section

B. From the **Contact Method** dropdown menu, select the option for **Export**

C. Check the checkbox in the **Sent** column for any customer you would like to export data for

D. Click the **Export** button, this will generate and download a comma separated (CSV) file. This will most likely be in the **Downloads** folder, which can be found in **My Computer** (this may be called **Computer**, or **This Computer** depending on your version of Windows). The file should open in Microsoft Excel or similar when double-clicked.



Sending emailed or SMS reminders

It is possible to send a customer an emailed or SMS reminder of their deferred work by using the following process:

A. Generate a deferred work report as per steps A to F of the [Reporting on deferred work](#) section.

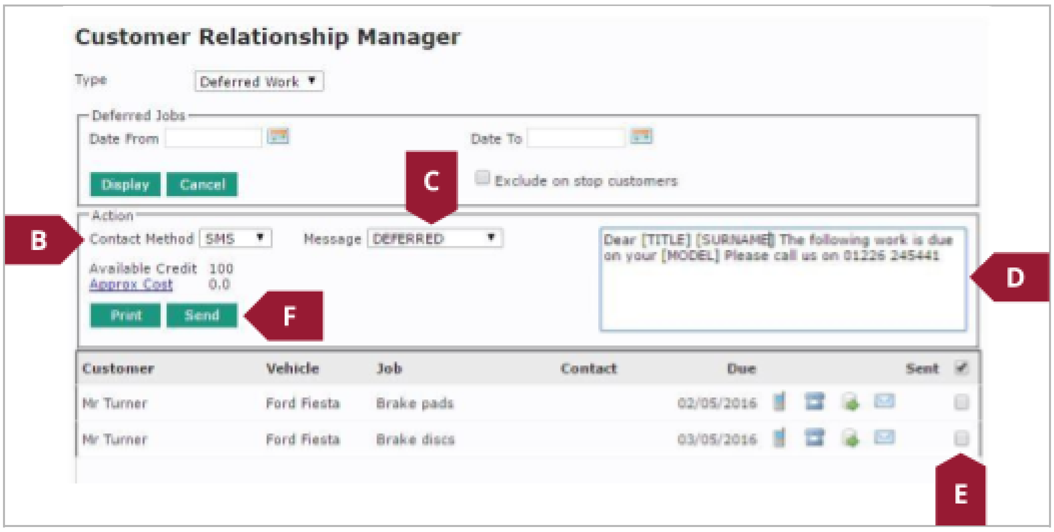
B. From the **Contact Method** dropdown menu, select the required option. Please note that the **Phone** option simply notes that the customer has been contacted (see step F), as to avoid duplicate messages should you choose to contact the customer by phone.

C. From the **Message** dropdown menu, select the option for **DEFERRED**.

D. *Optionally, amend the text in the **Message** text field. Note that any text in brackets ([]) will be replaced, for example, [SURNAME] will automatically be changed to the specific customer's last name.*

E. Check the checkbox in the **Sent** column for any customer you would like to send a message to. Any customers with a checkbox already ticked have already been contacted, unchecking the box and then checking it again will cause the message to be resent.

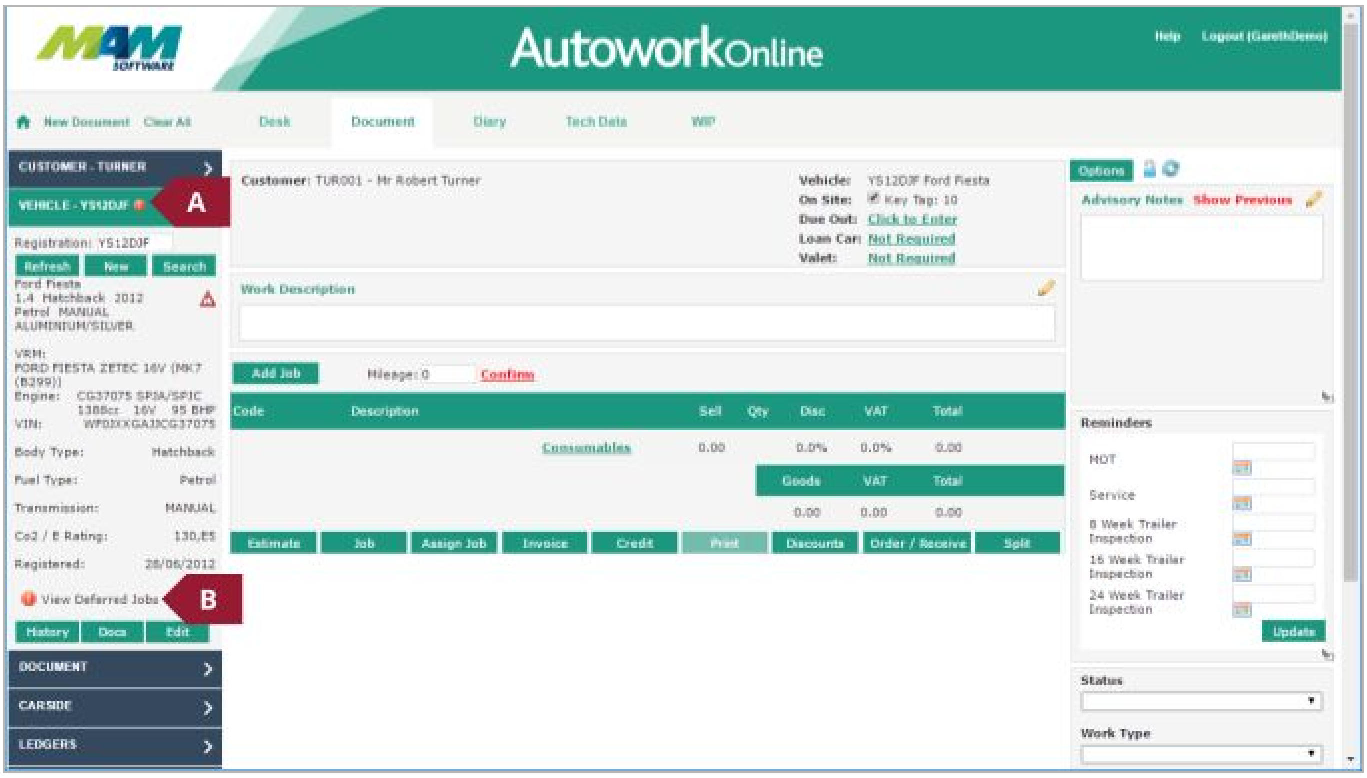
F. Finally, click the **Send** button to send the messages. Please note that the button will be relabeled as **View** when the **Phone** option is used, this will display a list of the customers' contact details.



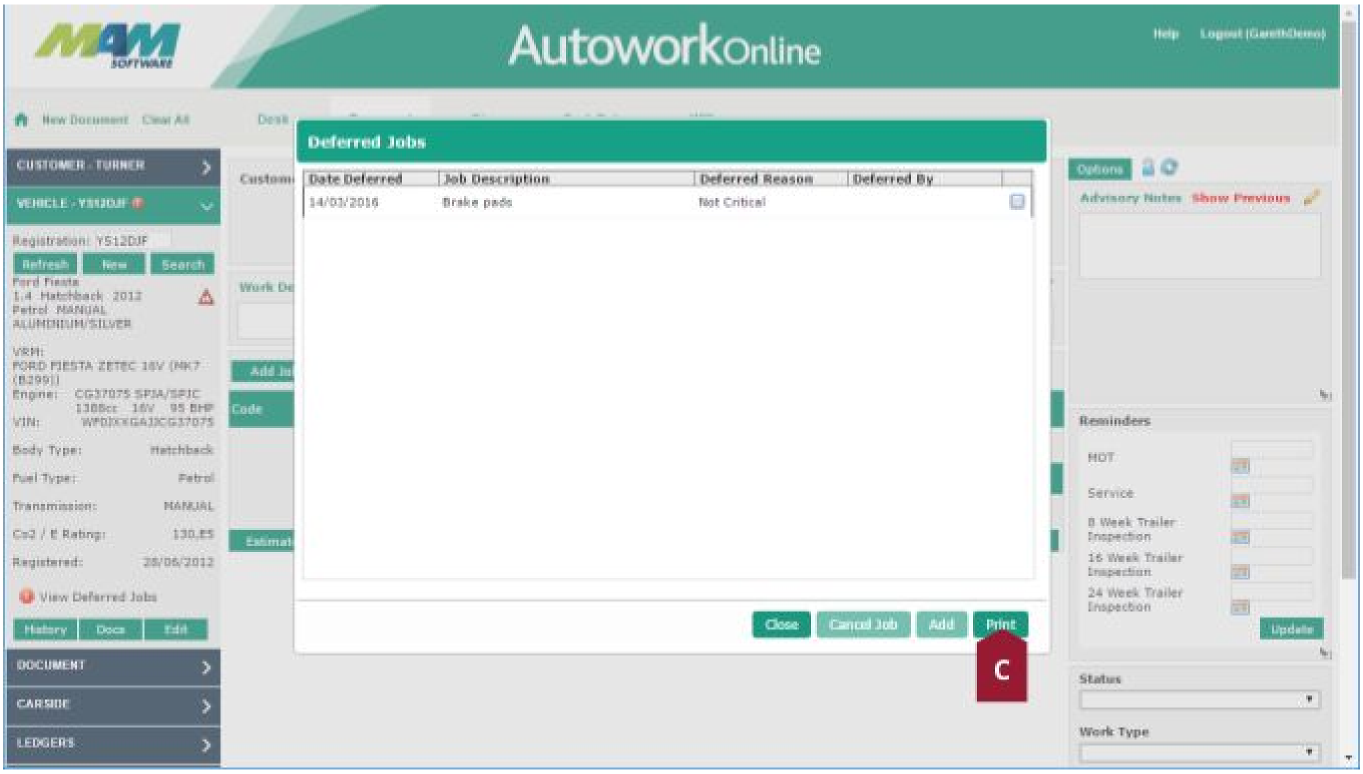
Viewing, recovering, or deleting a specific customer's deferred work

Viewing deferred work

When a vehicle is entered where deferred work exists, the system will automatically prompt the user. An exclamation point (!) will show in a red circle on the **Vehicle** menu button to the left of the vehicle's registration number (A). If the user then clicks the **Vehicle** menu button to expand it, a **View Deferred Jobs** link (B) will show at the bottom, beneath the vehicle details.



If the **View Deferred Jobs** link (B in the previous screenshot) is clicked, the **Deferred Jobs** screen will open, this lists the deferred jobs against that vehicle, including columns for Date deferred, the job description, reason code, and the technician who deferred the job. A list of current deferred jobs can be printed by clicking the **Print** button (C)

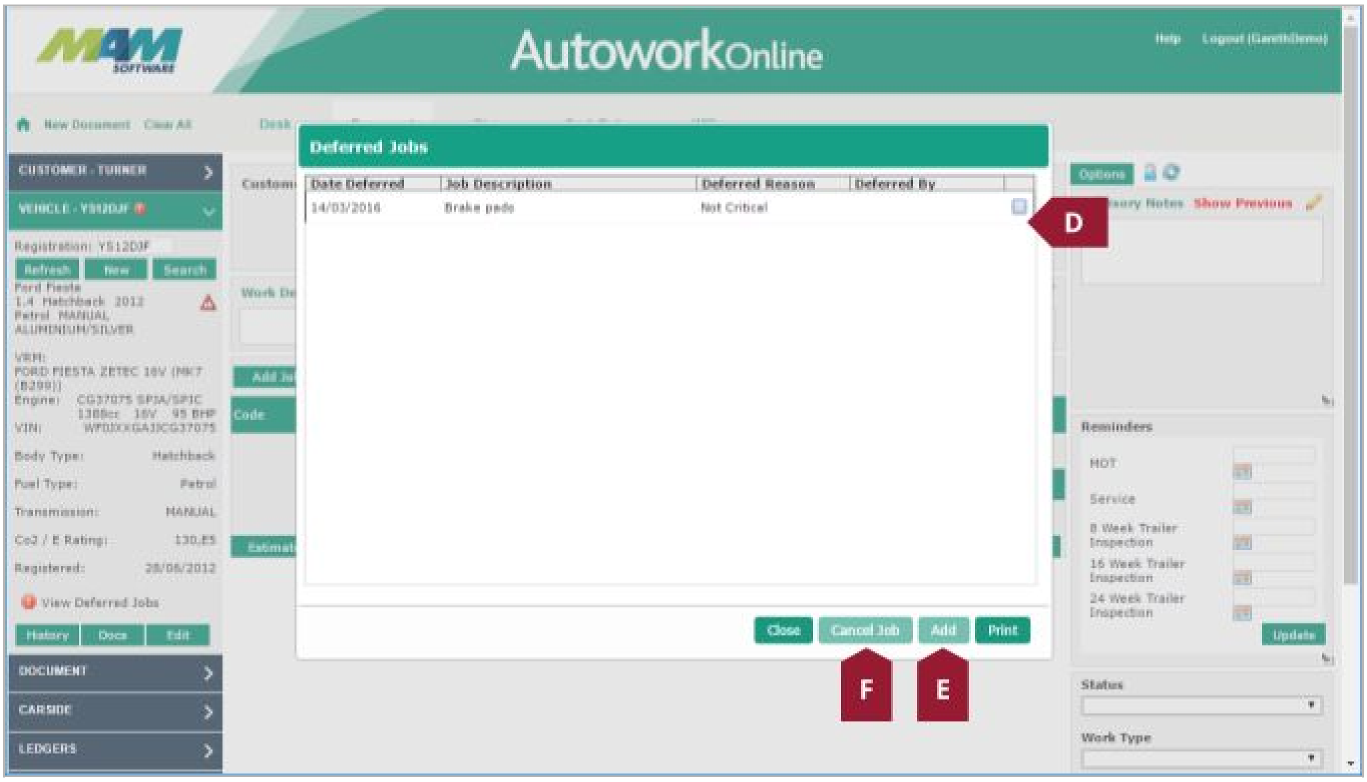


Recovering deferred work

To recover a job, simple check the checkbox for the particular job (D) in the **Deferred Jobs** screen, and then click the **Add** button (E), the items from the deferred job will automatically be added to a new document.

Deleting deferred work

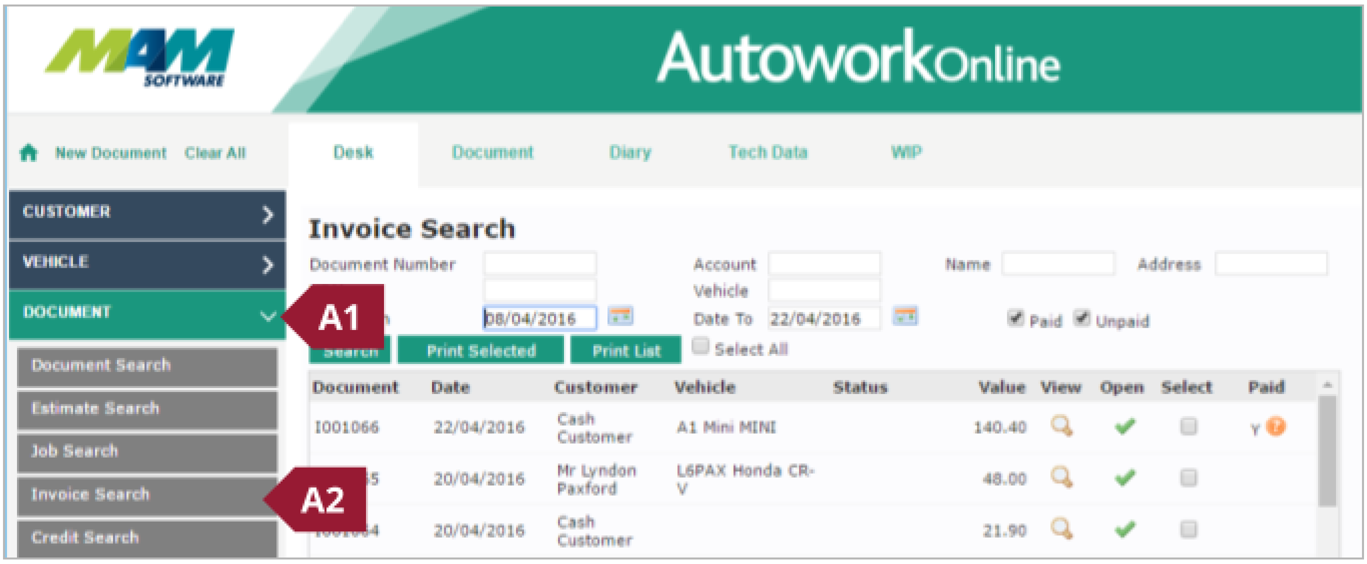
There is also an option to cancel the job from this screen. This is done by checking the checkbox for the particular job (D) in the **Deferred Jobs** screen, and then clicking the **Cancel Job** button (F).



Issuing a refund

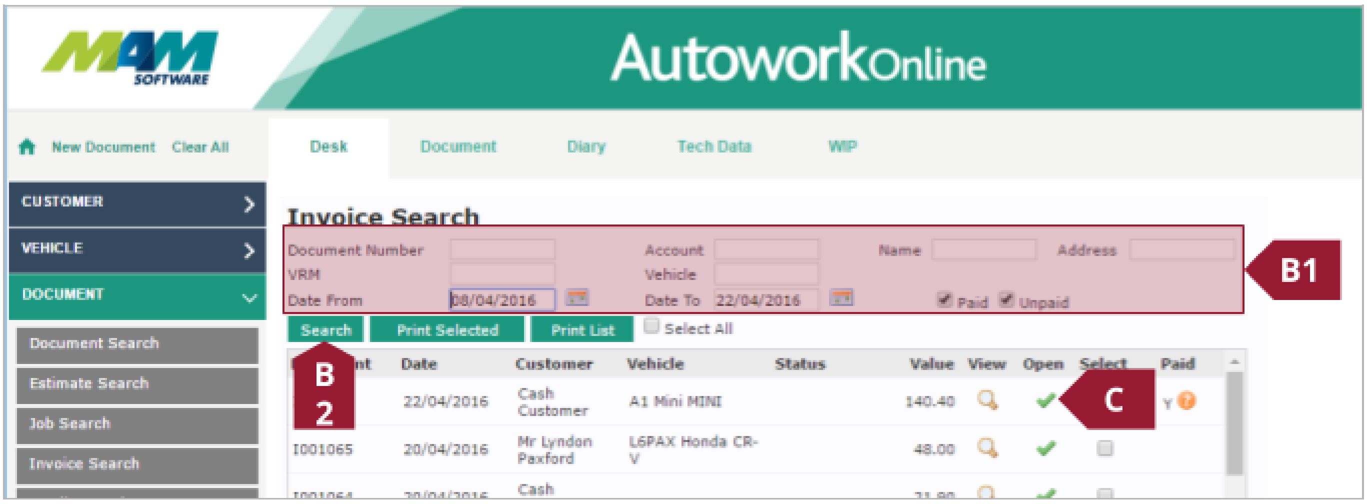
In some cases, a customer invoice may be marked as “paid” in error. It is now possible to quickly and easily refund the payment from the document screen. This automatically reverses the payment, and marks the invoice as “unpaid”. This is achieved using the following process:

A. Click the **Document** menu button (A1), then select the **Invoice Search** menu item (A2)



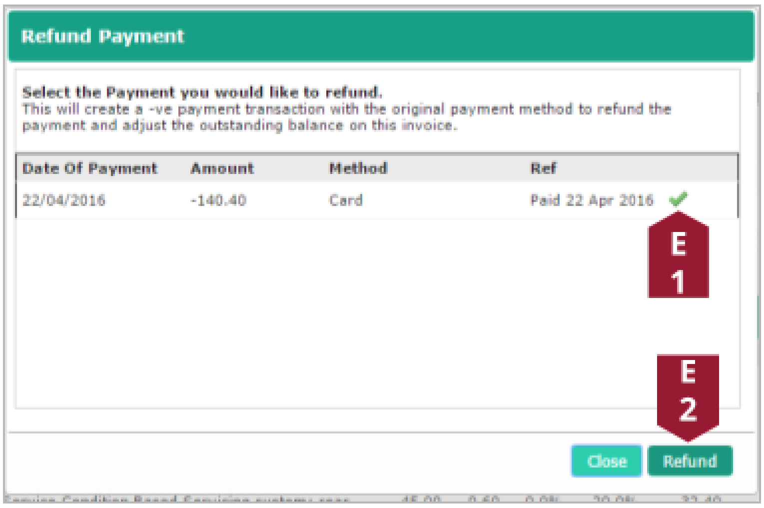
B. Enter the required search criteria (B1), then click the **Search** button (B2)

C. Click the **Open** button against the document you would like to refund

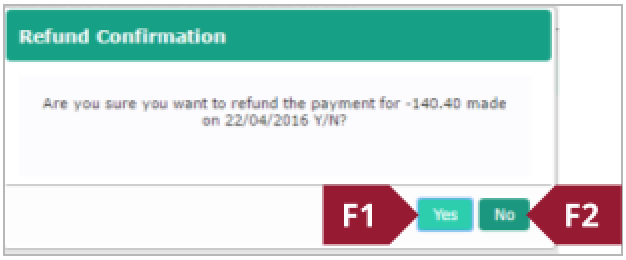


D. Click the **Refund** button

E. Click the **Select** button (E1) against the payment you would like to refund, then click the **Refund** button (E2)



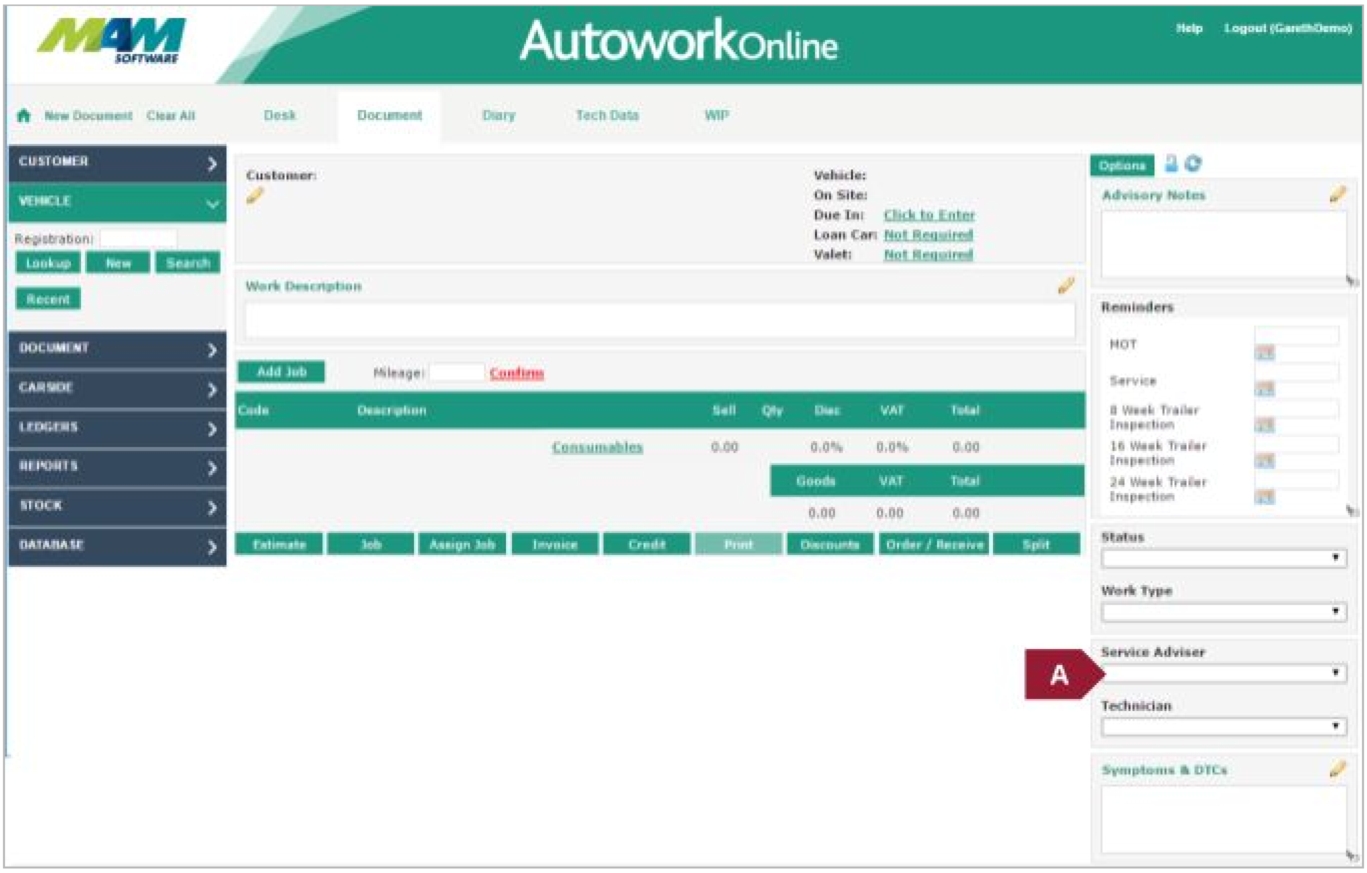
F. Confirm the payment details, then click the **Yes** button (F1) to confirm the refund, or the **No** button (F2) to abort it



The payment will now be refunded, and the invoice marked as unpaid.

Service adviser

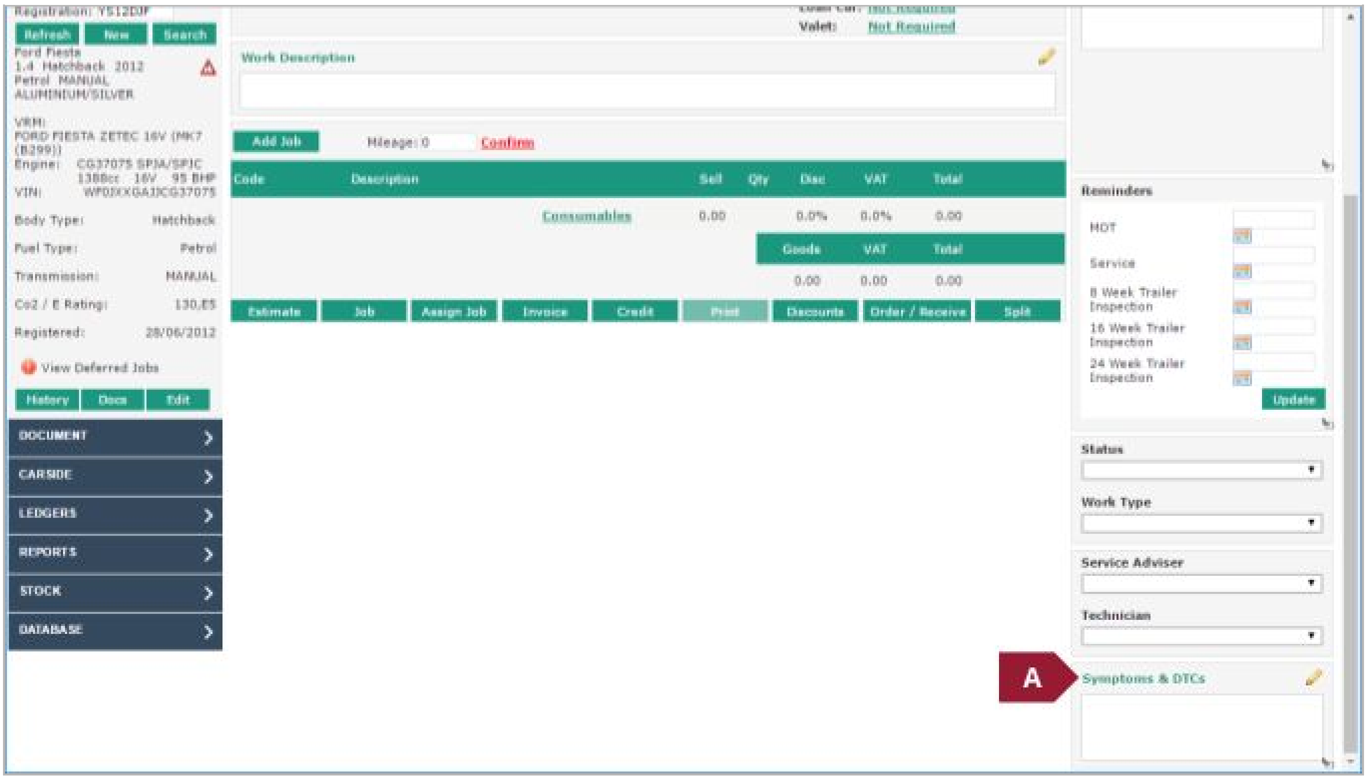
It is now possible to specify a member of staff as a "Service Adviser" from the Document screen. To set a Service Adviser against a document, simply select the member of staff from the **Service Adviser** drop down menu (A).



Diagnostic trouble codes (DTC)

A new tab has been added to the Symptoms section of the Document screen, this can be used to search for manufacturers' Diagnostic Trouble Codes (DTCs). The feature is used as follows;

A. Click the **Symptoms & DTCs** link, **please note** that you may need to scroll down slightly.



B. Click the **DTCs** tab

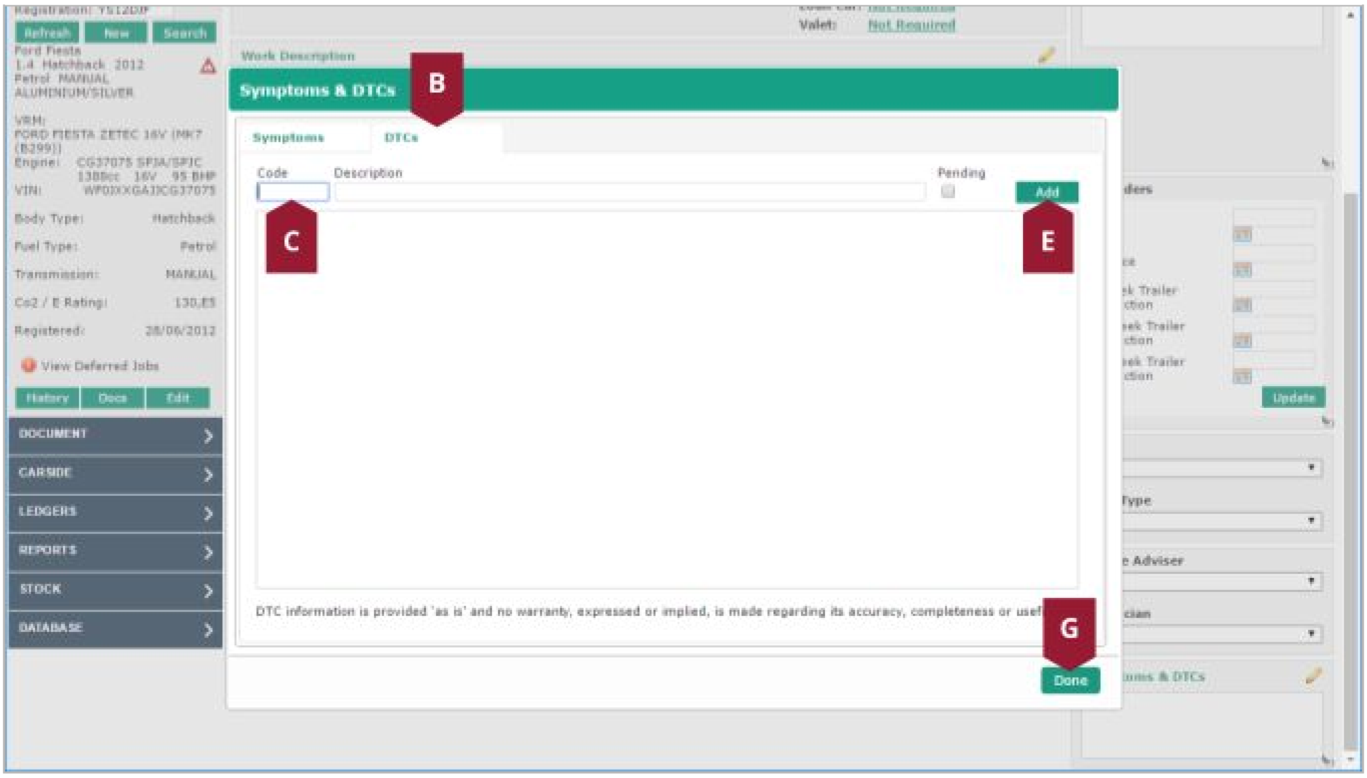
C. Enter the DTC code from your fault code reading device into the **Code** text field

D. Press Tab to display the description of the DTC if it is held on our database. If the code is invalid, the text "Code not recognised will" show

E. Click the **Add** button to add the code to the document

F. Optionally, repeat steps C and D for additional codes

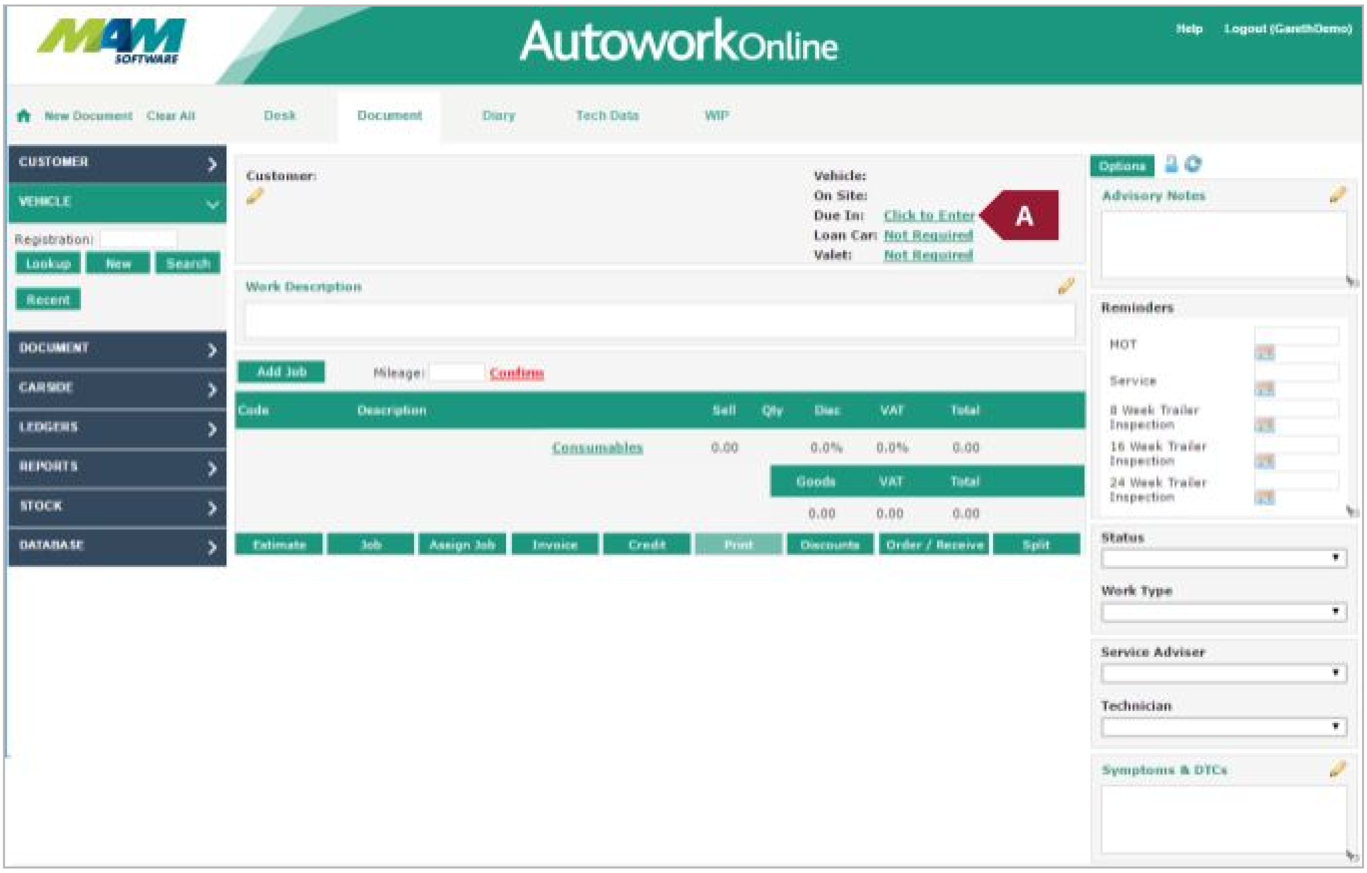
G. Click the **Done** button to return to the document screen



Vehicle book in

A new feature has been added to the Document tab to allow the user to book the date that a vehicle is due to arrive on site. **Please note**, this does not book the vehicle in on the diary. The process of booking in a vehicle is as follows:

A. From the **Document** tab, click the **Click to Enter** link to the right of the **Due In** heading. If the vehicle has already been booked in, click the link showing the date and time it is booked in, this will display the same options, and allow the date/time to be changed.

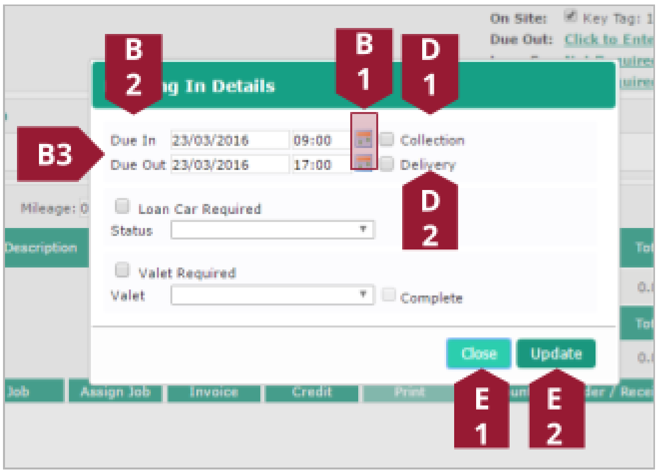


B. Enter a date and time for when the vehicle is due in and out, this can be done by clicking the **Calendar** buttons (B1), or by entering the date/time into the **Due In** (B2) and **Due Out** (B3) date and time fields

C. Optionally, enter details for Loan Car and Valeting, see the Loan car, and Valeting sections of this document for further information

D. Optionally, flag the vehicle for ***collection*** *or* ***delivery*** *by checking the required checkboxes (D1 and D2)*

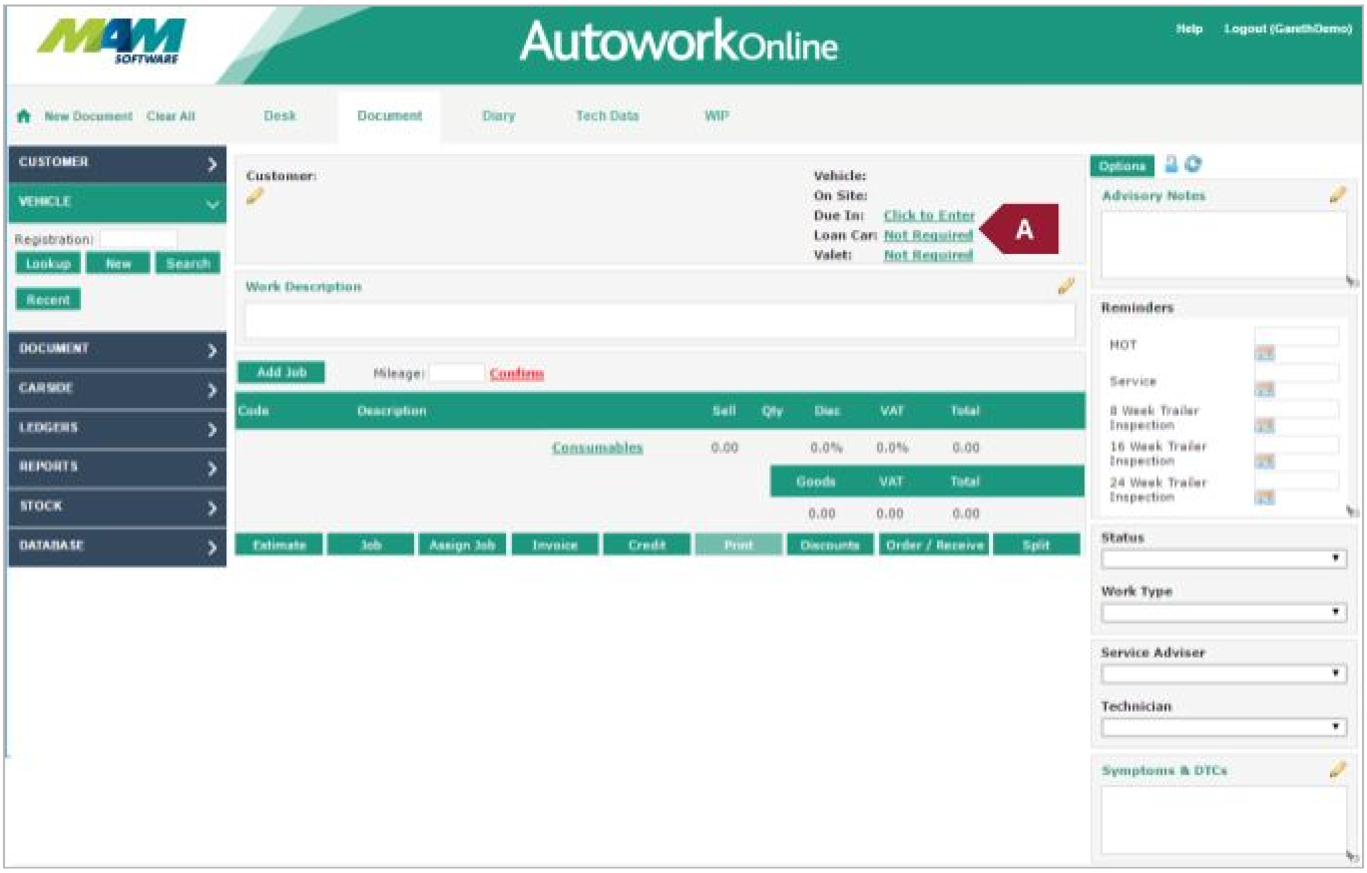
E. Click the **Update** (E1) button when you are happy with your entries, or the **Close** (E2) button if you would like to cancel



Loan car

It is now possible to state that a customer has been loaned a car while theirs is on site. A loan car can be added to a document using the following process:

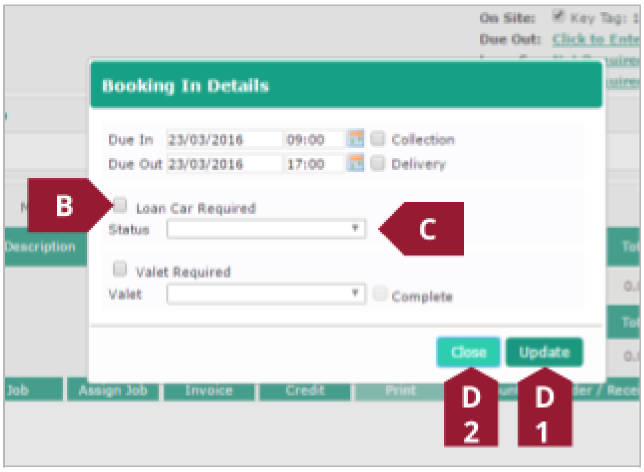
A. From the **Document** tab, click the **Not Required** link to the right of the **Loan Car** heading. If there is already a loan car on the document, the loan car status will display instead of "Not Required".



B. Check the **Loan Car Required** checkbox

C. Select an option from the **Status** dropdown menu

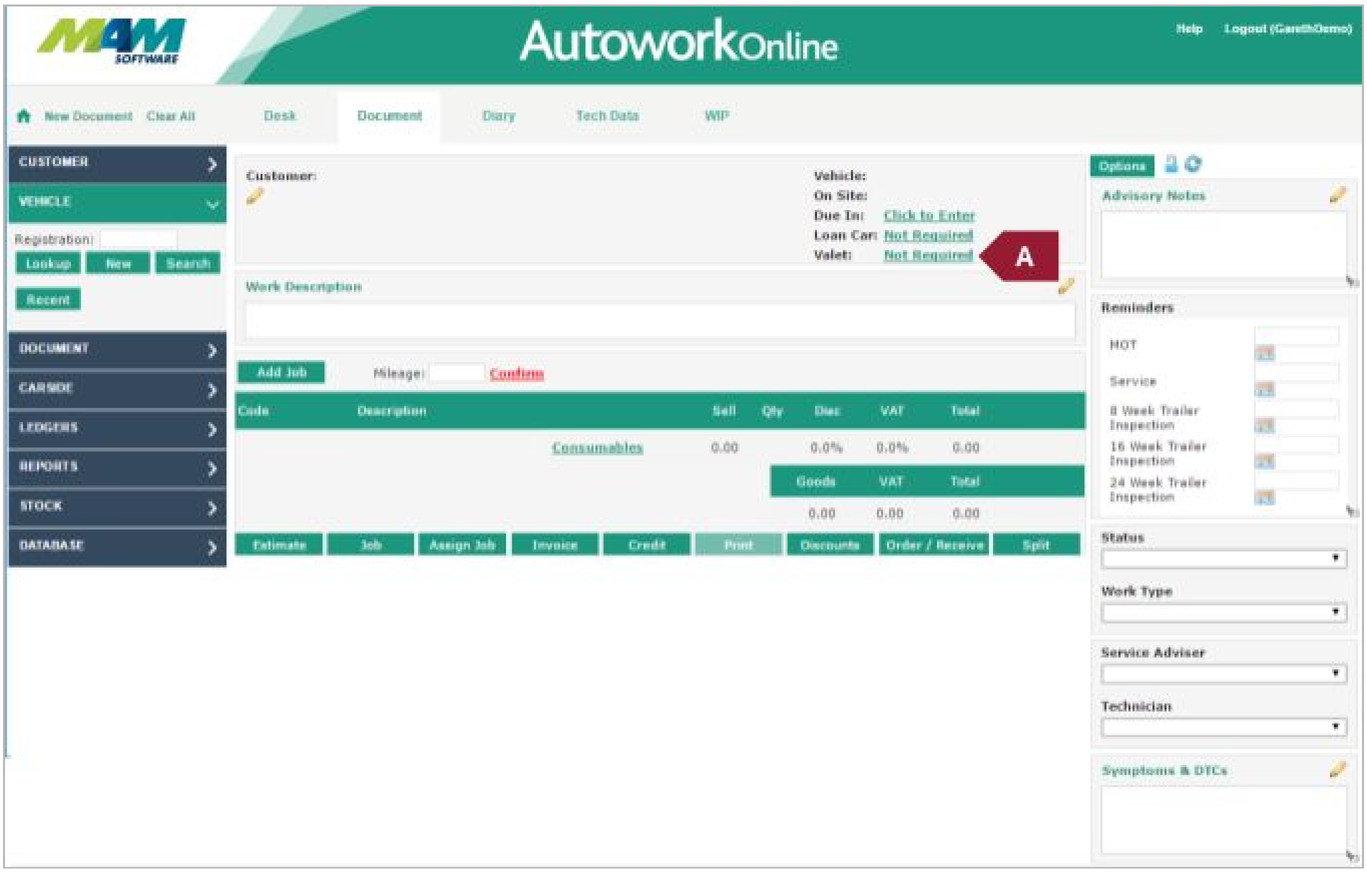
D. Click the **Update** button (D1) when you are happy with your entries, or the **Close** button (D2) if you would like to cancel



Valeting

A new option has been added to the **Document** tab, which allows the user to add a valeting option against the customer's vehicle. This is carried out as follows:

A. From the **Document** tab, click the **Not Required** link to the right of the **Valet** heading. If there is already a valeting option on the document, the valeting option will display instead of "Not Required".

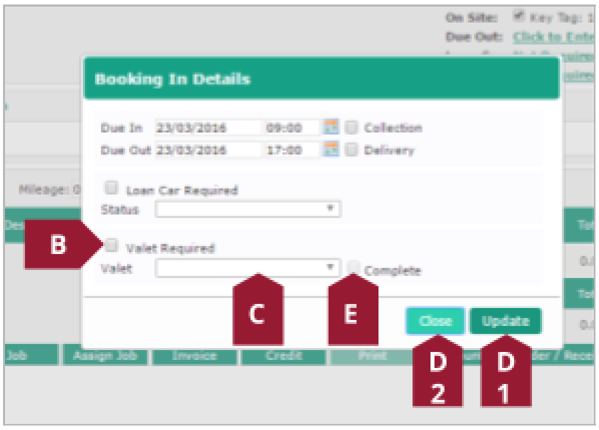


B. Check the **Valet Required** checkbox

C. Select an option from the **Valet** dropdown menu

D. Click the **Update** button (D1) when you are happy with your entries, or the **Close** button (D2) if you would like to cancel

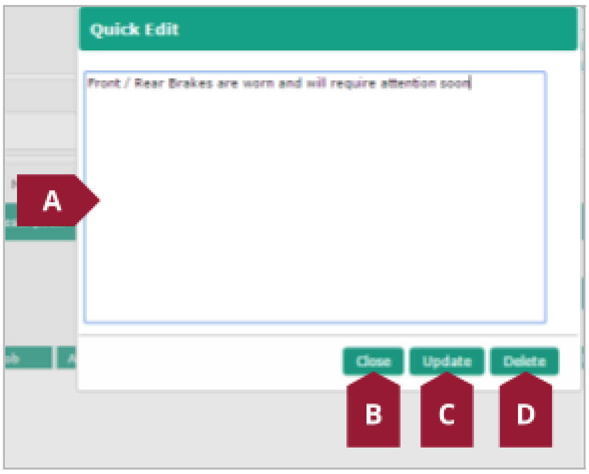
E. When you would like to note that the valet has been completed, open the **valeting** options screen using the instructions in step A, then check the **Complete** checkbox. Confirm the changes as in step D



Quick edit

In the new version of Autowork, it is now possible to quickly edit several of the fields within the **Document** tab. These are: **Symptoms**, **Work Description**, and **Advisory Notes**.

To edit the fields, simply click their current setting. The **Quick Edit** window will pop up, where the contents of the field (A) can be modified. Clicking the **Close** (B) button will close the window, discarding the changes. Clicking the **Update** button (C) will change the field on the document. Clicking the **Delete** button (D) will clear the contents of the field.



Technician efficiency and costs

The new **Technician Efficiency** feature allows you to quickly and easily log and report on your technicians' timekeeping performance and profit margins.

Please note: If the Technician Cost facility is enabled, the technicians' hourly rates will be visible to all users in multiple areas of Autowork Online.

Setting up the feature

In order to use the Technician efficiency and costs feature, you will need to enable the appropriate options. This is done by carrying out the following process:

A. Click the **Database** menu

B. Select the **Codes** sub-menu

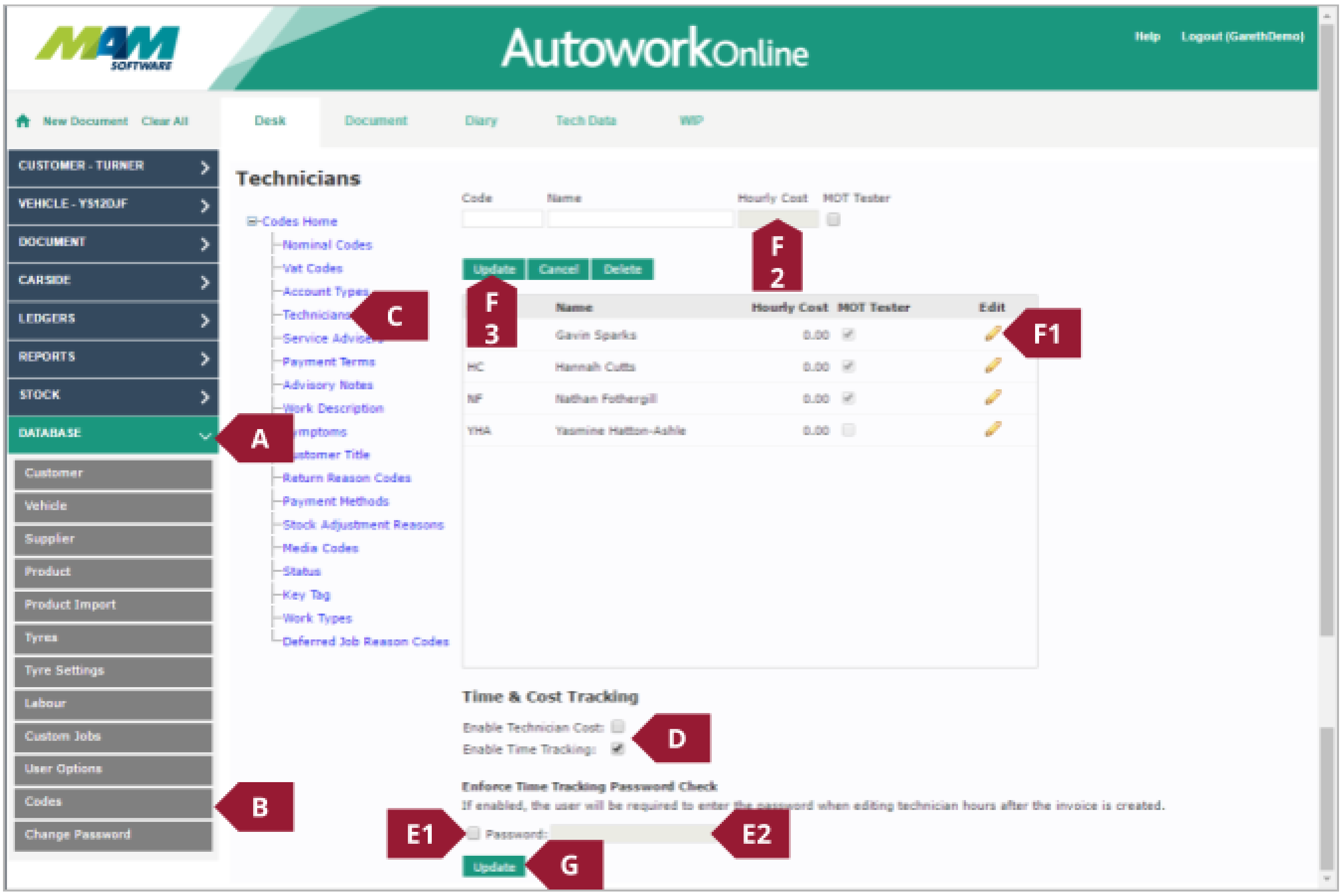
C. Click the **Technicians** link

D. Under the **Time & Cost Tracking** heading, check the **Enable Technician Cost**, and/or **Enable Time Tracking** checkboxes as required

E. *Optionally, check the **Enforce Time Tracking Password Check** checkbox (E1), and then enter a password into the **Password** text field (E2) if you would like technicians to enter a password when logging a time sheet*

F. *Optionally, if you checked the **Enable Technician Cost** option above, click the **Edit** button (F1) against a technician, enter an hourly cost for the technician into the **Hourly Cost** text field (F2), and then click the **Update** button (F3). Repeat this step for other technicians*

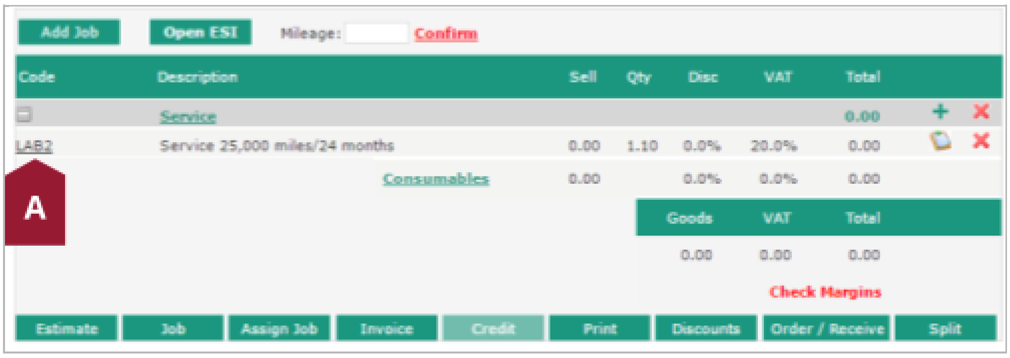
G. Click the **Update** button to save the changes



Logging technicians' costs

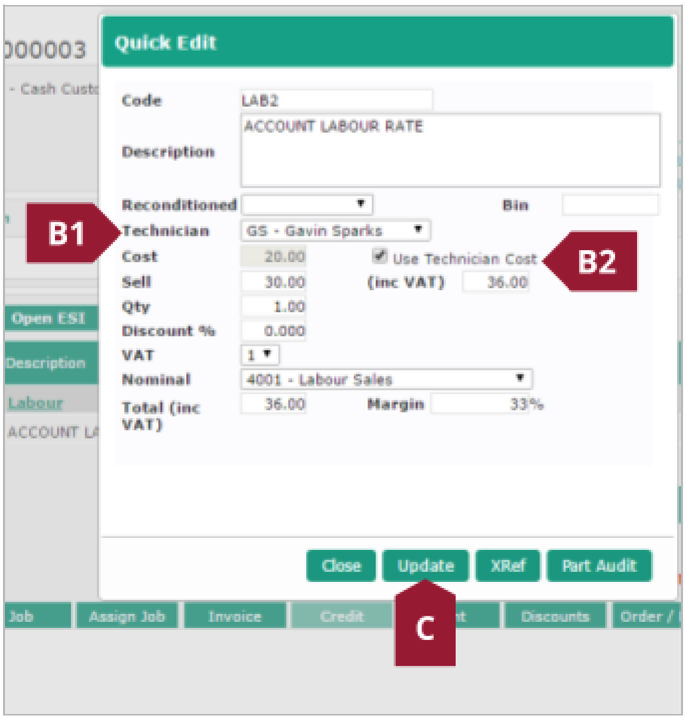
In order for the technician cost tracking to work, you will need to specify a technician for each task. The process to do this is as follows:

A. From the **Document** tab, click a current labour item on the job



B. From the **Quick Edit** screen, select a technician from the **Technician** drop down menu (B1), and check the **Use Technician Cost** checkbox (B2). The previously set technician's cost will be automatically set against the labour item.

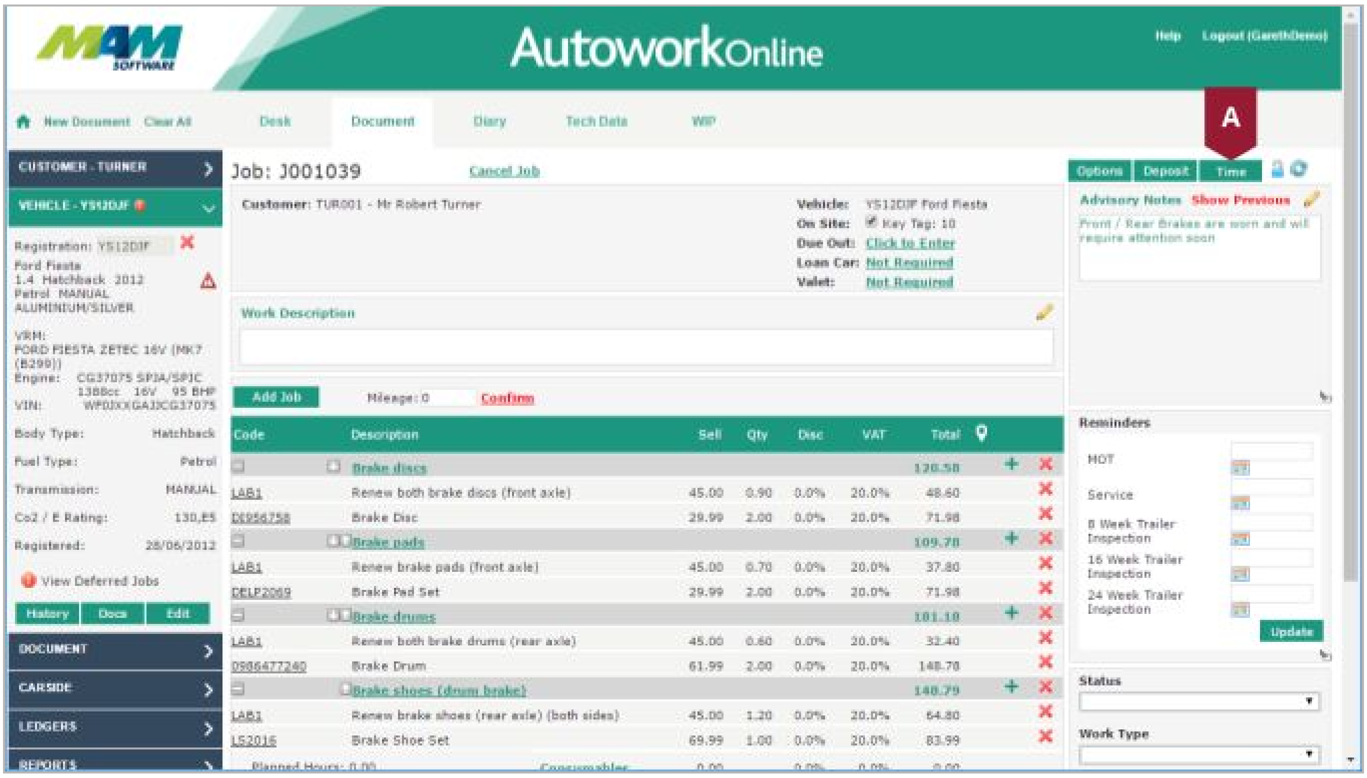
C. Click the **Update** button to save the changes, and click the **Update Job** button on the document screen.



Logging timesheets

A Technician is able to easily log the time it took versus the quoted time for each particular labour item. This is done using the following process:

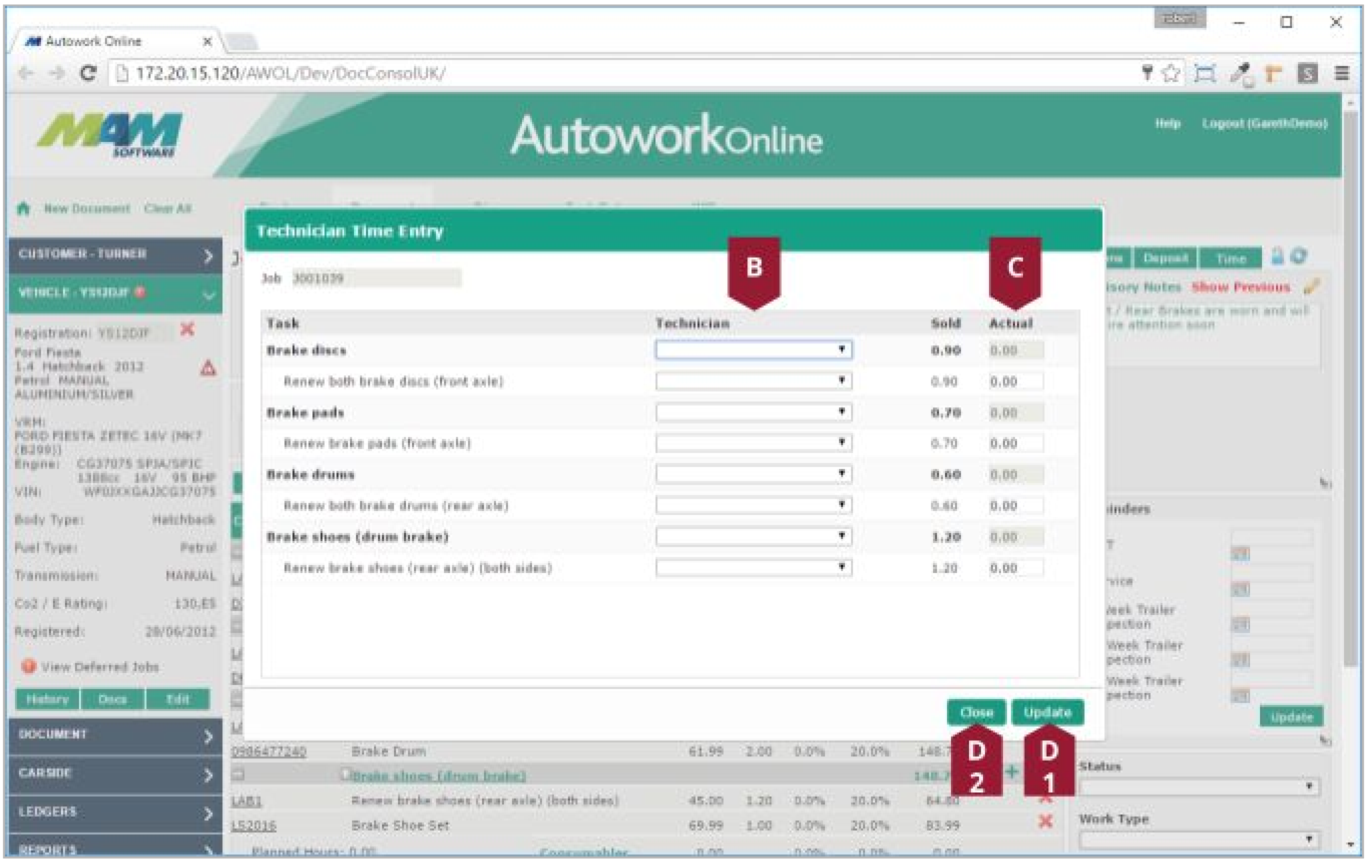
A. From the main **Document** tab, click the **Time** button (**note** that this will not appear until a job is created).



B. Select the correct technician for each particular task in the relevant **Technician** dropdown menu

C. Enter the time taken for each task into the relevant **Actual** text field

D. Click the **Update** button (D1) to confirm the changes, or the **Close** button (D2) to reject them

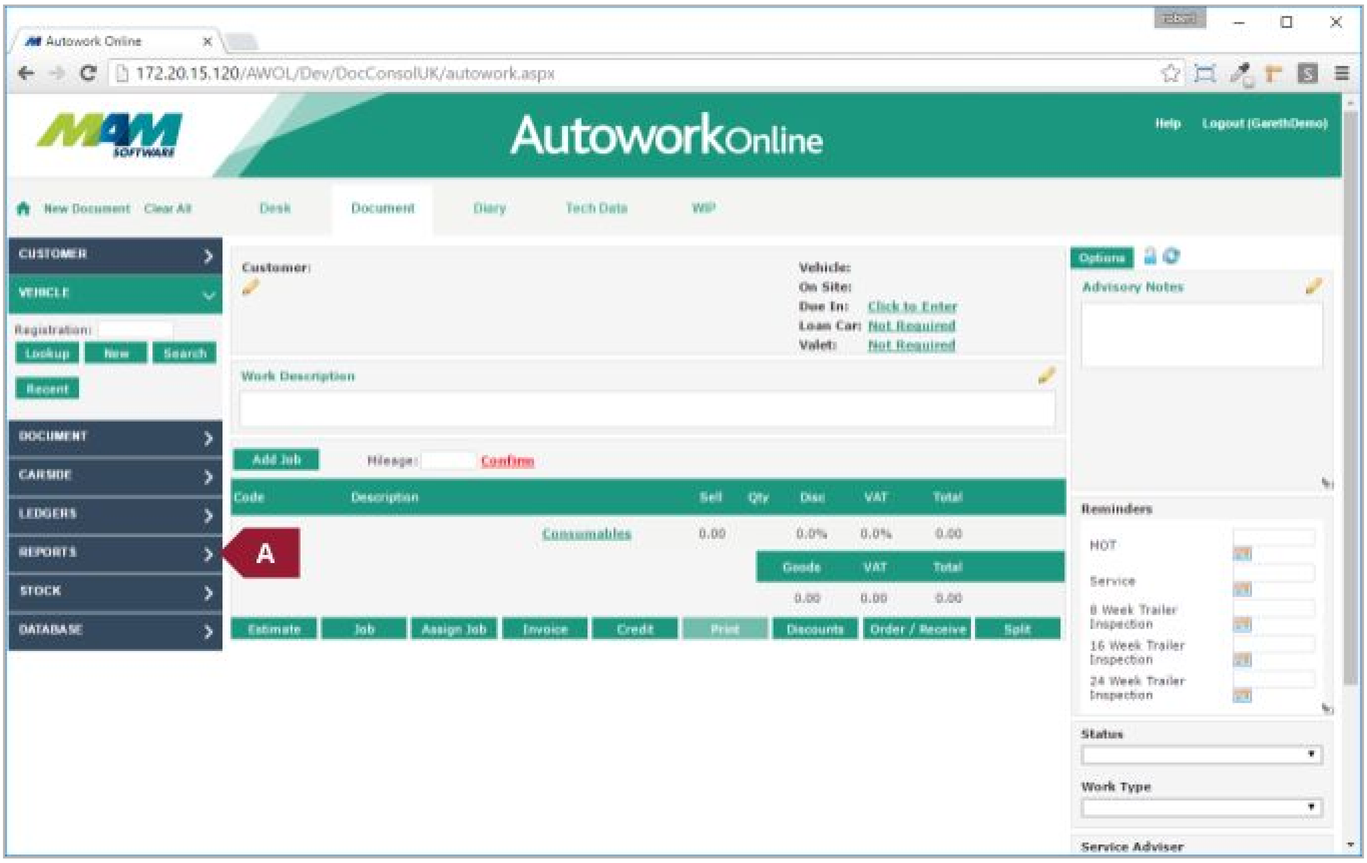


Please note: You will not be able to report upon the above times until the job is invoiced.

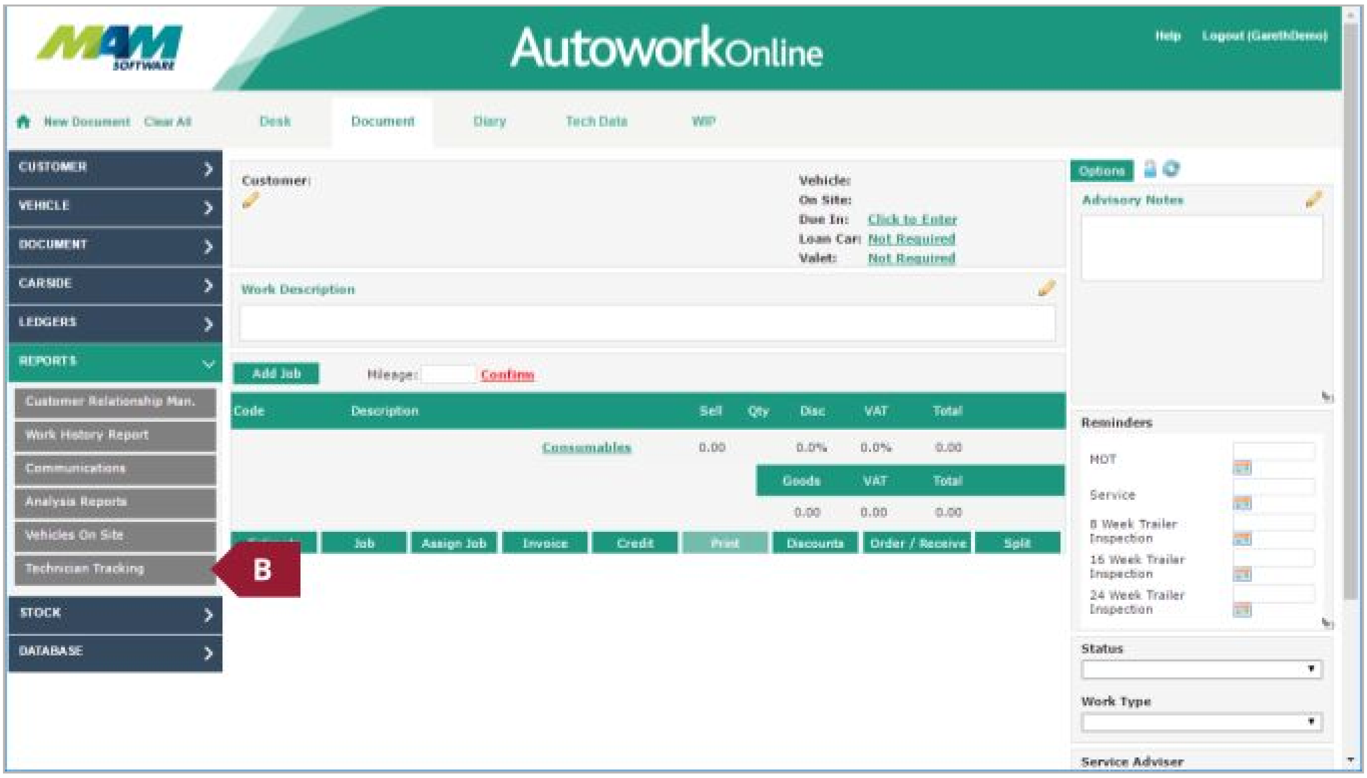
Reporting on efficiency and margins

The new efficiency feature also includes comprehensive reporting features, allowing the user to report on a particular technician's statistics. The process is described below:

A. Click the **Reports** menu button



B. Select the menu option for **Technician Tracking**



C. Enter a job number into the **Job Number** text field (C1), OR select either the **Completed Jobs** (C2) or **Open Jobs** radio button (C3) to report on a particular job, or all completed/open jobs respectively.

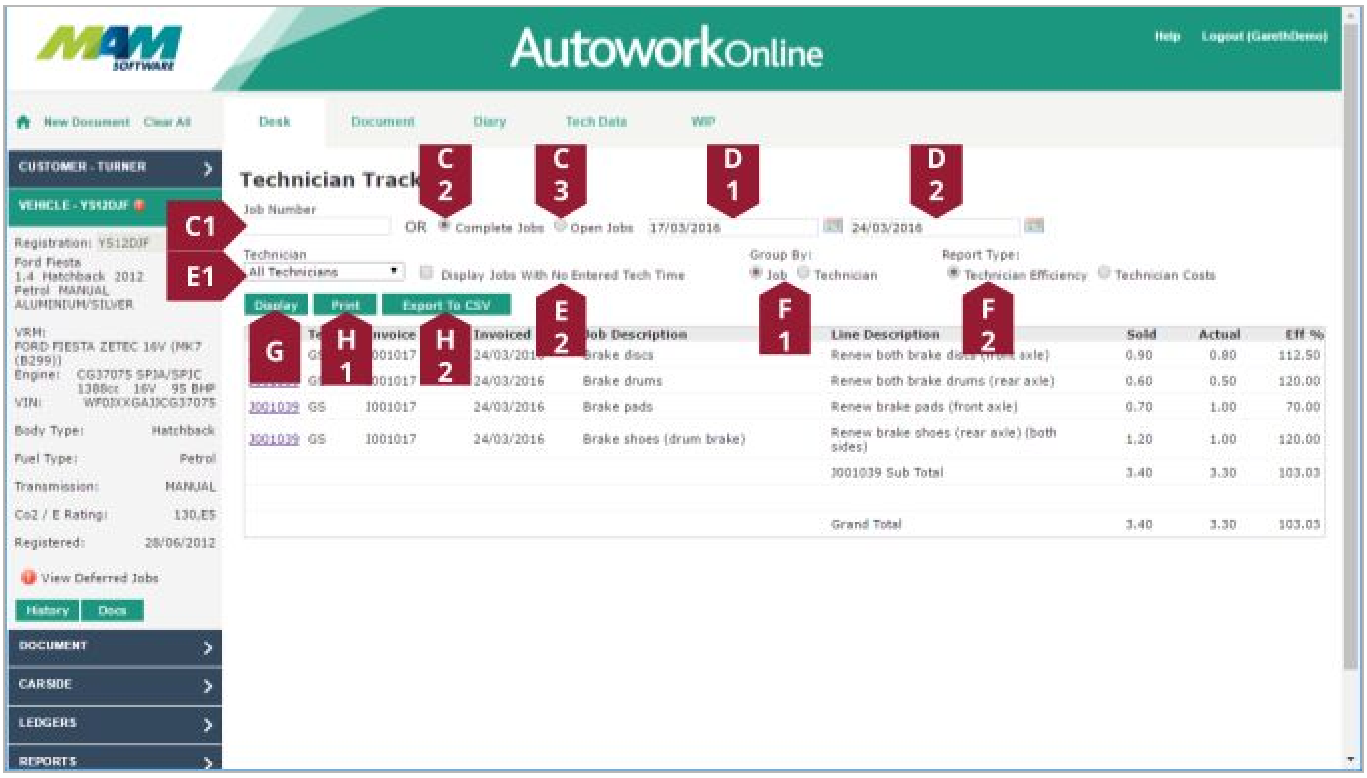
D. Set a start and end date in the **Start** (D1) and **End** (D2) text fields to set a date range to report on, or leave them both blank to show all items.

E. Select a technician to report on from the **Technician** dropdown menu (E1), and check the **Display Jobs With No Entered Tech Time** checkbox (E2) if you would like to show jobs with no timesheets entered against them.

F. Set the **Group By** radio buttons (F1) to either **Job** or **Technician** to group the report output by job or technician respectively. The **Report Type** radio buttons (F2) can be set to export a report containing **Technician Efficiency** (shows quoted time versus actual time, and gives a percentage), and **Technician Costs** (show profit margins).

G. Click the **Display** button to display the results on screen.

H. *Optionally, click the **Print** button (H1) to print the report, or the **Export To CSV** button (H2) to export it.*



Work in progress (WIP) tab

A new WIP tab has been added to the main Autowork Online tab bar, the new tab displays the current status of documents, and allows it to be easily changed. The WIP screen is covered in more detail in the separate Autowork Online - Work in progress (WIP) setup guide and Autowork Online - Work in progress (WIP) user guide documents.