

Autoworkonline

A feature-rich web-based
workshop system



Driving Business Performance

Contents

- 3 Databases and information
- 4 Workshop management
- 5 Parts management
- 6 Tyre sales module
- 7 Accounting
- 8 CRM & reporting
- 8 Tech data

Databases and information

Overview

Autowork Online incorporates detailed parts, supplier and customer databases and also includes the Autocat+ electronic parts catalogue. These give access to important information that can be included in quotations, job cards and invoices.

Customer database

The customer database provides the facility to create and store data for customers. It enables name, address, phone number & email address details to be saved and searched upon.

Furthermore, the customer database stores complete work histories that are automatically updated as work is completed. Postcode lookups facilitates rapid address entry.

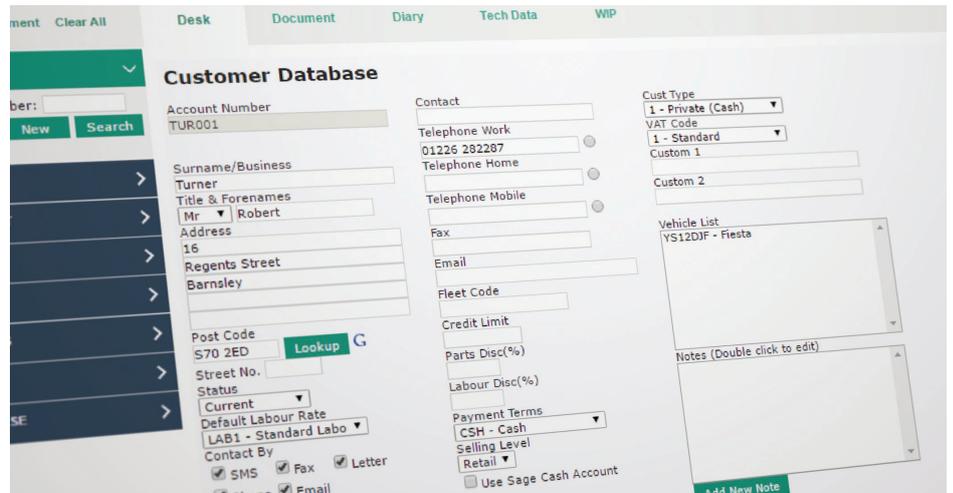
Vehicle database

Autowork Online's vehicle database enables you to record a wide range of vehicle attributes. Data can be taken directly from the DVLA database using vehicle registration numbers and supplemented with important information such as service and MoT due dates, radio and immobiliser codes, and mileage. Vehicles can be assigned to and transferred between customers.



Parts database

The parts database enables parts data to be stored and retrieved for use in quotations, jobs and invoices. In



Customer Details screen

addition to storing part numbers, descriptions, suppliers and prices, Autowork Online has the facility to allocate product group codes to product records for pricing, reporting and global amendments. The option of linking to your supplier database will enable live online lookups to their catalogue. Alternative parts may be defined by your supplier so that similar or replacement products can be offered in place of the original.

Autocat+ parts catalogue

The Autocat+ electronic parts catalogue gives access to millions of manufacturers' part numbers. It provides the facility to identify suitable component parts and include them in quotations, job cards and invoices.

Supplier database

The supplier database provides the facility to store data for suppliers. In addition to storing names, addresses and phone numbers, links to the parts database can be defined for ordering purposes.

Work descriptions

Autowork Online provides the facility to create a series of codes that refer to the different work descriptions. These codes can be entered onto job cards and invoices for future analysis. Pre-set Additional Information codes can be setup in the system to cover any advisory notes.

Technicians database

The technicians database facility provides the ability to store the names and initials of all the mechanics for jobs and refer to these job cards.

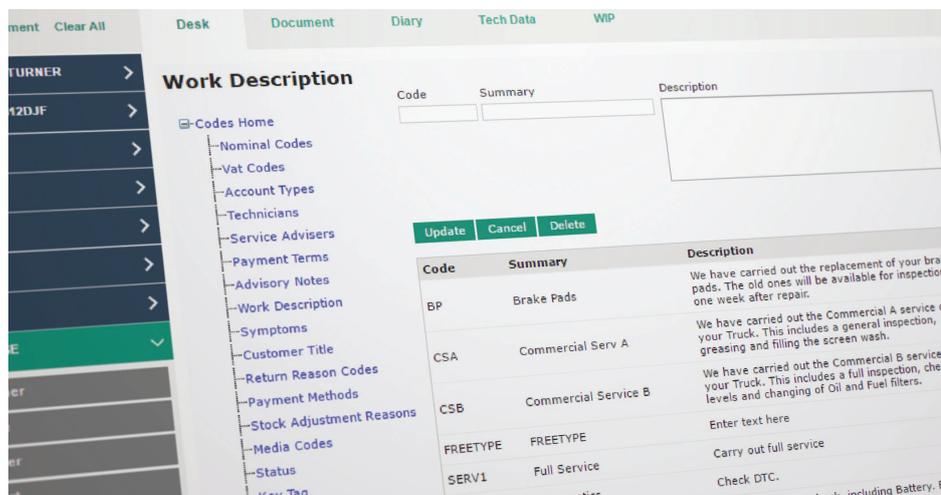
Labour rates

Autowork Online offers the facility of assigning differing levels of labour charges per hour for inclusion on a quotation or invoice.

Consumables codes

Autowork Online includes a facility to generate an additional line on the invoice to include a charge to cover the cost of consumables and other miscellaneous materials used in completing a job.

Workshop management



Work Description screen

Overview

Autowork Online's comprehensive management facilities contain all of the necessary functions to manage workshop resources. It provides the ability to control all aspects of workshop activity from the creation of quotations, through to printing job cards and the production of invoices.

Work in Progress (WIP) tab

The system's Work in Progress tab allows you to easily view information on current jobs. Documents are sorted into a set of customisable columns, one for each particular status. The WIP screen also offers selectable, customisable view templates, which can be used to set a selection of status codes specific to a particular job role.

Deferred work

The new deferred work feature allows operators to defer customers' work rather than simply delete it. The data is logged, and can be easily reported on. The system also supports the sending of SMS or email reminders to remind customers of their deferred work, reducing lost sales.

Quote / estimate creation

Autowork Online is able to create professional printed estimates for prospective customers. These can be created using various pieces of information from the software's databases, and may be stored for future reference. The document screen has been revamped for version 173 of Autowork Online.

Repair times

Autowork Online includes a comprehensive repair times database featuring hundreds of common jobs. Both times and descriptions can be easily incorporated in job cards using any of the pre-defined labour rates.

Service schedules

Autowork Online enables you to create job cards based on manufacturers' recommended service schedules. Labour elements can be automatically added to a job card and a detailed or summary work sheet created.

Custom jobs

Custom jobs can be created to cover fixed-price services. They provide a quick

and easy way to create estimates or job cards and can include work descriptions, labour and parts elements.

Job card creation

Items on a quote can be transferred onto a job card, and amended as required.

Parts' stock can then be downdated, and any parts not held in stock can be ordered from the supplier. In the latest version of Autowork Online, it is now possible to create "job groups" containing the parts and labour for a particular task.

Invoice creation

Invoices can be created from a historic quotation or job card. An enquiry screen can be used to retrieve the quote or job card using the customer name, account number or other recorded information. Optionally, an invoice may be raised directly from the quote screen. Customer details, product and price information are all transferred from the quotation.

Workshop diary

Autowork Online features a comprehensive diary for booking in jobs. A separate diary manages MoT bookings. Diary days are colour coded so that, at a glance, you can see how many hours are booked in against the maximum available. Jobs booked into the diary are also colour coded to indicate whether or not parts have been ordered.

MoT diary

The MoT diary handles up to four MoT bays. The diary shows the available slots for each bay on any given day, along with the customer and vehicle details. Bookings can be easily added to the diary, moved or deleted as required.

Parts management

Overview

Autowork Online's stock control facilities provide accurate management of all parts used in the workshop. They include online ordering, order history and usage reports.

Online ordering

Any parts required for a job can be ordered directly from within Autowork Online. Once an item is selected from the Autocat+ parts catalogue, stock is checked and the latest price retrieved. Clicking a button transmits the order and a confirmation is received from the supplier. Ordered parts will be flagged in the diary against the relevant job.

Order history

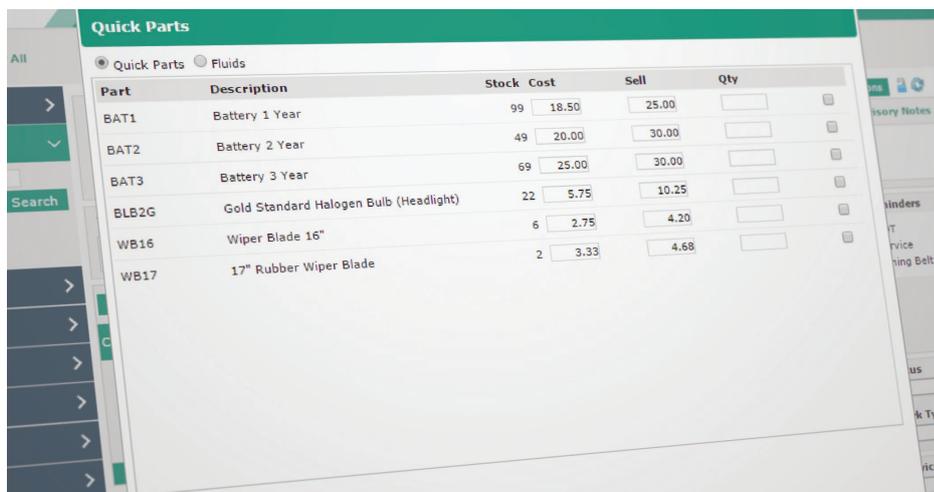
At any given time, Autowork Online can display all outstanding purchase orders. These can be selected by purchase order number, purchase order date, due date, part number or supplier account number. Autowork Online offers the options of transmitting orders electronically to suppliers, or sending them by email, fax or post.

Suggested ordering

Autowork Online can create suggested orders based on current, minimum and maximum stock levels. A suggested order can include every part number that's current free stock falls below the minimum stock level. The system takes into account maximum stock levels and quantities already on existing purchase orders.

Stock usages

The stock history function can be used to display stock usage in individual months over the last 12 months. This can



Part	Description	Stock	Cost	Sell	Qty
BAT1	Battery 1 Year	99	18.50	25.00	
BAT2	Battery 2 Year	49	20.00	30.00	
BAT3	Battery 3 Year	69	25.00	30.00	
BLB2G	Gold Standard Halogen Bulb (Headlight)	22	5.75	10.25	
WB16	Wiper Blade 16"	6	2.75	4.20	
WB17	17" Rubber Wiper Blade	2	3.33	4.68	

Quick Parts Entry screen

be selected by supplier name, product group or part number. It also offers the opportunity to display all movements recorded against a part number within a chosen history period.



Part	Description	Mar	Feb	Jan	Dec	Nov	Oct	Sep	Aug	Jul	Jun	May	Apr
132652	SWF 650mm Wiper Blade	2	0	0	0	0	0	0	0	0	0	0	0
132703	SWF 700mm Wiper Blade Arm with Washer Jets	2	0	0	0	0	0	0	0	0	0	0	0
244793	Valeo Fuel Cap	1	0	0	0	0	0	0	0	0	0	0	0
SW30	SW30 Fully Synthetic Engine Oil	0	2	0	0	0	0	0	0	0	0	0	0
BAT10	Battery	1	0	0	0	0	0	0	0	0	0	0	0
BF110	Brake Fluid	0	2	0	0	0	0	0	0	0	0	0	0
DEP2289	Brake pad set	4	0	0	0	0	0	0	0	0	0	0	0
DEP2289	Brake Disc	4	0	0	0	0	0	0	0	0	0	0	0

Goods receiving

Autowork Online can record the quantities of goods received into stock against a purchase order number and update stock levels. Stock quantities can be received manually or as ordered with any discrepancies manually amended before updating. Any items that are not received can remain on the purchase order for future delivery or may be deleted if preferred. Quantities that are 'part received' may be flagged so that the remainder may be cancelled if required.

Stocktaking

The stock management facilities include the ability to produce printed stock sheets by bin location. The current stock records may then be amended to reflect the actual stock situation. It is also possible to manually adjust stock with user-defined adjustment reasons.

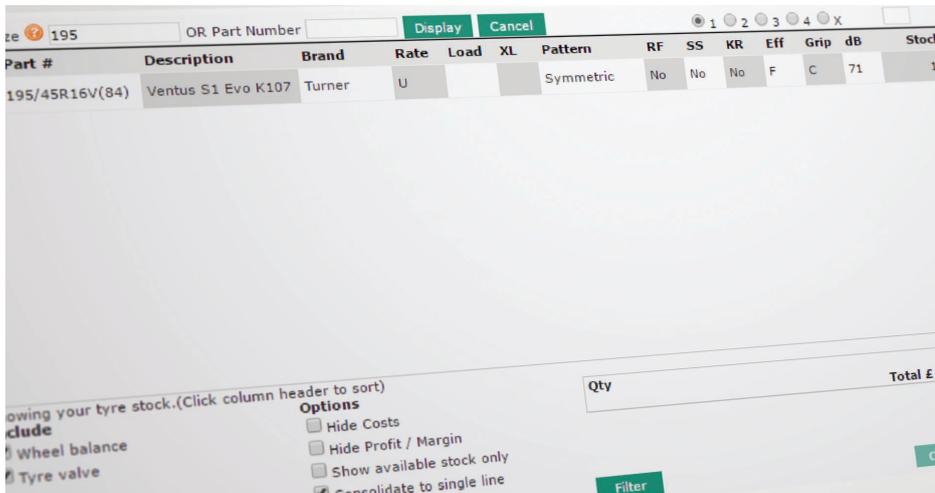


Description	Min	Max	Stock	Cost	Value	New Stock	Reason
SWF 650mm Wiper Blade	10	30	30	4.60	138.00	16	Stocktake
SWF 700mm Wiper Blade Arm with Washer Jets	15	25	17	5.00	85.00	17	Stocktake
Valeo Fuel Cap	5	15	8	10.00	80.00	8	Stocktake
SW30 Fully Synthetic Engine Oil	100	500	196	5.00	980.00	500	Stocktake
Battery	0	0	24	30.00	720.00	24	Stocktake
Mann Hummel Cabin/Pollen Filter	10	25	15	11.00	165.00	25	Stocktake
Hengst Fuel Filter	10	25	15	4.00	60.00	24	Stocktake
EP2 Multipurpose Lithium Grease	15	50	19	1.00	19.00	45	Stocktake

Stock returns

Autowork Online has the ability to create returns notes that record items returned to suppliers. It is able to log returned items with a valid reason code and provides an option to update the stock record. It can also record comments to/from the supplier and the supplier's credit note number once the claim is satisfied.

Tyre sales module



Tyre Sales screen

Overview

Autowork Online's tyre sales module provides dedicated functionality for the sale and purchase of tyres. This includes a comprehensive tyre database, a tyre sales screen and online ordering.

Tyre product database

The tyre database stores all tyre records in one place. It operates in the same way as Autowork Online's parts database, but has additional tyre-specific fields. This data can be displayed at point-of-sale and is fully searchable.

Tyre data import

Tyre data can be imported from a supplier in the format of a CSV file. All tyre database fields can be imported, including prices and stock levels.

2012 tyre labelling

Autowork Online fully supports EU regulation (EC) No 1222/2009. The tyre database can store fuel efficiency, wet grip performance and road noise data and print the information on invoices.

Point of sale (POS)

The dedicated tyre sales screen provides a quick and easy means of identifying and selling tyres. It features a fully customisable grid supporting search, sort and filter commands, together with quick quote, supplier enquiry/order and 'extras' facilities.

Tyre 'extras'

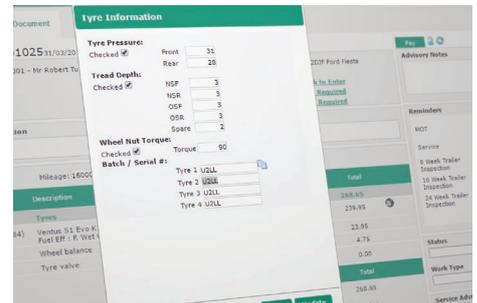
Multiple 'extras' can be configured for inclusion with each tyre sale (e.g. valve, balance and disposal). All extras can be toggled on/off on the POS screen.

Show fitted price

By default, the selling price shown in the POS grid is the RRP for a single tyre. Autowork Online can optionally show a fitted price (inclusive or exclusive of VAT), which includes any extras selected and takes into account the quantity required.

Tyre info

Clicking on any tyre part number will pop up a tyre information box showing all the details for that tyre from the database. If available, images will also be displayed.



Online supplier stock

When an online tyre supplier has been configured, Autowork Online can display the supplier's stock alongside your own stock. If the tyre supplier provides an RRP, it will be used to calculate the fitted price, unless a markon has been set for the specific tyre.

Markon matrix

When using the online suppliers, Autowork Online can override the RRP the supplier provides with your own sell price using the markon matrix. Markons can be defined against any combination of specific brands or cost price ranges, using a percentage of the cost price or a fixed value for the range.

Ordering tyres

Autowork Online provides several options for ordering tyres via the POS screen, including 'online' and 'offline' purchases.

Online tyre orders

Tyres can be ordered electronically from an online tyre supplier by clicking on the order button in POS. The order quantity will take into account your own stock level, and can be manually amended if required.

Offline tyre orders

Offline tyre orders can be created via the POS or stock order screens and transmitted via fax or email.

Accounting

Overview

Autowork Online's accounting facilities have been specifically designed for the workshop environment. They include sales and purchase ledgers, as well as VAT analysis. The accounting facilities fully integrate with the sales procedures so that all purchases and sales automatically update the necessary ledgers. There is also the facility to export to SAGE.

Sales ledger

Autowork Online automatically maintains a full sales ledger for all sales to all customers. All invoices raised from job cards automatically update the ledger and manual invoices can be created for sales that do not directly follow on from a quotation.

Sales invoice enquiry

It is possible to search for sales invoices by typing the initial characters of one of the enquiry types listed. Autowork Online can search on any one of a number of fields and options exist for sorting the resulting list by customer name or sales invoice.

Customer account enquiry

Autowork Online can instantly display the transactions of an individual customer by finding customer accounts selected by date. There is also an option to show zero balances (transactions that are paid).

Customer statements

Autowork Online provides the ability to list customers with an outstanding balance on their account, and optionally show customers with zero balances and include zero transactions (ie, warranty invoices). Autowork Online can then produce printed statements as required.

Ref	Type	Acct	Name	Gross	Balance	Date	Due/Paid	View	Pay
Paid 30 Mar 2016	CSH	TUR001	Turner	-496.80	0.00	30/03/2016			
1001021	INV	TUR001	Turner	496.80	0.00	30/03/2016	30 Mar 16		
Paid 24 Mar 2016	CSH	TUR001	Turner	-184.50	0.00	24/03/2016			
1001020	INV	TUR001	Turner	184.50	0.00	24/03/2016	24 Mar 16		
Paid 24 Mar 2016	CSH	TUR001	Turner	-227.46	0.00	24/03/2016			
1001019	INV	TUR001	Turner	227.46	0.00	24/03/2016	24 Mar 16		
Paid 24 Mar 2016	CSH	TUR001	Turner	-209.96	0.00	24/03/2016			
1001018	INV	TUR001	Turner	209.96	0.00	24/03/2016	24 Mar 16		
Total Gross:				0.00					
Total Balance:				0.00					
Selected Items:				0.00					

Sales Ledger screen

Fleet control & sub accounts

The option of linking multiple sub-accounts to a master account for fleet invoicing is available in Autowork Online.

Insurance splits

Autowork Online enables invoices to be split so that an insurance company can be billed and the excess charged to the customer.

Item Code	Description	VAT Code	Net	VAT	Total	Edit
5000	Purchases	1	5031.12	1016.22	6047.34	

Purchase ledger

Autowork Online can maintain a full purchase ledger for all purchases from all suppliers. Manual orders may be created directly in ledgers.

Supplier payments

The accounts facilities can record payments in full or in part against an

outstanding invoice or make a payment on account. They provide the ability to create and print remittance advice notes and record comments about a supplier.

Account enquiry

The account enquiry screen enables you to view the invoices and credits issued by your supplier. You can see which items are paid or unpaid, reprint documents or post transactions to the purchase ledger.

Sales & purchase reports

Autowork Online's accounts facilities enable reports to be created showing purchases or sales on a particular day or within a particular month. Autowork Online can print a report if required.

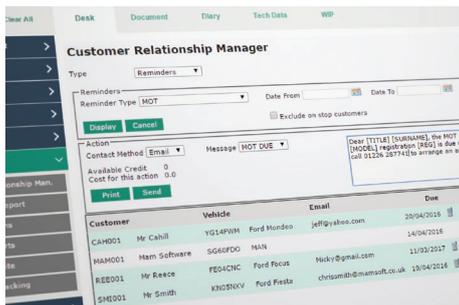
VAT accounting

Autowork Online is able to create reports showing a one-page summary of VAT data for a given period. It can display goods values and VAT values for invoices, credit notes and totals for each VAT code that has been used. It is also able to produce reports showing the VAT return selected by the start and end of a financial period.

CRM & reporting

Customer relationship management (CRM)

Autowork Online provides a host of features for keeping you in contact with your customers, including email, SMS text messaging and mail-merge. All correspondence is automatically recorded for future reference.



Reminders

Autowork Online can send customer reminders via email or SMS or export mailing lists for mail merging with a word processor. Reminders can be created for any activity including MOTs, servicing due dates, seasonal checks or promotions. The reminders feature has been updated to work with the new deferred work feature, allowing reminders of deferred work to be sent to customers.

SMS messaging

The SMS module allows you to contact your customers by text message. Messages can be sent from a list of previously defined templates or created ad-hoc. They can include a range of merge fields including contact and vehicle details.

Technician efficiencies and costs

The new technician efficiency and costs facility allows your technicians to log itemised timesheets for jobs. This data can then be reported on to monitor

efficiencies and margins by technician, job, and task. The data can be used to identify and eliminate inefficient or unprofitable business practices.

Email

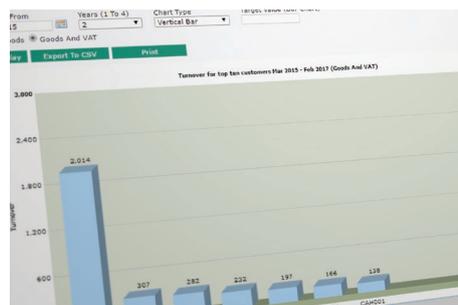
Autowork Online can email a variety of documents directly to your customers or suppliers including quotes, invoices and purchase orders. Emails are sent using addresses taken directly from the database and can include pre-defined text appropriate to the document being sent.

Reporting

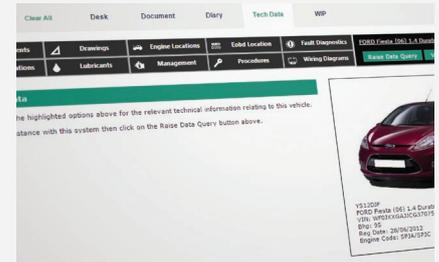
Autowork Online's reporting facilities are designed to help you run your business more efficiently by providing you with vital management information in a format that can be easily understood. Reports can be exported to CSV or displayed on screen. In the new version of Autowork Online, the reporting suite has been updated to display customers' deferred work.

Charts

Autowork Online uses colourful pie charts and graphs to condense and analyse data to visually indicate trends. The reports can be used to highlight the areas of your business that are the least profitable, allowing you to act accordingly.



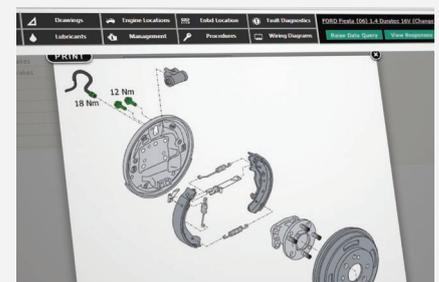
Tech data



Autowork Online's optional technical repair data provides essential maintenance and repair information on cars and light commercial vehicles. The data is organised into seven main categories:

- ▶ Maintenance
- ▶ Engine
- ▶ Transmission
- ▶ Exterior/Interior
- ▶ Brakes
- ▶ Steering/Suspension
- ▶ Electronics

It contains essential maintenance and repair information, adjustment data, technical drawings, fuses and relays, fault code diagnosis and engine management data. It also includes wiring diagrams for aircon systems.



The data covers almost 7,000 engine types and over 6,000 engine management systems. The data is supported by over 50,000 technical drawings and thousands of wiring diagrams.