Autowork Online changes and new features

For version 175

MAM SOFTWARE

Driving Business Performance

Contents

Introduction

In the new version of Autowork Online, several changes have been made to the way that the catalogue module matches and displays parts. The catalogue now uses improved Autocat version 8 data, which boasts tighter part to vehicle matching, and improved data compression. This results in fewer parts being returned, making the system more efficient.

Fleet account support has been completely overhauled, and is now far more advanced, allowing a customer account to be flagged as a "fleet account provider". All customers flagged as such can be selected in a Fleet Account dropdown menu against other accounts. This simplifies the process, and reduces the room for error.

A new feature for **Warranty Accounts** has also been added, this means that a customer account can be flagged as a "warranty provider", this will then be selectable in a similar way to the Fleet Account, to show that a customer's warranty is provided by a particular account.

Further changes to the **Document** screen have also been made: It is now possible to move and scale all screen elements (except the parts grid), not just the ones on the right hand side. The coding for the screen has also been revamped, and now requires fewer refreshes, making the user experience slicker and more efficient.

The integrated **OE Service Schedules** screen has also been reworked, making the feature clearer and easier to use. Optional service tasks are now clearly shown at the top of the list, with OE recommendations automatically ticked, and a new **Parts Required** section lists all the parts needed for the service before opening the catalogue.

The **Custom Jobs Maintenance** screen has been restyled, and several additional features have been added: It is now possible to categorise jobs, and a new **Package Jobs** feature has been added. Package Jobs allow you to predefine a minimum *Service From** selling price for the package, which is maintained until the selling price of the parts exceeds the minimum price.

In addition to the above changes, numerous smaller changes have been made: Diagnostic Trouble Codes (DTCs) can now be printed on quotes and jobs, and Keytags can now be 10 characters long (rather than 4).

Benefits

- Improved catalogue part to vehicle matching - Save time by making part selection simpler

- Enhanced catalogue data compression - Lookup speed and system overheads are decreased

- Simplified Fleet Account setup - Streamlined setup routine saves time and improves clarity

- New Warranty Accounts - Save time by simplifying Warranty Account file maintenance

- Increased customisation - All Document screen elements can be configured to your particular needs

- Revamped Service Schedules - Save time and boost efficiency with the new, clearer Servicing screen

- More flexible Custom Jobs - Easier to organise, and new Package Jobs feature enhances flexibility

Enhanced parts catalogue[1]

In v175, the Autocat electronic parts catalogue has been enhanced to use new version 8 data. This offers several important benefits:

Version 8 catalogue data

The new Autocat v8 data standard helps manufacturers accurately match their parts to vehicles. Where they have one this, the matched parts will be highlighted and the number of choices will be reduced.

Enhanced date range compression

A new compression feature means that the number of times a duplicate part will show when it has been matched against multiple date ranges will be reduced. This is carried out server-side, so also improves the speed of lookups, as less data is transmitted.

Before: Parts BFF8041 and BFA2002 are duplicated

Model	Years	Part	Description	Body	Vendor	POS	
{ALL}	{ALL}	{ALL}	{ALL}	Hatchback	{ALL Prime}	{ALL}	Reset
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck		

After: The parts are only listed once each

Model	Years	Part	Description	Body	Vendor	POS	
{ALL}	{ALL}	{ALL}	{ALL}	Hatchback	{ALL Prime}	{ALL}	Reset
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol EYDB	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol EYDB	10/98 -11/04	BFC1006	Cabin Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol EYDB	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck		
Focus 1.8 MK 1 (1998-2005) 1796 16 Petrol EYDB	10/98 -11/04	BFO4008	Oil Filter	Hatchback	*Borg & Beck		

Improved part sorting

Parts are now sorted by **supplier**, followed by **Description, then position**. This is particularly beneficial for lookups on items like filters, where several different parts (i.e. cabin filters and oil filters) appear on the same lookup. This means that all air filters supplied by Mann are shown together.

Before: The list of parts is not ordered by the type of filter

Model	Years	Part	Description	Body	Supplier	POS	
{ALL}	{ALL}	{ALL}	{ALL}	{ALL}	{ALL Prime}	{ALL}	Reset
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	0451103259	Oil Filter	Hatchback	*Bosch		0
	1796	16	P3259	Petrol	EYDB					
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	0986628516	Cabin Filter	Hatchback	*Bosch		0
	1796	16	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	1457433686	Air Filter	Hatchback	*Bosch		0
	1796	16	S3686	Petrol	EYDB					
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	1987432045	Cabin Filter	Hatchback	*Bosch		0
	1796	16	M2045	Petrol	EYDB					
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	1987432345	Cabin Filter	Hatchback	*Bosch		0
	1796	16	R2345	Petrol	EYDB					
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	F026403009	Fuel Filter	Hatchback	*Bosch		0
	1796	16	F026403009	Petrol	EYDB					
Focus 1.8 MK 1 (1998-2005)	10/00 -04/05	CAF939	Air Filter	Saloon	*Fram		0

After: The filter types are sorted (i.e. all air filters together)

Model	Years	Part	Description	Body	Supplier	POS	
{ALL}	{ALL}	{ALL}	{ALL}	Hatchback	{ALL Prime}	{ALL}	Reset
Focus 1.8 MK 1 (1998-2005)	09/98 -12/04	C2774/3KIT	Air Filter		*Mann-Filter		0
	1796	113	16	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	09/98 -12/04	CU3567	Cabin Filter		*Mann-Filter		0
	1796	113	16	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	09/98 -12/04	CUK3567	Cabin Filter		*Mann-Filter		0
	1796	113	16	Cabin (Carbon) Filter	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	09/98 -12/04	FP3567	Cabin Filter		*Mann-Filter		0
	1796	113	16	Cabin (Freicious) Filter	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	08/02 -12/04	WK614/46	Fuel Filter		*Mann-Filter		0
	1796	113	16	Petrol	EYDB						
Focus 1.8 MK 1 (1998-2005)	09/98 -12/04	W719/27	Oil Filter		*Mann-Filter		0
	1796	113	16	Petrol	EYDB						

Document screen changes

Movable panels

Following on from the changes that were made in the v173 update, it is now possible to move every element on the Document screen. This is done via the following process:

Moving panels

Panels can be moved 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).
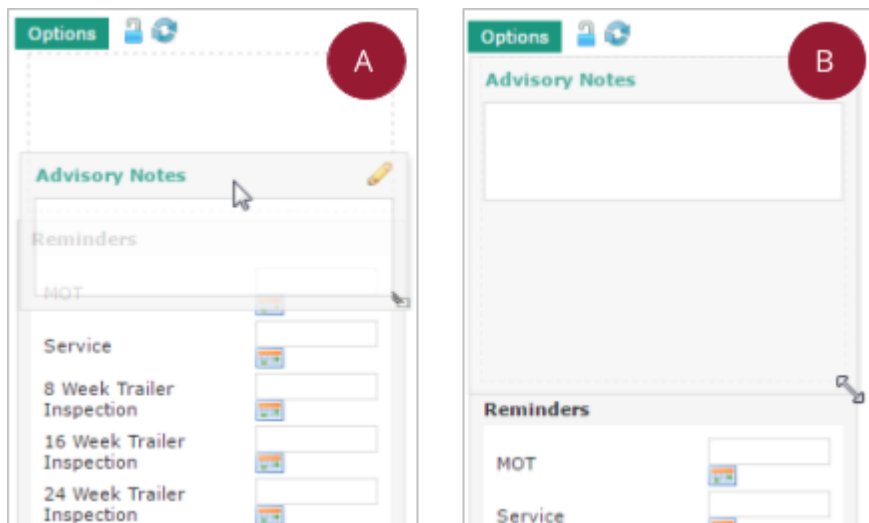
Locking the panels

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.
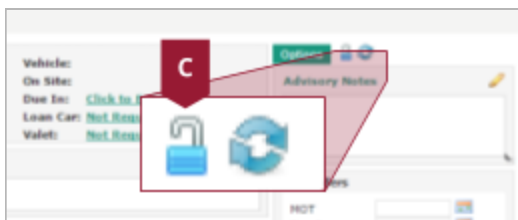
Restoring the default layout

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.
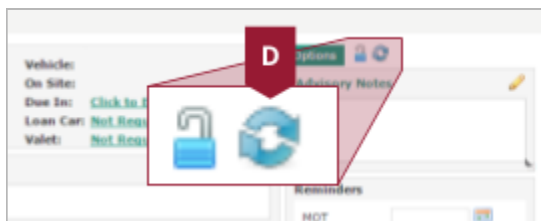
Customer contact details

Links for quickly entering or updating the customer contact details have been added to the **Document** screen, these allow the **Phone** and **Email** details to be updated directly. If you do not have a mobile number or email address for the current customer, these will be highlighted in red.
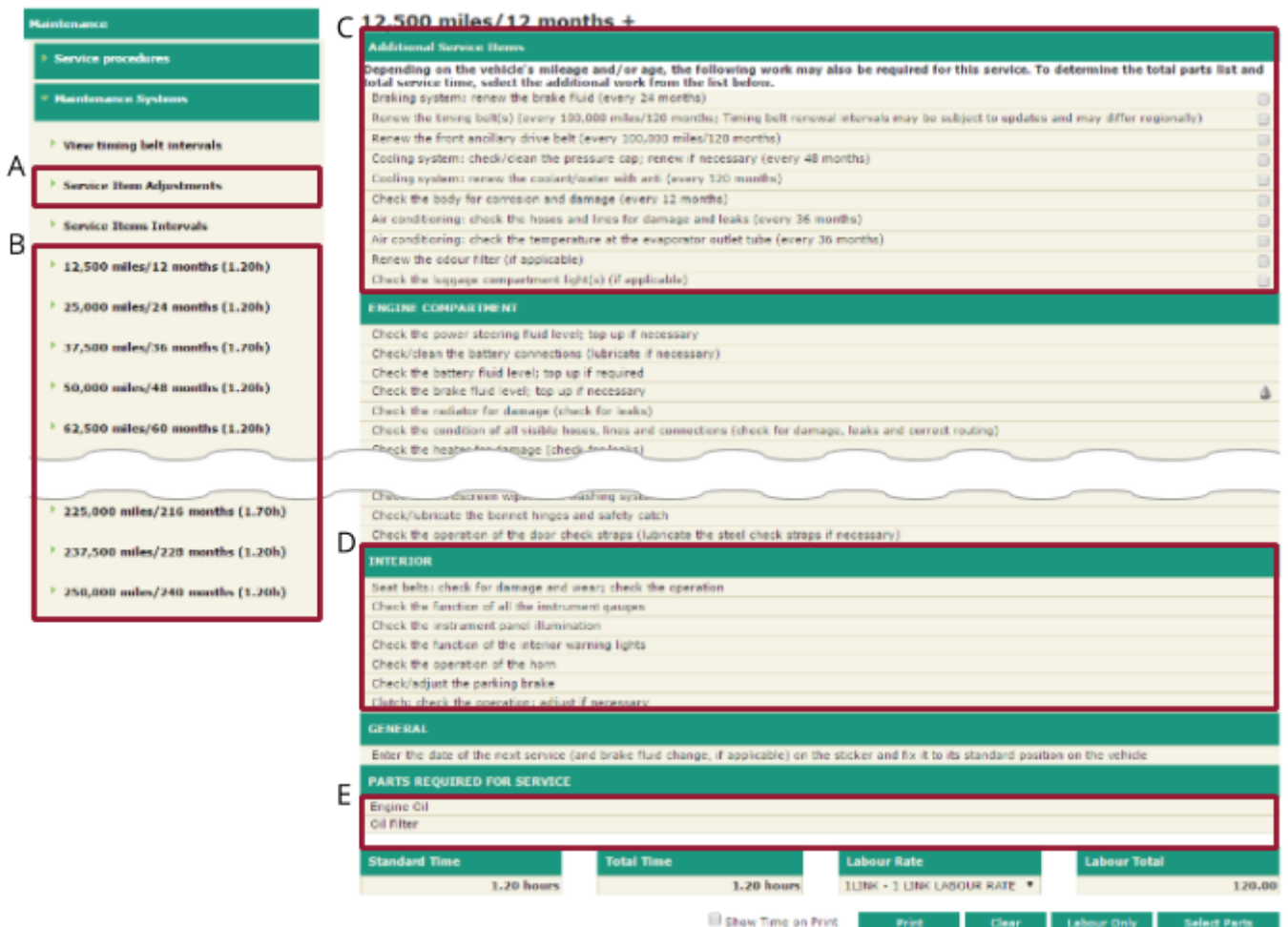
Service schedule screen changes

The Service Schedules screen has been updated to use new cleaner, easier to use layout. The changes are as follows:

A. The **Service Item Adjustments** option has moved position

B. Normal and Condition based service selection is now intuitive with tick boxes for multiple condition based services.

C. The **Additional Service Items** section has been relocated to the top of the page and shows OE included tasks where appropriate

D. Individual service tasks are now sorted ordered naturally, by vehicle area

E. The **Parts Required** for the service are now listed at the bottom of the page and on the print

In addition to these visible changes, the screen has also been updated to use new time calculations, resulting in more accurate OE service times. Parts included in an OE service are also automatically checked.

Custom job maintenance updates

Screen changes

The **Custom Jobs** screen has been updated to use a new layout which simplifies the processes for creating and managing Custom Jobs. The changes are as follows:

A. Price Type dropdown menu - Price types are now selected in a dropdown menu, in order to integrate the new **Package Jobs** feature

B. Job Category dropdown menu - A optional job category can be selected for the job from a predefined list

C. Active checkbox - Can be used to flag a job as active, deactivating a job will hide it, but not remove it. You can use this to toggle promotions and seasonal services on and off for example

D. Larger grids - The size of the grids showing existing jobs, and the contents of the selected job has been increased and a search filter has been added to help you find the job you want to edit

Package jobs
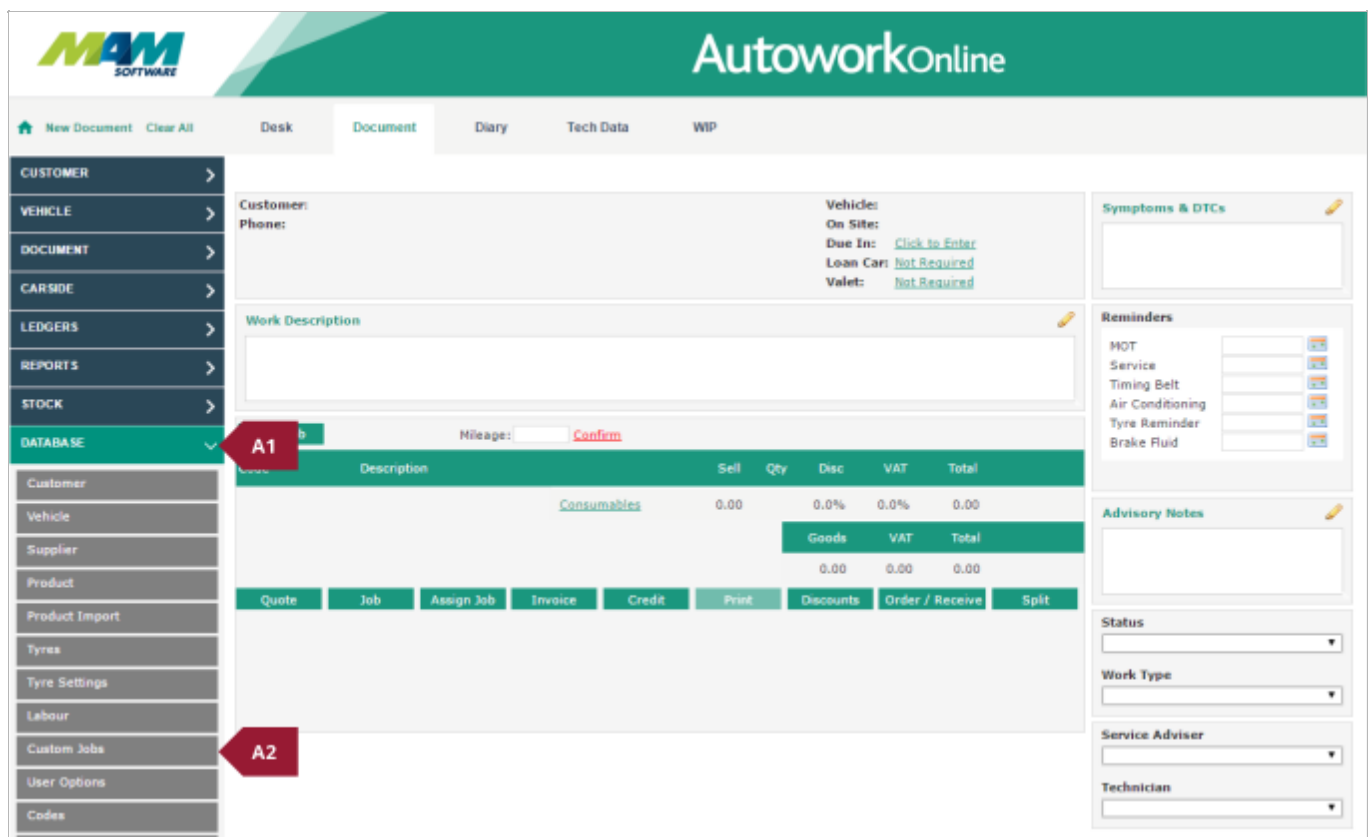
The new Package Jobs feature allows flexibly-priced custom jobs to be created, these work in a similar way to fixed price jobs, but can contain parts with variable pricing, the price of which is balanced by varying the cost of labour.

For example, for a job set up for a fixed price of £150, which included a brake pad set, and the labour to fit it. If the part cost £60, the labour would automatically be adjusted to £90 to make up the total. If the brake pad set was £70, the labour value would decrease to £80 to balance the difference.

Please note: Since the new **Package Jobs** feature was added, it is no longer possible to add a **Job** to an existing **Job Grouping** by clicking the **+** button against the Job Grouping. This is because the Package job must be kept on its own separate job group in order for the pricing to be correctly calculated.
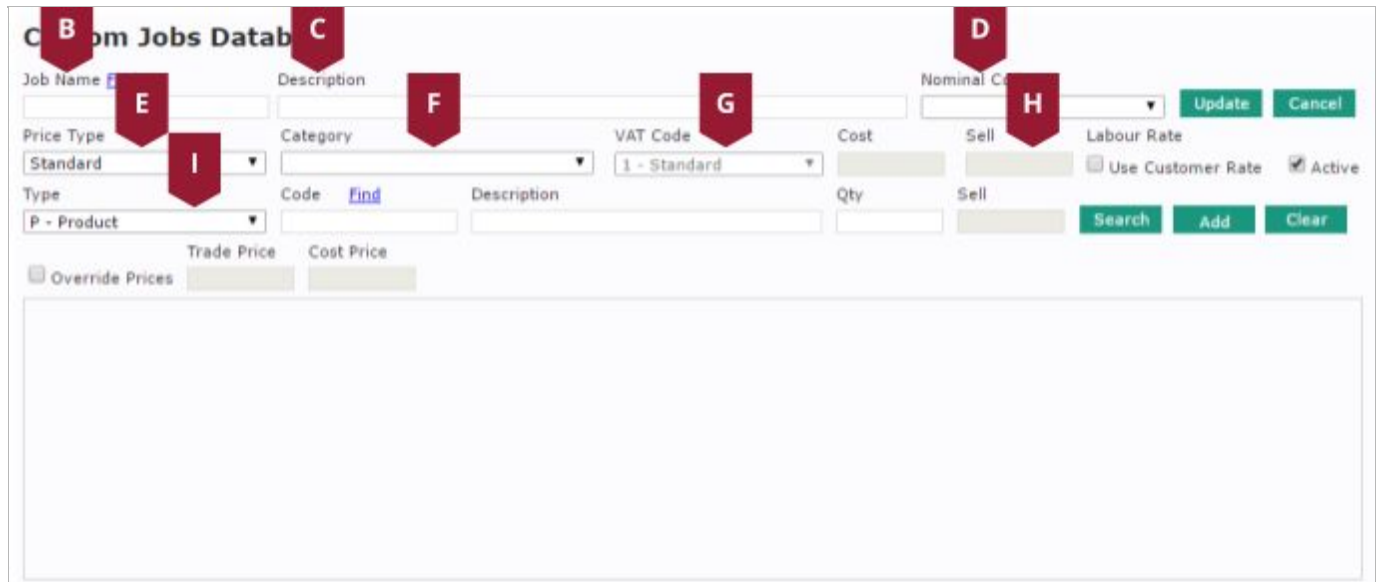
Setting up Package jobs

A. Click the **Database** menu (A1), and then the **Custom Jobs** sub-menu (A2)

B. Enter a **Job Name**, **Description** (C), **Nominal Code** (D), **Category** (F), and **VAT Code** (G). Set the **Price Type** dropdown menu (E) to **Package**, enter a **Selling price** (H), and the **Type** dropdown menu (I) to **PG - Product Group**

J. A new **Catalogue** dropdown menu (J1) will appear, set this to the required product group, and then click the **Select** button (J2)

K. A new product group line will be added to the table, this represents a part selected from the catalogue, which can have a variable price based on the particular vehicle. Add a labour line by selecting **L - Labour** from the **Type** dropdown menu (K1), then enter the relevant **Labour Code** (K2). This process can be repeated to add individual parts and Work Descriptions if required. When you are happy with your job, click the **Update** button (K3)

Using Package jobs

A. On the **Document** tab, with a customer and vehicle entered, click the **Add Job** button

B.   Click the **Jobs** option

C.   In the **Custom Jobs** screen, select the appropriate **Category** (C1), or enter a **Filter** query (C2), then click the **Add** button (C3) against the appropriate job

D. The Catalogue will automatically open with the correct registration and product group pre-entered. Click the **Add** button (D1) for the required part(s), then click the **Add to basket** button (D2), followed by the **Finish** button (D3)
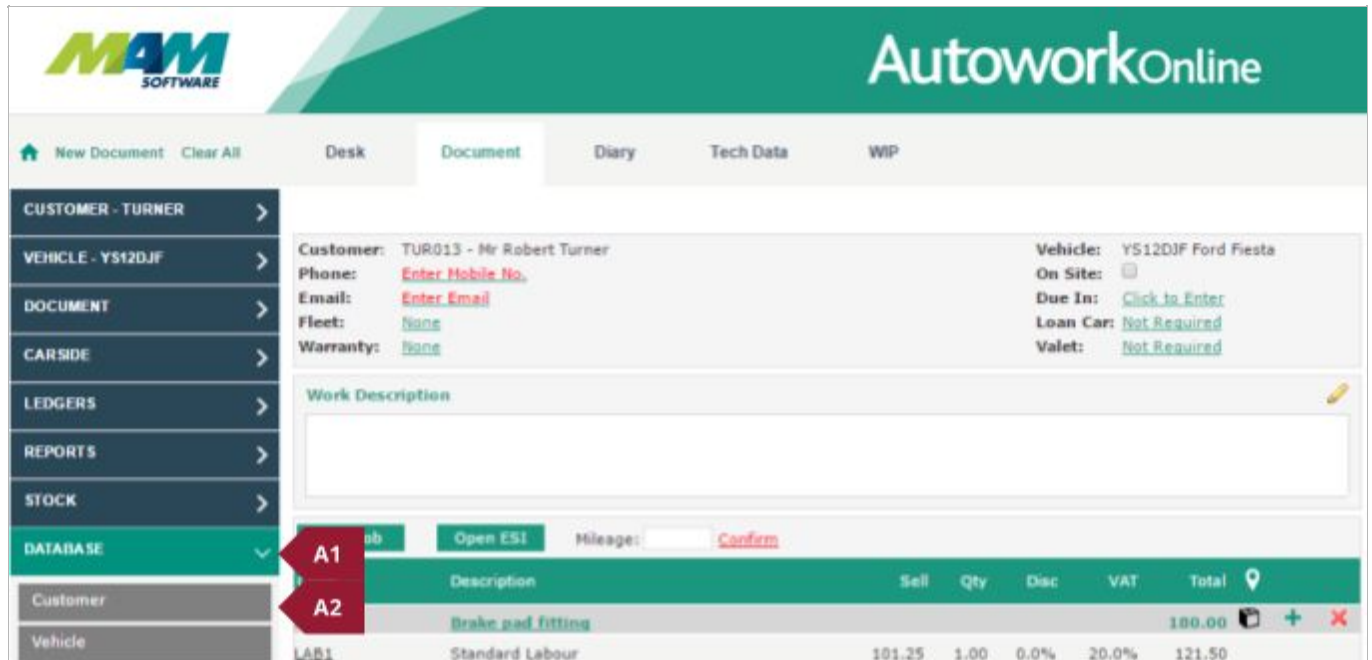
E. A job will be added to the document, the cost of the labour line will automatically change to make up the full cost for the package based on the sales value of the part included
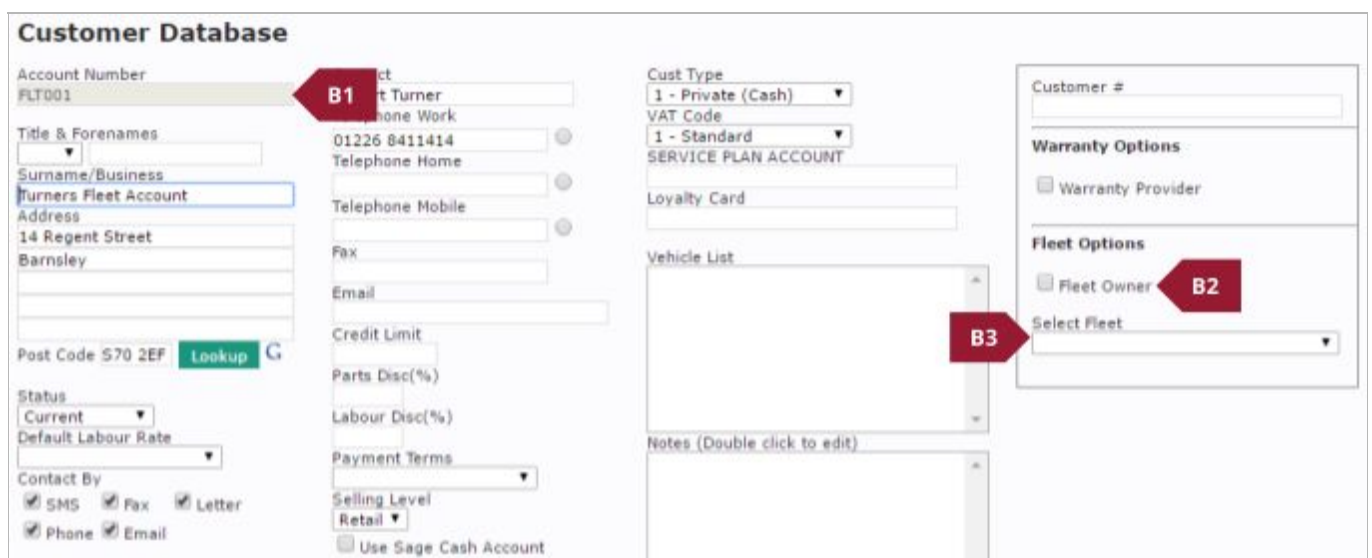
Fleet accounts

The way that fleet accounts work has also been improved, rather than being able to specify any customer as the fleet owner, specific customer accounts must be flagged as a "fleet owner" in order to select them. This is done as follows:

A. Click the **Database** menu (A1), and then the **Customer** sub-menu (A2)

B. Enter the customer you would like to use as the fleet owner (B1), then check the **Fleet Owner** checkbox (B2). On other accounts, you can now select the fleet owner from the dropdown menu (B3) to make them belong to this fleet owner, a customer reference (used by the fleet owner for the customer) can also be set in the **Customer#** box, this can be used for the fleet company's own account numbers and can be searched on. Click the **Update** button to save any changes.

Additional settings

When selecting a customer who belongs to a fleet, this will be shown on the document screen. It is possible to set or change this relationship directly from this screen. This is done by clicking the **Fleet** entry in the customer details section (A).

This will open a menu allowing the following options. As well as setting / viewing the customer's fleet relationship, you can also record specific authorisation information for this job:

B.   Fleet account

C.   Customer number

D.   Vehicle ID Code

E.   Authorisation status (status codes are hard-coded)
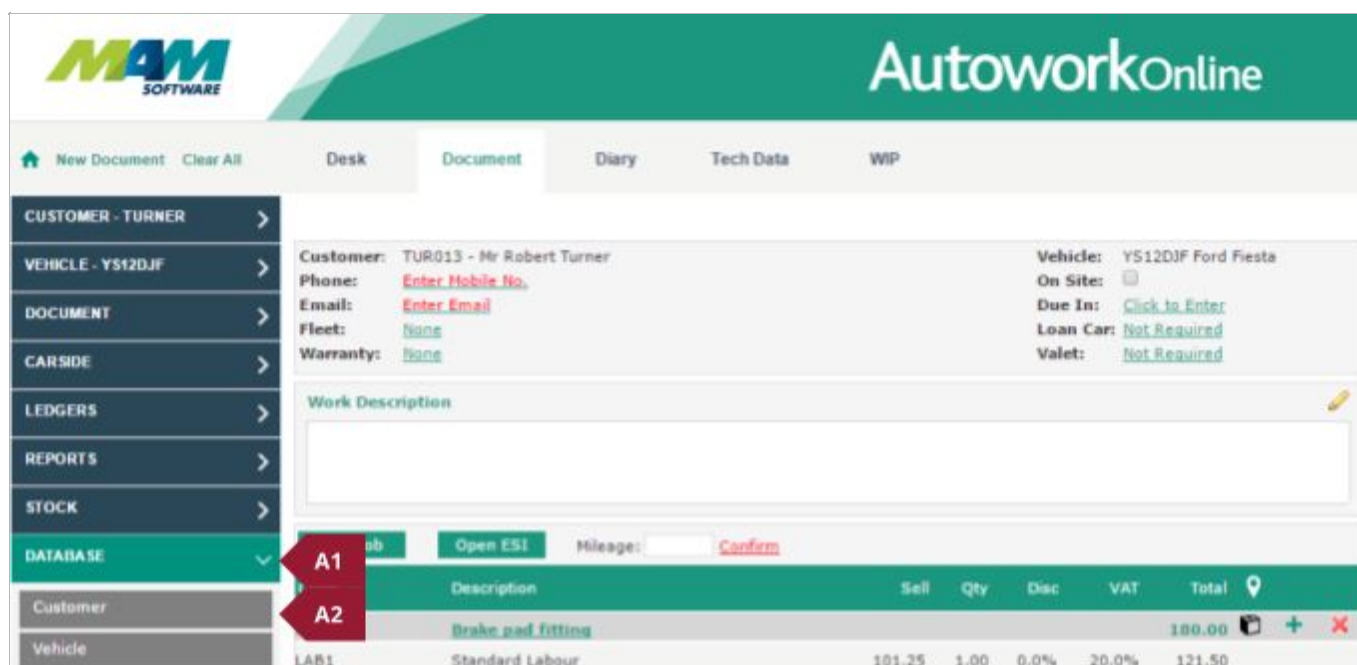
F.   Authorisation reference

G.   Authorised value

Warranty accounts

A warranty accounts feature has also been introduced. In the same was as setting a customer account as a fleet owner, you can now set a customer as a Warranty Provider. You can then flag a job as a 'Warranty' repair and select the provider.
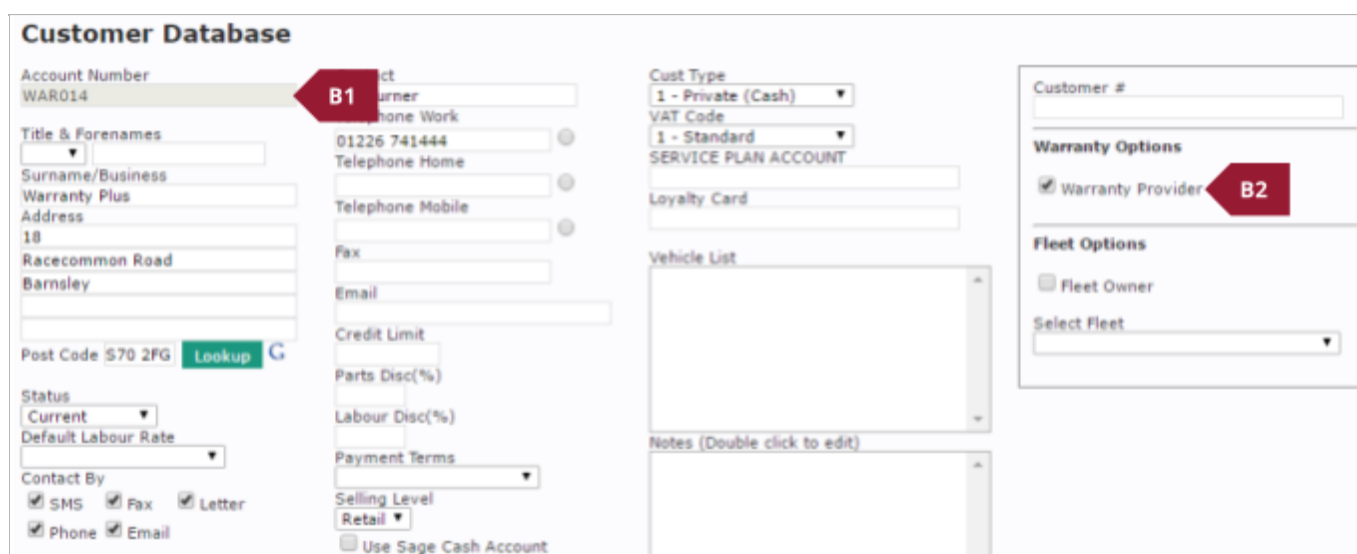
A. Click the **Database** menu (A1), and then the **Customer** sub-menu (A2)

B. Enter the customer you would like to use as the Warranty Provider (B1), then check the **Warranty Provider** checkbox (B2). Click the **Update** button to save changes.

Additional settings

A document can then be flagged as a warranty job using the following process:

A. Click the **Warranty** entry in the customer details section of the Document screen

This will open a menu allowing the following options:

B.	Warranty Provider	H.	Original Shop Code
C.	Warranty Name	I.	Original Invoice Number
D.	Warranty Description	J.	Original Invoice Date
E.	Provider Ref	K.	Original Invoice Milage
F.	Customer number	L.	Notes
G.	Authorisation status		

N. Select a Warranty provider and record any details you need to in the fields as appropriate, then click the **Update** button. Build the job as normal.

O. When the **Invoice** button is clicked, a prompt asking if you would like to split the invoice will pop up. If the **Cancel** button is clicked, the invoice will be raised as normal, if the **OK** button is clicked, this will open the **Split Invoice** screen and set the warranty provider as the 3rd party automatically.

P. From here you can select which items to charge to the warranty provider (P1) and (P2) . Set an **excess** (P3) and **Customer Contribution** (P4) if required. Once all the values are correct, clicking the **Invoice** button (P5) will generate two invoices, one for the customer, and another for the warranty provider.

Minor changes

Diagnostic Trouble Code (DTC) printing

In v175, it is now possible to print the Diagnostic Trouble Code (DTC) that has been added to a document when a Estimate or Job is created.

Loan car/valet/collection detail printing

The details for Loan Cars, Valeting, and Collections now print on the job sheet.

Key tag code length

The **Key Tags** feature has been updated so that the key tag code can be up to 10 characters long, rather than the original four.