

# Autowork Online changes and new features

*For version 175*

A man with short dark hair and a light beard, wearing a blue work shirt over a white t-shirt, is holding a silver laptop. He is smiling slightly and looking towards the camera. The background is a blurred industrial setting, possibly a car repair shop, with a car wheel and some equipment visible. The image is overlaid with a large green and blue diagonal graphic on the left side.

**Driving Business Performance**

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## 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<sup>1</sup>

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.

#### Before: Nine parts listed (five visible) for supplier "Apec"

Model	Years	Part	Description	Body	Supplier	POS	Reset
(ALL)	(ALL)	(ALL)	(ALL)	Hatchback	Apec	(ALL)	Reset
MINI 1.6 Cooper R56 (2006-2014) .First .One	01/10 -12/14	DSK2626	Brake Disc	Hatchback	Apec	FR	0
1598   16   Vented   Petrol							Q t3
MINI 1.6 Cooper R56 (2006-2014) .S .First .One	01/10 -12/14	DSK2849	Brake Disc	Hatchback	Apec	RR	0
1598   16   Solid   Petrol							Q t3
MINI 1.6 Cooper S R56 (2006-2014)	01/10 -12/14	DSK2499	Brake Disc	Hatchback	Apec	FR	0
1598   16   Vented   Petrol							Q t3
MINI 1.6 Cooper S R56 (2006-2014)	01/10 -12/14	DSK3006	Brake Disc	Hatchback	Apec	FR	0
1598   16   Vented   Petrol							Q t3
MINI 1.6 Countryman Cooper R60 (2010-).One	09/10 -	DSK2996	Brake Disc	Hatchback	Apec	FR	0
1598   16   Vented   Petrol							Q t3
MINI 1.6 Countryman Cooper R60	09/10 -	DSK2997	Brake Disc	Hatchback	Apec	RR	0

#### After: Two parts listed (front and back disc)

Model	Years	Part	Description	Body	Vendor	POS	Reset
(ALL)	(ALL)	(ALL)	(ALL)	Hatchback	(ALL time)	(ALL)	Reset
MINI 1.6 Cooper R56 (2006-2014)   1598   16   Vented   Petrol	01/10 -12/14	DSK2626	Brake Disc	Hatchback	*Apec	FR	0
MINI 1.6 Cooper R56 (2006-2014)   1598   16   Solid   Petrol	01/10 -12/14	DSK2849	Brake Disc	Hatchback	*Apec	RR	0

<sup>1</sup> This feature is not applicable to the Euro Car Parts version of Autowork Online

## 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	Reset
(ALL)	(ALL)	(ALL)	(ALL)	Hatchback	(ALL Prime)	(ALL)	
Focus 1.8 MK 1 (1998-2005)	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol							

### After: The parts are only listed once each

Model	Years	Part	Description	Body	Vendor	POS	Reset
(ALL)	(ALL)	(ALL)	(ALL)	Hatchback	(ALL Prime)	(ALL)	
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFA2002	Air Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol   EYDE							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFC1006	Cabin Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol   EYDE							
Focus 1.8 MK 1 (1998-2005)	07/02 -11/04	BFF8041	Fuel Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol   EYDE							
Focus 1.8 MK 1 (1998-2005)	10/98 -11/04	BFO4008	Oil Filter	Hatchback	*Borg & Beck	0	
1796   16   Petrol   EYDE							



## 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	Reset
{ALL}	{ALL}	{ALL}	{ALL}	{ALL}	{ALL Prime}	{ALL}	
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							

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

Model	Years	Part	Description	Body	Supplier	POS	Reset
{ALL}	{ALL}	{ALL}	{ALL}	Hatchback	{ALL Prime}	{ALL}	
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							

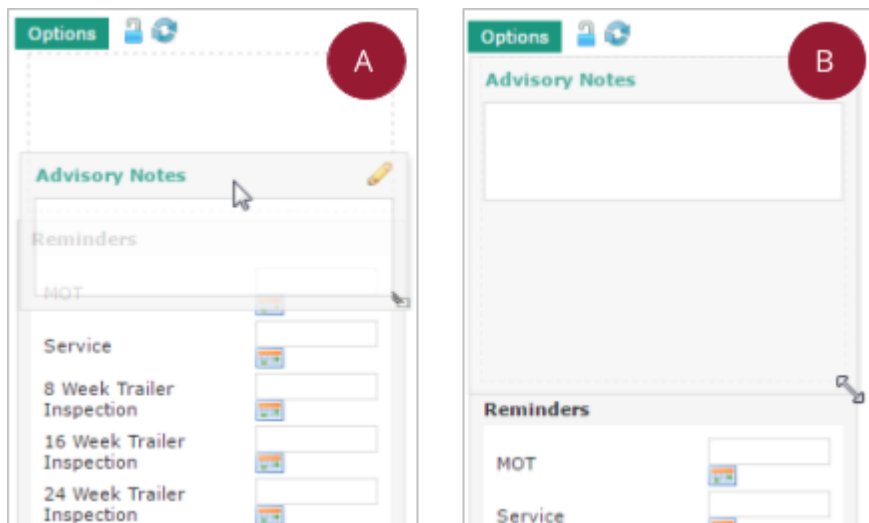
## Document screen changes

### 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:

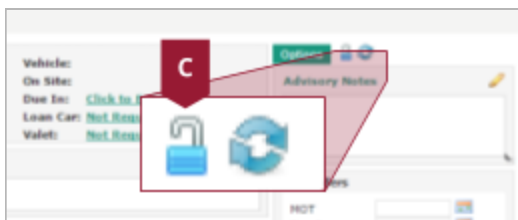
#### Moving panels

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).



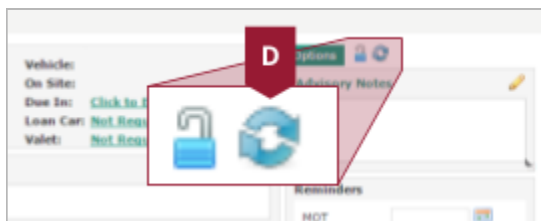
#### Locking the panels

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.

**Customer:** TUR013 - Mr Robert Turner
 

**Phone:** Enter Mobile No.
   
**Email:** Enter Email

**Fleet:** None
   
**Warranty:** None

**Vehicle:** YS12DJF Ford Fiesta
   
**On Site:** ☐
  
**Due In:** [Click to Enter](#)
  
**Loan Car:** [Not Required](#)
  
**Valet:** [Not Required](#)

**Work Description**

**Add Job**
**Open ESI**
Mileage:  [Confirm](#)

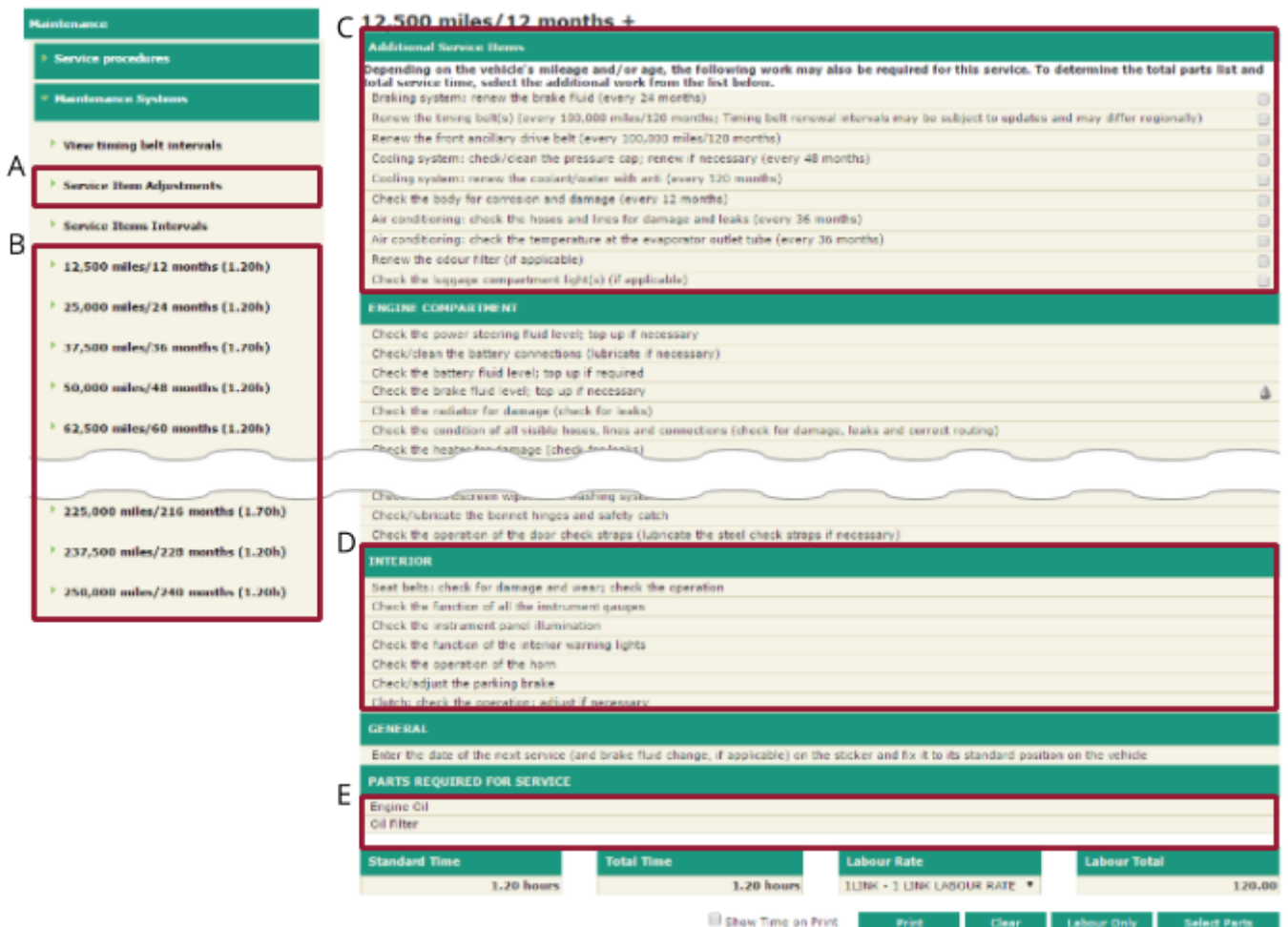
Code	Description	Sell	Qty	Disc	VAT	Total	
	<a href="#">Brake pad fitting</a>					180.00	+ -
LAB1	Standard Labour	101.25	1.00	0.0%	20.0%	121.50	
GBP1932AF	Brake Pad Set	48.75	1.00	0.0%	20.0%	58.50	-
	<a href="#">Consumables</a>	0.00		0.0%	0.0%	0.00	
					<b>Goods</b>	<b>VAT</b>	<b>Total</b>
					150.00	30.00	180.00

**Quote**
**Job**
**Assign Job**
**Invoice**
**Credit**
**Print**
**Discounts**
**Order / Receive**
**Split**



## Service schedule screen changes

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



The screenshot shows the 'Maintenance' screen with the following sections and annotations:

- A:** 'Service Item Adjustments' option in the left sidebar.
- B:** 'Service Item Intervals' section in the left sidebar, listing intervals such as '12,500 miles/12 months (1.20h)'.
- C:** 'Additional Service Items' section at the top, containing a list of tasks with checkboxes, such as 'Braking systems: renew the brake fluid (every 24 months)'.
- D:** 'INTERIOR' section, containing tasks like 'Seat belts: check for damage and wear; check the operation'.
- E:** 'PARTS REQUIRED FOR SERVICE' section at the bottom, listing 'Engine Oil' and 'Oil Filter'.

At the bottom of the screen, there is a summary table:

Standard Time	Total Time	Labour Rate	Labour Total
1.20 hours	1.20 hours	LINK - 1 LINK LABOUR RATE	120.00

Buttons at the bottom include: Show Time on Print, Print, Clear, Labour Only, and Select Parts.

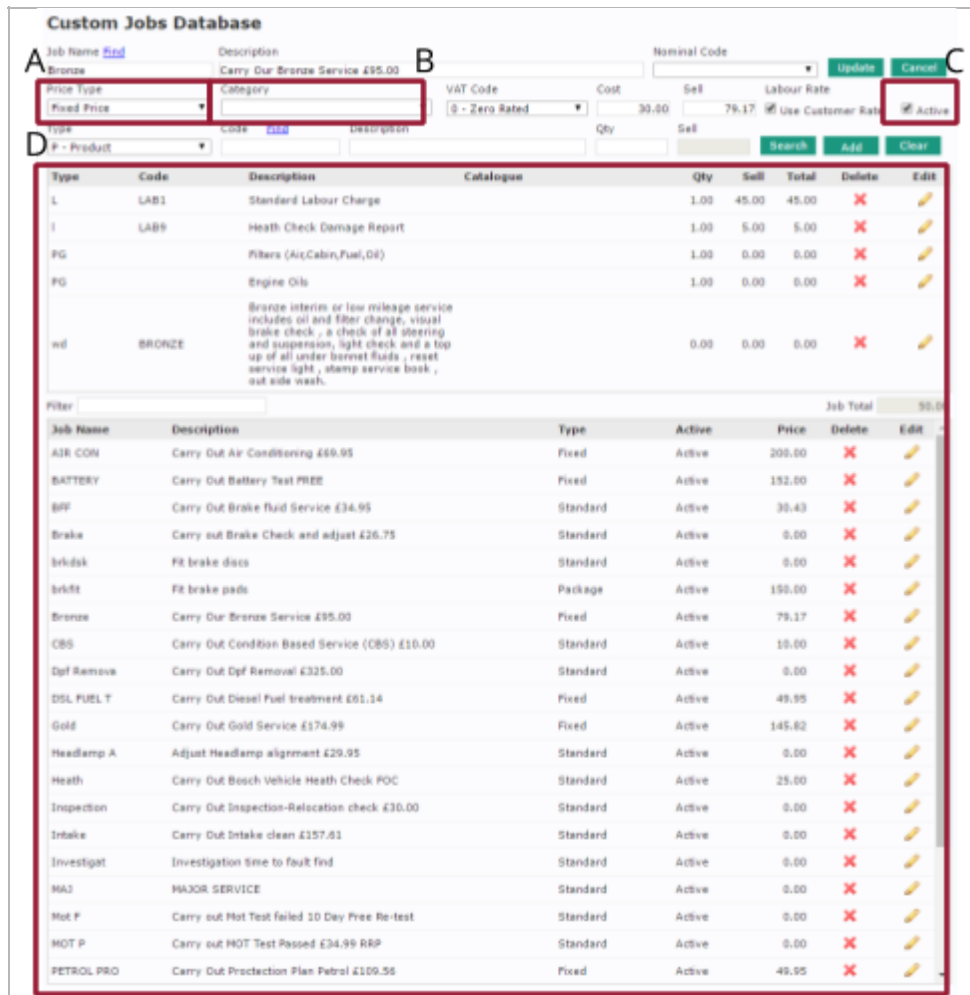
- The **Service Item Adjustments** option has moved position
- Normal and Condition based service selection is now intuitive with tick boxes for multiple condition based services.
- The **Additional Service Items** section has been relocated to the top of the page and shows OE included tasks where appropriate
- Individual service tasks are now sorted ordered naturally, by vehicle area
- 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:



**Custom Jobs Database**

**A** Job Name: Bronze Description: Carry Out Bronze Service £95.00 **B** Nominal Code:            **C**

Price Type: Fixed Price Category:            VAT Code: 0 - Zero Rated Cost: 30.00 Sell: 79.17 ☒ Use Customer Rate ☒ Active

**D** Type: P - Product Code: LAB1 Description:            Qty:            Sell:           

Type	Code	Description	Catalogue	Qty	Sell	Total	Delete	Edit
L	LAB1	Standard Labour Charge		1.00	45.00	45.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
I	LAB9	Heath Check Damage Report		1.00	5.00	5.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
FG		Filters (Air,Cabin,Fuel,Oil)		1.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
FG		Engine Oils		1.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
wd	BRONZE	Bronze interim or low mileage service includes oil and filter change, visual brake check - a check of all steering and suspension, light check and a top up of all under bonnet fluids, reset service light, stamp service book, out side wash.		0.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

Filter:            Job Total: 90.00

Job Name	Description	Type	Active	Price	Delete	Edit
AIR CON	Carry Out Air Conditioning £60.95	Fixed	Active	200.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
BATTERY	Carry Out Battery Test FREE	Fixed	Active	152.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
BPF	Carry Out Brake fluid Service £34.95	Standard	Active	30.43	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Brake	Carry out Brake Check and adjust £26.75	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
brkdisc	Fit brake discs	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
brkfit	Fit brake pads	Package	Active	150.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Bronze	Carry Out Bronze Service £95.00	Fixed	Active	79.17	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
CBS	Carry Out Condition Based Service (CBS) £10.00	Standard	Active	10.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Dpf Remove	Carry Out Dpf Removal £325.00	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
DSL FUEL T	Carry Out Diesel Fuel treatment £61.14	Fixed	Active	49.95	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Gold	Carry Out Gold Service £174.99	Fixed	Active	145.82	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Headlamp A	Adjust Headlamp alignment £29.95	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Heath	Carry Out Bosch Vehicle Heath Check POC	Standard	Active	25.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Inspection	Carry Out Inspection-Relocation check £30.00	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Intake	Carry Out Intake clean £157.61	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Investigat	Investigation time to fault find	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
MAJ	MAJOR SERVICE	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Mot P	Carry out Mot Test failed 10 Day Free Re-test	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
MOT P	Carry out MOT Test Passed £34.99 RRP	Standard	Active	0.00	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
PETROL PRO	Carry Out Protection Plan Petrol £109.56	Fixed	Active	49.95	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

- 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

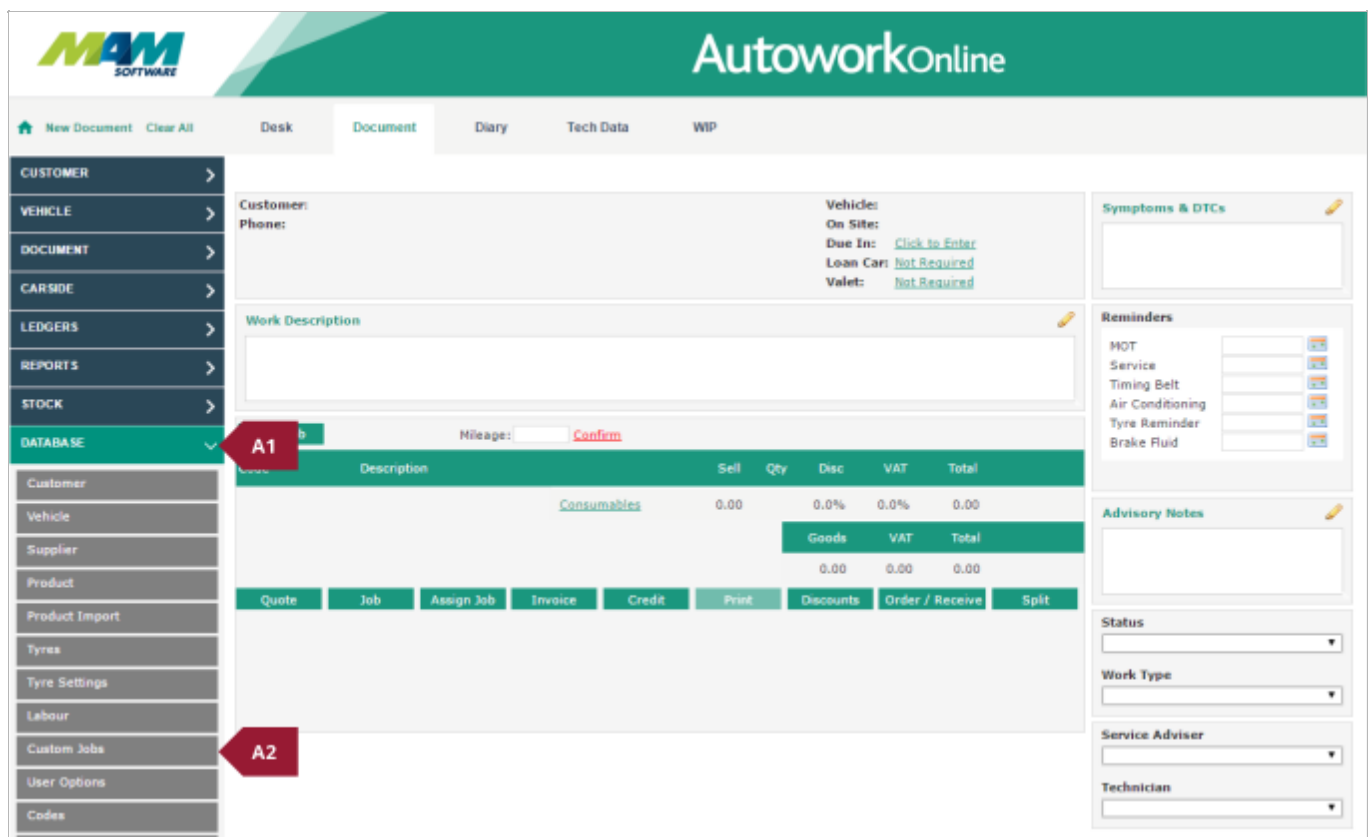
The new Package Jobs feature allows flexibly-priced custom jobs to be created, these work in a similar way to fixed price jobs, but can contain parts with variable pricing, the price of which is balanced by varying the cost of labour.

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.

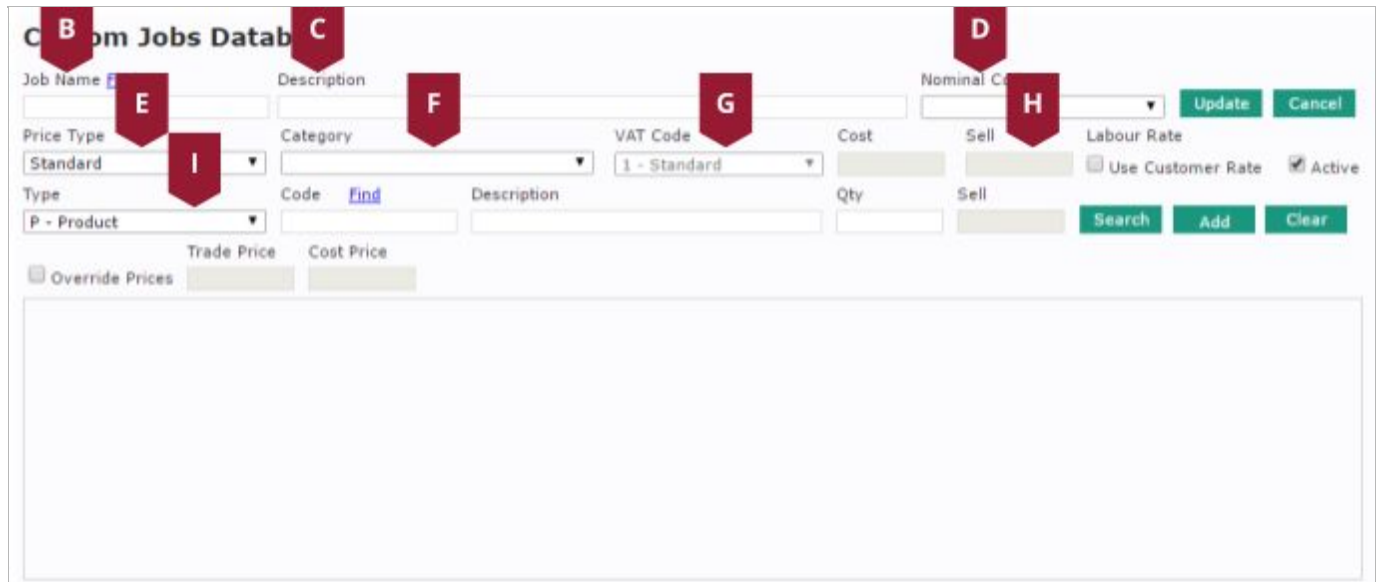
## Setting up Package jobs

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



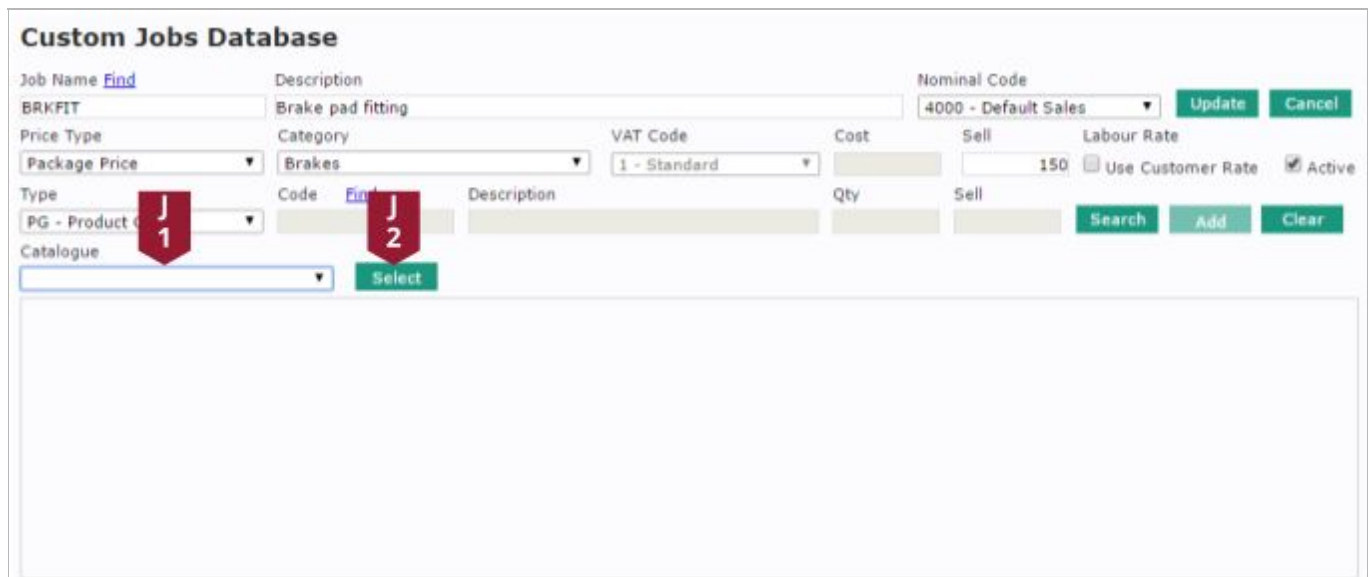
The screenshot shows the AutoworkOnline software interface. The top navigation bar includes the MAM SOFTWARE logo and the text 'AutoworkOnline'. Below this is a secondary navigation bar with tabs: New Document, Clear All, Desk, Document, Diary, Tech Data, and WIP. On the left side, there is a vertical menu with the following items: CUSTOMER, VEHICLE, DOCUMENT, CAR SIDE, LEDGERS, REPORTS, STOCK, DATABASE, Customer, Vehicle, Supplier, Product, Product Import, Tyres, Tyre Settings, Labour, Custom Jobs, User Options, and Codes. The DATABASE menu item is highlighted with a red arrow labeled 'A1'. The Custom Jobs sub-menu item is highlighted with a red arrow labeled 'A2'. The main content area displays a form for creating a new job, including fields for Customer, Vehicle, and Work Description. A table with columns for Description, Sell, Qty, Disc, VAT, and Total is visible. The table contains a single row for 'Consumables' with a value of 0.00. The table is divided into two sections: 'Goods' and 'VAT', with a total of 0.00. The bottom of the interface shows a status bar with buttons for Quote, Job, Assign Job, Invoice, Credit, Print, Discounts, Order / Receive, and Split.

- 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**



The screenshot shows the 'Custom Jobs Database' form. Annotations B through I point to the following fields: B (Job Name), C (Description), D (Nominal Code), E (Price Type dropdown), F (Category dropdown), G (VAT Code dropdown), H (Selling price input), and I (Type dropdown). The form includes buttons for 'Update', 'Cancel', 'Search', 'Add', and 'Clear'. There are also checkboxes for 'Use Customer Rate' and 'Active'.

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



The screenshot shows the 'Custom Jobs Database' form with the following data entered: Job Name 'BRKFIT', Description 'Brake pad fitting', Nominal Code '4000 - Default Sales', Price Type 'Package Price', Category 'Brakes', VAT Code '1 - Standard', and Selling price '150'. Annotations J1 and J2 point to the 'Catalogue' dropdown menu and the 'Select' button, respectively. The form also includes buttons for 'Update', 'Cancel', 'Search', 'Add', and 'Clear'.

- ### Custom Jobs Database

Job Name [Find](#)  
BRKFIT

Description  
Brake pad fitting

Nominal Code  
4000 - Default Sales

Update

Cancel

Price Type  
Package Price

Categories  
Brakes

VAT Code  
1 - Standard

Cost

Sell  
150

Labour Rate  
☐ Use Customer Rate

☒ Active

Type  
PG - Product Group

Code

Description

Qty

Sell

Search

Add

Clear

Catalogue  
Pads

Select

Type	Code	Description	Catalogue	Qty	Sell	Total	Delete	Edit
PG		Pads		1	0.00	0.00		

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

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B. Click the **Jobs** option

Customer: TUR013 - Mr Robert Turner

Phone: [Enter Mobile No.](#)

Email: [Enter Email](#)

Fleet: [None](#)

Warranty: [None](#)

Vehicle: YS12DJF Ford Fiesta

On Site: ☐

Due In: [Click to Enter](#)

Loan Car: [Not Required](#)

Valet: [Not Required](#)

**Work Description**

Blank

Jobs **B**

Labour

Repair Times

Service

Parts

Mileage:  [Confirm](#)

Option	Sell	Qty	Disc	VAT	Total
<a href="#">Consumables</a>	0.00		0.0%	0.0%	0.00
			<b>Goods</b>	<b>VAT</b>	<b>Total</b>
			0.00	0.00	0.00

Assign Job

Invoice

Credit

Print

Discounts

Order / Receive

Split

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

Custom Jobs

Filter:

C1

bal

☒ My Jobs

Categories

Uncategorised

Specials & Promotions

Service & Maintenance

Air Conditioning & Heater

Brakes

Cooling System

Diagnosis & Inspection

Electrical & Battery

Engine Compartment

Engine Performance

Exterior Interior

Fluids

In Car Technology

Transmission

Under Vehicle

Wheels & Tyres

C2

Job Name

Job Description

Type

Price

C3

BRKFIT

Brake pad fitting

Package

150.00

Close

Add Selected



- 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)

Model	Years	Part	Description	Body	Supplier	POS	Reset
{ALL}	{ALL}	{ALL}	{ALL}	Hatchback	{ALL Prime}	{ALL}	
Fiesta 1.4 MK 7 (2008-2013)	09/08 -12/13	MDB2875	Brake Pad Set	Hatchback	*Mintex	FR	0
1388   95   16   Lucas   Petrol   SPJA/SPJC							
Fiesta 1.4 MK 7 (2008-2013)	03/10 -11/12	GBP1932AF	Brake Pad Set	Hatchback	*Unipart	FR	0
1388   95   16   ATE   Petrol   SPJA/SPJC							

D 1

D 2

D 3

Check Prices

View basket

Add to basket

Finish

☒ Show Basket ☐ Hide Costs

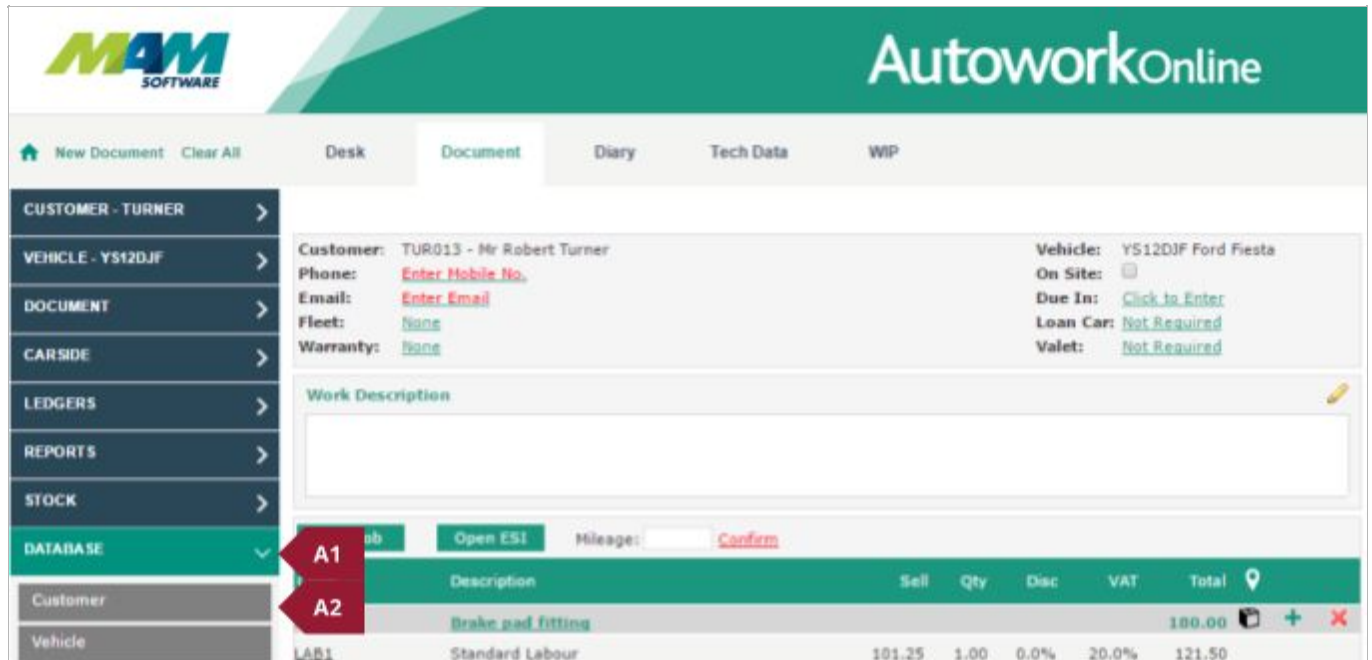
- E. A job will be added to the document, the cost of the labour line will automatically change to make up the full cost for the package based on the sales value of the part included

Code	Description	Sell	Qty	Disc	VAT	Total	
	Brake pad fitting					180.00	+ -
LAB1	Standard Labour	101.25	1.00	0.0%	20.0%	121.50	
GBP1932AF	Brake Pad Set	48.75	1.00	0.0%	20.0%	58.50	
	Consumables	0.00		0.0%	0.0%	0.00	
				Goods	VAT	Total	
				150.00	30.00	180.00	

## Fleet accounts

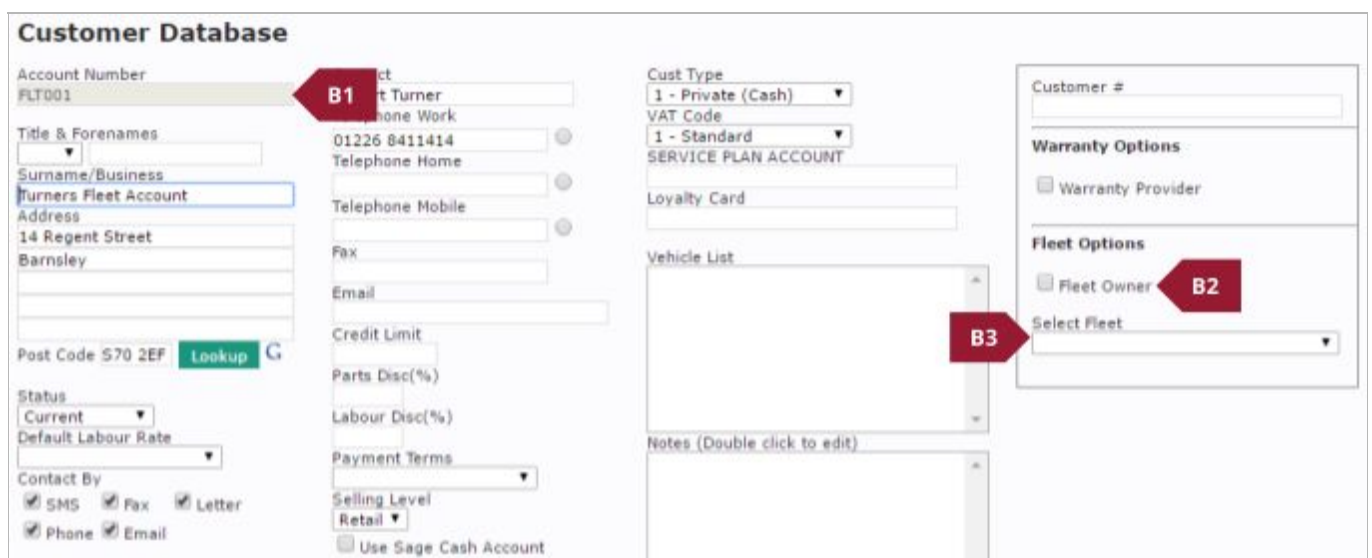
The way that fleet accounts work has also been improved, rather than being able to specify any customer as the fleet owner, specific customer accounts must be flagged as a “fleet owner” in order to select them. This is done as follows:

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



The screenshot shows the AutoworkOnline software interface. On the left, a sidebar menu has the 'DATABASE' option highlighted with a red arrow labeled 'A1'. Below it, the 'Customer' sub-menu is also highlighted with a red arrow labeled 'A2'. The main area displays a customer record for 'TUR013 - Mr Robert Turner'. The record includes fields for Phone, Email, Fleet, and Warranty, each with a red 'Enter' button. To the right, there are fields for Vehicle (YS12DJF Ford Fiesta), On Site, Due In, Loan Car, and Valet, each with a red 'Click to Enter' button. Below the record, there is a 'Work Description' field and a table with columns: Description, Sell, Qty, Disc, VAT, and Total. The table contains two rows: 'Brake pad fitting' and 'Standard Labour'.

- 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.



The screenshot shows the 'Customer Database' form. On the left, there are fields for Account Number (FLT001), Title & Forenames, Surname/Business, Address, Post Code, Status, and Contact By. A red arrow labeled 'B1' points to the 'Turners Fleet Account' dropdown menu. In the center, there are fields for Cust Type, VAT Code, SERVICE PLAN ACCOUNT, Loyalty Card, Vehicle List, and Notes. A red arrow labeled 'B2' points to the 'Fleet Owner' checkbox. On the right, there is a 'Customer #' field and a 'Fleet Options' section with a 'Select Fleet' dropdown menu. A red arrow labeled 'B3' points to the 'Select Fleet' dropdown menu.

## 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).

<b>Customer:</b> TUR013 - Mr Robert Turner	<b>Vehicle:</b> YS12DJF Ford Fiesta
<b>Phone:</b> <a href="#">Enter Mobile No.</a>	<b>On Site:</b> <input type="checkbox"/>
<b>Email:</b> <a href="#">Enter Email</a>	<b>Due In:</b> <a href="#">Click to Enter</a>
<b>Fleet:</b> <a href="#">FLT001</a> <b>A</b>	<b>Loan Car:</b> <a href="#">Not Required</a>
<b>Warranty:</b> <a href="#">None</a>	<b>Valet:</b> <a href="#">Not Required</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

Fleet Details

Select Fleet

FLT001 - Turners Fleet Account

B

C

Customer #

Vehicle ID Code

D

E

Authorised

Authorisation Reference

F

Authorised Value

0.00

G

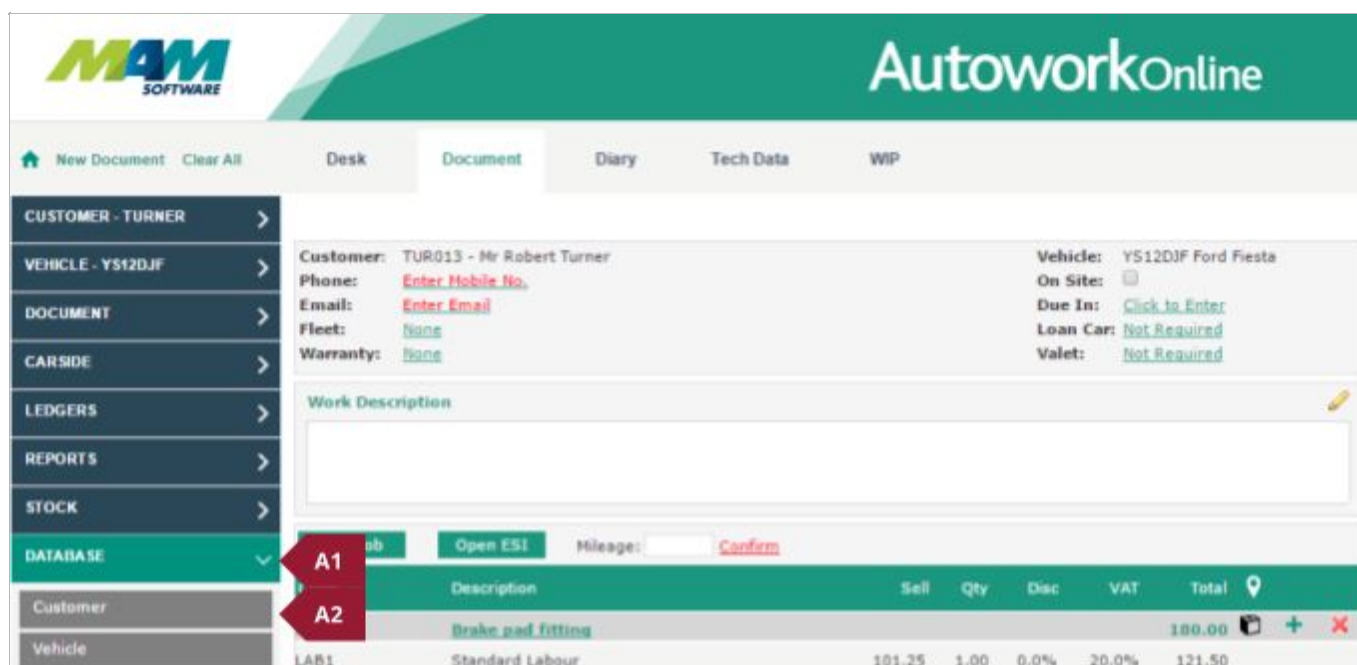
Close

Update

## Warranty accounts

A warranty accounts feature has also been introduced. In the same way 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.

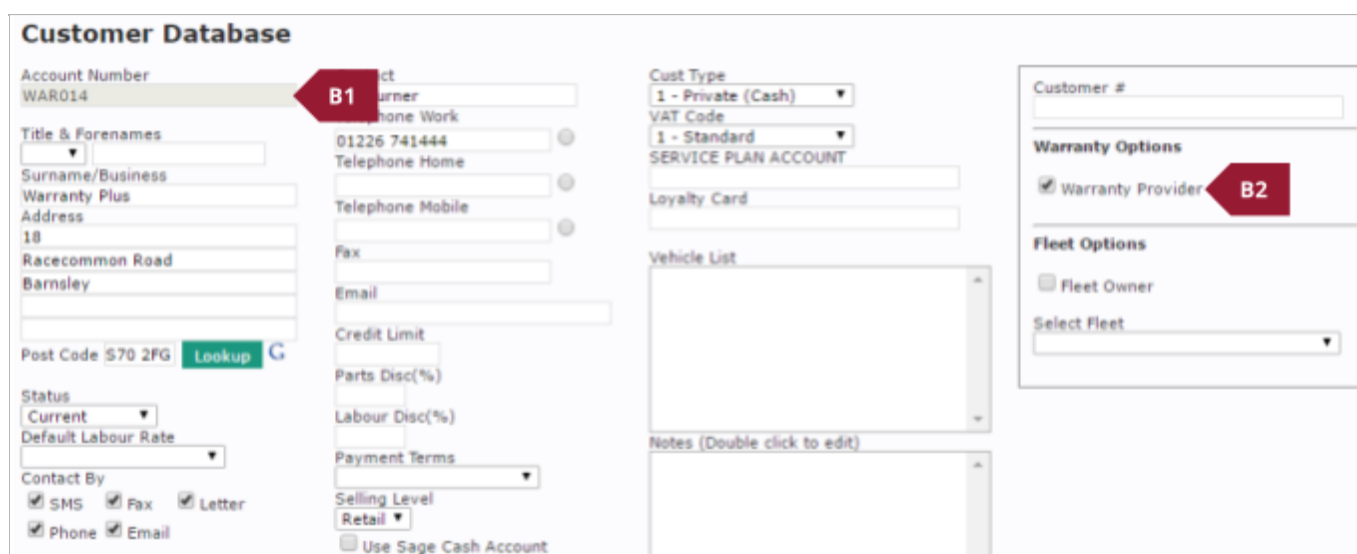
- A. Click the **Database** menu (A1), and then the **Customer** sub-menu (A2)



The screenshot shows the AutoworkOnline interface. On the left, the 'DATABASE' menu is highlighted with a red arrow labeled 'A1'. Below it, the 'Customer' sub-menu is highlighted with a red arrow labeled 'A2'. The main area displays a job entry form for 'TUR013 - Mr Robert Turner'. The form includes fields for 'Phone', 'Email', 'Fleet', and 'Warranty'. The 'Warranty' field is currently set to 'None'. Below the form, there is a table with columns: 'Description', 'Sell', 'Qty', 'Disc', 'VAT', and 'Total'. The table contains two rows: 'Brake pad fitting' and 'Standard Labour'.

Description	Sell	Qty	Disc	VAT	Total
Brake pad fitting					180.00
Standard Labour	101.25	1.00	0.0%	20.0%	121.50

- 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.



The screenshot shows the 'Customer Database' form. The 'Account Number' field is set to 'WAR014'. The 'Contact' field is set to 'Mr Robert Turner'. The 'Cust Type' dropdown is set to '1 - Private (Cash)'. The 'VAT Code' dropdown is set to '1 - Standard'. The 'SERVICE PLAN ACCOUNT' checkbox is checked. The 'Warranty Options' section has the 'Warranty Provider' checkbox checked, indicated by a red arrow labeled 'B2'. The 'Fleet Options' section has the 'Fleet Owner' checkbox unchecked. The 'Select Fleet' dropdown is set to 'None'.

## 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

<b>Customer:</b> TUR013 - Mr Robert Turner	<b>Vehicle:</b> YS12DJF Ford Fiesta
<b>Phone:</b> <a href="#">Enter Mobile No.</a>	<b>On Site:</b> <input type="checkbox"/>
<b>Email:</b> <a href="#">Enter Email</a>	<b>Due In:</b> <a href="#">Click to Enter</a>
<b>Fleet:</b> FLT001	<b>Loan Car:</b> <a href="#">Not Required</a>
<b>Warranty:</b> <a href="#">None</a> <b>A</b>	<b>Valet:</b> <a href="#">Not Required</a>

This will open a menu allowing the following options:

**Warranty Details**

C

Warranty Provider

B

D

Warranty Name

E

Warranty Description

F

Provider Ref.

G

Customer #

H

Authorisation

I

Original Shop Code

J

Original Invoice No.

K

Original Invoice Date

L

Original Invoice Mileage

Notes

Not Submitted

Close

Update

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 Mileage
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.

## Split Invoice

Select 3rd Party:

Claim Ref:

Invoice Date:

To produce a split invoice, first select your 3rd party (this will be the insurance company for insurance splits). Then select the values you wish to charge to them before adding any excess value.

P1

P2

Select Net and VAT values to invoice to the 3rd party		Net	VAT	Net	VAT
LAB1	Standard Labour	101.25	20.25	<input type="checkbox"/>	<input type="checkbox"/>
GBP1932AF	Brake Pad Set	48.75	9.75	<input type="checkbox"/>	<input type="checkbox"/>
				Select <input type="checkbox"/>	Select <input type="checkbox"/>

P3

Enter Excess value if applicable

P4

Enter Betterment / Customer Contribution if applicable  (ex VAT) ☒ Include VAT

Select 3rd Party

AAW01  
AA Warranty Claims

Net   
VAT   
Total

Primary Customer

TUR013  
Mr Turner

Net   
VAT   
Total

Click Invoice to create both customer and 3rd party invoices.

☒ Consolidate VAT only lines

P5



### 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.