

Autowork Online changes and new features

For version 176

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

The latest version of the Autowork Online garage management system offers several enhancements designed to improve workflow, increase efficiency, and improve customer service.

The **MOT Diary** screen has been completely overhauled: The schedule grid now fills the full width of the screen for better visibility, MOT bookings are now linked to the relevant job card, and vehicles can be marked as “on site” from the MOT Diary screen. MOT jobs can now have a status, allowing them to be flagged as a “pass” or “fail”, allowing for improved visibility, and allowing this information to be easily relayed to the customer. It is now also possible to create an MOT booking directly from the MOT Diary screen, simplifying workflow. A new feature has been added that allows MOT jobs to be rescheduled on the grid, meaning that scheduling changes can easily be made.

MOT Due Dates will be automatically added to any vehicle when available. The data is automatically retrieved from the DVLA’s database. This results in improved data accuracy, allows MOTs to be upsold to customers who call in with other enquiries, and helps to ensure that vehicles are not being driven without a valid MOT.

The VRM lookup feature has also been improved, and is now fully compatible with new electric powered vehicles.

Benefits

- Smoother workflow - MOT Diary features a larger, clearer grid, and MOTs can be booked in directly
- Improved rescheduleing - It’s now possible to swap 2 appointments in the grid
- Easily see an MOT’s status - Statuses can be set against an MOT, and viewed in the document screen
- Quickly open an MOT job from the grid by clicking on the job number.
- Boost profits - Automatic MOT due dates prompt where a customer can be sold an MOT
- More accurate data - MOT due dates are automatically updated where required

MOT Diary

Improved grid layout

In the latest version of Autowork Online, the layout of the MOT Diary has been revamped to improve workflow.

MOT Diary Thursday 27 October 2016

October 2016

Su	Mo	Tu	We	Th	Fr	Sa
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Day: 1

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
08:30								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
09:15								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
10:00								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
11:00		Turner	YS12DF Ford Fiesta 2012	NP	1126263		Passed	<input checked="" type="checkbox"/>	<input type="button" value="Assign"/>	<input type="button" value="Move"/>	<input type="button" value="Delete"/>	<input type="button" value="Block"/>
11:45	Bike							<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
12:30								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
13:45								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
14:30								<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
15:00	Retest							<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>
16:00	Retest							<input type="checkbox"/>	<input type="button" value="Assign"/>		<input type="button" value="Delete"/>	<input type="button" value="Block"/>

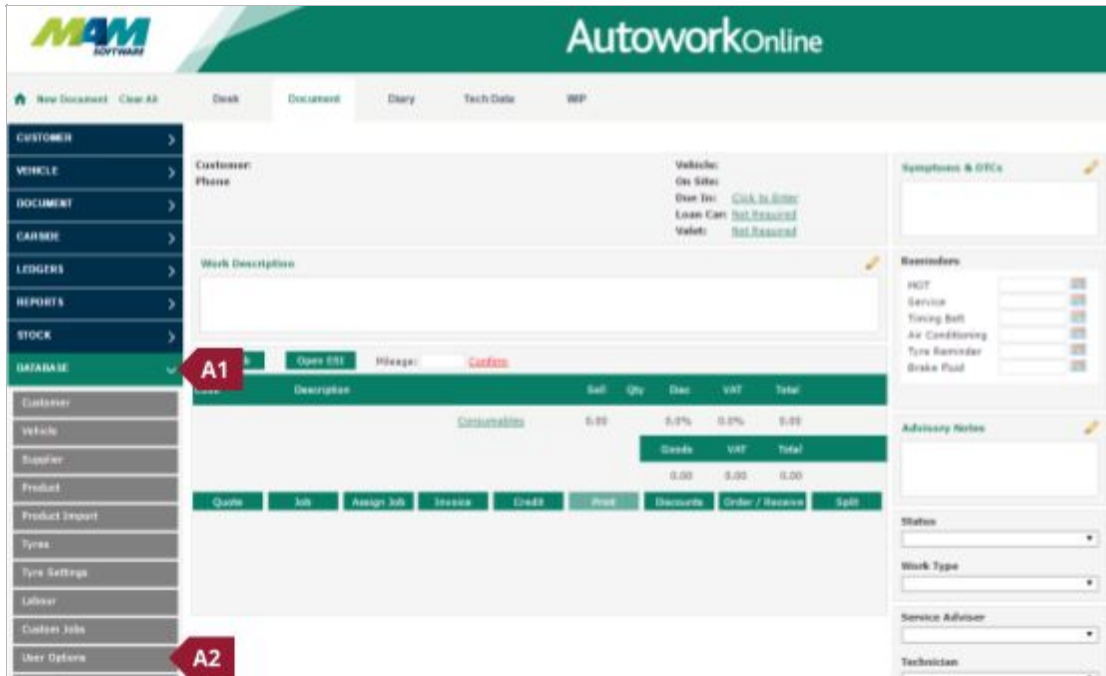
Key: Available Online (Yellow) Unavailable (Red)

- A. Calendar - Clicking a day will cause the main diary grid to display the entries for that day
- B. Name column - Slots can now be named, allowing certain slots to be designated for certain purposes, such as retests. See the [Creating diary slots](#) section for more information on naming slots
- C. Job number - displays the document number of the job linked to the MOT, clicking the link will display the job in the **Document** tab
- D. Status column - Shows the current status of the MOT, this can be changed using the dropdown menu
- E. On site column - Checking the box against an MOT appointment will mark the vehicle as "On site". Key tags can also be assigned and viewed.
- F. Assign column - Clicking the green + button on an empty row will allow a new appointment to be created directly from the diary
- G. Move column - Clicking the **Move** button against an existing appointment will allow it to be rescheduled to a different slot or swapped with an existing booking

Creating diary slots

By default, the MOT diary will be blank, and slots will need to be defined, this is done using the following process:

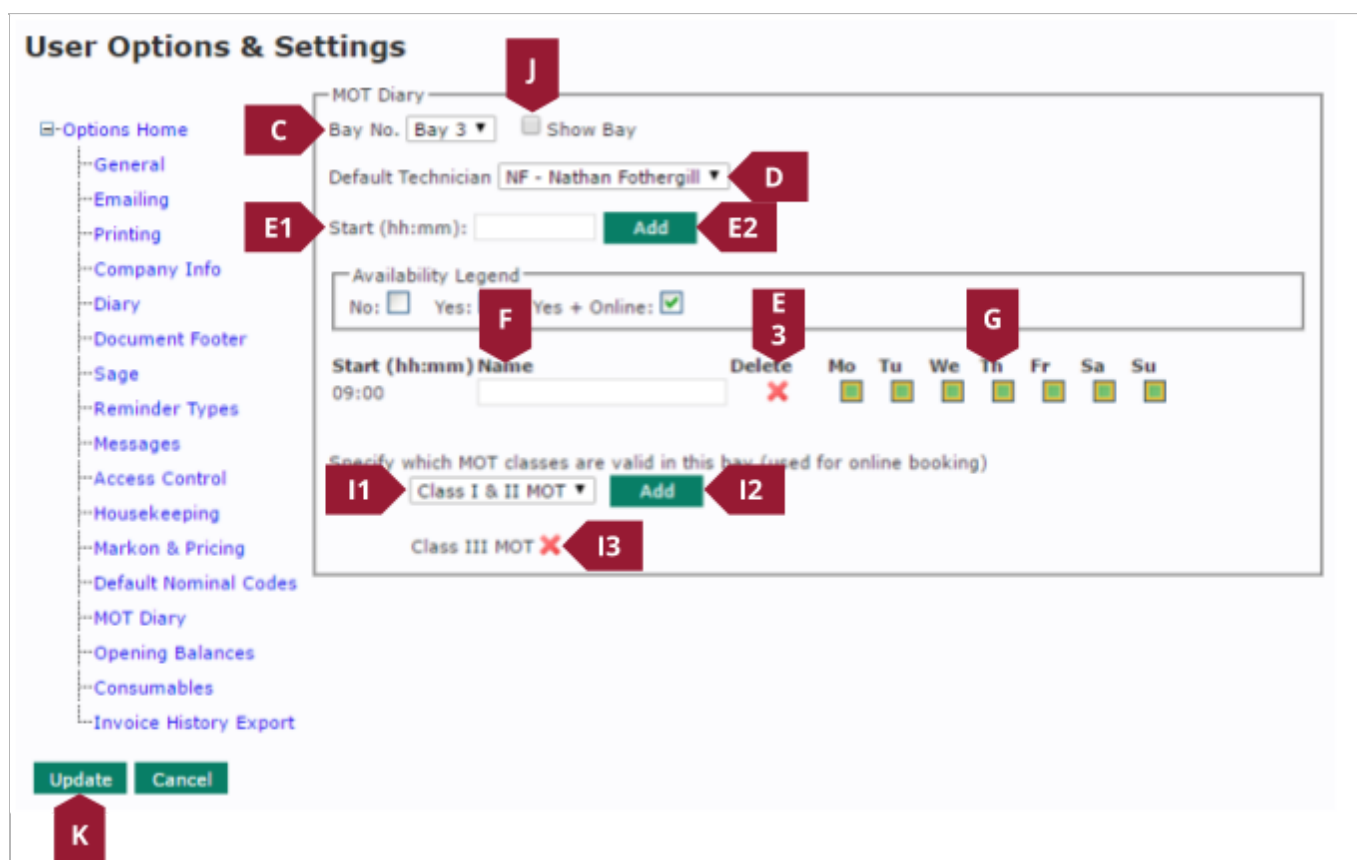
- A. Click the **Database** menu (A1), and then the **User Options** menu item (A2)



- B. Click the link for **MOT Diary**



- C. Select the bay you would like to set up from the **Bay No** dropdown menu
- D. Select a **Default Technician** from the dropdown menu
- E. Type a start time for the slot into the **Start** box (E1) (formatted as **HH:MM**), and then click the **Add** button (E2), any slots added can be removed by clicking the **Cross** button (E3)
- F. *Optional, type in a **Name** for the slot*
- G. Click the **Availability** checkboxes for each day to toggle their availability between: **Unchecked** - Not available, **Checked** - available offline, and **Checked with green highlight** - Available on and offline
- H. Repeat steps E to G for any additional slots
- I. Select the **MOT Classes** that can be performed on that bay from the dropdown menu (I1), then click the **Add** button (I2) to add them to the list. Entries can be removed by clicking the **Cross** button (I3)
- J. Check the **Show Bay** checkbox to display the bay in the Diary screen
- K. Click the **Update** button to save the changes



User Options & Settings

MOT Diary

Bay No. **Bay 3** ☐ Show Bay

Default Technician **NF - Nathan Fothergill**

Start (hh:mm): **Add**

Availability Legend
No: ☐ Yes: ☐ Yes + Online: ☒

Start (hh:mm) Name Delete Mo Tu We Th Fr Sa Su

09:00 ☒ ☒ ☒ ☒ ☒ ☒ ☒

Specify which MOT classes are valid in this bay (used for online booking)

Class I & II MOT **Add**

Class III MOT ☒

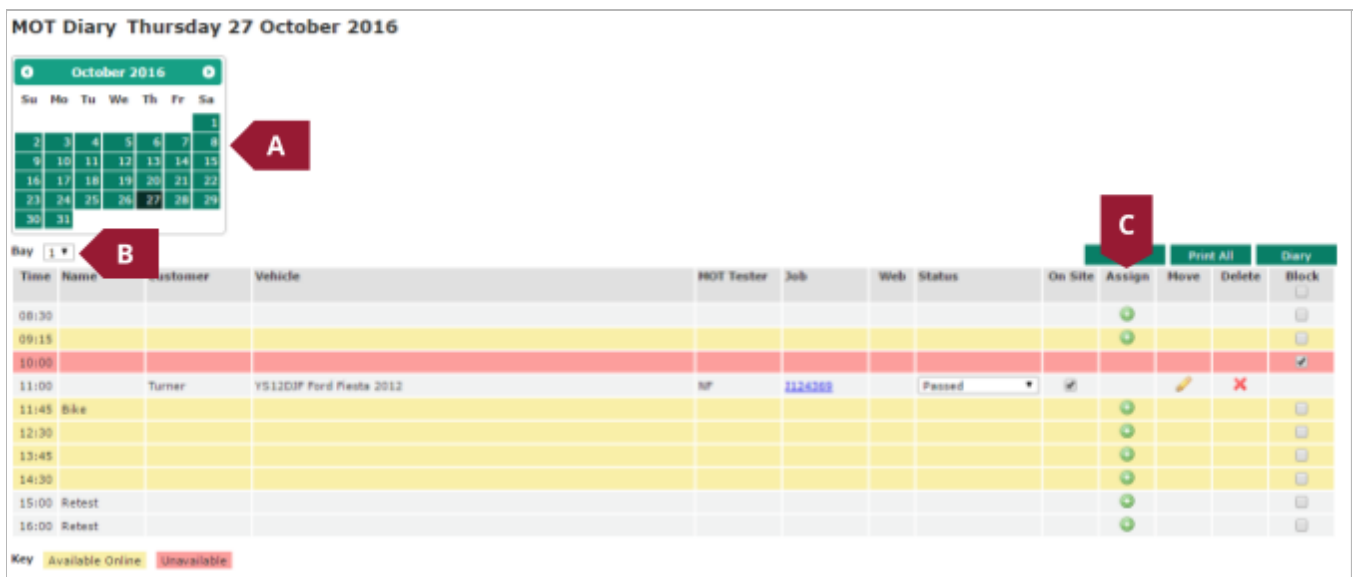
Update **Cancel**

Creating new diary entries

Although the old method of creating an MOT job in the **Document** screen, and then clicking the **MOT** icon to add the diary entry will still work correctly, it is now possible to book MOTs directly from the MOT Diary screen. The new process is far simpler, and has a more efficient workflow. New diary entries are created using the following process:

- Use the **Calendar** to select the date you would like to create the booking on
- From the Diary screen, click the **Assign** button against the slot you would like to book the MOT into
- Select the **Bay** you would like to use for the booking

MOT Diary Thursday 27 October 2016



Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
08:30									+			
09:15									+			
10:00									+			
11:00	Turner		YS12DJP Ford Fiesta 2012	NP	1126285		Passed					
11:45	Bike								+			
12:30									+			
13:45									+			
14:30									+			
15:00	Retest								+			
16:00	Retest								+			

Key: Available Online (green), Unavailable (red)

- Select an **MOT Tester** (D1), and **Labour** (D2) from the dropdown menus
- Enter a **Customer** account code (E1), and click the **Search** button (E2) to search for an existing customer, or the **New** button (E3) to create a new one

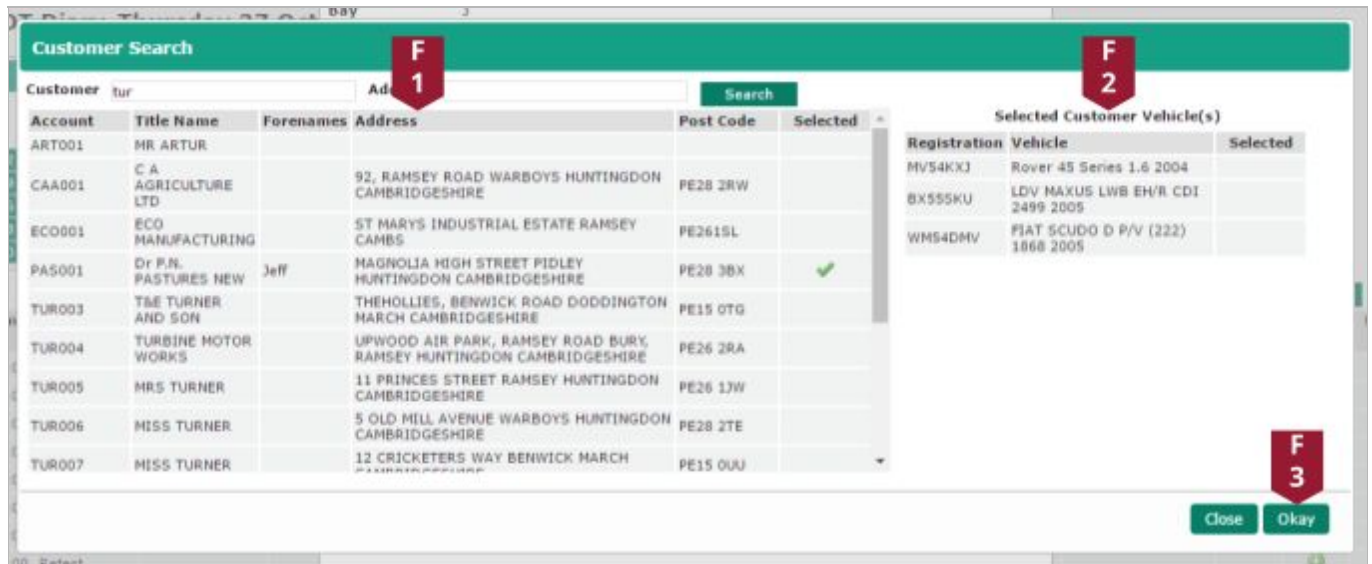
Add Booking

Bay: 3
 Date: 27/10/2016
 Time: 10:00

D1 MOT Tester: Nathan Fothergill ▼
D2 Labour: ▼

E1 Customer:
E2 Search **E3** New

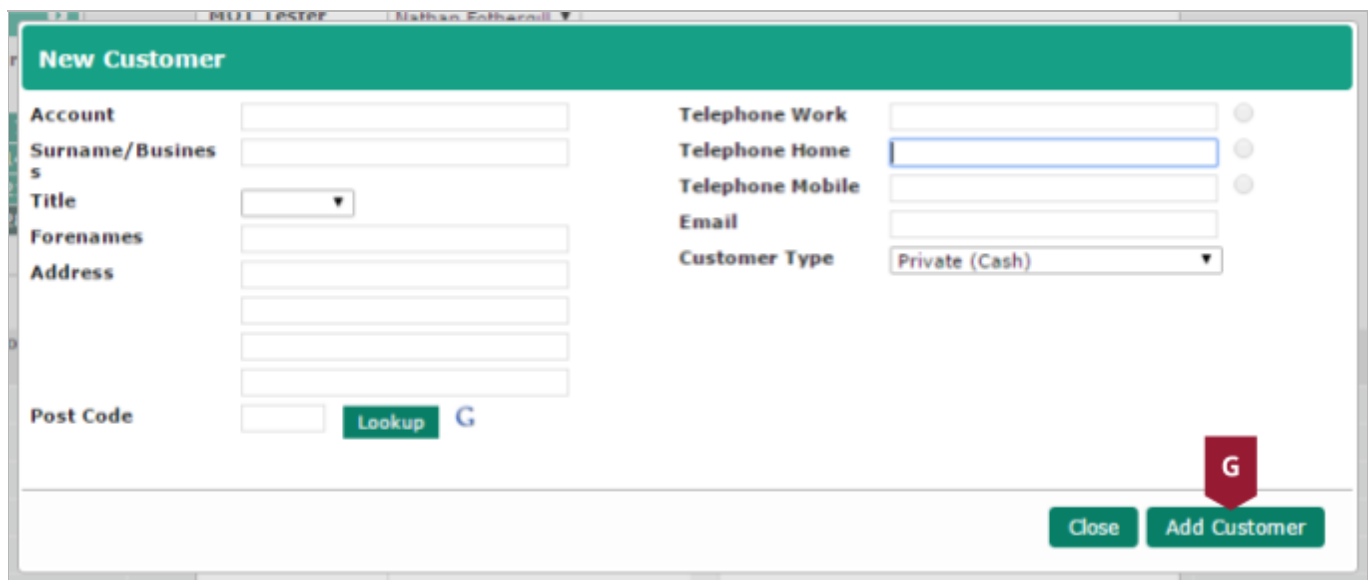
- F. If an existing customer has been entered, you will be presented with the following screen, where the **Customer** (F1) and then **Vehicle** (F2) can be clicked to select them, before clicking the **Okay** button (F3) to confirm the selection



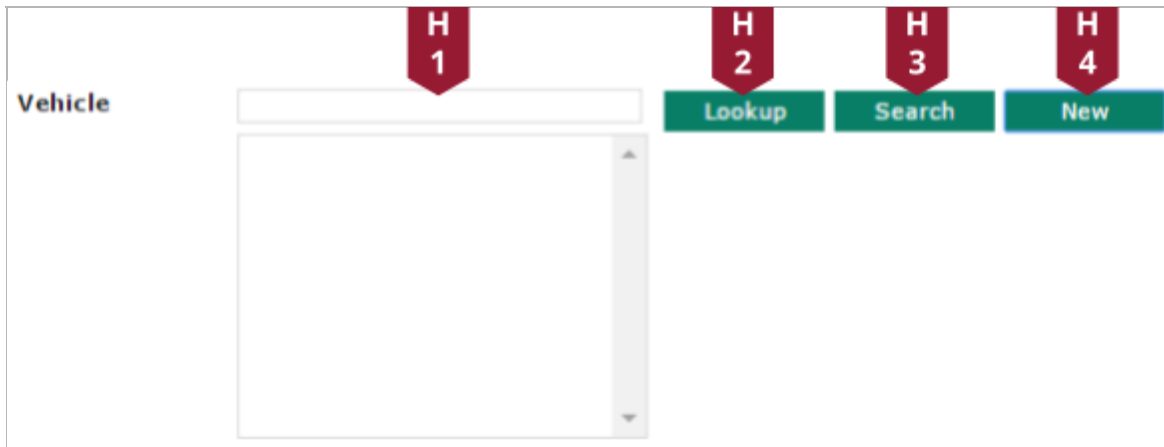
Account	Title Name	Forenames	Address	Post Code	Selected
ART001	MR ARTUR				
CAA001	C A AGRICULTURE LTD		92, RAMSEY ROAD WARBOYS HUNTINGDON CAMBRIDGESHIRE	PE28 3RW	
ECO001	ECO MANUFACTURING		5T MARYS INDUSTRIAL ESTATE RAMSEY CAMBS	PE261SL	
PAS001	Dr P.N. PASTURES NEW	Jeff	MAGNOLIA HIGH STREET PIDLEY HUNTINGDON CAMBRIDGESHIRE	PE28 3BX	✓
TUR003	T&E TURNER AND SON		THEHOLLIES, BENWICK ROAD DODDINGTON MARCH CAMBRIDGESHIRE	PE15 0TG	
TUR004	TURBINE MOTOR WORKS		UPWOOD AIR PARK, RAMSEY ROAD BURY, RAMSEY HUNTINGDON CAMBRIDGESHIRE	PE26 2RA	
TUR005	MRS TURNER		11 PRINCES STREET RAMSEY HUNTINGDON CAMBRIDGESHIRE	PE26 1JW	
TUR006	MISS TURNER		5 OLD MILL AVENUE WARBOYS HUNTINGDON CAMBRIDGESHIRE	PE28 2TE	
TUR007	MISS TURNER		12 CRICKETERS WAY BENWICK MARCH	PE15 0UU	

Registration	Vehicle	Selected
MV54KXJ	Rover 45 Series 1.6 2004	
BX555KU	LDV MAXUS LWB EH/R CDI 2499 2005	
WM54DMV	FIAT SCUDO D P/V (222) 1868 2005	

- G. If the **New** button was clicked, the following screen will display, allowing for the customer's details to be entered, when the **Add Customer** button is clicked, the new customer record will be created

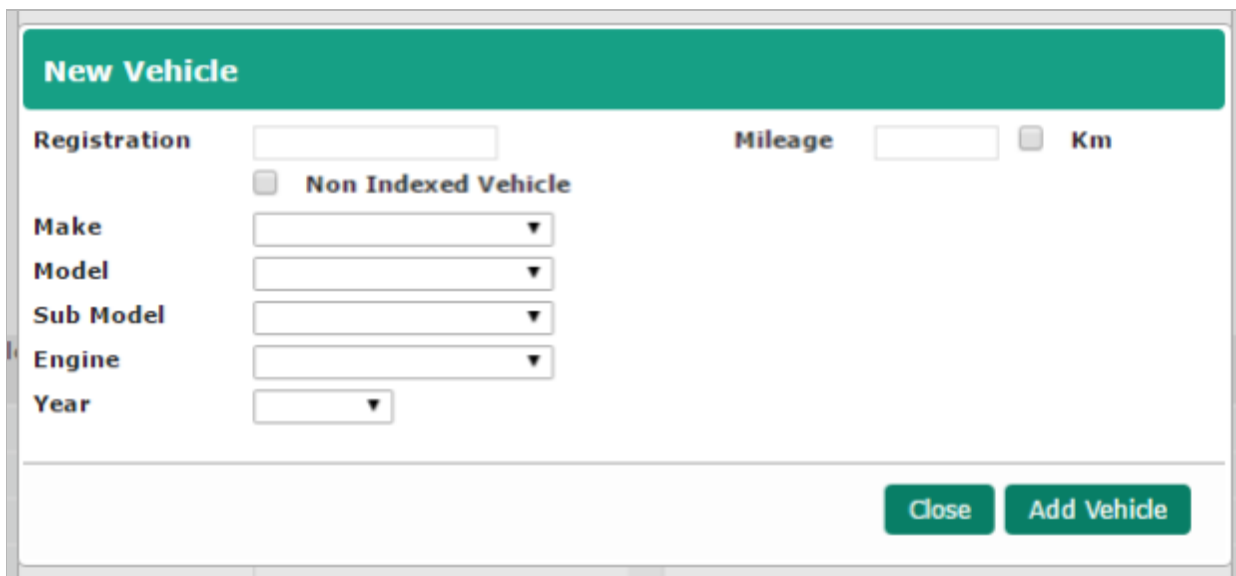


- H. If a vehicle was selected in the previous step, it will automatically populate the vehicle details section. However, a new vehicle can be added using the following process: Enter a VRM into the **Vehicle** box (H1), and then click the **Lookup** button (H2), the vehicle details will automatically display. If the vehicle already exists on the system, click the **Search** button (H3), and then select it from the list, and if the vehicle needs to be entered manually, click the **New** button (H4).



The screenshot shows a form section titled "Vehicle". It contains a text input field for the Vehicle Registration Mark (VRM), a list box for vehicle details, and three buttons: "Lookup", "Search", and "New". Red callout boxes with white text are placed above each element: "H 1" above the VRM input field, "H 2" above the "Lookup" button, "H 3" above the "Search" button, and "H 4" above the "New" button.

- I. If the **New** button is clicked, the **New Vehicle** screen will pop up. Fill out the relevant details, and then click the **Add Vehicle** button to add the vehicle to the database



The screenshot shows the "New Vehicle" form. It has a green header bar with the title "New Vehicle". Below the header, there are several fields: "Registration" (text input), "Mileage" (text input), and a checkbox labeled "Non Indexed Vehicle". There are also dropdown menus for "Make", "Model", "Sub Model", "Engine", and "Year". At the bottom right, there are two buttons: "Close" and "Add Vehicle".

J. When you are happy with the settings, click the **Okay** button to create the appointment

Add Booking

Bay

3

Date

28/10/2016

Time

09:00

MOT Tester

Nathan Fothergill ▼

Labour

▼

Customer

TUR002

MR TURNER

23 WESTFIELD ROAD

RAMSEY

HUNTINGDON

CAMBRIDGESHIRE

PE26 1JR

711695

41221313313

Search

New

Vehicle

A1

Mini

MINI

1.6

2007

Lookup

Search

New

Close

J

Okay

Managing existing diary entries

Deleting appointments

Existing MOT jobs can easily be removed from the diary using by clicking the **Delete** button (A) against it.

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												
10:00												
11:00												
12:00		Turner	YS12DJP Ford Fiesta 2012	NP	1124372							
13:00												
14:00												
15:00												
16:00	Retest											
16:30	Retest											

You will be presented by a prompt, clicking the **Yes** button (B) will delete the entry, whereas clicking the **No** button (C) will return to the diary screen without deleting the entry.

Delete Booking

This will delete the selected booking.

Are you sure you want to proceed?

Yes

No

B

C

Rescheduling appointments


It's possible to easily move an MOT appointment to a different slot, or swap it with another appointment. This can be done using the following process:

- A. Click the **Move** button

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												<input type="checkbox"/>
10:00												<input type="checkbox"/>
11:00												<input type="checkbox"/>
12:00		Turner	YS12DJF Ford Fiesta 2012	NP	1124372			<input type="checkbox"/>				<input type="checkbox"/>
13:00												<input type="checkbox"/>
14:00												<input type="checkbox"/>
15:00												<input type="checkbox"/>
16:00	Retest											<input type="checkbox"/>
16:30	Retest											<input type="checkbox"/>

- B. If you would like to change the technician assigned to the job, this can be changed in the **MOT Tester** dropdown menu (B1). Click the **Assign** button (B2) against the slot you would like to move the appointment to, and the job will be moved

MOT Diary Friday 28 October 2016



Day ▼ 3

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												<input type="checkbox"/>
10:00												<input type="checkbox"/>
11:00		C A AGRICULTURE LTD	KR60KRE NISSAN NAVARA DCI ASENTA 4X4 2010	NP	1124374			<input type="checkbox"/>				<input type="checkbox"/>
12:00		Turner	YS12DJF Ford Fiesta 2012	NP	1124372			<input type="checkbox"/>				<input type="checkbox"/>
13:00												<input type="checkbox"/>
14:00												<input type="checkbox"/>
15:00												<input type="checkbox"/>
16:00	Retest											<input type="checkbox"/>
16:30	Retest											<input type="checkbox"/>

Move Booking

Customer: C A AGRICULTURE LTD

Job: 1124374

MOT Tester: Nathan Fothergill ▼

Please select Assign below to move your booking.

B1 **B2**

- C. If you attempt to move the appointment into a slot that is already populated, the following message will display: Clicking the **Yes** button (C1) will swap the position of the two appointments, whereas clicking the **No** button (C2) will leave the schedule unchanged.

Swap Booking






















This will swap the selected bookings.

Are you sure you want to proceed?

C1 **C2**






















Changing a job's status and marking it as "on-site"

The job associated with an MOT booking can be marked as on or off-site by checking or unchecking the **On-Site** checkbox (A).

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												<input type="checkbox"/>
10:00												<input type="checkbox"/>
11:00												<input type="checkbox"/>
12:00		Turner	YS12DIF Ford Fiesta 2012	NP	1124372							<input type="checkbox"/>
13:00												<input type="checkbox"/>
14:00												<input type="checkbox"/>
15:00												<input type="checkbox"/>
16:00	Retest											<input type="checkbox"/>
16:30	Retest											<input type="checkbox"/>



Updating an MOTs status

The **Status** column on the MOT Diary screen can be used to set and display the MOT's pass or fail status. The column features a dropdown menu (A), where a status can be selected.

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												<input type="checkbox"/>
10:00												<input type="checkbox"/>
11:00												<input type="checkbox"/>
12:00		Turner	YS12DIF Ford Fiesta 2012	NP	1124372							<input type="checkbox"/>
13:00												<input type="checkbox"/>
14:00												<input type="checkbox"/>
15:00												<input type="checkbox"/>
16:00	Retest											<input type="checkbox"/>
16:30	Retest											<input type="checkbox"/>

Viewing the job card associated with a diary entry

The job card linked to a particular diary entry can be opened by clicking the document number in the **Job** column (A).

Time	Name	Customer	Vehicle	MOT Tester	Job	Web	Status	On Site	Assign	Move	Delete	Block
09:00												<input type="checkbox"/>
10:00												<input type="checkbox"/>
11:00												<input type="checkbox"/>
12:00		Turner	YS12DIF Ford Fiesta 2012	NP	1124372							<input type="checkbox"/>
13:00												<input type="checkbox"/>
14:00												<input type="checkbox"/>
15:00												<input type="checkbox"/>
16:00	Retest											<input type="checkbox"/>
16:30	Retest											<input type="checkbox"/>

Automatically updated MOT Due Dates

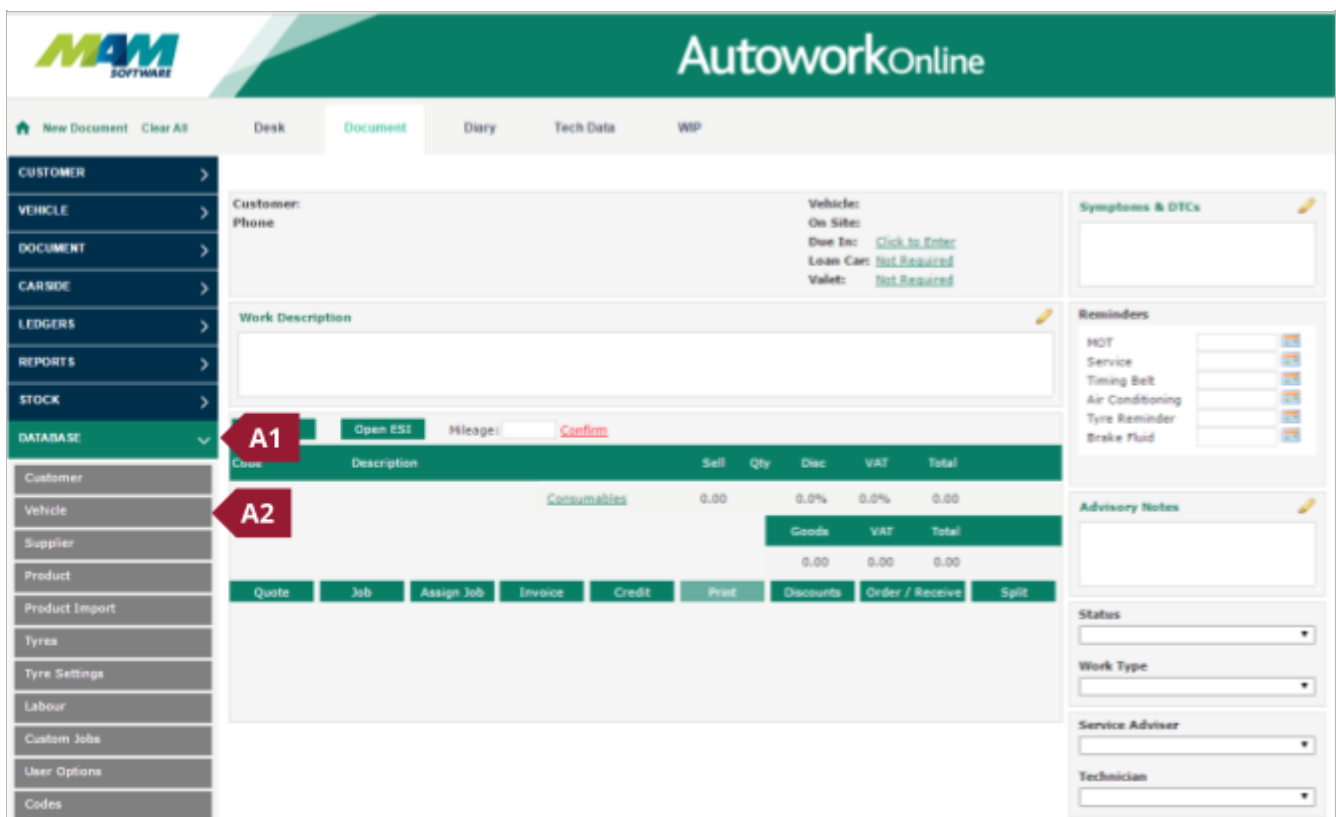
In the latest version of Autowork Online, the **MOT Due Date** (displayed in the **Vehicle** section of the **Database** menu, as well as the **Document** screen) will be automatically updated when the vehicle is retrieved or a VRM is entered into the **Document** or **Vehicle** screens. This service is offered **free of charge**¹.

This will only happen if the field is either completely blank, or if the current date is in the past. This data is retrieved from the VRM data supplier, however, if the vehicle is less than three years old, this will automatically be calculated based on the date of first registration plus three years.

Forcing a manual update of the data

In some cases, you may want to query the due date again. It is possible to update the due date to the one held by the data provider, even if there is a current valid date. This is achieved using the following process:

- A. From the **Database** menu (A1), select the **Vehicle** option (A2)



The screenshot shows the AutoworkOnline software interface. The top navigation bar includes 'New Document', 'Clear All', 'Desk', 'Document', 'Diary', 'Tech Data', and 'WIP'. The left sidebar contains a 'DATABASE' menu with options: Customer, Vehicle, Supplier, Product, Product Import, Tyres, Tyre Settings, Labour, Custom Jobs, User Options, and Codes. The 'DATABASE' menu is highlighted with a red arrow labeled 'A1'. The 'Vehicle' option is selected, highlighted with a red arrow labeled 'A2', and its sub-menu is visible. The sub-menu includes 'Open ES', 'Mileage', 'Confirm', 'Consumables', 'Goods', 'VAT', and 'Total'. The main area displays a table with columns: Case, Description, Sell, Qty, Disc, VAT, and Total. The table shows a single row for 'Consumables' with values: 0.00, 0.0%, 0.0%, 0.00. Below the table are buttons: Quote, Job, Assign Job, Invoice, Credit, Print, Discounts, Order / Receive, and Split. The right sidebar contains sections: 'Symptoms & DTCs', 'Reminders' (with a list of reminders: MOT, Service, Timing Belt, Air Conditioning, Tyre Reminder, Brake Fluid), 'Advisory Notes', 'Status', 'Work Type', 'Service Adviser', and 'Technician'.

¹ Although the MOT due date lookup is free, if the vehicle is not already on file, a charge will be incurred for the VRM lookup

- B. Enter the vehicle's **Registration**
- C. Click the **Lookup MOT Due Date** button (C1), the **MOT Due Date** field (C2) will be overwritten with the correct date

Vehicle Database

Registration
YS12DJF

☐ Non Indexed Vehicle
[Refresh VRM Data](#)

Make
Ford

Model
Fiesta

Sub Model

Engine
1.4

Year
2012

Body Type
Hatchback

Fuel Type
Petrol

Transmission
Manual

Gears
5

Mileage
0

☐ KM

Doors

Colour
ALUMINIUM/SILVER

Trim

Mark

Usual Driver

Tyre Size (Front)

Tyre Size (Rear)

Chassis Number
WF0JXXGAJJCG37075

Engine Number
CG37075

Engine Code
SPJA/SPJC

Type

Co2 / E Rating
130,E5

Original Reg

Manufacture Date
MM / YYYY

First Reg Date
28/06/2012

Purchase Date

Warranty Expiry Date

Warranty Type

Vehicle ID Code

Radio Code

Immobiliser Code

Key Code

Valves
16

Exact CC
1388

Camshaft

Cylinders

Weight

Fuel Delive

Notes

Add New Note

Customer
TUR012
Miss Turner

☐ Power Steering

☐ CAT

☐ ABS

☐ Air Con

☐ DPF

☐ TPS

☐ Scrapped

MOT
29/06/2017

Service

Timing Belt

Air Conditioning

Tyre Reminder

Brake Fluid

Update

Cancel

Transfer

Change VRM

Search

Delete

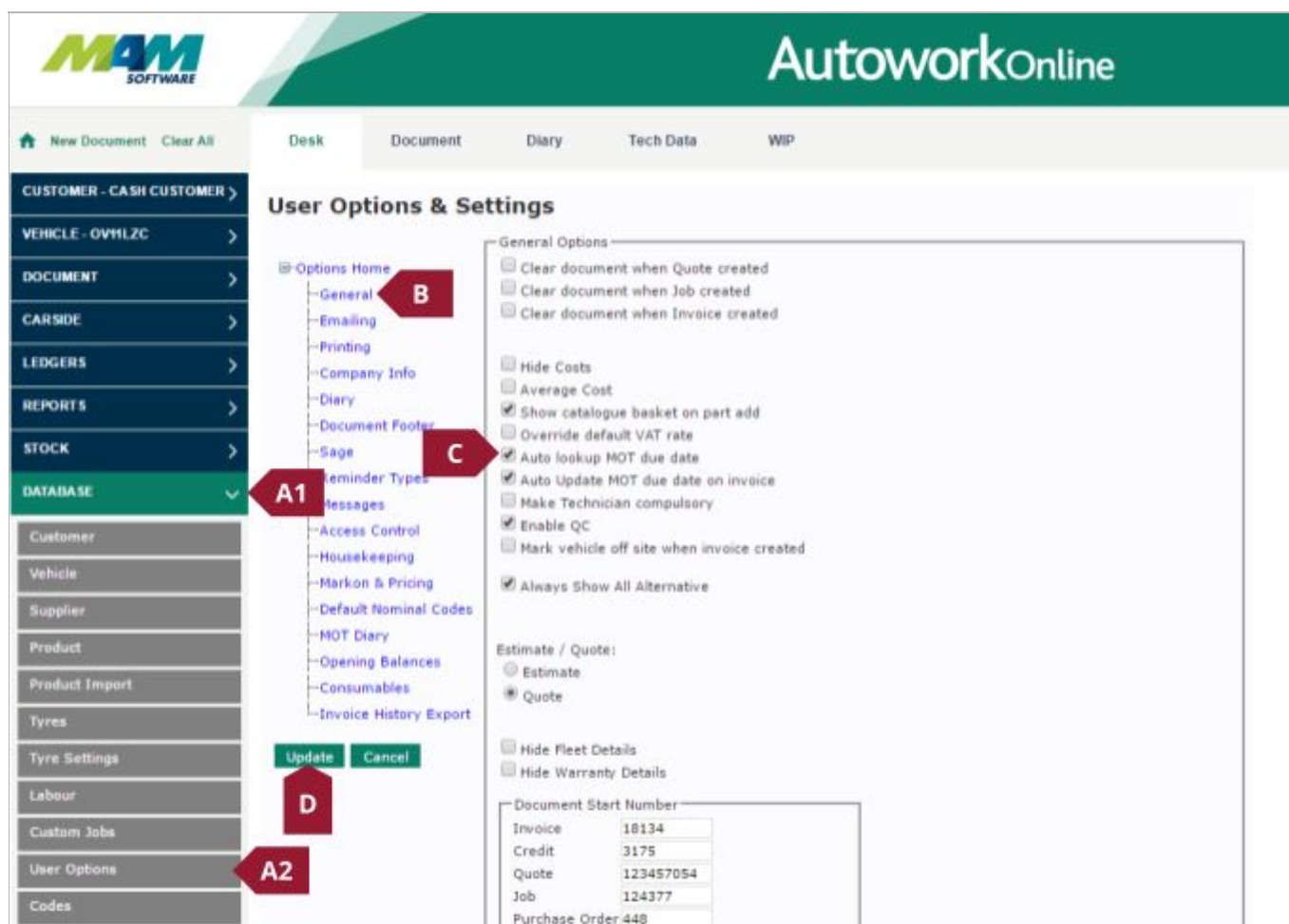
Print

Lookup MOT Due Date

Disabling the feature

If this feature is not required, it is possible to turn it off using the following process:

- Click the **Database** menu (A1), and then the **User Options** menu item (A2)
- Click the **General** option
- Uncheck the **Auto lookup MOT due date** checkbox
- Click the **Update** button



The screenshot displays the 'AutoworkOnline' interface. On the left sidebar, the 'DATABASE' menu is expanded, and 'User Options' is selected. The 'General' option is selected under 'User Options'. The 'Auto lookup MOT due date' checkbox is checked. The 'Update' button is highlighted. The main area shows various settings including 'General Options', 'Estimate / Quote', and 'Document Start Number'.

VRM lookups - electric vehicle support

The VRM lookup feature has been improved, and is now able to look up electric vehicles correctly.

Registration:

Refresh New Search

Nissan Leaf
0.0 Hatchback 2011
Electric AUTOMATIC
WHITE

VRM:
NISSAN LEAF EV AUTO (MK1
(ZE0A))
Engine: 06092A EM61
107 BHP
VIN: JN1FAAZE0U0005697

Body Type: Hatchback

Fuel Type: Electric

Transmission: AUTOMATIC

Co2 / E Rating: 0,

Registered: 17/05/2011