



Autowork Online Using Deferred work

Driving Business Performance

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Introduction

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

Benefits

- Reduce losses – defer work rather than simply delete it entirely
- Drive sales – automatically remind customers of their deferred work

Using Deferred work

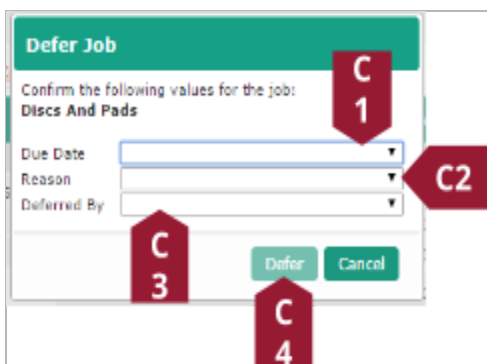
Deferring work

The process to defer work is as follows:

- A. Once a job group has been added to the document, and then either a job or estimate generated, clicking the **Delete** button in the job header will trigger a prompt
- B. In this prompt, clicking the **Delete** button (B1) will delete the whole job group, clicking the **Defer** button (B2) will defer the job, and clicking the **Cancel** button (B3) will not delete the item



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

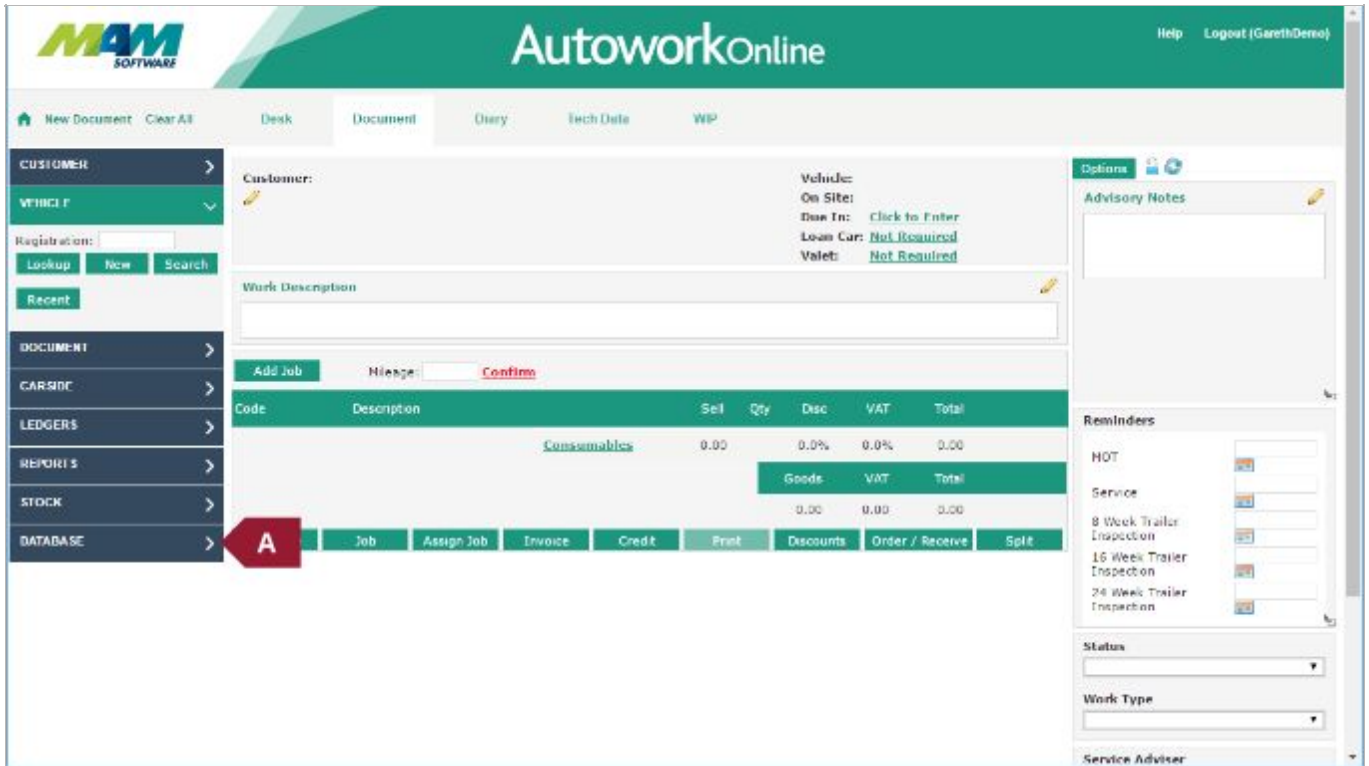


Deferred job reason codes

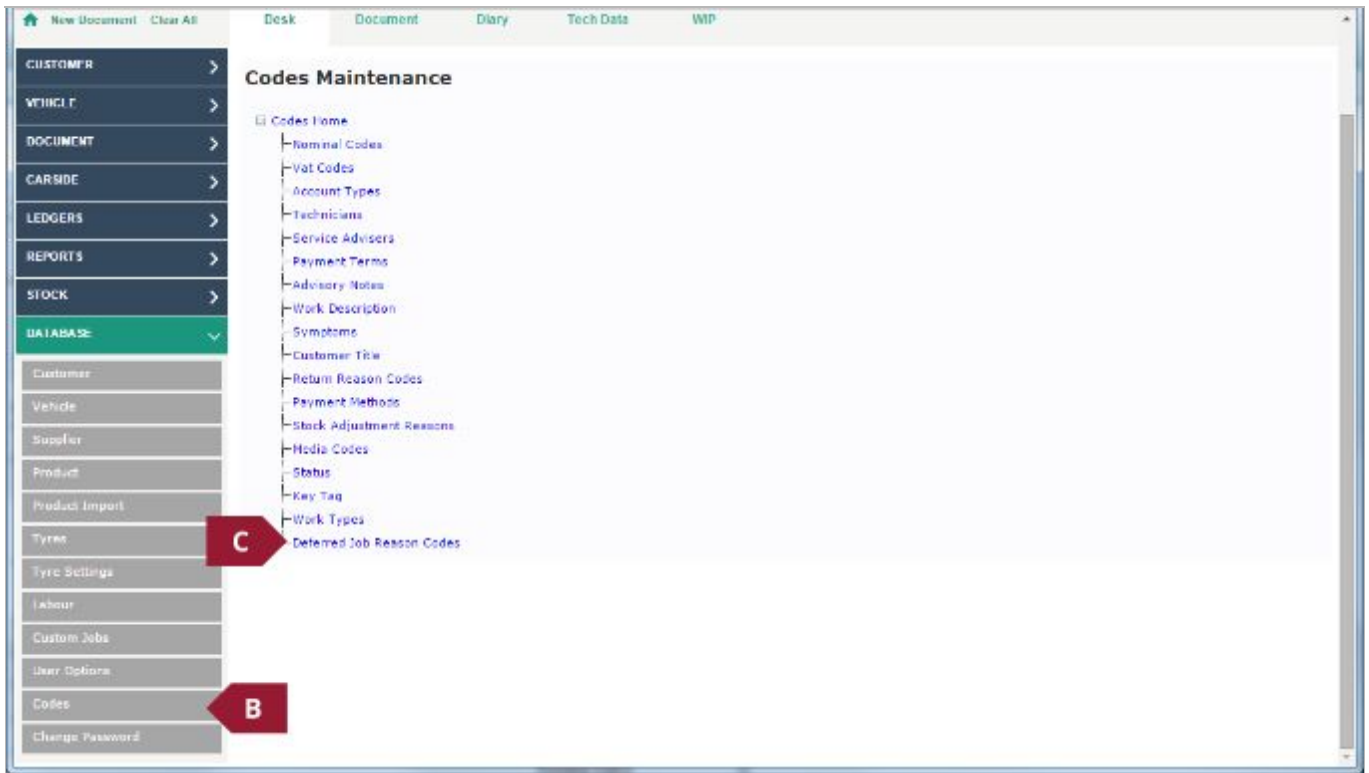
Deferred job reason codes can be customised as required, this is done using the following process:

Adding a new code

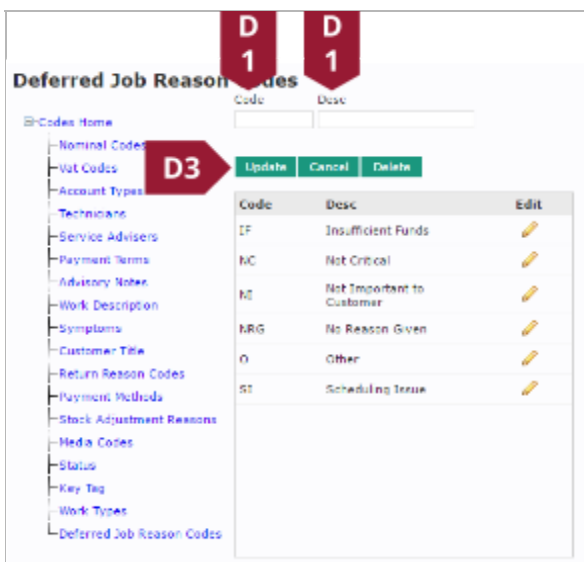
- A. Click the **Database** menu button



- B. Click the menu option for **Codes**
- C. Click the link for **Deferred Job Reason Codes**

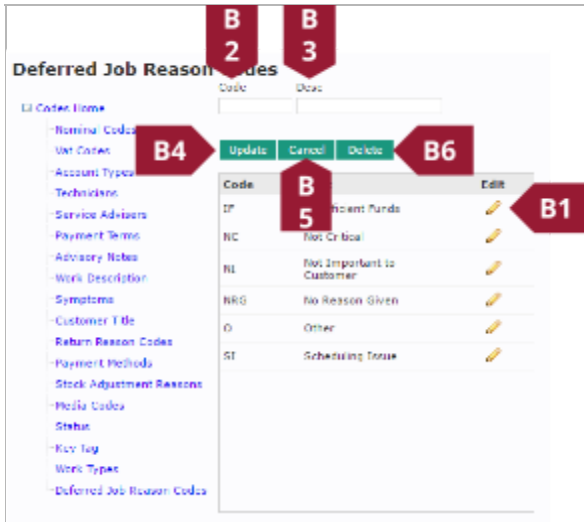


- D. Enter a code and description into the **Code** (D1) and **Desc** (D2) text fields respectively, then click the **Update** button (D3) to confirm the changes.



Modifying or deleting an existing code

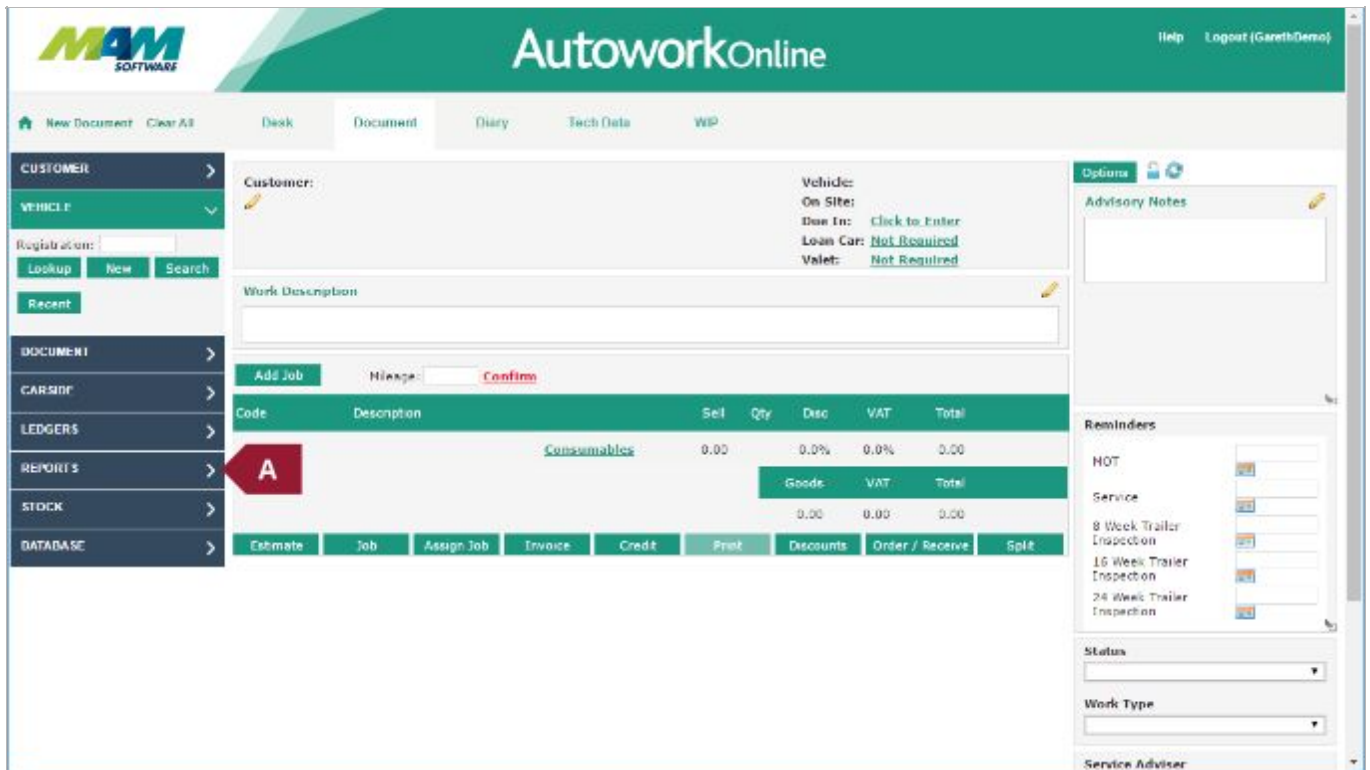
- A. Access the Deferred job reason codes screen, as per steps A to C in the [Adding a new code](#) instructions
- B. Click the **Edit** button (B1) against the code that you would like to edit, modify the contents of the **Code** (B2) and **Desc** (B3) text fields, and then click the **Update** (B4) button to make the changes. Alternately, the **Cancel** button (B5) can be clicked to reject the changes, or the **Delete** button (B6) can be clicked to delete the code entirely.



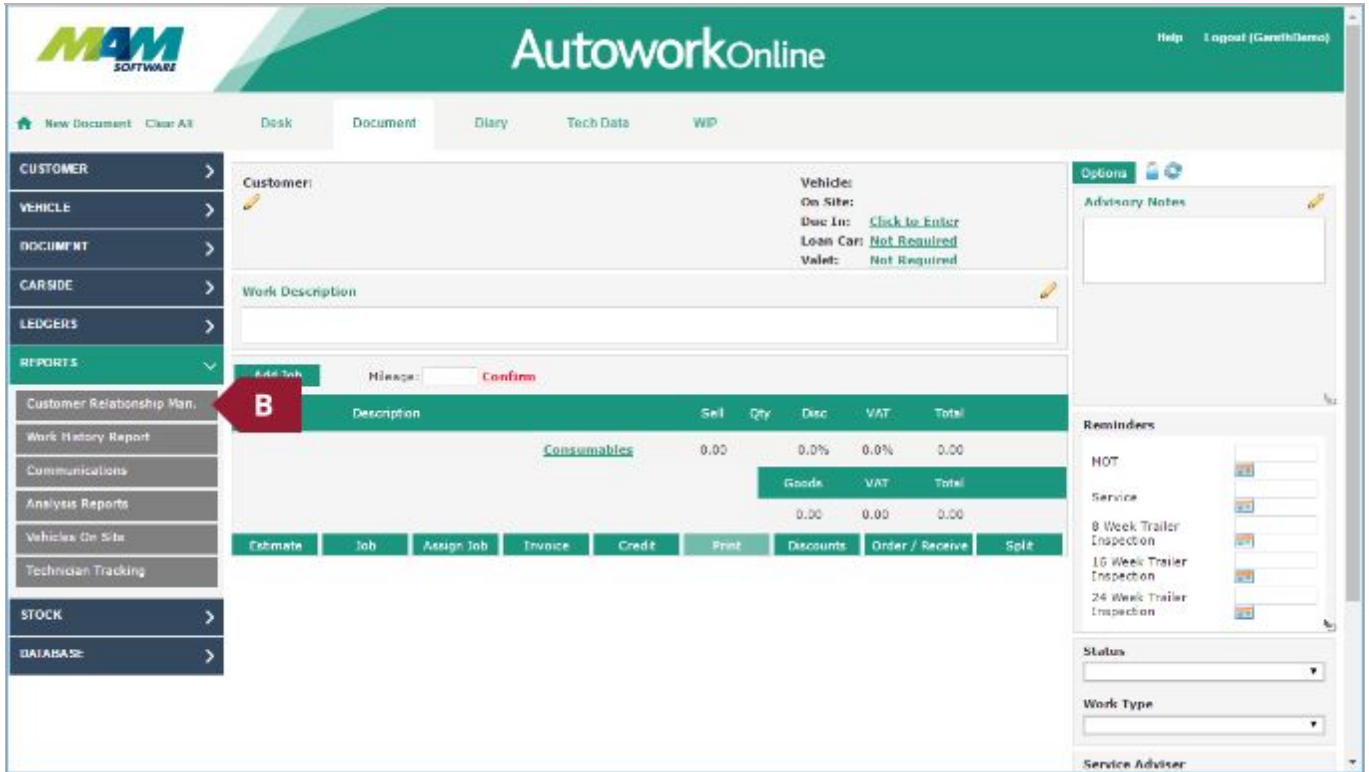
Reporting on deferred work

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

- A. Click the **Reports** menu button



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



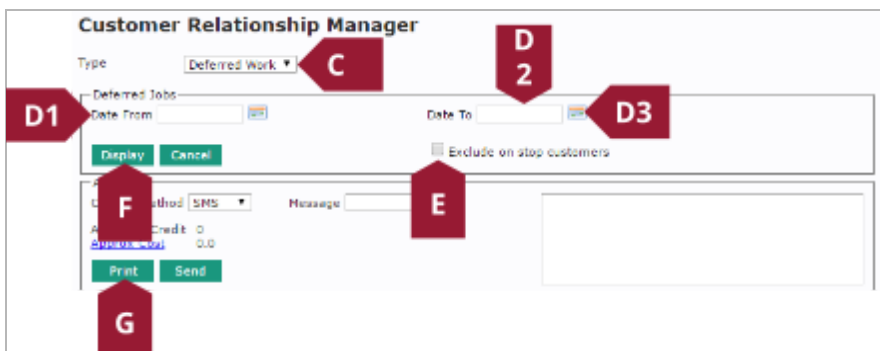
C. Select the option for **Deferred work** from the **Type** dropdown menu

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

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

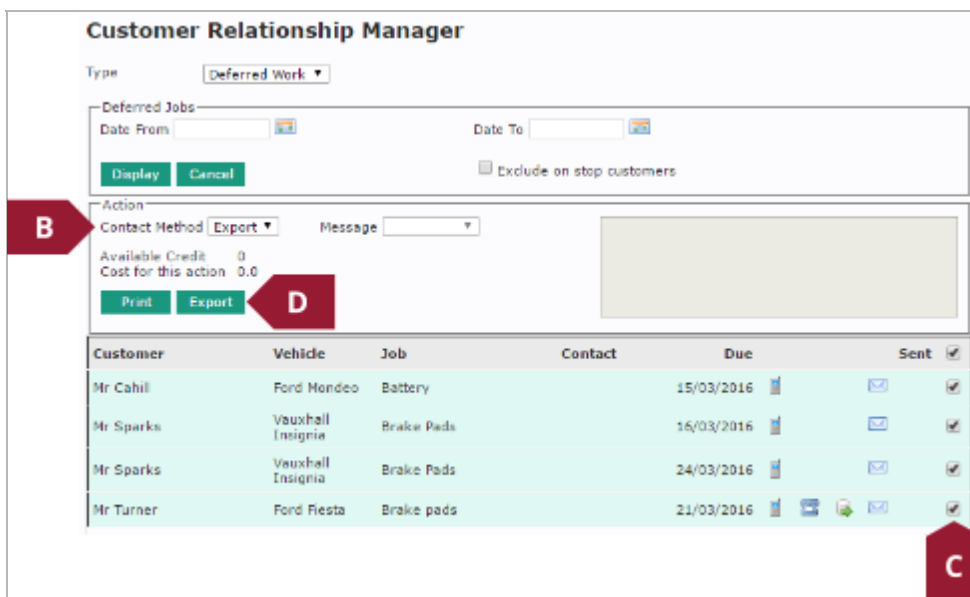
F. Click the **Display** button to display the report on screen.

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



Exporting a list of deferred work

- A. Generate a deferred work report as per steps A to F of the [Reporting on deferred work](#) section
- B. From the **Contact Method** dropdown menu, select the option for **Export**
- C. Check the checkbox in the **Sent** column for any customer you would like to export data for
- D. Click the **Export** button, this will generate and download a comma separated (CSV) file. This will most likely be in the **Downloads** folder, which can be found in **My Computer** (this may be called **Computer**, or **This Computer** depending on your version of Windows). The file should open in Microsoft Excel or similar when double-clicked.



Customer Relationship Manager

Type: **Deferred Work**

Deferred Jobs

Date From: Date To:

Exclude on stop customers

Action

Contact Method: **Export** Message:

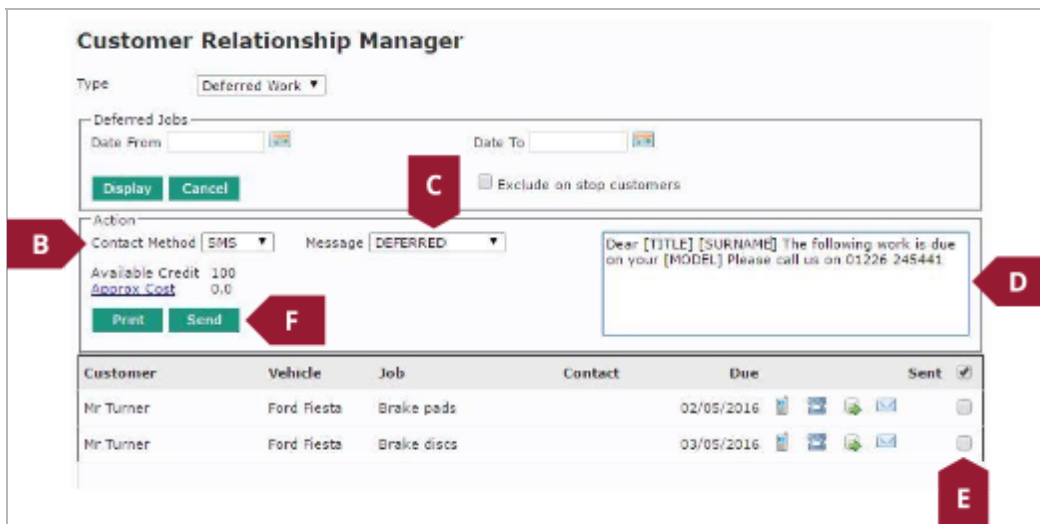
Available Credit: 0
Cost for this action: 0.0

Customer	Vehicle	Job	Contact	Due	Sent
Mr Cahill	Ford Mondeo	Battery		15/03/2016	<input checked="" type="checkbox"/>
Mr Sparks	Vauxhall Insignia	Brake Pads		16/03/2016	<input checked="" type="checkbox"/>
Mr Sparks	Vauxhall Insignia	Brake Pads		24/03/2016	<input checked="" type="checkbox"/>
Mr Turner	Ford Fiesta	Brake pads		21/03/2016	<input checked="" type="checkbox"/>

Sending emailed or SMS reminders

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

- A. Generate a deferred work report as per steps A to F of the [Reporting on deferred work](#) section
- B. From the **Contact Method** dropdown menu, select the required option. Please note that the **Phone** option simply notes that the customer has been contacted (see step F), as to avoid duplicate messages should you choose to contact the customer by phone.
- C. From the **Message** dropdown menu, select the option for **DEFERRED**.
- D. *Optionally, amend the text in the **Message** text field. Note that any text in brackets ([]) will be replaced, for example, [SURNAME] will automatically be changed to the specific customer's last name.*
- E. Check the checkbox in the **Sent** column for any customer you would like to send a message to. Any customers with a checkbox already ticked have already been contacted, unchecking the box and then checking it again will cause the message to be resent.
- F. Finally, click the **Send** button to send the messages. Please note that the button will be relabeled as **View** when the **Phone** option is used, this will display a list of the customers' contact details.



The screenshot shows the 'Customer Relationship Manager' interface. At the top, there's a 'Type' dropdown set to 'Deferred Work'. Below this is a 'Deferred Jobs' section with 'Date From' and 'Date To' input fields, 'Display' and 'Cancel' buttons, and an 'Exclude on stop customers' checkbox. A red arrow labeled 'C' points to the 'Display' button. The 'Action' section includes a 'Contact Method' dropdown set to 'SMS', a 'Message' dropdown set to 'DEFERRED', and a text area containing a message template: 'Dear [TITLE] [SURNAME] The following work is due on your [MODEL] Please call us on 01226 245441'. A red arrow labeled 'D' points to the text area. Below the text area are 'Print' and 'Send' buttons, with a red arrow labeled 'F' pointing to the 'Send' button. At the bottom, there is a table with columns: Customer, Vehicle, Job, Contact, Due, and Sent. The 'Sent' column has checkboxes. A red arrow labeled 'E' points to the 'Sent' column. The table contains two rows for 'Mr Turner' with jobs 'Brake pads' and 'Brake discs', both due on 02/05/2016 and 03/05/2016 respectively.

Customer	Vehicle	Job	Contact	Due	Sent
Mr Turner	Ford Fiesta	Brake pads		02/05/2016	<input type="checkbox"/>
Mr Turner	Ford Fiesta	Brake discs		03/05/2016	<input type="checkbox"/>

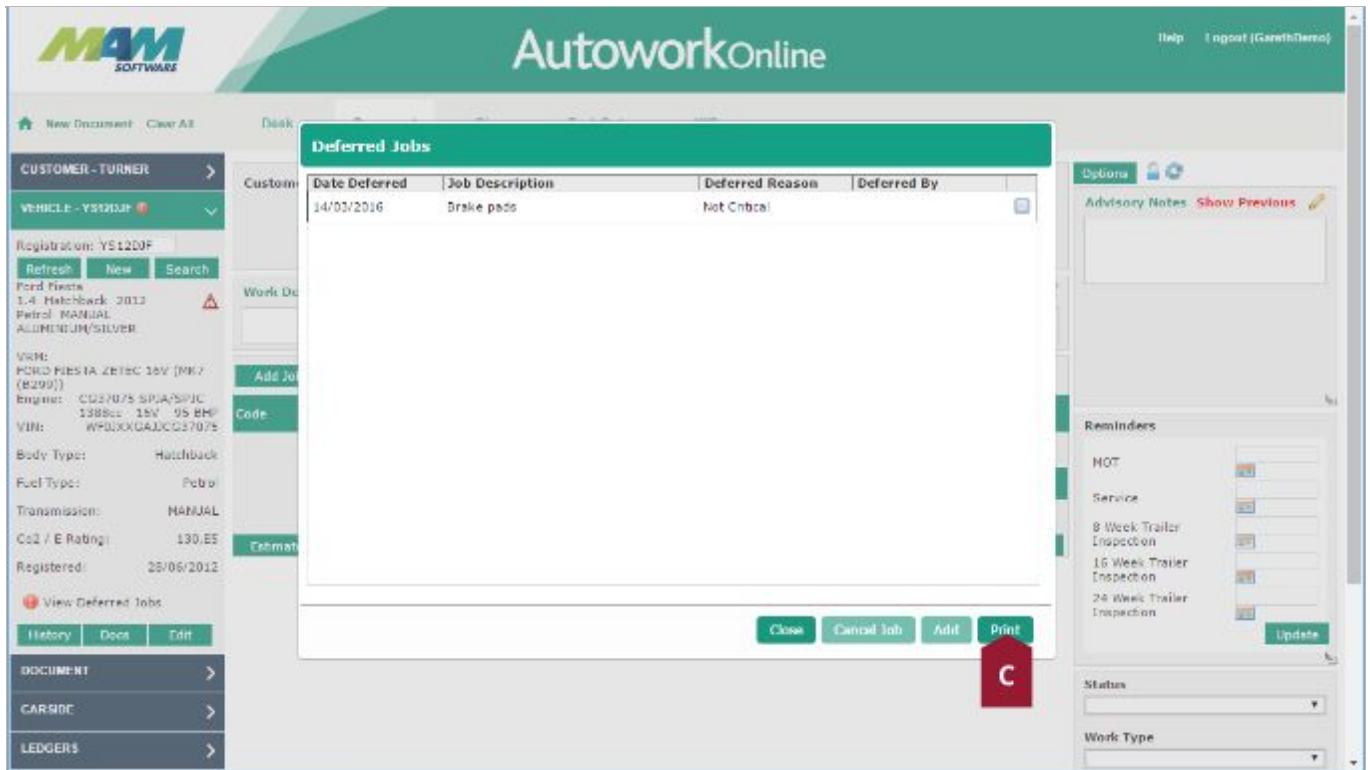
Viewing, recovering, or deleting a specific customer's deferred work

Viewing deferred work

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

The screenshot displays the AutoworkOnline web application interface. At the top, the MAM SOFTWARE logo and 'AutoworkOnline' title are visible, along with 'Help' and 'Logout (GarethDemo)' links. The main navigation bar includes 'New Document', 'Clear All', and tabs for 'Desk', 'Document', 'Diary', 'Tech Data', and 'WP'. The 'CUSTOMER - TURNER' section shows 'Customer: TUR001 - Mr Robert Turner'. The 'VEHICLE - YS12DJF' section features a red circle with an exclamation point (A) next to the registration number. Below this, vehicle details are listed: 'Ford Fiesta 1.4 Hatchback 2012', 'Petrol MANUAL', 'ALUMINIUM/SILVER', 'VRM: PORD FIESTA ZETEC 16V (MK7 (B299))', 'Engine: CG37075 SPDA/SPIC', '1388cc 15V 95 BHP', 'VIN: WFOUXXGAJCG37075', 'Body Type: Hatchback', 'Fuel Type: Petrol', 'Transmission: MANUAL', 'Co2 / E Rating: 130.E5', and 'Registered: 28/08/2012'. A 'View Deferred Jobs' link (B) is highlighted with a red arrow. The 'Work Description' field is empty. Below it, an 'Add Job' button is shown with 'Mileage: 0' and a 'Confirm' button. A table with columns 'Code', 'Description', 'Self', 'Qty', 'Disc', 'VAT', and 'Total' is present, with a row for 'Consumables' showing values of 0.00, 0.0%, and 0.0%. The right sidebar contains 'Options', 'Advisory Notes', 'Reminders' (listing 'HOT', 'Service', and '8 Week Trailer Inspection'), and 'States' and 'Work Type' dropdown menus.

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



Recovering deferred work

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

Deleting deferred work

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

