Autowork Online
Using job groupings and refunds

Driving Business Performance

Contents

Introduction

A new feature has been added to Autowork Online version 173 which will allow the grouping of jobs and labour charges within a document. For example, the parts and labour for a particular job could all be grouped together in a job group. This makes the document clearer and easier to understand for the customer, as they can see at a glance what a particular job costs. The new version also increases productivity and efficiency, as it allows whole jobs groups to be deferred if required.

Benefits

- Increased efficiency – the new layout results in a quicker, easier to use workflow

- Cleaner, easier to read documents – all parts and labour for a task are grouped together

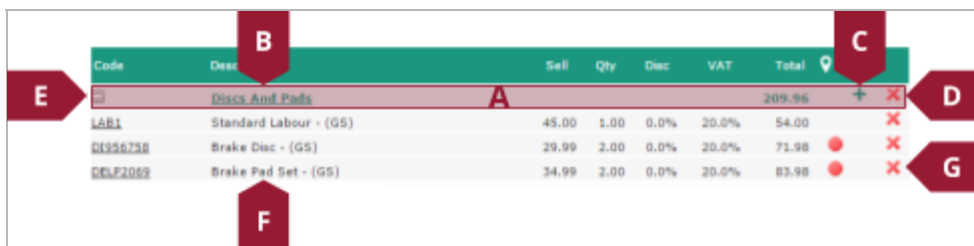- Easily reverse an invoice if it has been raised in error

Using job groupings

Job group types

There are several different types of job group available, these are:

- Blank - Inserts a new blank job group

- Jobs - adds a pre-defined custom job

- Labour - adds a labour charge

- Repair times - add a OEM-supplied labour time from the catalogue

- Service - add a service schedule

- Parts - add a part

- Quick parts - quickly add part from a list of commonly sold items

- Catalogue - add a part from a catalogue lookup

- Tyre sales - look up and add tyres to the document

Please note, even though the new feature has been added, all of the above items (other than "Blank") work in an almost identical way to the old version of Autowork Online. It would be possible to use the new system in a way that is very similar to the old system. This would be achieved by creating a new job group, and then manually adding parts and labour to it. Even though it is possible to use the system in this way, it is not recommended, as making full use of the new features will prove more efficient once they have been learned.

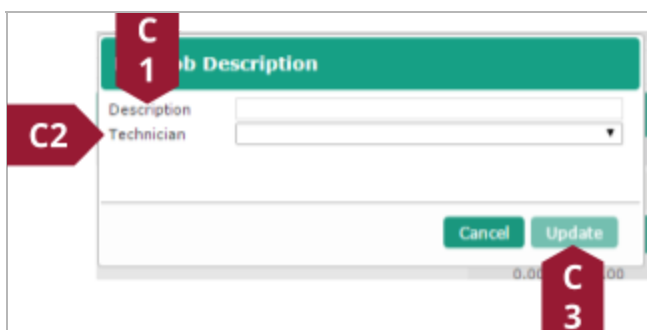## Job grouping screen elements explained

A. Job header
B. Job description
C. Add button - adds a new item to the job
D. Delete/defer job button - deletes/defers the whole job
E. Minimise button - collapses the job
F. Line description
G. Delete item button - deletes the selected item only

Creating a new job group

A. In the new system, the Add Job button replaces the separate buttons for **Jobs**, **Labour**, **Repair Times**, **Service**, **Parts**, **Quick Parts**, **Catalogue**, and **Tyre Sales**. Clicking the **Add Job** button (A1), will open a menu (A2), clicking any option within the menu, and then going through the same process as on the old system will add a job grouping of the desired type. For example, selecting the **Jobs** option, then choosing a pre-set quick job for changing brake pads and discs will add a job containing the required parts and labour.
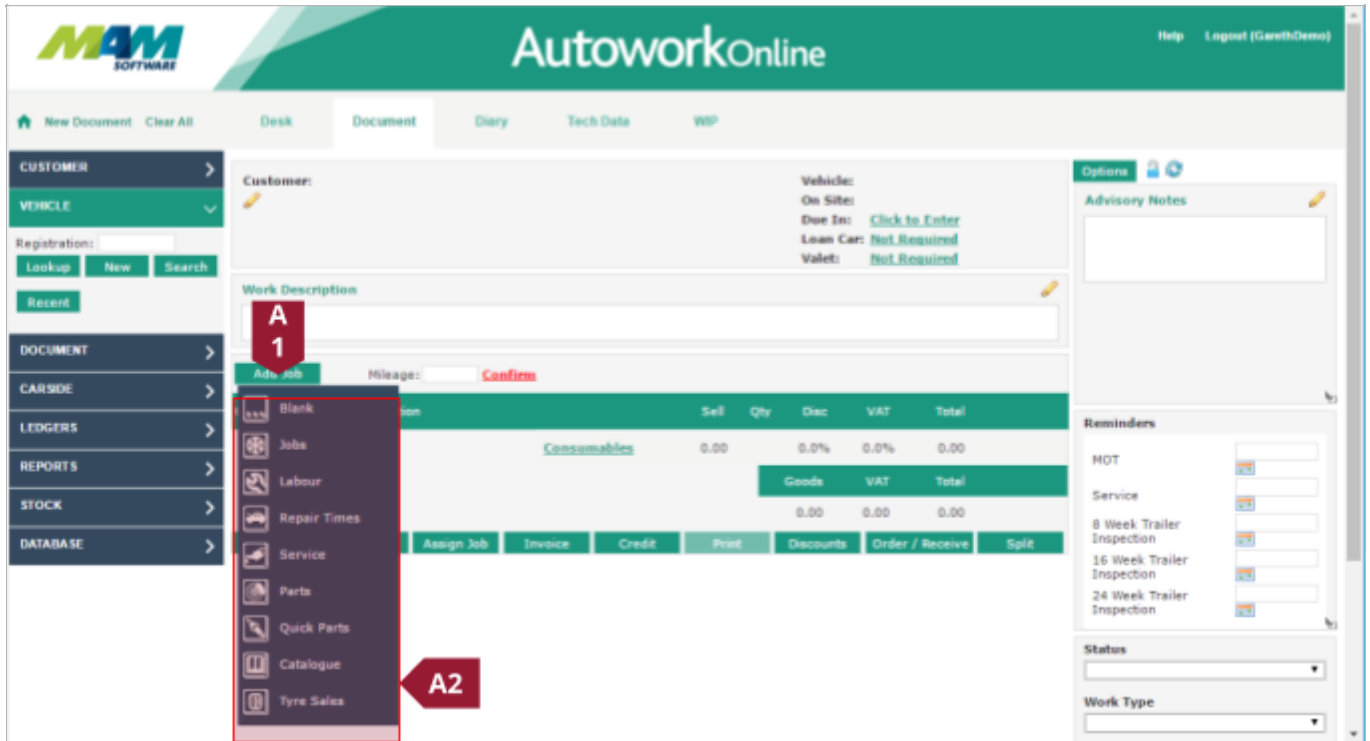
B. The only exception to the above is the new Blank option, this adds a blank job group, which can be added to using the instructions in the [Adding an item to an existing job group section](). To add the new blank job, click the **Add Job** button (A1), and then select **Blank** (A2) from the menu

C. Enter a description for the job into the **Description** text field (C1), select the technician assigned to that particular job from the **Technician** dropdown menu (C2), and then click the **Update** button (C3) to add the blank job.

Adding an item to an existing job group

To add an item to an existing job, simply click the **Add** button in the **Job Header** (see the *Job grouping screen elements explained* section for details) this will open the **Add Job** menu, and items can be added using the same process as in the *Creating a new job group instructions*.

Please note: Since the new **Package Jobs** feature was added in version 175, it is no longer possible to add a **Job** in this way. This is because the Package job must be kept on its own separate job group in order for the pricing to be correctly calculated.

Moving an item from one job group to another

An item can be moved from one job group to another by simply clicking it, and then dragging it to the required job group.

Renaming a job/assigning a job to a different technician

The name and technician assignments against a job group can be changed by simply clicking the **Job Name** link in the job header (see the *Job grouping screen elements explained* section for details). This will open the same screen as in point C of the *Creating a new job group instructions*, and the details can be amended in the same way.

Removing an item from a job group

To remove an item from a job group, simply click the **Delete Item** button (see the *Job grouping screen elements explained* section for details), and then either click the **OK** Button to delete it, or the **Cancel** button to go back.

Deferring an entire job group

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. 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 (see the *Job grouping screen elements explained* section for details) 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.
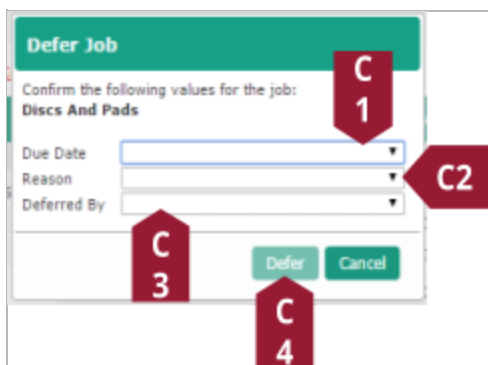

Please refer to the *Deferred work* documentation for further information on setting up and using this feature.

Issuing a refund

In some cases, a customer invoice may be marked as "paid" in error. It is now possible to quickly and easily refund the payment from the document screen. This automatically reverses the payment, and marks the invoice as "unpaid". This is achieved using the following process:

A. Click the **Document** menu button (A1), then select the **Invoice Search** menu item (A2)
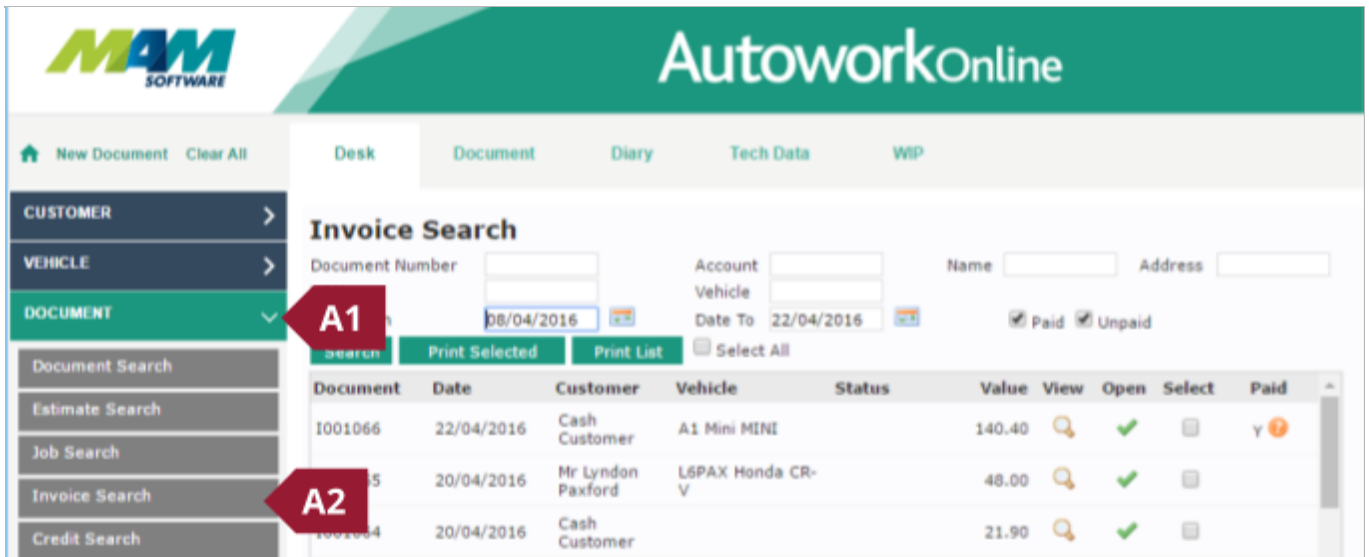
B. Enter the required search criteria (B1), then click the **Search** button (B2)

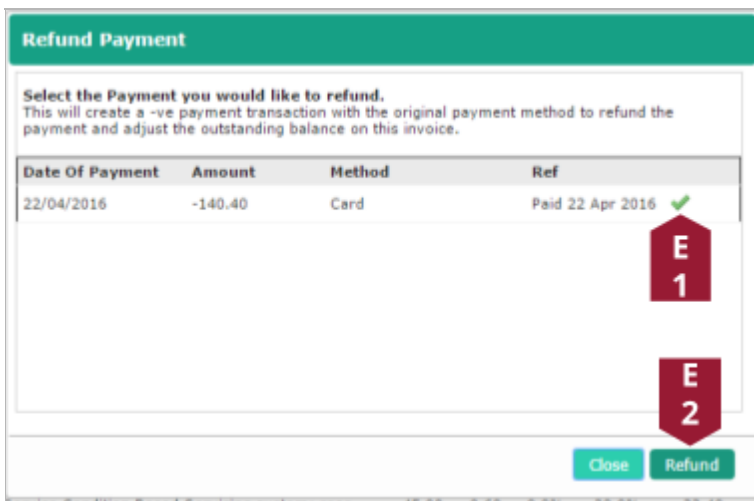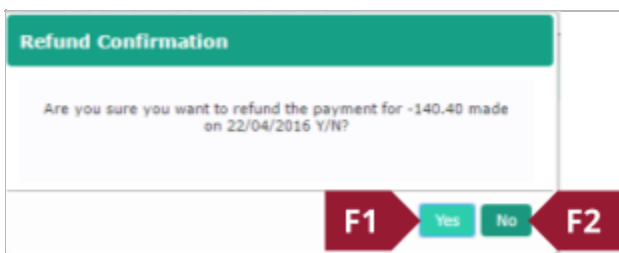C. Click the **Open** button against the document you would like to refund
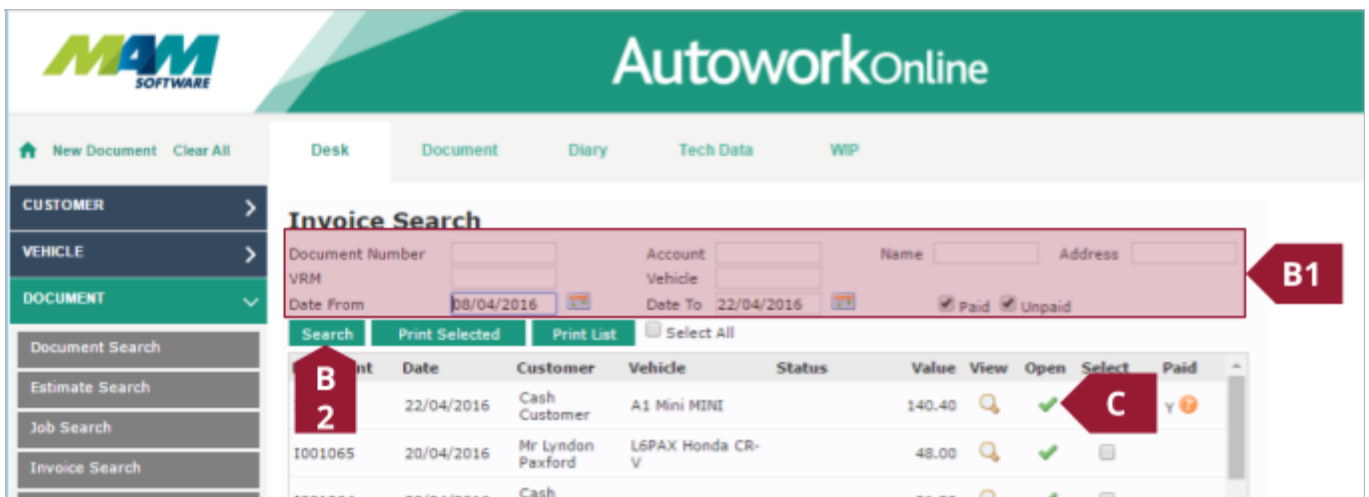
D. Click the **Refund** button

E. Click the **Select** button (E1) against the payment you would like to refund, then click the **Refund** button (E2)

F. Confirm the payment details, then click the **Yes** button (F1) to confirm the refund, or the **No** button (F2) to abort it

The payment will now be refunded, and the invoice marked as unpaid.