

Autowork Online -
Work in progress
(WIP) setup guide

Driving Business Performance

Contents

Contents	2
Introduction	3
Benefits	3
WIP screen elements explained	4
Setting up WIP	5
Document status codes	5
View templates	8
Creating a new template	8
Editing an existing template	12
Adding or removing status codes	12
Rearranging status code panes	12
Optional features	13
Key tags	13
Creating new key tags	13
Editing an existing key tag	14
Deleting an existing key tag	15

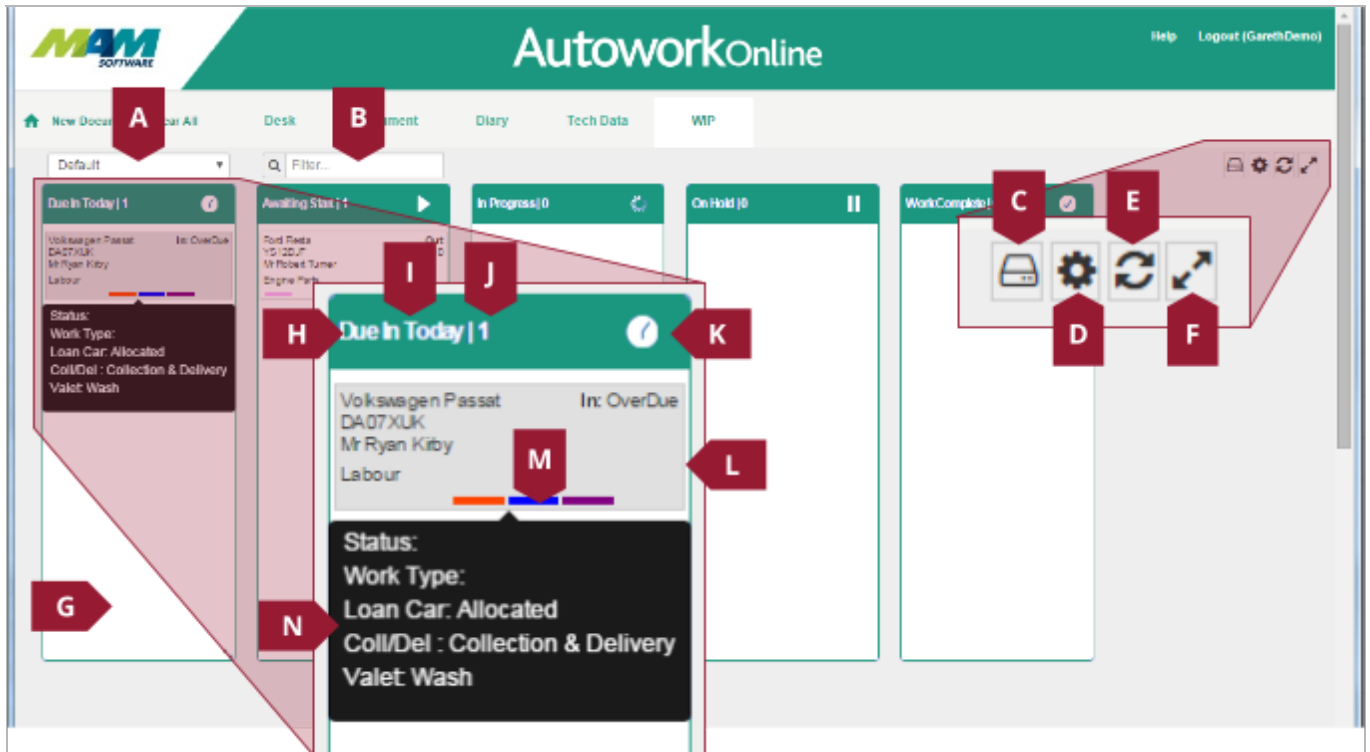
Introduction

The Autowork Online **W**ork **i**n **P**rogress (WIP) tab allows you to easily view information on currently outstanding jobs and invoices. The documents are sorted into a set of customisable columns, one for each particular status, and the status of a job can quickly be changed by simply dragging and dropping it with your mouse. The WIP screen also offers selectable view templates, these are fully user-customisable, and can be used to set a selection of status codes specific to a particular job role.

Benefits

- Customisable views - see the status of all documents relevant to you at a glance
- Simple, clean user interface - easily and efficiently manage the status of jobs
- Automatic key tagging facility - easily keep track of your customers' keys
- Valeting options - automatically advise staff where a vehicle needs to be valeted

WIP screen elements explained



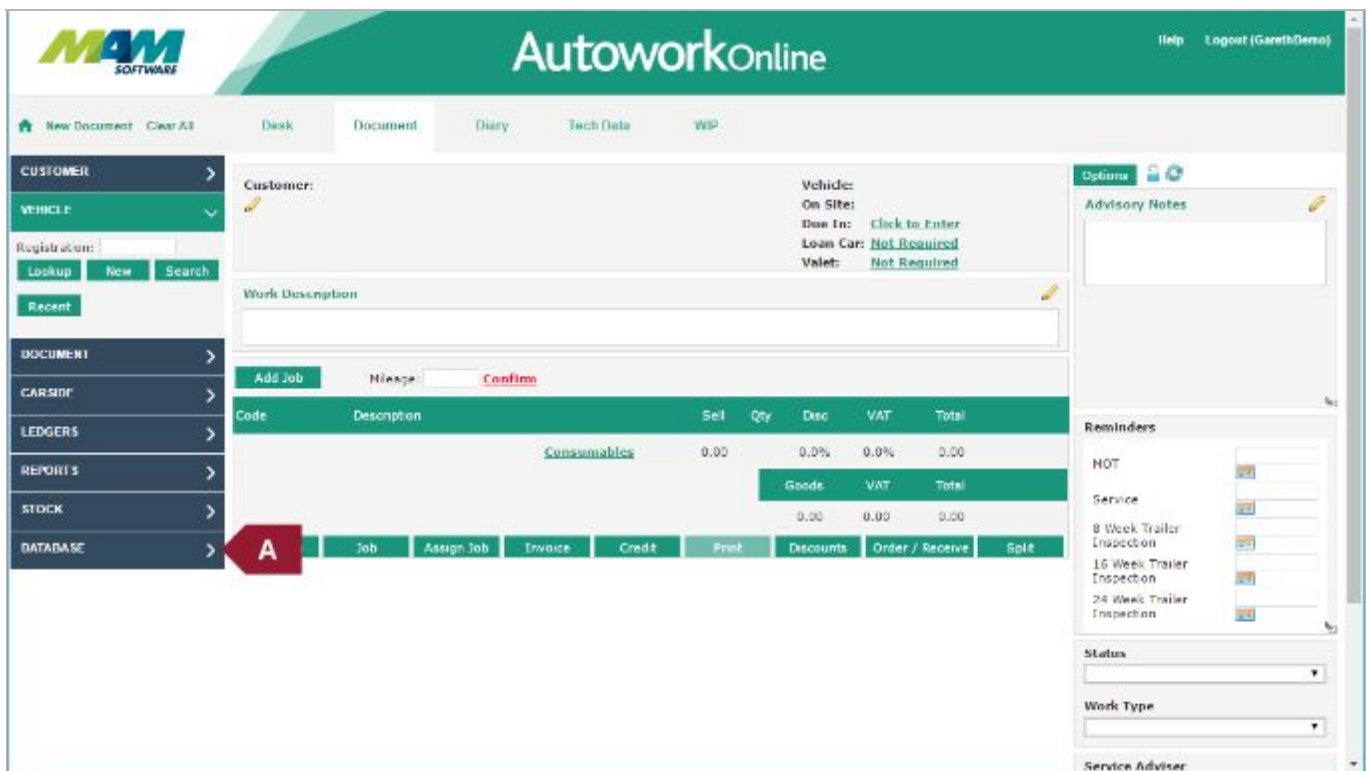
- A. WIP template selection dropdown menu
- B. Filter text field - can be used to search on various fields, for example, a customer's name
- C. WIP template settings button - access the WIP template settings
- D. Settings menu button - select which status codes will display in the selected WIP view
- E. Refresh button
- F. Fullscreen button
- G. Status code pane header - contains the status code name (H), the number of items that currently have that status (I), and status code icon (J)
- K. Document - contains the details of a job or invoice
- L. Status colours - show the current status of the document, from left to right these are: Overall status code, valeting option, loan car option, and collection option.
- M. Document details popup - shows various extra details for the job when the user rolls their mouse over the status colours

Setting up WIP

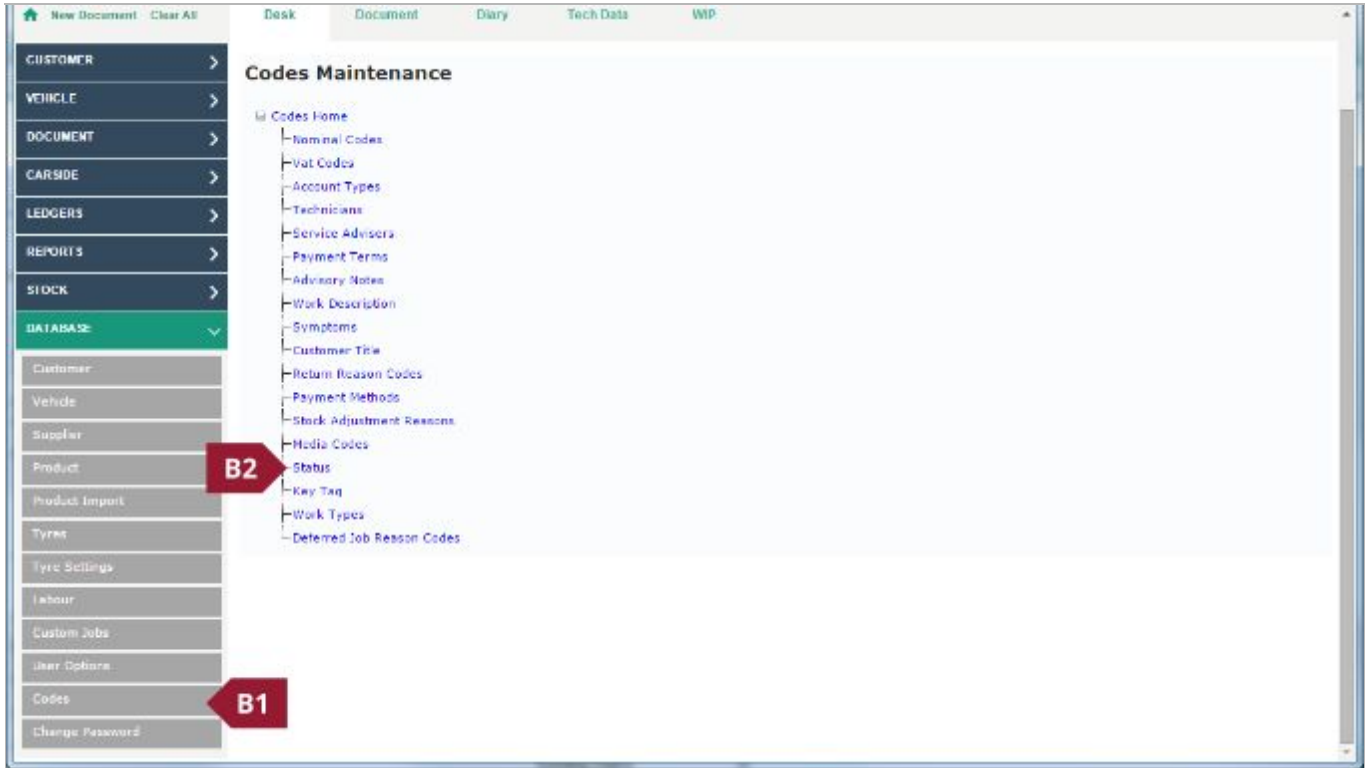
Document status codes

In order to work correctly with WIP, document status codes must have a WIP Category assigned to them. The process to do this is as follows:

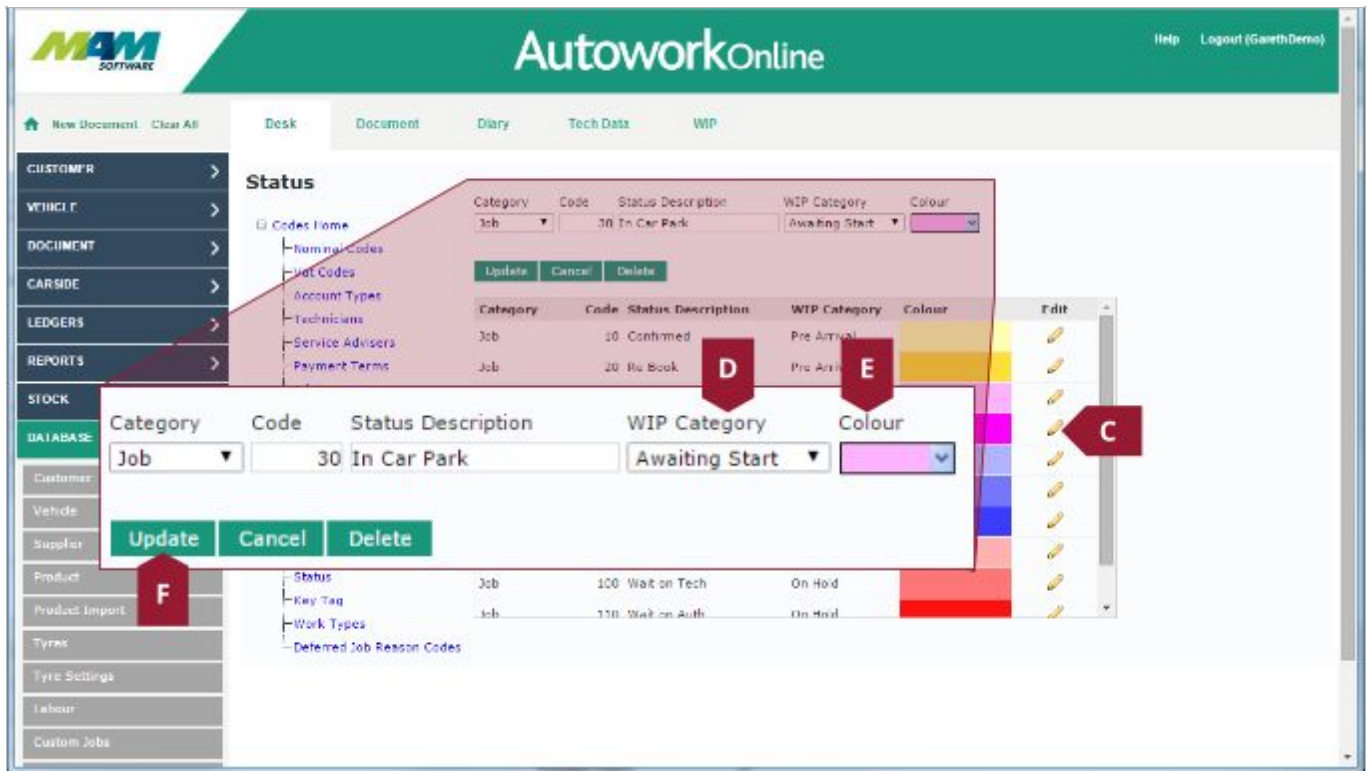
- A. Click the **Database** menu button.



B. Click the **Codes** (B1) menu item, and then the **Status** (B2) link.



- C. Click the **Edit** button against the code you would like to modify.
- D. Select an option from the **WIP Category** dropdown menu.
- E. Make a selection from the **Colour** dropdown menu, this will be used to indicate the status within the WIP screen
- F. Click the **Update** button to apply the changes



View templates

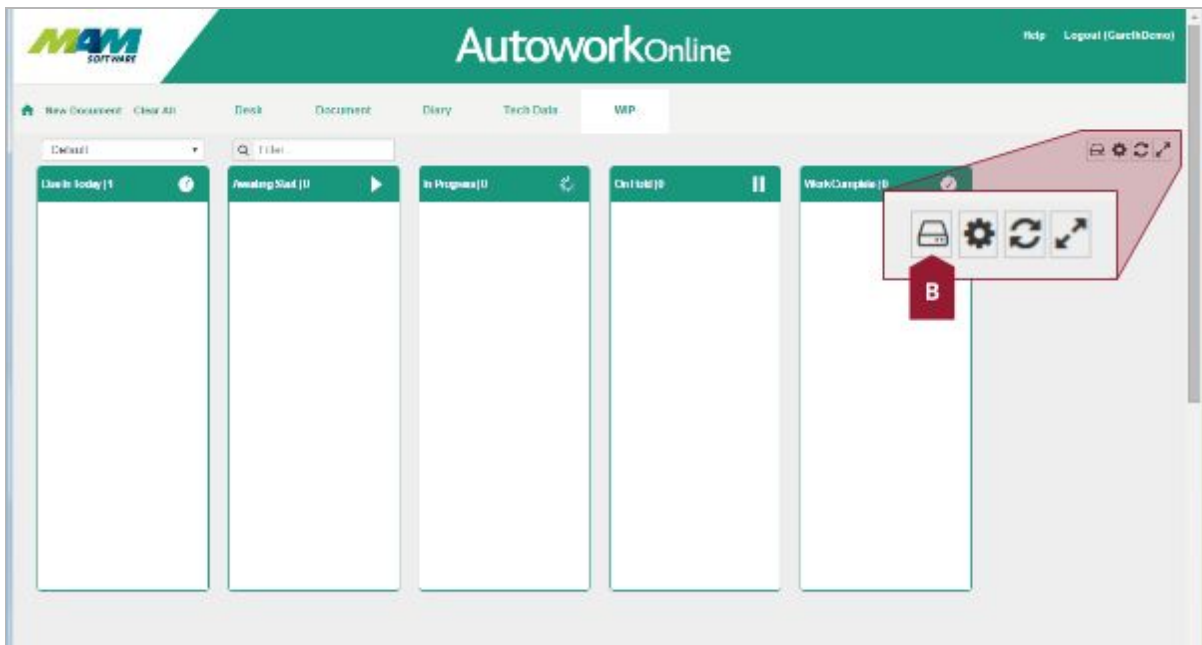
A view template is used to define the status codes visible to a user in a certain job role, and also how they are presented.

Creating a new template

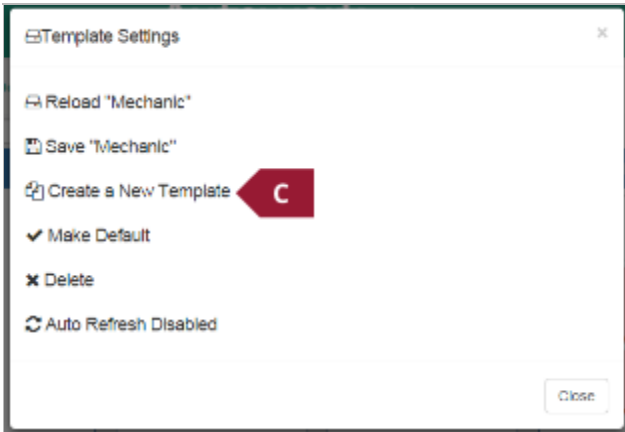
- A. From the main screen, click the **WIP** tab.



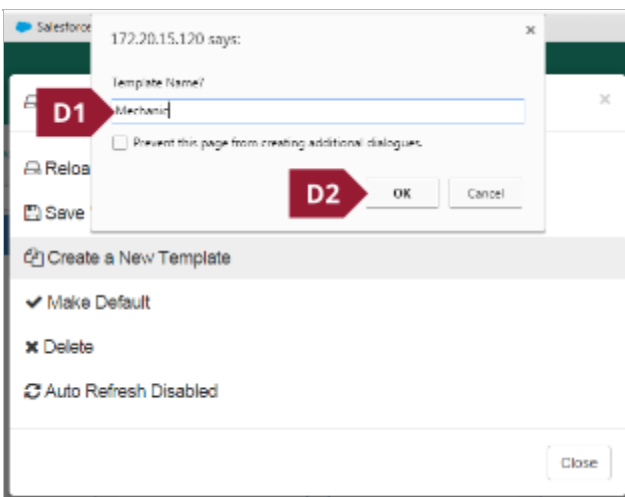
- B. Click the **Template Settings** button, located in the upper right



C. Click Create the **New Template** link

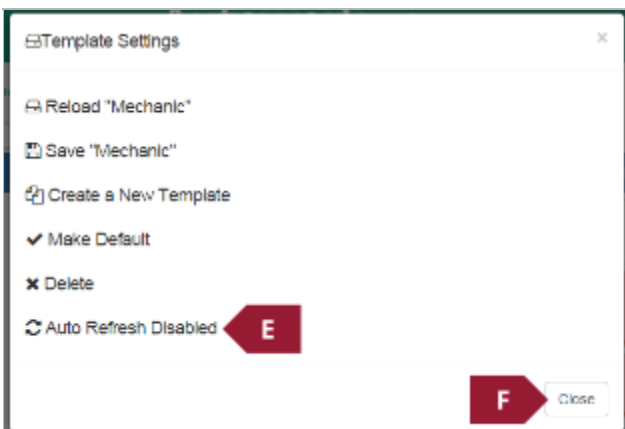


D. Enter a job role into the **Template Name** text field (D1), for example "Mechanic", then click the **OK** button (D2)

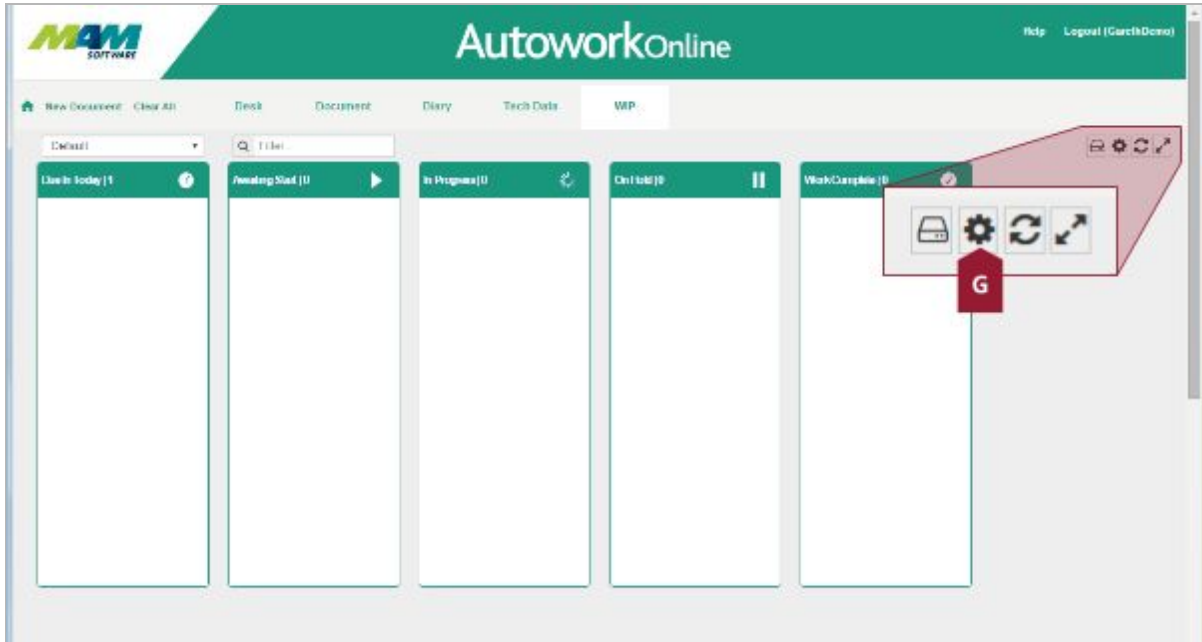


E. *Optionally, click the **Auto Refresh Disabled** link to enable automatic refreshing of the WIP screen at 60 second intervals*

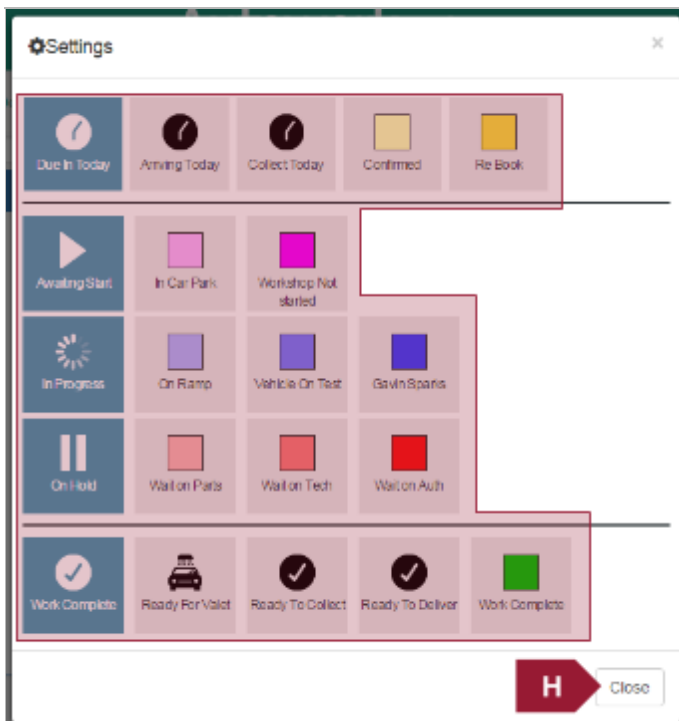
F. Click the **Close** button



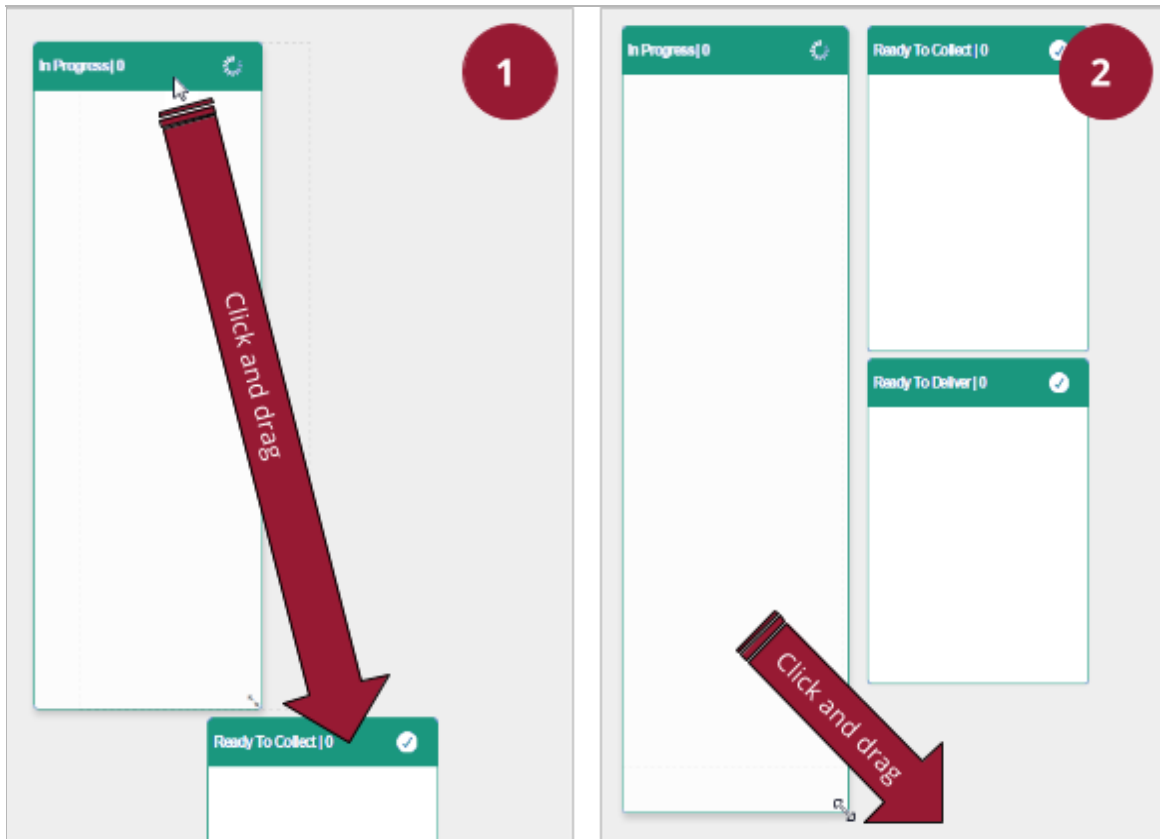
G. Click the **Settings** button in the upper right of the screen



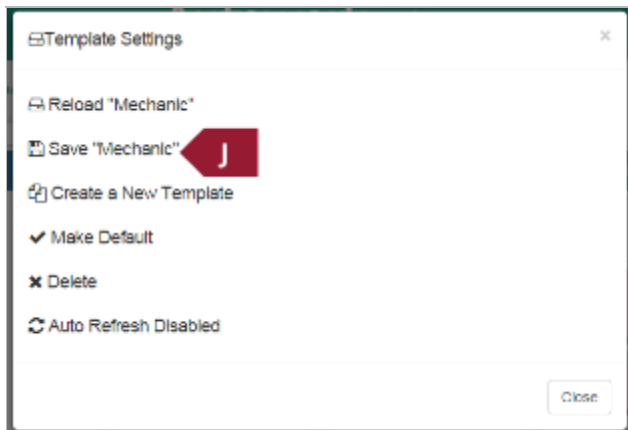
H. Click any of the statuses you would like to show in the currently selected template. Any statuses that are highlighted in blue will display on the WIP screen for this template. When you are happy with the selected statuses, click the **Close** button.



I. The next screen will allow you to set the layout of the WIP screen for the selected template. The panes for each status code can be moved by left-clicking and dragging their headers (1), and can be resized by left-clicking and dragging their bottom-right hand corner (2).



- J. Once you are happy with the layout, click the **Template Settings** button ([see step B](#)), and then click **Save <template name>**.



Editing an existing template

Adding or removing status codes

Statuses can be added and removed from the WIP screen by performing [steps G and H in the above *Creating a new template section*](#).

Rearranging status code panes

To rearrange already existing status code panes, you can simply click and drag the header to move, and click and drag the lower-left hand corner of the box to resize it, [as per step I of the *Creating a new template section*](#).

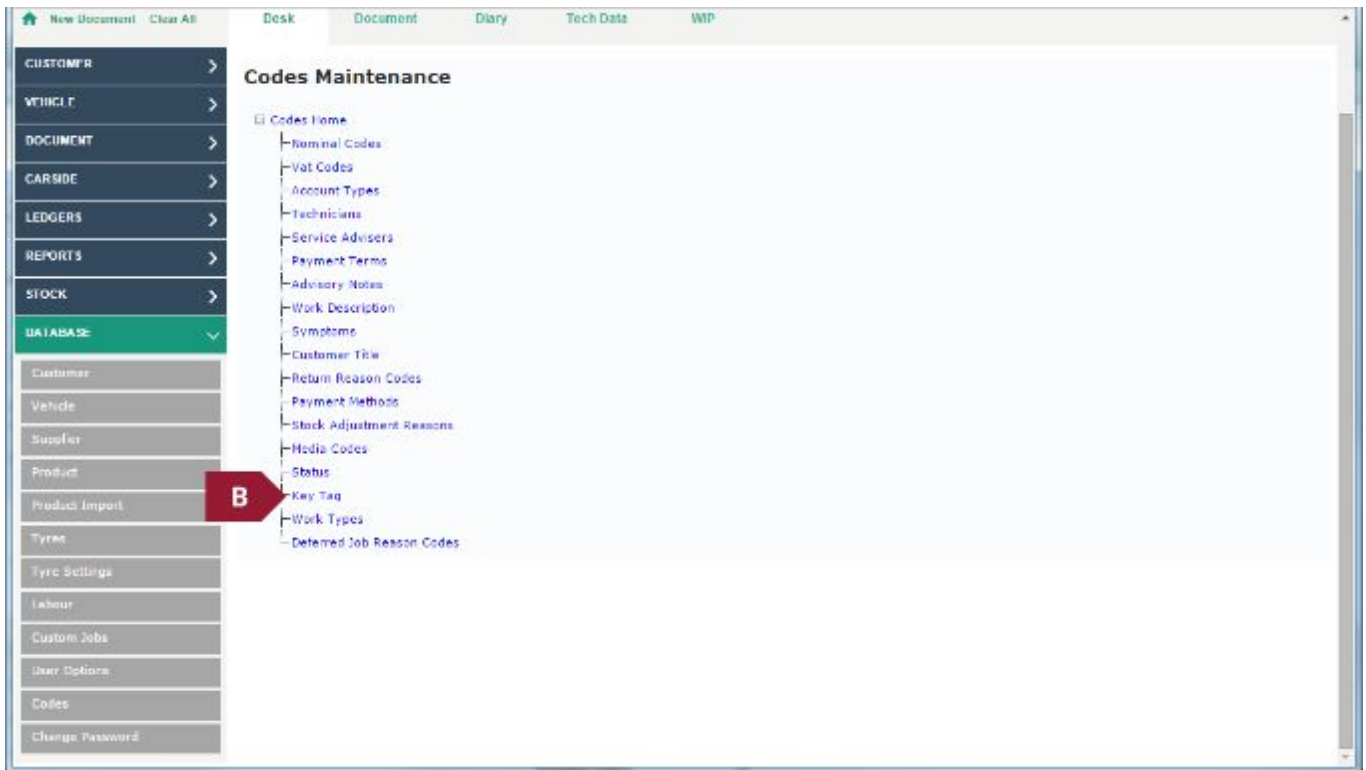
Optional features

Key tags

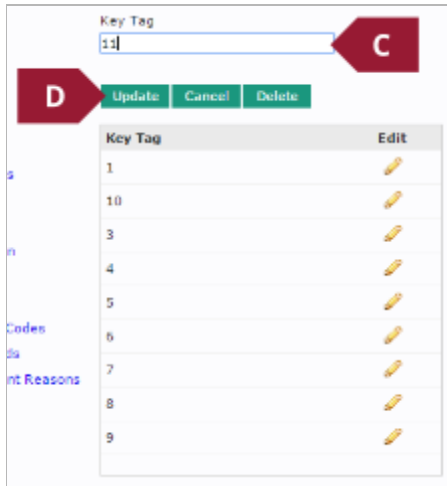
Key tags allow the operator to assign a numbered tag to the customer's keys while the vehicle is on site, allowing them to be easily retrieved when the customer returns.

Creating new key tags

- A. Click the **Database** menu button, then click the **Codes** menu item, [as per steps A and B1 of the Document status codes section](#).
- B. Click the **Key Tag** link



- C. Enter a reference into the **Key Tag** text field (this can be up to four characters long).
- D. Click the **Update** button to save the changes



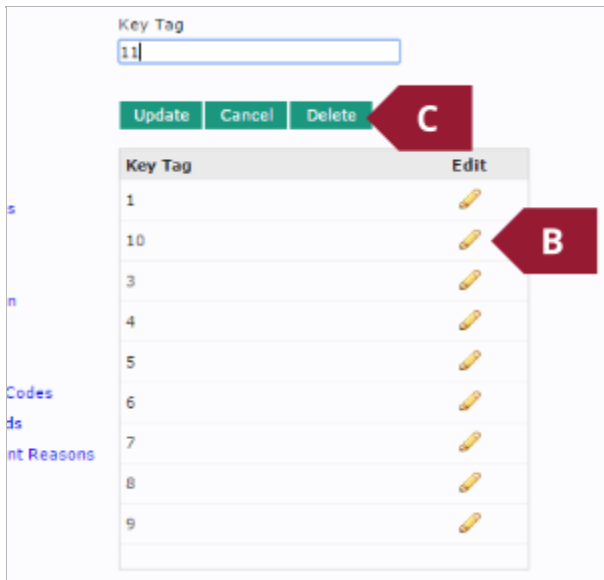
Editing an existing key tag

- A. Access the **Key Tag** menu, [as per steps A and B in the above *Creating new key tags section*](#).
- B. Click the **Edit** button against the code that you would like to edit.
- C. Modify the code in the **Key Tag** text field (C1), and click the **Update** button (C2) when you are happy with the changes.



Deleting an existing key tag

- A. Access the **Key Tag** menu, [as per steps A and B in the above *Creating new key tags section*](#).
- B. Click the **Edit** button against the code that you would like to edit.
- C. Click the **Delete** button.



- D. If you are sure that you would like to delete the key tag, click the **OK** button at the prompt (D1), If you would like to cancel the deletion, then click the **Cancel** button (D2).

