

# Autowork Online -Work in progress (WIP) setup guide

**Driving Business Performance** 



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# Introduction

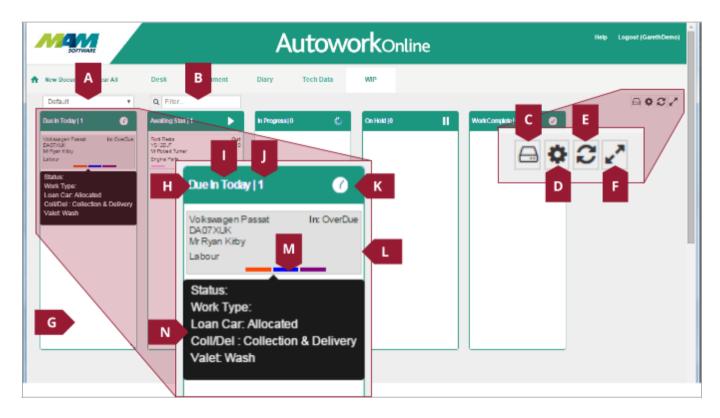
The Autowork Online **W**ork **in P**rogress (WIP) tab allows you to easily view information on currently outstanding jobs and invoices. The documents are sorted into a set of customisable columns, one for each particular status, and the status of a job can quickly be changed by simply dragging and dropping 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.

SOFTWARE	P		A	utowo	orka	Dnl	line				Help	Logout (Garel	bDemo)
A New Document Clear All	Desk	Document	Diary	Tech Data	WP								
CUSTOMER > VEHICLE  Registration: Lookup New Search Recent	Customer:	tron					Vehicle: On Site: Due In: Loan Car Valet:	n Not Re		/	Options 🔒 🕢 Advisory Notes		0
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REPORTS > STOCK > DATABASE >		Job Assi	ign Job 🛛 Irwo	ice Credit	Prol		Goode 0.00 Descounts	VAT 0.00 Order:	Total 0.00 / Receive	Split	Service 8 Week Trailer Inspection 16 Week Trailer Inspection		
											24 Week Trailer Enspection Status Work Type		•
											Service Adviser		•



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

New Document Clear All	Desk	Document	Diary	Tech Data	WIP	
	Codes	Maintenance				
VEHICLE	in the second					
DOCUMENT	Godes H	ome nal Codes				
CARSIDE >	-vat o					
LEDGERS >	Tech	niciana				
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Cudomer	EV.025	m Reason Codes				
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Supplar		k Adjustment Reason a Codes				
Product	B2 Stat					
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Tyres		Types med Job Reason Cod				
Tyre Settings	1					
Labour						
Custom Jobs						
Jaar Optione	_					
Codes	B1					
Change Password						



- 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

New Document. Clear Af	Desk Document	Diary Tech Data WIP	
TOMPR >	Status		
cur >	E Codes Liome	Category Code Status Description WIP Category Colour 3cb  V 30 In Car Park Availing Start  V	-
UMENT >	- Nominal Codes	Update Cancel Delate	
SIDE >	Account Types	Category Code Status Description WIP Category Colour	rdit +
SERS	Hadmiciana HService Advisera	Job 10 Continued Pre Arrival	
DRTS >	Payment Terms	Job 20 Re Book D Pre Annie E	1
сарали	Code Status De	Antickies WID Colorest	
Category			с 🖌 с
Job	30 In Car Pa	rk Awaiting Start 🔻 👻	
ide			
update	Cancel Delete		
F	- Status - Key Teg	Job 100 Walt on Tech On Hold	0
deet Import	-Work Types	Job 110 Wait on Auth On Hold	
ns'	-Deferred Job Reason Co	les	
e Settings			



## 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.

		A	utow	<b>Ork</b> Online	
sk	Document	Diary	Tech Data	WIP	

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

Man Softward	AutoworkOnline	goul (GarchDeno)
A Bra Dourcest Chur AD	Tesk Decorrent Diary Tech Data WIP	
Estaul •	Q rite.	ROCZ
Line fit loday (1	Averating Stad (1)     Is 19 (2)     Christel (1)     WeakComplete (1)	



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

⊟Template Settings	×
🕀 Reload "Mechanic"	
🖺 Save "Mechanic"	
쉽 Create a New Template C	
✓ Make Default	
× Delete	
C Auto Refresh Disabled	
	Close

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

Salestorce	172.20.15.120 says:	ж	
<sup>∉</sup> D1	Tempiste Name? Mechanic		×
A Reloa	Prevent this page from creating additional dialogues.		
산) Create	a New Template		
🗸 Make D	Default		
X Delete			
C Auto Re	efresh Disabled		
			Close

- *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

⊟Template Settings	×
B Reload "Mechanic"	
Save "Mechanic"	
입 Create a New Template	
✓ Make Default	
× Delete	
C Auto Refresh Disabled	
F	lose



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

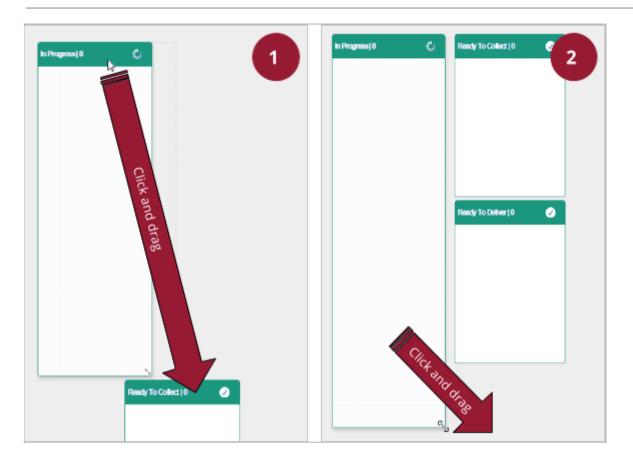
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Default +	Q filei.		ROCZ
Live in Focky   1	Prevadency Stad (U	b Program(0) Contine(1) 1 Weak	G

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.

OSettings					×
Due in Today	Anving Today	Collect Today	Contirmed	He Book	
Avating Start	In Car Park	Workshop Not started		1	
in Progress	On Ramp	Vehicle On Test	GavinSparis		
On Hold	Wait on Parts	Wait on Tech	Waiton Auth		
Work Complete	Ready For Valet	Ready To Collect	Ready To Deliver	Work Complete	
				н	Close

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-righthand corner (2).





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

⊟Template Settings	×
Reload "Mechanic"	
<ul> <li>ℓ²] Create a New Template</li> <li>✓ Make Default</li> <li>X Delete</li> </ul>	
C Auto Refresh Disabled	
	Close



#### Editing an existing template

#### Adding or removing status codes

Statuses can be added and removed from the WIP screen by performing <u>steps G and H in the above *Creating a*</u> <u>new template section</u>.

#### *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-lefthand corner of the box to resize it, <u>as per step I of the *Creating a new template section*</u>.



# **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, <u>as per steps A and B1 of the</u> <u>Document status codes section</u>.
- B. Click the **Key Tag** link

A New Document Clear All	Desk	Document	Diary	Tech Data	WID	*
CUSTOMER >	Codes	Maintenance				
VEHICLE >	Ei Codes I					
		inal Codes				
CARSIDE >	-Vat (	Codes unt Types				
LEDGERS >	Tech	niciana				
REPORTS >		ice Advisers ment Terms				
stock >		sory Notes k Description				
UATABASE 🗸 🗸	Sym	otoms				
Custumer	1.	omer Title Im Reason Codes				
Vehicle		ment Methods				
Suppler	1.000	k Adjustment Resson ia Codes				
Product	Stati					
Product Import	B	Tag k Types				
Тутыс		med Job Reason Code	5			
Tyre Sellings						
Labour						
Custom Jobs						
- Durr Options						
Codes						
Change Password						

- 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

	Key Tag 11	c
D	Update Cancel Delete	
	Key Tag	Edit
	1	1
	10	0
	3	0
	4	0
	5	1
es	6	ø
leasons	7	0
	8	1
	9	ø
	2	

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, <u>as per steps A and B in the above *Creating new key tags section*.</u>
- 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).

