

Autowork Online -
Work in progress
(WIP) user guide

A man with short dark hair and a light beard, wearing a blue work uniform over a white t-shirt, is smiling and holding a silver laptop. He is standing in what appears to be a factory or workshop setting, with blurred machinery and equipment in the background. The image is overlaid with a large green and blue geometric shape on the left side.

Driving Business Performance

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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.

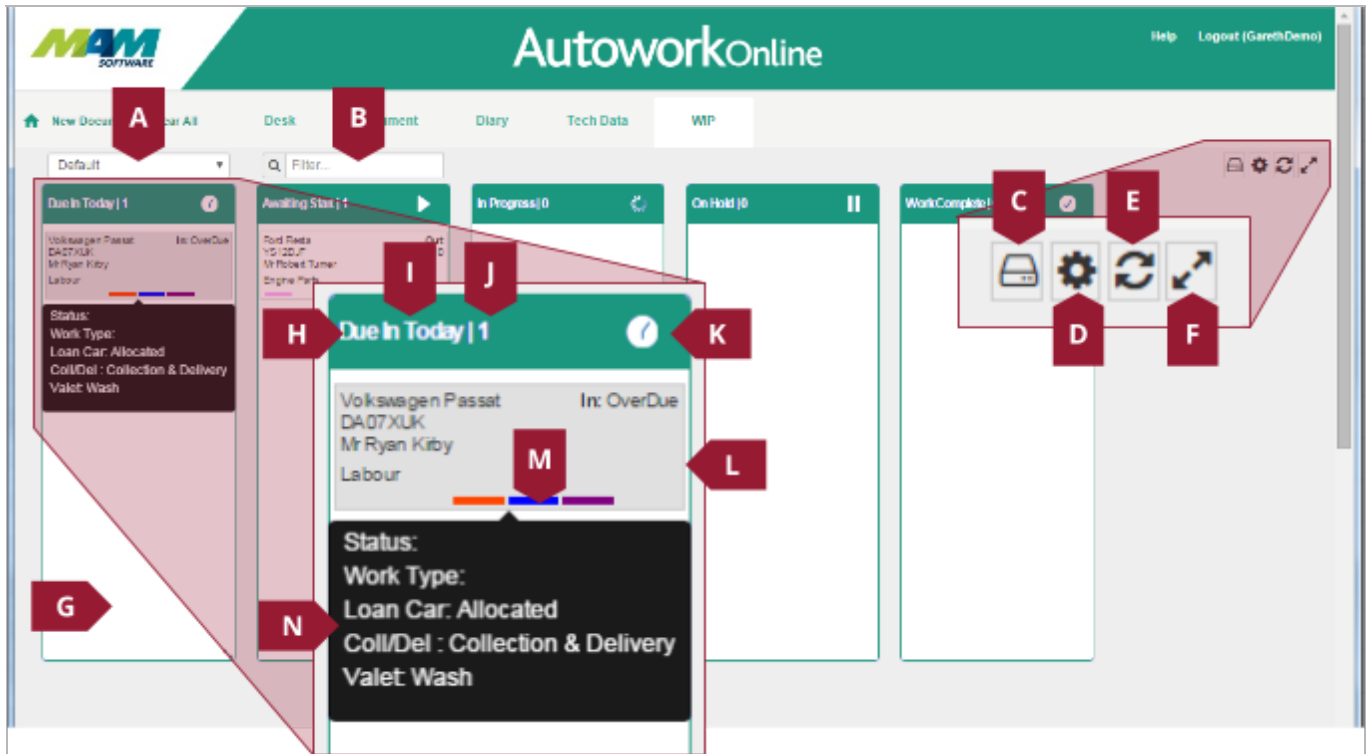
Benefits

- 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

Setup notes

Please note, in order for the WIP facility to work correctly, it will need to be configured, please refer to the Autowork Online - Work in progress (WIP) setup guide, or speak to your supervisor if this requires implementation.

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 - updates the details in the WIP screen
- F. Fullscreen button - Displays the WIP screen in fullscreen
- G. Status code pane - contains all documents that have a particular status
- H. Status code pane header - contains the status code name (I), the number of items that currently have that status (J), and status code icon (K)
- L. Document - contains the details of a job or invoice
- M. 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.
- N. Document details popup - shows various extra details for the job when the user rolls their mouse over the status colours

Using WIP

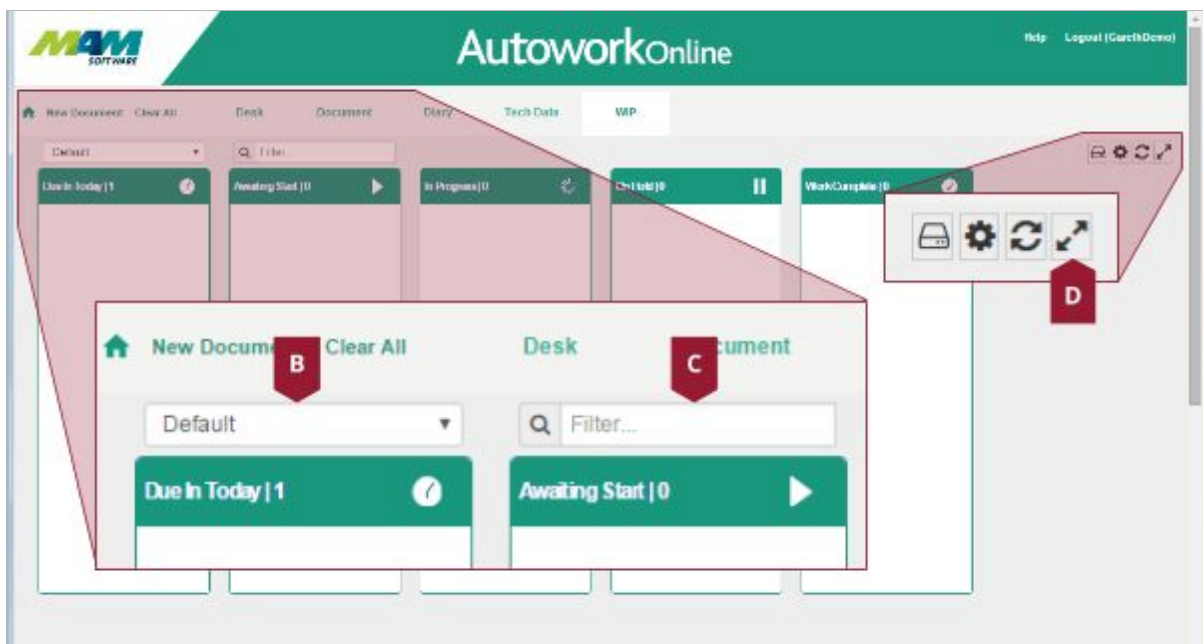
Firstly, any document that you would like to show in WIP will need to have a status assigned to it. If there is no status currently assigned to the document, simply select one from the **Status** dropdown menu in the lower-righthand corner of the Job tab. Secondly, in order to appear in WIP, the document must be either booked in today, or marked as "on site".

Viewing outstanding documents in WIP

- A. Click the **WIP** tab in the tab bar

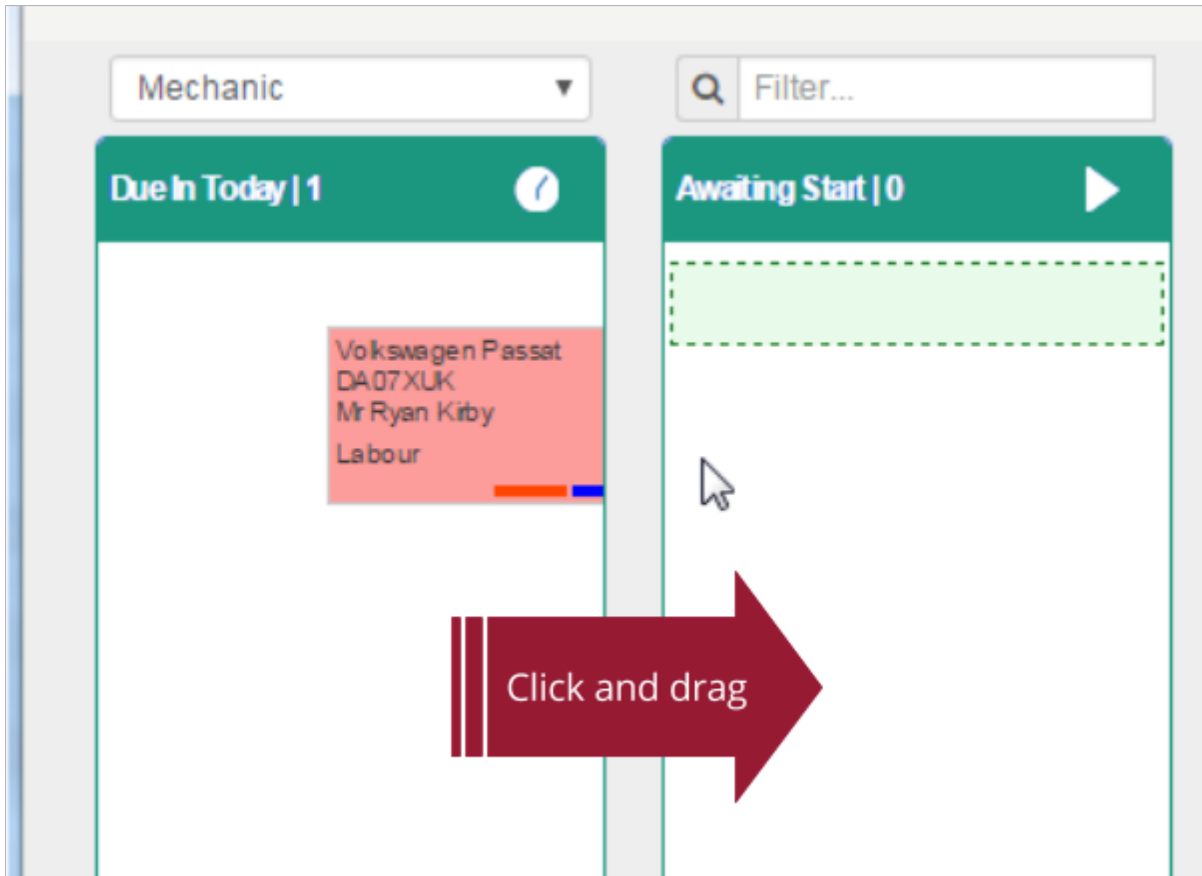


- B. Select the relevant template from the **Template Selection** dropdown menu
- C. Optionally, click into the **Filter** text field, and enter a search phrase (for example, a customer's name) to filter out specific documents. This filter can be reset by clicking the **Refresh** button
- D. Optionally, If you wish to view the WIP screen in fullscreen, click the **Fullscreen** button



Changing the status against a document

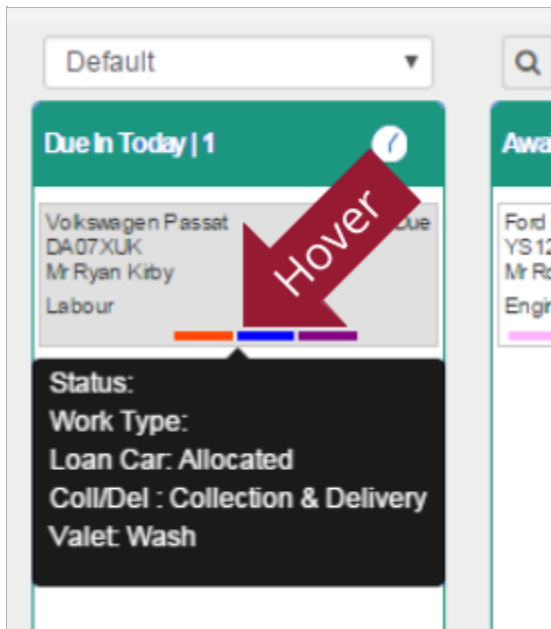
To change a document's status within WIP, simply left-click the job, and then drag it to the status code pane for the required status code, this will automatically update the document. A green area with a dashed outline will appear where the document will be placed when the mouse button is released.



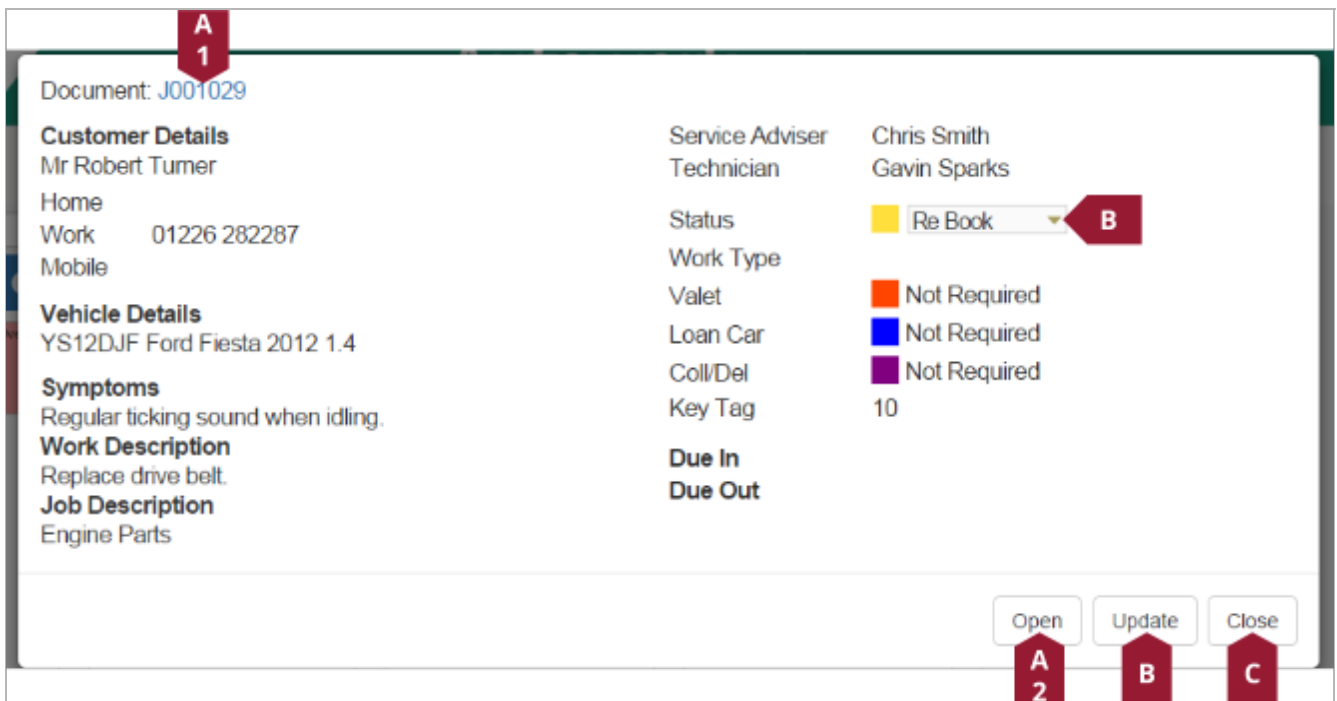
Viewing document details

There are two ways of viewing job details in WIP:

1. To view a basic summary, simply hover the mouse pointer over the **Status Code Colours** at the bottom of the document's entry on the status code pane. A summary of the job details will be shown in a small balloon pop up.



2. To view the document in full, double-click the entry on the **Status Code Pane**, this allows for various other options:
 - a. Click either the **Document Number** link (A1), or **Open** button (A2) to open the document in the document screen.
 - b. Select a new status from the **Status** dropdown menu (B), and then click the **Update** button (A2) to change the status.
 - c. Click the **Close** button to close the document details popup.

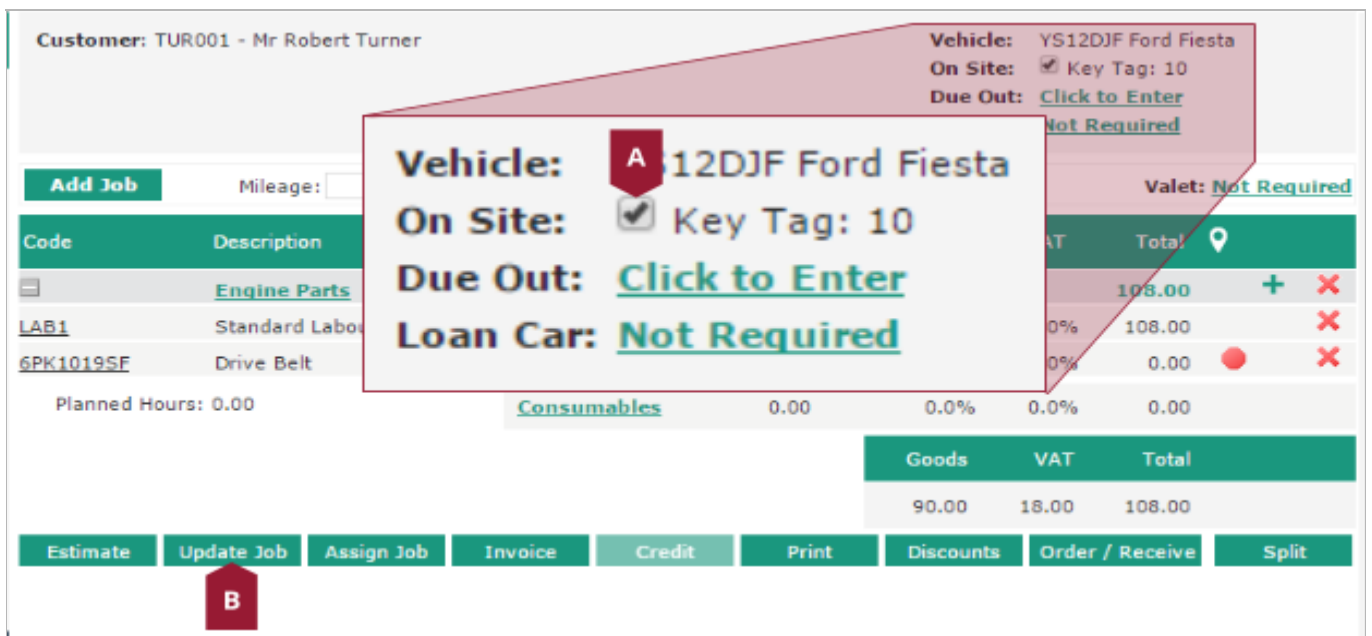


Removing a document from WIP

A document can be removed from WIP by marking it as off site, this can be done in several ways:

For jobs

- A. From the **Document** tab, uncheck the **On Site** checkbox.
- B. Click the **Update Job** button.



Customer: TUR001 - Mr Robert Turner

Vehicle: YS12DJF Ford Fiesta
On Site: Key Tag: 10
Due Out: [Click to Enter](#)
Loan Car: [Not Required](#)

Valet: [Not Required](#)

Code	Description	Planned Hours	Consumables	Goods	VAT	Total		
LAB1	Standard Labour	0.00	0.00	90.00	18.00	108.00	+	×
6PK1019SF	Drive Belt	0.00	0.00	0.00	0.00	0.00	●	×

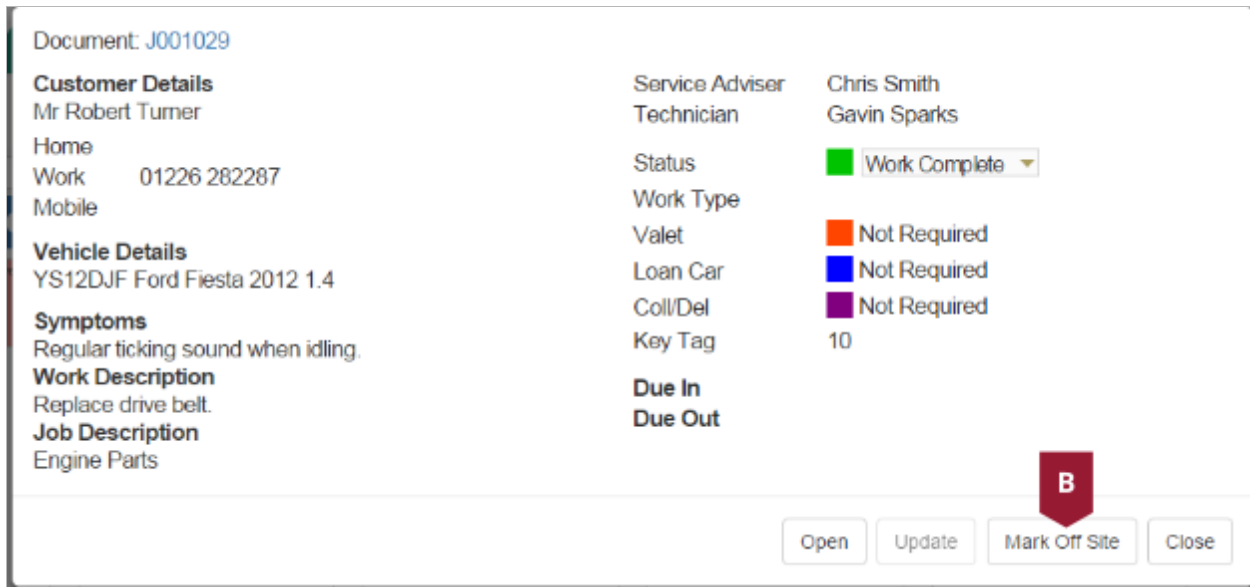
Planned Hours: 0.00

Update Job (B)

For invoices

- A. Double-click the invoice in the main WIP screen
- B. Click the **Mark Off Site** button

Please note: If the Mark vehicle off site when invoice created option is enabled, this step will not be required.



Document: J001029

Customer Details Mr Robert Turner Home Work 01226 282287 Mobile	Service Adviser Technician Chris Smith Gavin Sparks
Vehicle Details YS12DJF Ford Fiesta 2012 1.4	Status Work Complete
Symptoms Regular ticking sound when idling.	Work Type Valet Not Required
Work Description Replace drive belt.	Loan Car Not Required
Job Description Engine Parts	Coll/Del Not Required
	Key Tag 10
	Due In Due Out

Open Update **Mark Off Site** Close

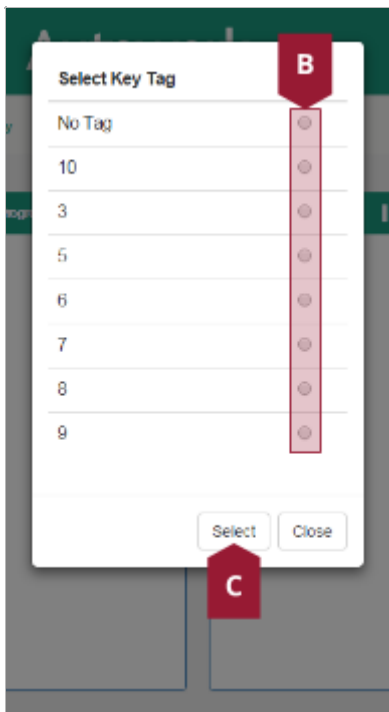
Optional features

Please note that the following features may require additional setup, please refer to the *Autowork Online - Work in progress (WIP) setup guide*, or speak to your supervisor if you would like to use these features.

Key tagging

When a customer checks in their vehicle, it may be desirable to add a numbered tag to their keys, so that they can be tracked. If this feature is set up, it will work as follows:

- A. When a document is moved from a status code that has its WIP category set to “Pre-arrival”, to one
- B. that has it set to anything else (for example, “Awaiting Start”), a **Select Key Tag** prompt will pop up.
- C. Select the radio button for the required tab, or select **No Tag** if a key tag is not required. **Note** that key tags are predefined within the database menu, there is no way to add a tag via WIP, please refer to the *Autowork Online - Work in progress (WIP) setup guide* for further information.
- D. Click the **Select** button to save the changes, or the **Close** button to cancel.



Valeting

If a document has a valeting option set against it, it will automatically be added to the **Ready For Valeting** pane within WIP. Once valeting has been completed on the vehicle, it can be removed from the **Ready For Valeting** pane by double clicking the document, and then clicking the **Valeting Complete** button.

