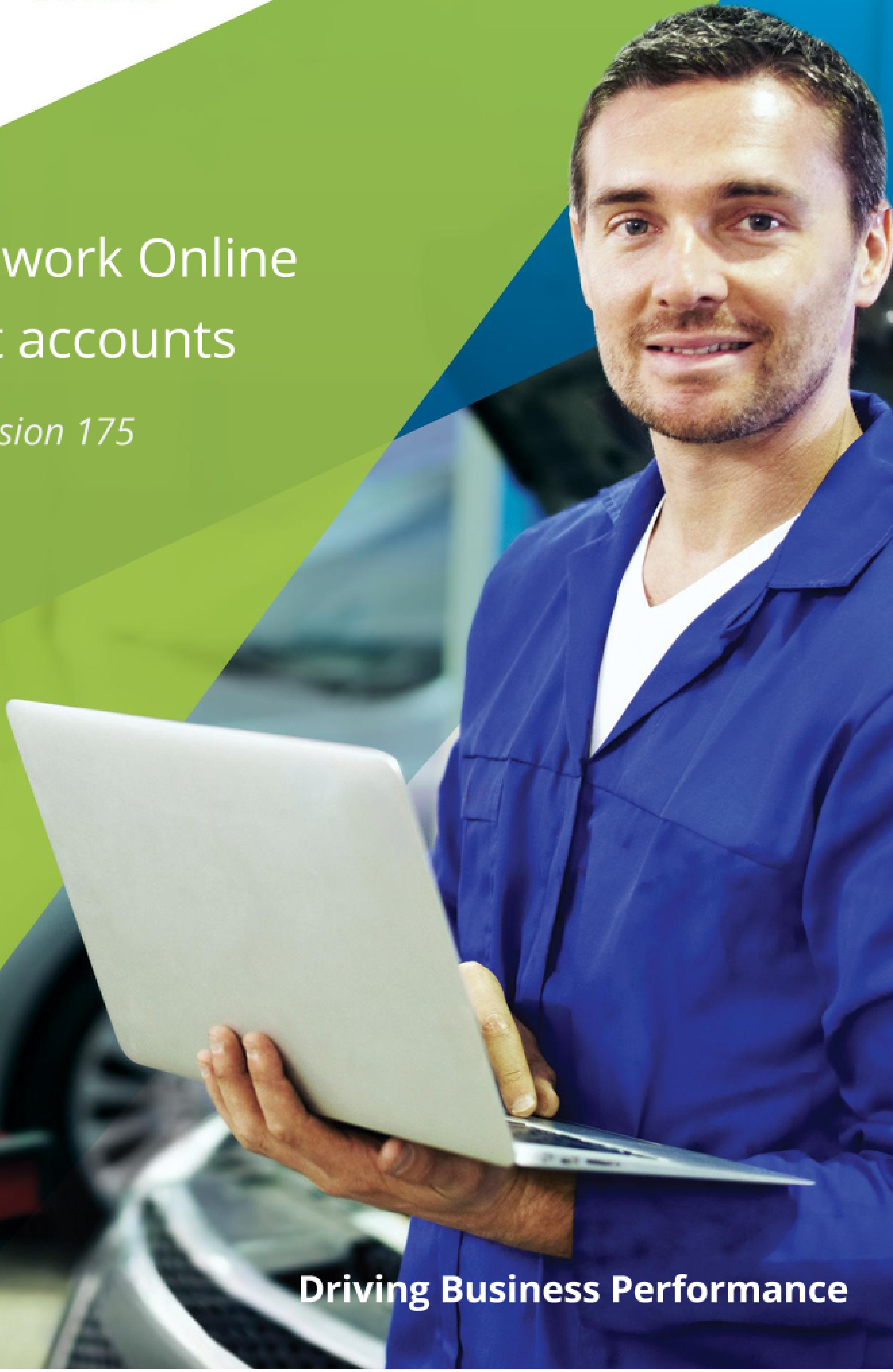
Autowork Online
Fleet accounts

For version 175



Driving Business Performance

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Introduction

In Autowork Online v175, **Fleet account** support has been completely overhauled, and is now far more advanced, allowing a customer account to be flagged as a “fleet account provider”. All customers flagged as such can be selected in a Fleet Account dropdown menu against other accounts. This simplifies the process, and reduces the room for error.

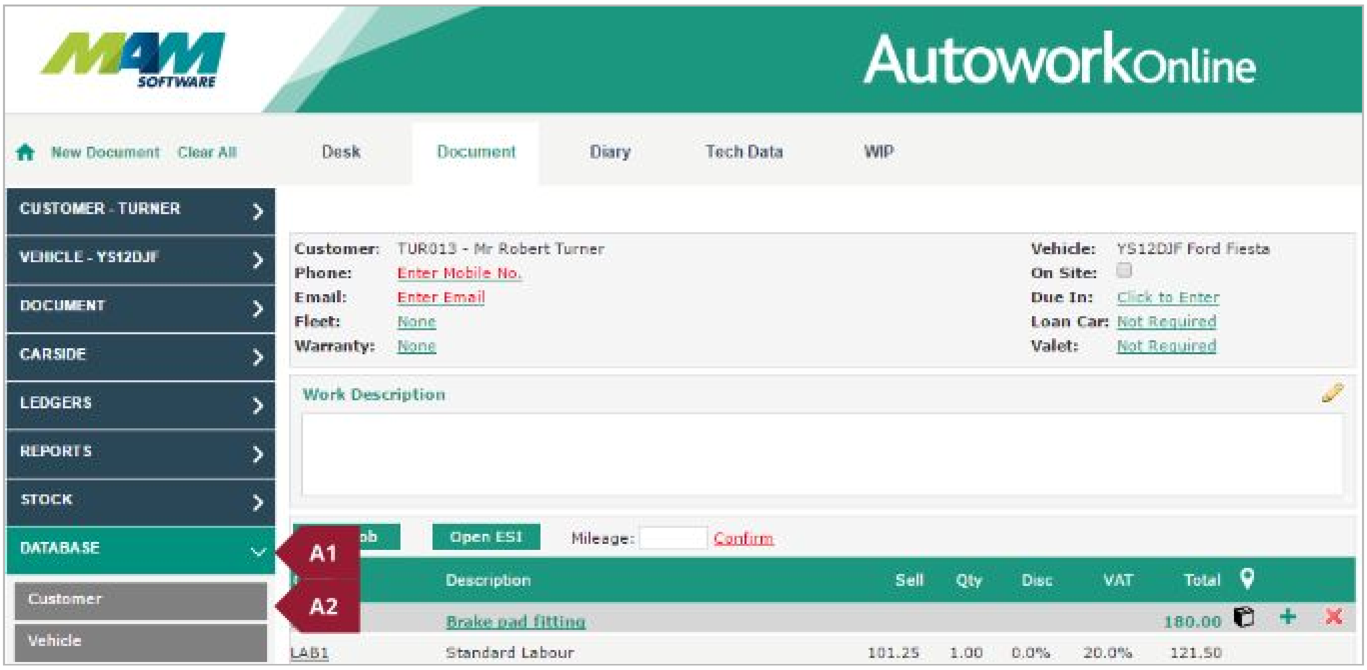
Benefits

- Simplified Fleet Account setup - Streamlined setup routine saves time and improves clarity
- Reduce errors - Improved validation reduces errors where fleet accounts are incorrectly assigned

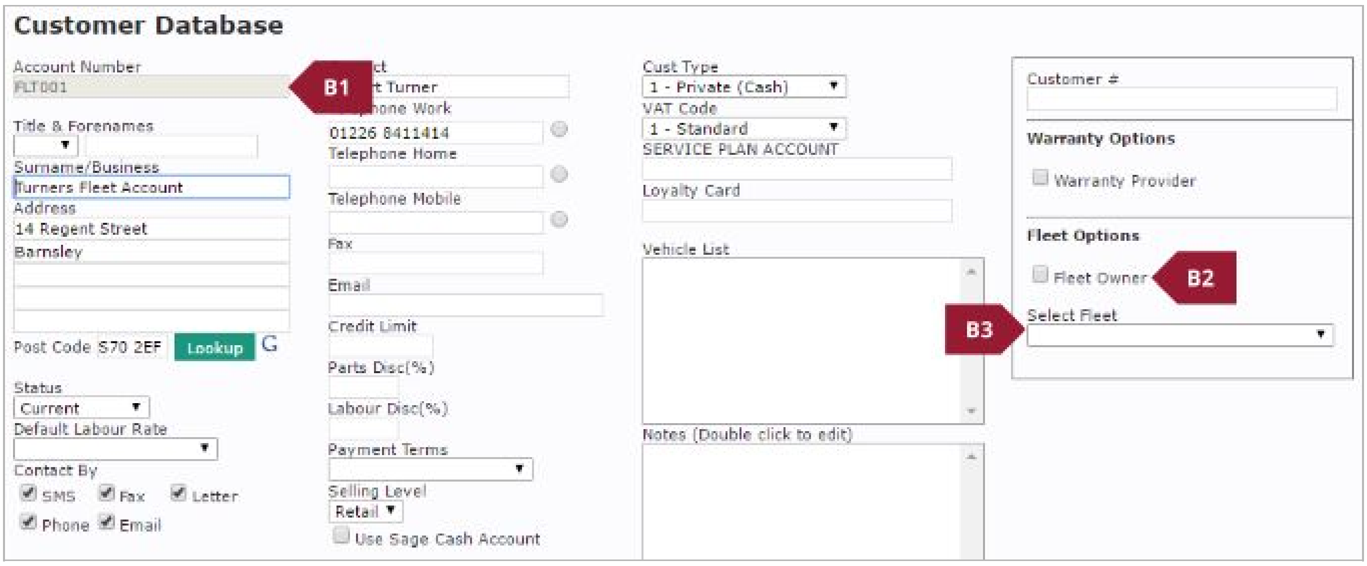
Setting up Fleet accounts

The way that fleet accounts work has also been improved, rather than being able to specify any customer as the fleet owner, specific customer accounts must be flagged as a “fleet owner” in order to select them. This is done as follows:

A. Click the **Database** menu (A1), and then the **Customer** sub-menu (A2)

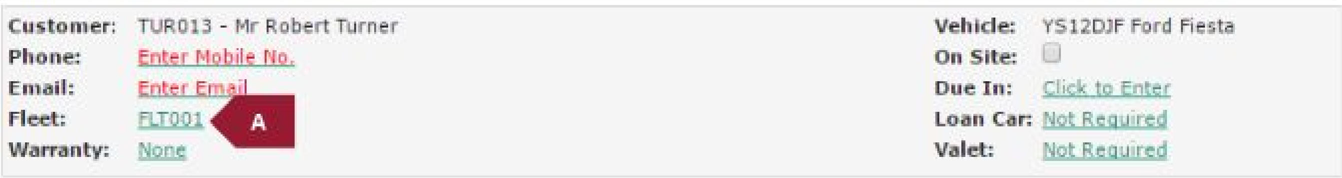


B. Enter the customer you would like to use as the fleet owner (B1), then check the **Fleet Owner** checkbox (B2). On other accounts, you can now select the fleet owner from the dropdown menu (B3) to make them belong to this fleet owner, a customer reference (used by the fleet owner for the customer) can also be set in the **Customer#** box, this can be used for the fleet company’s own account numbers and can be searched on. Click the **Update** button to save any changes.



Additional settings

When selecting a customer who belongs to a fleet, this will be shown on the document screen. It is possible to set or change this relationship directly from this screen. This is done by clicking the **Fleet** entry in the customer details section (A).



This will open a menu allowing the following options. As well as setting / viewing the customer's fleet relationship, you can also record specific authorisation information for this job:

B. Fleet account

C. Customer number

D. Vehicle ID Code

E. Authorisation status (status codes are hard-coded)

F. Authorisation reference

G. Authorised value