

Autowork Online Warranty accounts

For version 175

Driving Business Performance



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Introduction

In Autowork Online version 175, a new feature for **Warranty Accounts** has also been added, this means that a customer account can be flagged as a "warranty provider", this will then be selectable in a similar way to the Fleet Account, to show that a customer's warranty is provided by a particular account.

Benefits

- Simplify workflow Invoices are automatically split when a warranty job is created
- Reduce errors Only accounts flagged as a warranty provider can be used for warranty



Setting up Warranty accounts

A warranty accounts feature has also been introduced. In the same was as setting a customer account as a fleet owner, you can now set a customer as a Warranty Provider. You can then flag a job as a 'Warranty' repair and select the provider.

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

SOFTWARE					Au	to	wc	ork	Onlir	ne		
A New Document Clear All	Desk	Document	Diary	Tech Data	WIP							
VEHICLE - YS12DJF	Customer: Phone:	TUR013 - Mr Robert	Turner				Vehi On S	de: YS1	2DJF Ford	Fiesta		
DOCUMENT	Email: Fleet:	Enter Email					Due	In: <u>Clic</u> Car: Not	k to Enter Required			
CARSIDE	Warranty:	None					Vale	t: Not	Required			
LEDGERS	Work Des	cription										2
REPORTS >												
stock >												
DATABASE 🗸	A1 💾	Open ESI	Mileage:	Canfirm								
Customer	A2 -	Description			Sell	Qty	Disc	VAT	Total	9		
Vehicle	A2	Brake pad fit	ting						180.00	0	+	×
Tempe	LAB1	Standard Labo	pur		101.25	1.00	0.0%	20.0%	121.50			

B. Enter the customer you would like to use as the Warranty Provider (B1), then check the **Warranty Provider** checkbox (B2). Click the **Update** button to save changes.

Customer Database			
Account Number WAR014	B1 urner	Cust Type 1 - Private (Cash) VAT Code	Customer #
Title & Forenames	01226 741444 O Telephone Home	SERVICE PLAN ACCOUNT	Warranty Options
Address 18 Racecommon Road	Telephone Mobile	Vehicle List	Fleet Options
Post Code S70 2EG Lookup G	Email Credit Limit		Select Fleet
Status Current	Parts Disc(%) Labour Disc(%)	Ţ	
Contact By	Payment Terms v Selling Level	Notes (Double click to edit)	
🗹 Phone 🗹 Email	Retail V Use Sage Cash Account		



Additional settings

A document can then be flagged as a warranty job using the following process:

A. Click the Warranty entry in the customer details section of the Document screen

Customer:	TUR013 - Mr Robert Turner	Vehicle: YS12DJF Ford Fiesta
Phone:	Enter Mobile No.	On Site:
Email:	Enter Email	Due In: Click to Enter
Fleet:	FLT001	Loan Car: Not Required
Warranty:	None A	Valet: Not Required

This will open a menu allowing the following options:

Warranty Details					
Warranty Provider			Ψ.		в
Warranty Description					D
Customer #	Not Sub	mitted			F
Original Shop Code Original Invoice No. Original Invoice Date Original Invoice Mileage Notes			H T		
			•		L
					_
			Close Update		
Warranty Provider Warranty Name Warranty Descriptio Provider Ref	n	н. т. ј. К.	Original Shop Code Original Invoice Numbe Original Invoice Date Original Invoice Milage	r	

N. Select a Warranty provider and record any details you need to in the fields as appropriate, then click the **Update** button. Build the job as normal.



- O. When the **Invoice** button is clicked, a prompt asking if you would like to split the invoice will pop up. If the **Cancel** button is clicked, the invoice will be raised as normal, if the **OK** button is clicked, this will open the **Split Invoice** screen and set the warranty provider as the 3rd party automatically.
- P. From here you can select which items to charge to the warranty provider (P1) and (P2). Set an **excess** (P3) and **Customer Contribution** (P4) if required. Once all the values are correct, clicking the **Invoice** button (P5) will generate two invoices, one for the customer, and another for the warranty provider.

opine mite	oice					
Select 3rd Part	y: AAW01 Search New	To produce a split	invoice, first sele	ct your 3rd pa	rty (this will b	e the
Claim Ref:	01448456	wish to charge to	them before addi	ng any excess	value.	you
Invoice Date	14/09/2016					
Select Net and	VAT values to invoice to the 3rd pa	rty			P 1	P 2
Line Details		,	Net	VAT	Net	VAT
LAB1	Standard Labour		101.25	20.25		
GBP1932AF	Brake Pad Set		48.75	9.75		
					Select	Select
Enter Betterme	nt / Customer Contribution if applic	able 0.00 (ex	VAT) 🗹 Include V	VAT		
Enter Betterme Select 3rd Part AAW01	nt / Customer Contribution if applic /	able 0.00 (ex Primar TURO	VAT) 🗹 Include V ry Customer 13	VAT		
Enter Betterme Select 3rd Part AAW01 AA Warranty C	nt / Customer Contribution if applic / Claims Net	o.00 (ex Primar URO Mr Tu 0.00	VAT) 🗹 Include V ry Customer 13 rner	VAT	Net	150.00
Enter Betterme Select 3rd Part AAW01 AA Warranty (nt / Customer Contribution if applic / Claims Net VAT	0.00 (ex Primar URO Mr Tu 0.00 0.00	VAT) 🗭 Include V y Customer 13 rner	VAT	Net VAT	150.00 30.00