Autowork Online

Enhanced MOT Diary

For version 176
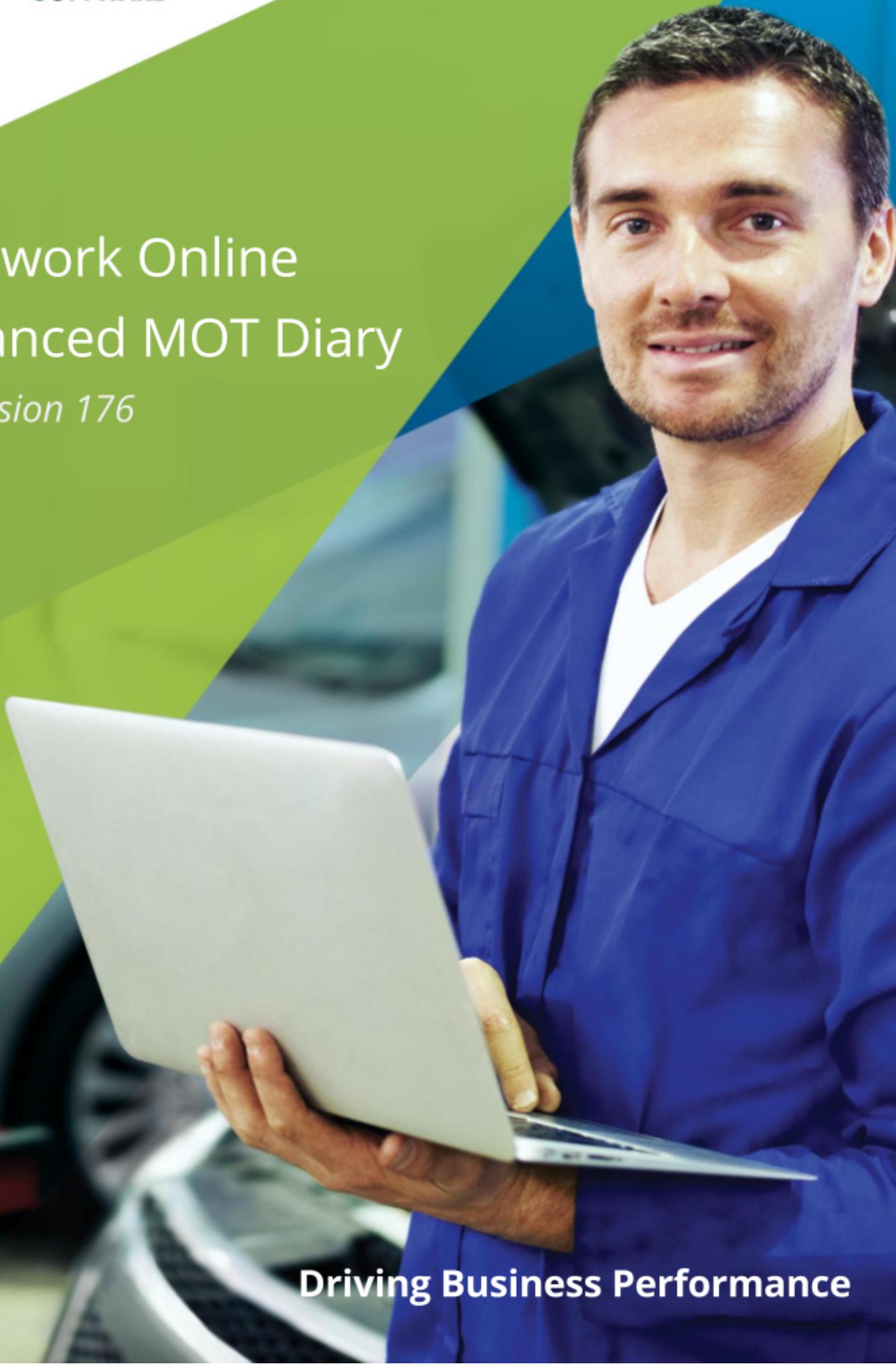
Driving Business Performance

Contents

Introduction

The latest version of the Autowork Online garage management system offers several enhancements designed to improve workflow, increase efficiency, and improve customer service.

The **MOT Diary** screen has been completely overhauled: The schedule grid now fills the full width of the screen for better visibility, MOT bookings are now linked to the relevant job card, and vehicles can be marked as "on site" from the MOT Diary screen. MOT jobs can now have a status, allowing them to be flagged as a "pass" or "fail", allowing for improved visibility, and allowing this information to be easily relayed to the customer. It is now also possible to create an MOT booking directly from the MOT Diary screen, simplifying workflow. A new feature has been added that allows MOT jobs to be rescheduled on the grid, meaning that scheduling changes can easily be made.
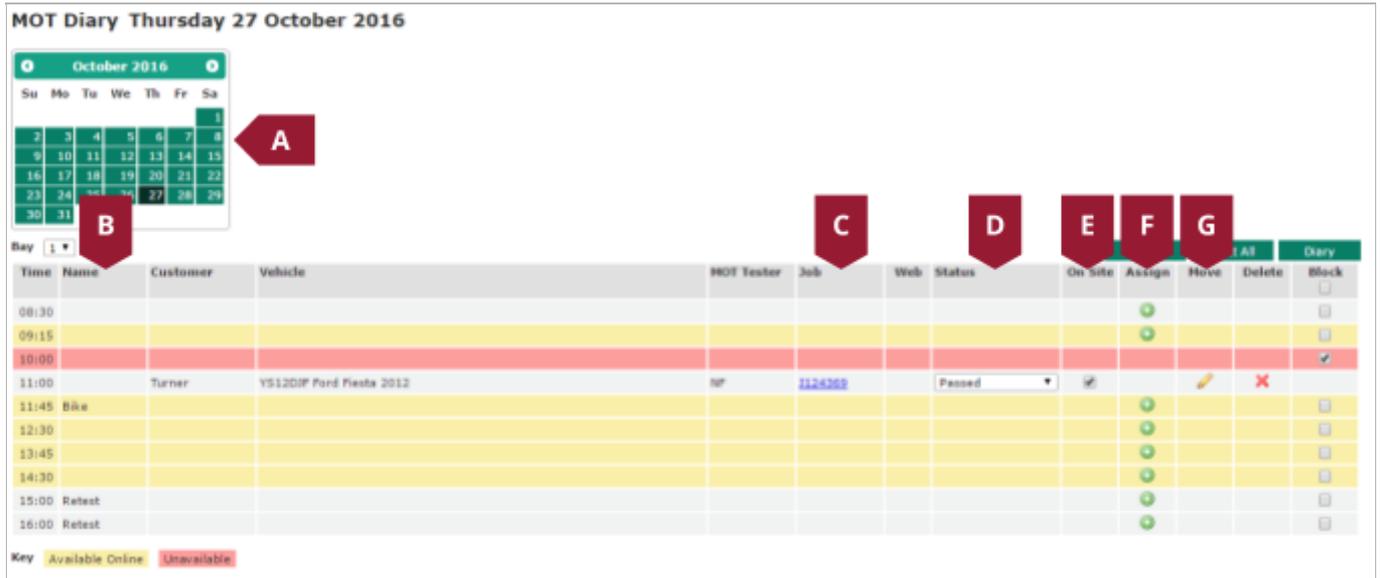
Benefits

- Smoother workflow - MOT Diary features a larger, clearer grid, and MOTs can be booked in directly

- Improved rescheduleing - It's now possible to swap 2 appointments in the grid

- Easily see an MOT's status - Statuses can be set against an MOT, and viewed in the document screen

- Quickly open an MOT job from the grid by clicking on the job number.

Improved grid layout

In the latest version of Autowork Online, the layout of the MOT Diary has been revamped to improve workflow.

A. Calendar - Clicking a day will cause the main diary grid to display the entries for that day

B. Name column - Slots can now be named, allowing certain slots to be designated for certain purposes, such as retests. See the *Creating diary slots* section for more information on naming slots

C. Job number - displays the document number of the job linked to the MOT, clicking the link will display the job in the **Document** tab

D. Status column - Shows the current status of the MOT, this can be changed using the dropdown menu

E. On site column - Checking the box against an MOT appointment will mark the vehicle as "On site". Key tags can also be assigned and viewed.

F. Assign column - Clicking the green **+** button on an empty row will allow a new appointment to be created directly from the diary

G. Move column - Clicking the **Move** button against an existing appointment will allow it to be rescheduled to a different slot or swapped with an existing booking

Creating diary slots

By default, the MOT diary will be blank, and slots will need to be defined, this is done using the following process:
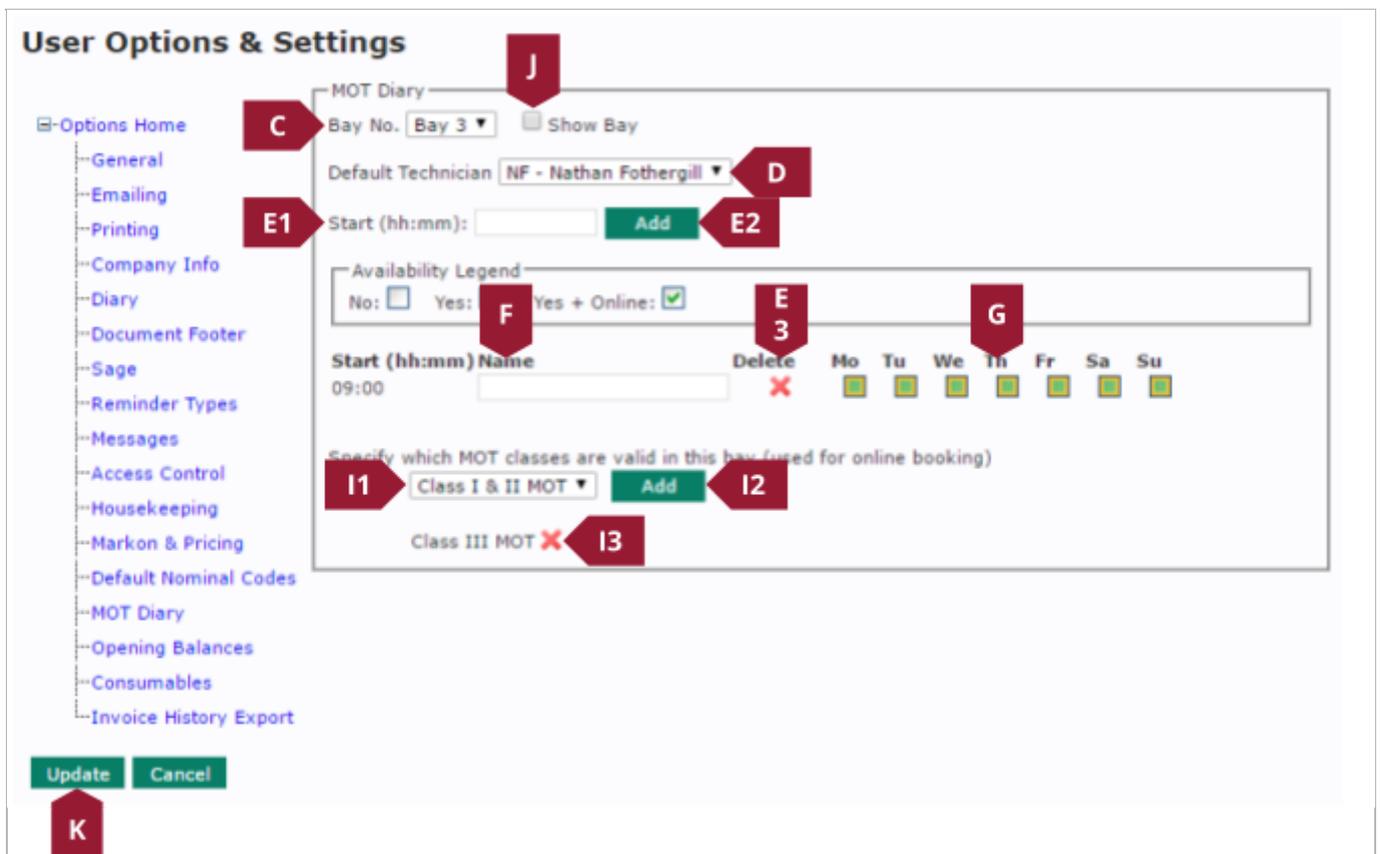
A. Click the **Database** menu (A1), and then the **User Options** menu item (A2)
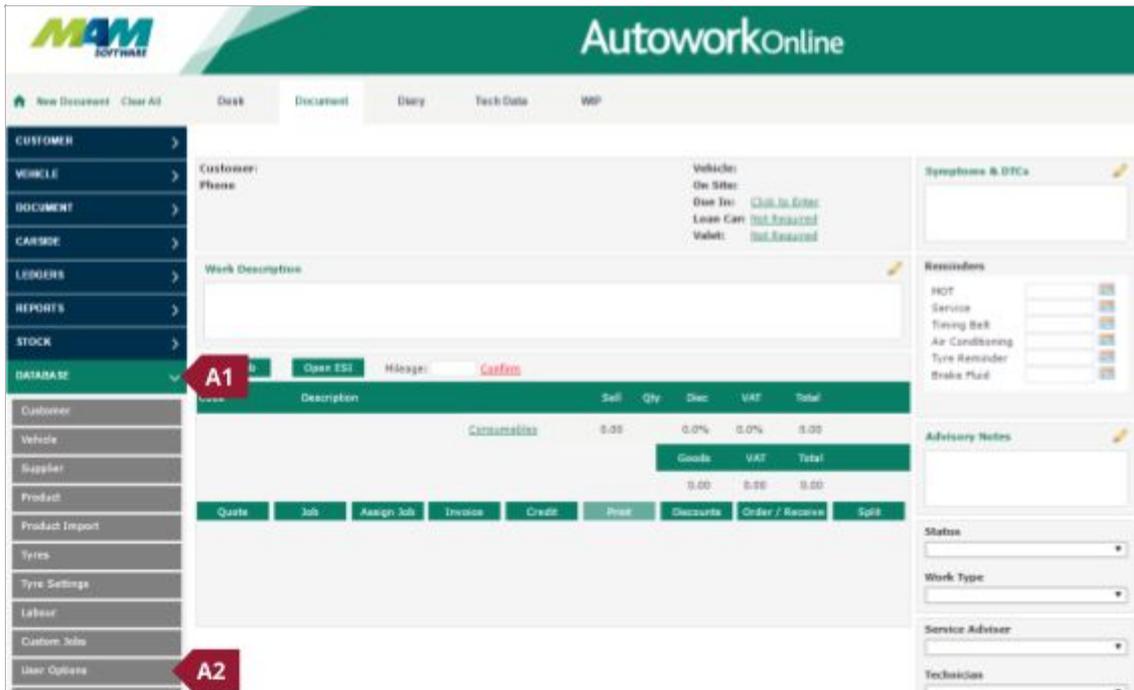
B. Click the link for **MOT Diary**

C. Select the bay you would like to set up from the **Bay No** dropdown menu

D. Select a **Default Technician** from the dropdown menu

E. Type a start time for the slot into the **Start** box (E1) (formatted as **HH:MM**), and then click the **Add** button (E2), any slots added can be removed by clicking the **Cross** button (E3)

F. *Optional, type in a **Name** for the slot*

G. Click the **Availability** checkboxes for each day to toggle their availability between: **Unchecked** - Not available, **Checked** - available offline, and **Checked with green highlight** - Available on and offline

H. Repeat steps E to G for any additional slots

I. Select the **MOT Classes** that can be performed on that bay from the dropdown menu (I1), then click the **Add** button (I2) to add them to the list. Entries can be removed by clicking the **Cross** button (I3)

J. Check the **Show Bay** checkbox to display the bay in the Diary screen

K. Click the **Update** button to save the changes

Creating new diary entries

Although the old method of creating an MOT job in the **Document** screen, and then clicking the **MOT** icon to add the diary entry will still work correctly, it is now possible to book MOTs directly from the MOT Diary screen. The new process is far simpler, and has a more efficient workflow. New diary entries are created using the following process:

A. Use the **Calendar** to select the date you would like to create the booking on

B. From the Diary screen, click the **Assign** button against the slot you would like to book the MOT into

C. Select the **Bay** you would like to use for the booking

D. Select an **MOT Tester** (D1), and **Labour** (D2) from the dropdown menus

E. Enter a **Customer** account code (E1), and click the **Search** button (E2) to search for an existing customer, or the **New** button (E3) to create a new one

F. If an existing customer has been entered, you will be presented with the following screen, where the **Customer** (F1) and then **Vehicle** (F2) can be clicked to select them, before clicking the **Okay** button (F3) to confirm the selection
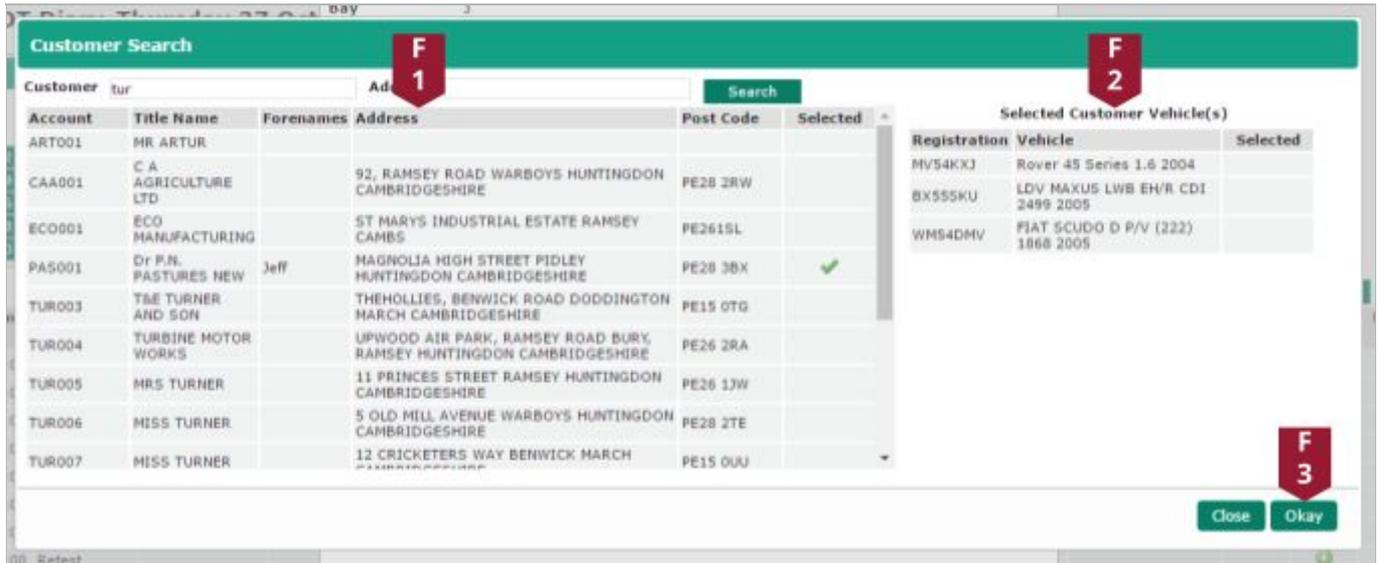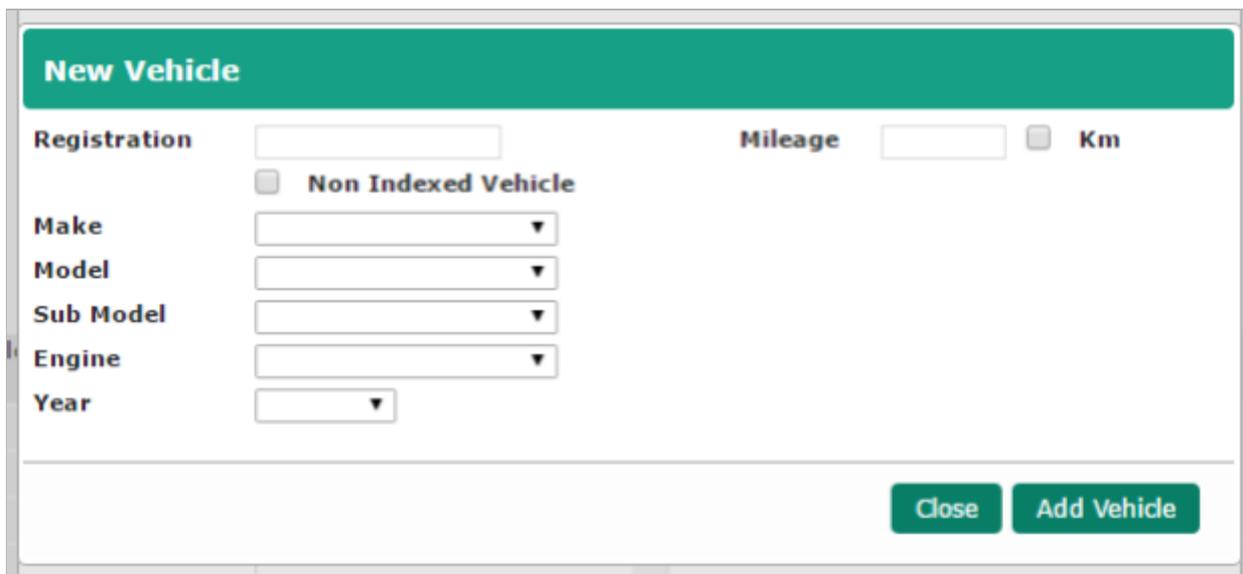

G. If the **New** button was clicked, the following screen will display, allowing for the customer's details to be entered, when the **Add Customer** button is clicked, the new customer record will be created
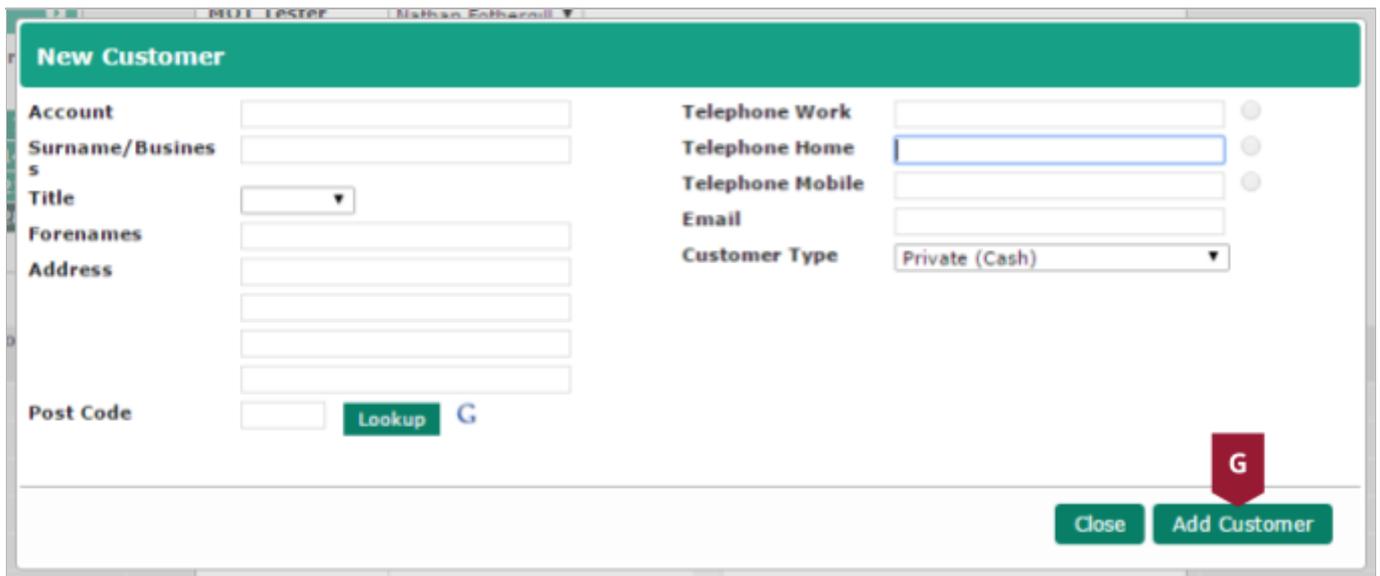
H. If a vehicle was selected in the previous step, it will automatically populate the vehicle details section. However, a new vehicle can be added using the following process: Enter a VRM into the **Vehicle** box (H1), and then click the **Lookup** button (H2), the vehicle details will automatically display. If the vehicle already exists on the system, click the **Search** button (H3), and then select it from the list, and if the vehicle needs to be entered manually, click the **New** button (H4).
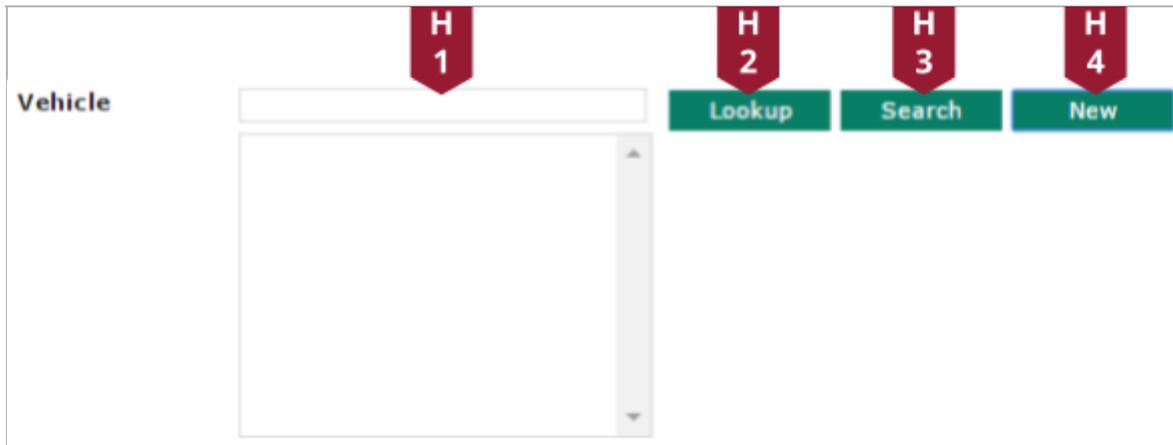
I. If the **New** button is clicked, the **New Vehicle** screen will pop up. Fill out the relevant details, and then click the **Add Vehicle** button to add the vehicle to the database

J.   When you are happy with the settings, click the **Okay** button to create the appointment

Managing existing diary entries

Deleting appointments

Existing MOT jobs can easily be removed from the diary using by clicking the **Delete** button (A) against it.

You will be presented by a prompt, clicking the **Yes** button (B) will delete the entry, whereas clicking the **No** button (C) will return to the diary screen without deleting the entry.
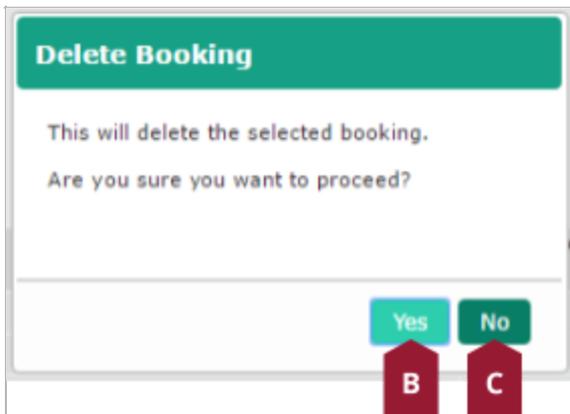
Rescheduling appointments

It's possible to easily move an MOT appointment to a different slot, or swap it with another appointment. This can be done using the following process:

A. Click the **Move** button

B. If you would like to change the technician assigned to the job, this can be changed in the **MOT Tester** dropdown menu (B1). Click the **Assign** button (B2) against the slot you would like to move the appointment to, and the job will be moved

C. If you attempt to move the appointment into a slot that is already populated, the following message will display: Clicking the **Yes** button will swap the position of the two appointments, whereas clicking the **No** button will leave the schedule unchanged.

Changing a job's status and marking it as "on-site"

The job associated with an MOT booking can be marked as on or off-site by checking or unchecking the **On-Site** checkbox (A).

Updating an MOTs status

The **Status** column on the MOT Diary screen can be used to set and display the MOT's pass or fail status. The column features a dropdown menu (A), where a status can be selected.

Viewing the job card associated with a diary entry

The job card linked to a particular diary entry can be opened by clicking the document number in the **Job** column (A).