



R189 UK Release Notes

**Release notes summary for Autowork Online
R189 January 2022.**

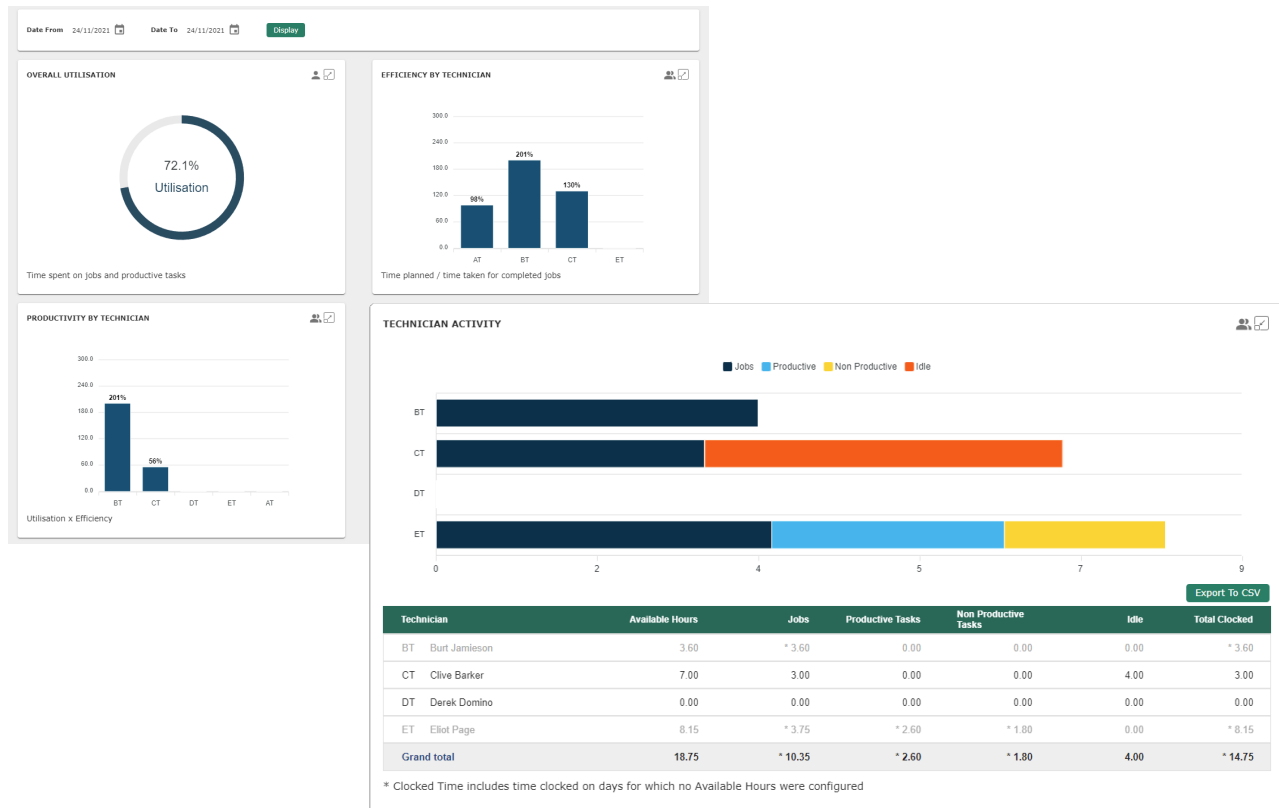
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TeamView reports




Applicable to the UK only

The Reports Suite for TeamView has been enhanced and extended. Data can be viewed at individual technicians or group levels. The ability to drill down into specific metrics and view/export tabular data has also been added.



Report navigation

Basic navigation controls:

	Switch between technician and group level
	Open and close the detail view
	Navigate back to the previous report

When viewing a report in the full-screen detail view, you can click on any graphical element to open a new report. Then drill down into the detail it represents.

Tip: You can also click on the Key/Description if the report section is too small.

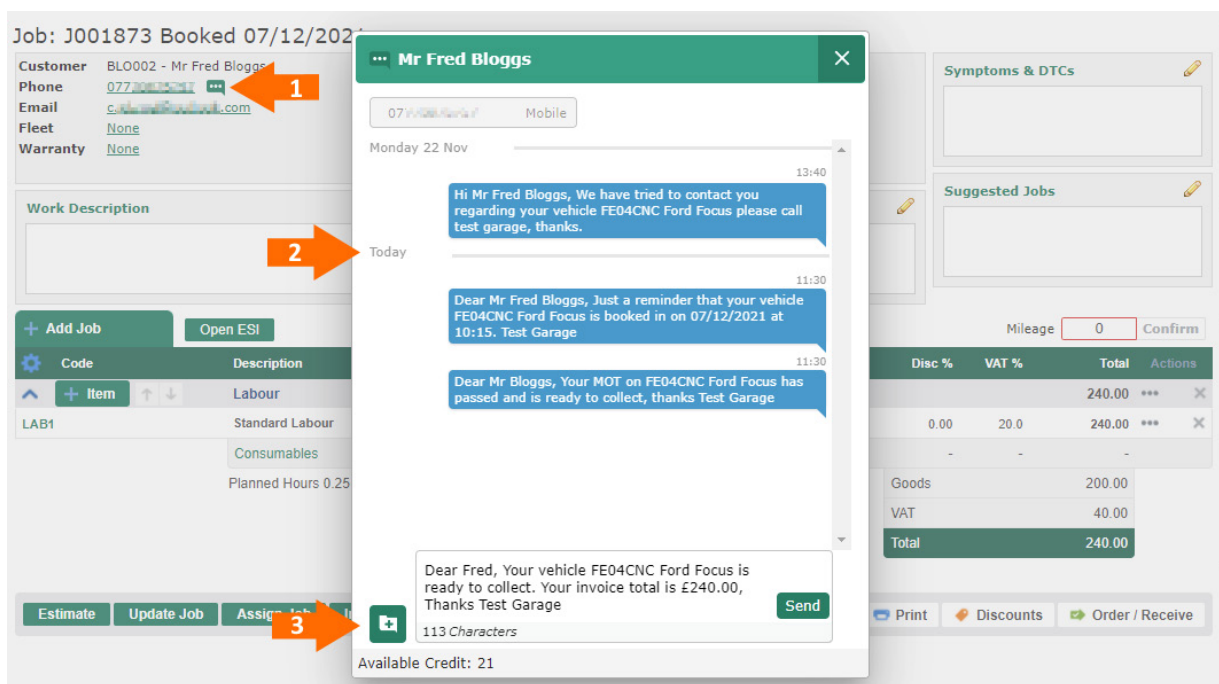
For a full description of the reports available, please see the TeamView Reports documentation.

Sending SMS

SMS is one of the most popular and powerful tools in Autowork Online. Reminders for works and appointments can be sent automatically using the existing Automation feature, and direct customer communications can be sent manually, on-demand. The latter can be used for progress updates, estimates and ready to collect alerts. This all combines to keep your staff and phone lines free.

To further improve this feature, a new pop up screen has been added. The pop up screen helps you send manual SMS messages with improved and streamlined usability.

All you need is a customer with a mobile phone number set. Then, open the popup using the new SMS icon (1) on the work screen or the SMS button on other screens.

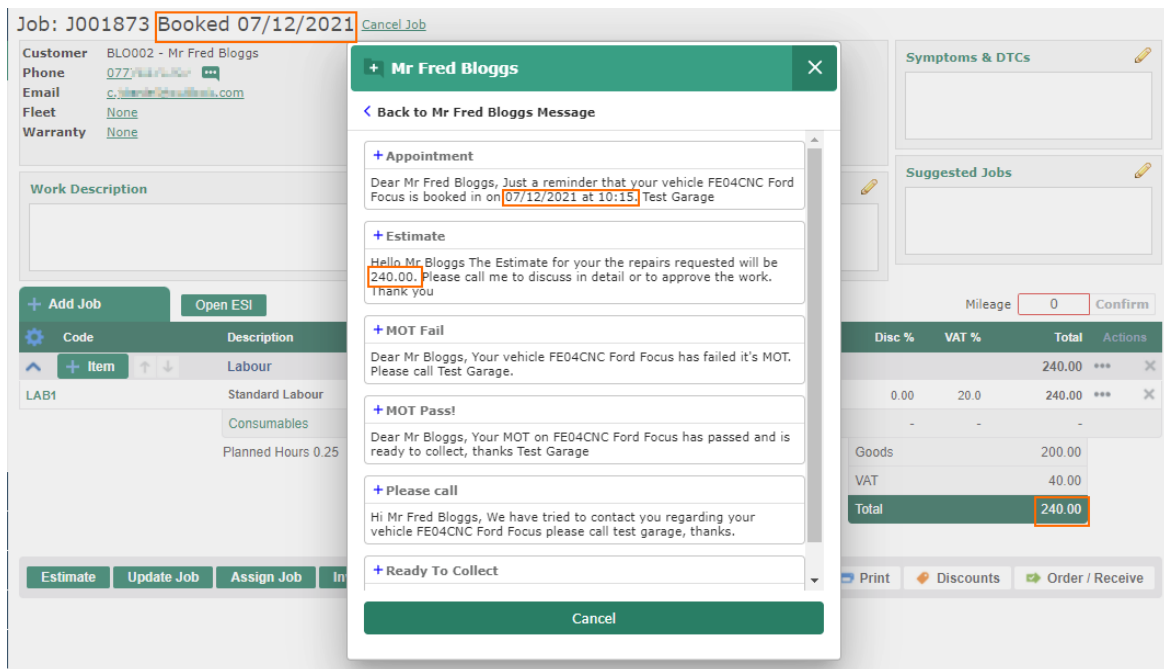


The new send message popup will show previous messages sent to the selected customer. This history includes the last 100 messages sent to the number shown, complete with the date/time sent (2).

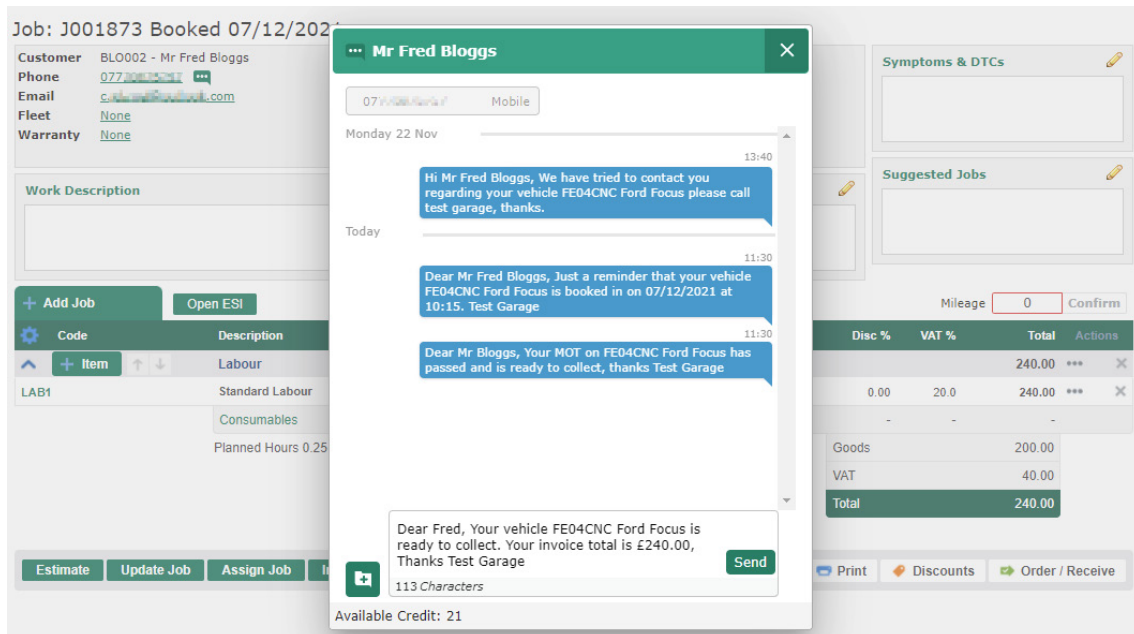
Using predefined messages is now easier than ever. Simply start by clicking the + icon (3) to open the list of available messages. Remember, you can set up as many predefined messages as you want to save time. And the improvements to that screen can be seen below.

Predefined message preview

When selecting from your list of predefined messages, each one will be previewed complete with any form filled content from the customer, vehicle or document. That way, you can see what the message will look like before it's sent.

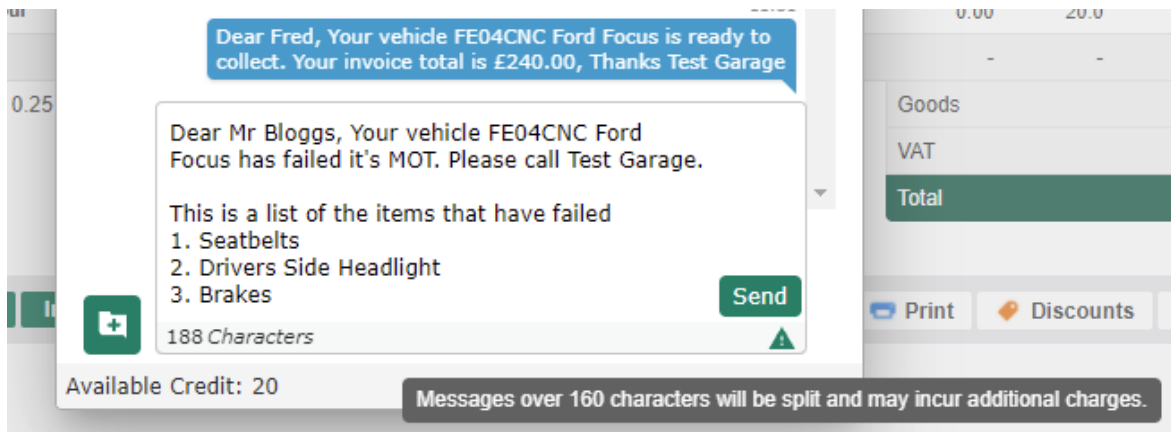


Simply click the message you want to use to return to the send message popup. You can preview and edit the selected message before sending it or click the + icon to choose a different predefined message.



Message credits & long messages

You can now send messages over 160 and up to 458 characters. The network carrier still sends these as individual messages, but now your customer will see it as a single message (subject to their phone's capabilities).



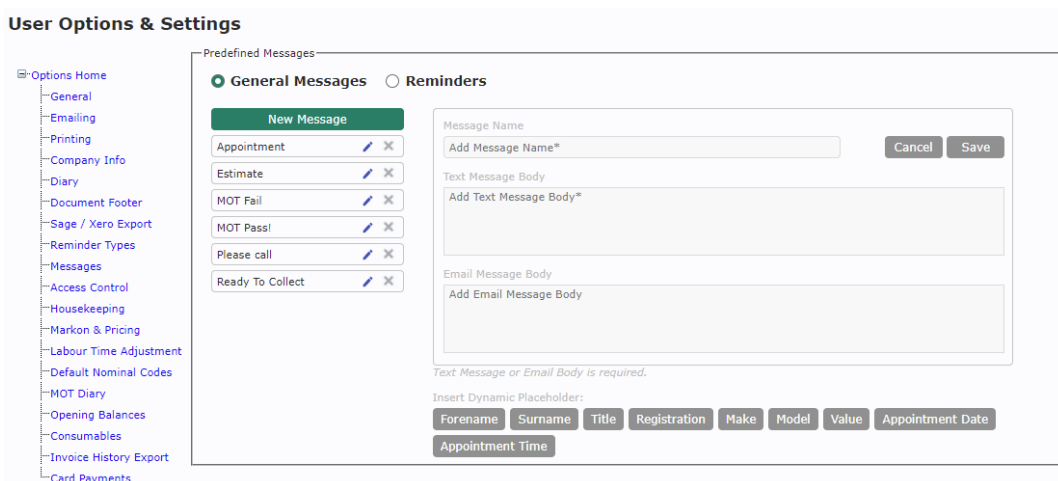
A standard message can be up to 160 characters and costs 1 credit. Messages exceeding 160 characters will be indicated by the icon & tool tip shown. These messages will cost 2 or 3 credits, depending on the length. Your available credit is displayed at the bottom of the message popup – if you'd like to increase the available credit, please contact support.

Improved predefined message maintenance

Predefined messages can be created in the Messages screen under User Settings.

General messages are available in the manual send message screen, while reminders are available in the CRM screen and when using the included Automated SMS feature.

To create a new message, click New Message, enter a name and the content for the SMS. You can also include email if needed.



To edit an existing message, just click on it in the list to the left.

The available form fill fields are now shown as buttons below. To use one, place the cursor where you want it to appear in the message field and click the relevant button.

Note that not all form fill information will be available when you send a message – for example, the vehicle fields are only appropriate when sending to a customer with a specific vehicle selected. Similarly, the value field will send the total from the currently displayed estimate, job or invoice.

User Options & Settings

- Options Home
- General
- Emailing
- Printing
- Company Info
- Diary
- Document Footer
- Sage / Xero Export
- Reminder Types
- Messages
- Access Control
- Housekeeping
- Markon & Pricing
- Labour Time Adjustment
- Default Nominal Codes
- MOT Diary
- Opening Balances
- Consumables
- Invoice History Export
- Card Payments

Predefined Messages

General Messages Reminders

New Message

Appointment	✎ ✕
Estimate	✎ ✕
MOT Fail	✎ ✕
MOT Pass!	✎ ✕
Please call	✎ ✕
Ready To Collect	✎ ✕

Message Name

Estimate Cancel Save

Text Message Body

Hello [TITLE] [SURNAME] The Estimate for your the repairs requested will be [VALUE]. Please call me to discuss in detail or to approve the work.

Thank you

Email Message Body

Hello [TITLE] [SURNAME]

The Estimate for your the repairs requested for your vehicle [REG] [MAKE] [MODEL] will be [VALUE]. Please call me to discuss in detail or to approve the work.

Text Message or Email Body is required.

Insert Dynamic Placeholder:

Forename
Surname
Title
Registration
Make
Model
Value
Appointment Date

Appointment Time

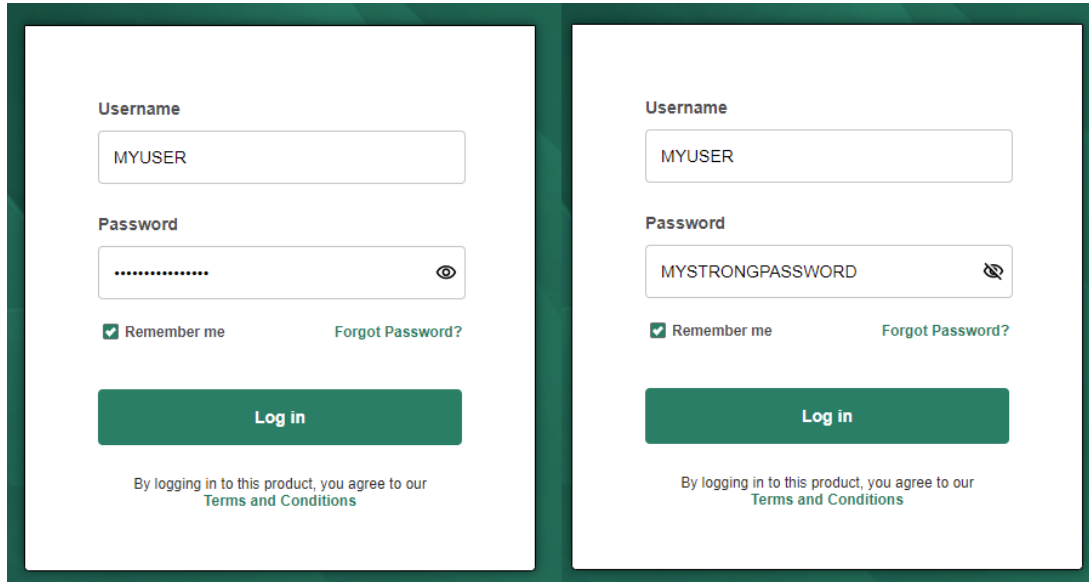
For more assistance with SMS or setting up the Automated feature please contact the support team.

UK - misc items

Miscellaneous improvements, customer requests and fixes.

Login screen

If you're having trouble logging in, you can now toggle the display of the password entered by clicking on the icon.



If you're still struggling to log in, the password reset process (via email) has been improved and will display the support number to get you the help you need. If you've not done so recently, check under the my account in the database menu to confirm that the system has your current email address.

The document footer settings

Character limits have been increased as follows:

1. Estimate: **2000** Characters [increased]
2. R/O: **2000** Characters [increased]
3. Invoice: **2000** Characters [increased]
4. Invoice Notification: **2000** Characters [unchanged]
5. Invoice Terms: **2000** Characters [increased]
6. Credit: **2000** Characters [increased]
7. Estimate Notification: **2000** Characters [unchanged]
8. Invoice Draft: **2000** Characters [increased]
9. Purchase Order: **80** Characters [unchanged]
10. Customer Statement: **1000** Characters [unchanged]

A visual character count for each field will show the remaining/total characters (for example, 0/2000). The remaining count will update as the user types.

Vehicle tag

Job card print now includes Vehicle Tag or Key Tag with the appropriate label depending on the option selected.

Vehicle Details

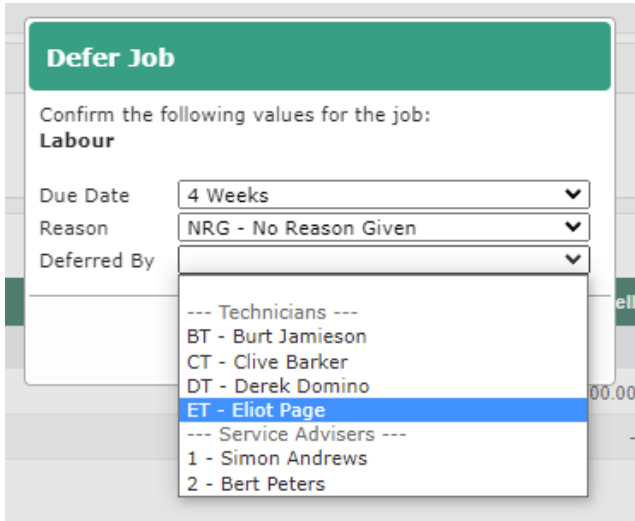
Reg	FE04CNC	Vehicle Tag	12345	PS	<input type="checkbox"/>	VIN	WF0AXXWPDA3P57630
Make	Ford	Colour	SILVER	CAT	<input type="checkbox"/>	Engine No	3P57630
Model	Focus	Engine	1.8 181,E2 16v	ABS	<input type="checkbox"/>	Engine Code	EYDB
YoM	2003	Fuel / Tran	Petrol / MANUAL	AC	<input type="checkbox"/>	Radio Code	

Stock downdating for CORES

CORES belonging to received parts will no longer always downdate stock when returned. Instead, they will now use the setting associated with the return reason code (which should usually be 'don't downdate'). The 'always downdate' rule still applies to ordinary received parts to create correct stock movements.

UK Customer requests & defensive programming

The following enhancements have been added following customer requests and support feedback.



The screenshot shows a 'Defer Job' form with the following fields and options:

- Confirm the following values for the job:**
- Labour**
- Due Date:** 4 Weeks
- Reason:** NRG - No Reason Given
- Deferred By:** A dropdown menu with the following options:
 - Technicians ---
 - BT - Burt Jamieson
 - CT - Clive Barker
 - DT - Derek Domino
 - ET - Eliot Page** (highlighted)
 - Service Advisers ---
 - 1 - Simon Andrews
 - 2 - Bert Peters

Deferred work by service advisors

Customer Request 00732073

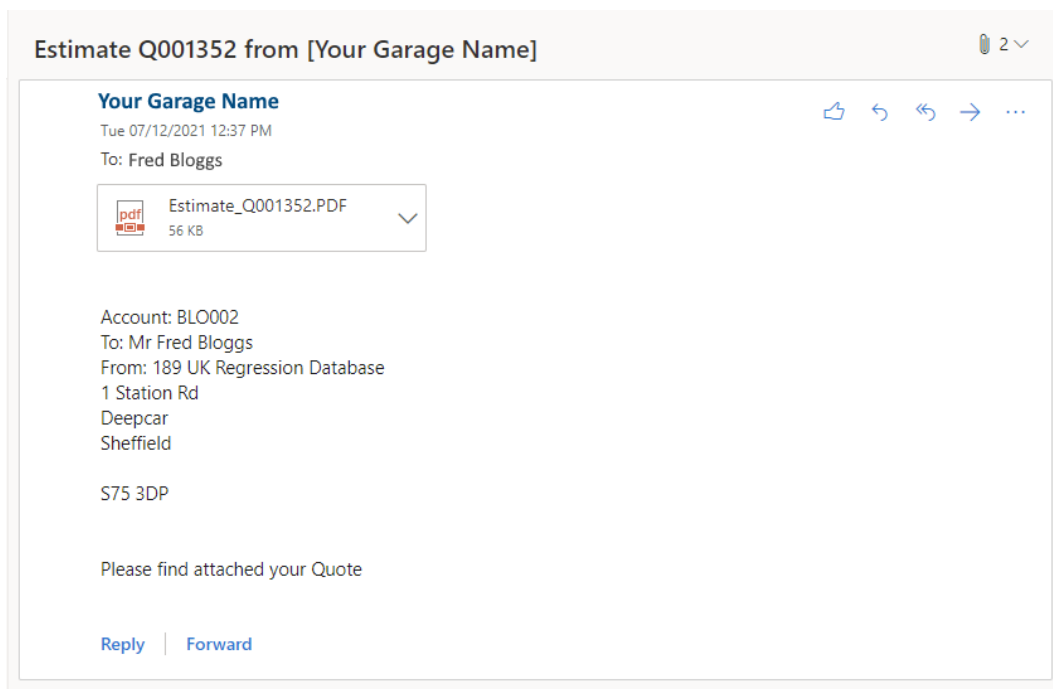
The dedicated Service Advisor role is becoming more popular in UK independent garages.

To support this, you can select from Service Advisors and Technicians when deferring work, allowing you to track performance and upselling opportunities across your team.

Improved email subject

Customer Request 00943186

The subject line of emails sent from the system will now more accurately describe their content, including the document type (where relevant) and your garage name. This will help the emails be clearly recognised and reduce the chance of them ending in your customer's spam folder.



Ability to search for documents by customer order number

Customer Request 01138248

You can now search for new and existing documents using the Customer Order Number. Select this from the list of optional search criteria in any document search screen.

You can enter the Customer Order Number against Estimates and Jobs via the Document options button on the main Work screen.

Document Search

Search Options

Date From: 23/11/2021 Date To: 07/12/2021

Document Status: Open / Unpaid Complete / Paid

Document Type: Quotes Jobs Invoices Credits

Print Options: Export PDF to Print/Email, Print List, Print Selected

Find Document: Enter Number OR Customer Order Number (selected) ORD1234

Optional Criteria: Select Type, Account, Customer, Address, Vehicle, Registration, Service Adviser, Technician, Customer Order Number (highlighted)

Document	Customer	Vehicle	Status	Value	View	Open
<input type="checkbox"/> J001873	Bloggs	FE04CNC Ford Focus		240.00		

Returns bin stock movements

Customer Request 01173481

To help identify parts that have been deleted from the Returns Bin (and therefore returned to stock), you can now show a movement reason of 'Returns Bin (Deleted)' instead of Adjustment.

Stock Movement Report

Date From: 07/12/2021 Date To: 07/12/2021 Part No: MYPART1

Product Group: {All} Show stocked parts only:

Part	Description	DateTime	Reason	Operator	Open	Adj	Close
MYPART1	Part Description	07/12/2021 01:51 PM	J001874	189REGUKCD	0	-1	-1
mypart1	Part Description	07/12/2021 01:51 PM	G000164	189REGUKCD	-1	1	0
MYPART1	Part Description	07/12/2021 01:52 PM	Returns Bin	189REGUKCD	0	-1	-1
MYPART1	Part Description	07/12/2021 01:52 PM	J001874	189REGUKCD	-1	1	0
MYPART1	Part Description	07/12/2021 01:53 PM	Returns Bin (Deleted)	189REGUKCD	0	1	1

Fleet information is retained

Invoices/credits will retain their fleet settings even if the user changes the fleet status of the customers attached to those documents.

Crediting a fleet invoice will always apply the credit to the original fleet customer.

These rules will apply for new transactions and recent invoices where the fleet information was already preserved. Older transactions (pre-2019) will behave as they do currently.

Bugs/defects

01167589	Service and repair times labour will now use the default labour nominal code. The labour code selected does not have one set.
00741553	*Work History Print* The customer's email address is now displayed on the work history report, enabling the garage to email the information to their inbox.
01084474	The Parts screen now prompts for superseded parts as expected.
01222090	The Parts screen display issue with Chrome v91 is now resolved.
01228313	*Invoice Print* If you have a part called "excess", the print invoice total previously didn't take it into account.
01215853	*TeamView* Inactive technicians will no longer be shown on the TeamView reports screen if they were not previously enabled for TeamView access.
01224639	*Document* When adding engine oil to a document, the job group text will no longer show as selected GroupText.
01218418	*Invoice Print* Tire spelling correct for UK to be Tyres.
01221233	Recent documents link no longer errors if the customer has been removed from the estimate selected.
01215890	*Reports* On the Business Analysis Report the overall job total was correct, but the breakdown line item was displaying an incorrect amount for the vat & total column. This has now been resolved.
01216946	*Document/RO* When updating estimates and adding deferred work from an existing job, this was copying existing line ids to the estimate. This has now been resolved.
01241623	*Reports* The Technician Time Report times out when searching for a wide date range. Therefore, some improvements have been made to optimise the query.
01226389	Ledgers-ve opening balances can now be matched off correctly.



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