# MAMSoftware
A Kerridge Commercial Systems Company

# AutoworkOnline

# R190 UK Release Notes

**Release notes summary for Autowork Online R190 May 2022.**

**Driving business performance**

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# TeamView Now Includes CarSide eVHC !

**Electronic Vehicle Health Checks** (eVHCs) and **Damage Inspections** have been added to TeamView.

In addition to the existing **Paperless Job Card** and **Technician Time Tracking** facility, TeamView users can now carry out inspections from the same devices. These features which were previously only available in CarSide have been improved and are now included as standard for new and existing TeamView users.

## No App Required

To make TeamView as accessible and flexible as possible it can run via a browser on Phones, Tablets and PC, allowing your technicians to switch between devices as needed.  Meaning you can run TeamView on unlimited devices for up to 4 technicians, with no need to download an app or register a device.  If you have more than 4 technicians, please contact us for options.

## How to Perform an Inspection

In TeamView open any Job card and select the new **Vehicle Inspection** tab.  Here you will see the built in **Damage Inspection** option and a list of all available **eVHCs**.  The status of each (for the current Job card) is also shown; in the case of the eVHC this includes the number of completed inspection items vs the total items in that checklist.

Tap the one you want to start to open it.

A default eVHC is included, but you can create as many as you want via the **eVHC maintenance screen** in AUTOWORK ONLINE.
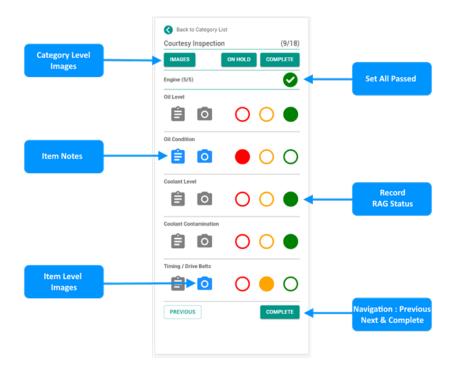
**eVHC Categories** — Each eVHC checklist is made up of items, which are divided into categories. Here you can view the categories and see the number of items completed in each. You can start at or jump to any category by tapping on it, but you can also set the category order in AUTOWORK ONLINE to suit your work flow or walkaround.



eVHC Name & Progress

Category Name & Progress

Set eVHC Status

Jump to any Category

Back to Vehicle Inspection

Courtesy Inspection (9/18)

ON HOLD   COMPLETE

Wheels & Tyres (2/6) >

Braking (2/7) >

Engine (5/5) >

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**eVHC Items and RAG** — Opening a category will list the items it contains. Again you can customise these items and their order as needed. Tapping the Red, Amber or Green icon will set the item as checked with the status chosen. Tap again to uncheck one.



Category Level Images

Item Notes

Item Level Images

Set All Passed

Record RAG Status

Navigation : Previous Next & Complete

Back to Category List

Courtesy Inspection (9/18)

IMAGES   ON HOLD   COMPLETE

Engine (5/5)

Oil Level

Oil Condition

Coolant Level

Coolant Contamination

Timing / Drive Belts

PREVIOUS   COMPLETE

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**Pass All —** The Pass All button at the top of each page allows you to quickly set all items on a page to Green.

This has been improved and now gives the technician the option to set only unchecked items to passed – allowing them to concentrate on the red / amber items first.



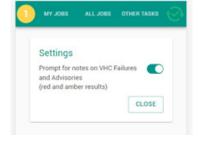**Tyre Tread Entry — Tyre** Items have additional attributes for tread depths.

Tapping on any of these fields will open the quick tread depth entry screen where you can record 3 tread depths across the width of the tyre.



**Notes & Notes Prompt option —** Tapping the notes icon allows text notes to be recorded for any item. The icon is coloured blue when a note is recorded. Tap again to view or edit. These notes are then viewable in AUTOWORK ONLINE and the printed report.
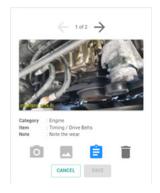
The notes entry can be set to automatically open when you set a red or amber status to quickly capture details.  Each user can set their preference for this behaviour in the TeamView settings screen.



**Images —** Images can now be captured at the item level (max 2 per item) as well as category level. These can be taken using the device's camera, selected from the camera roll or from the file selector on a PC.

Once entered, a text note can also be entered against an image.

All images are synced to AUTOWORK ONLINE automatically.

**Setting Status —** When a technician starts checking items, the eVHC's status will automatically be set to **In Progress**. Using the buttons displayed at the top of the page, the technician can also manually set its status to **In Progress** or **On Hold**; Mark it **Complete**, or **Resume** one previously completed.

There are some new and updated features within AUTOWORK ONLINE which are linked to the eVHC Status and RAG results. These are described in the AUTOWORK ONLINE section below.
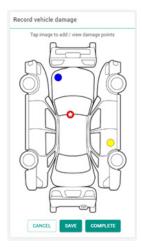
## Damage Inspection

Opening the Damage Inspection screen will display a vehicle template. Tap anywhere on the vehicle template to record damage and select from one of the pre defined types, or use the free type description option.

Images can also be added to any damage point using the camera icon.

Recorded damage points are shown on the template. Tap on an existing damage point to edit or delete it.

Press Save to save progress and sync with AUTOWORK ONLINE, where you can review and print a hard copy.

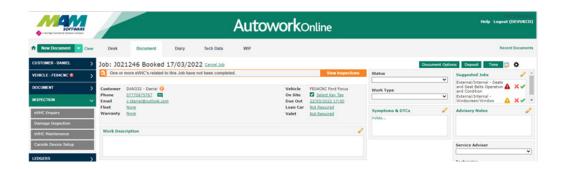Press complete to finish the inspection and lock it. It then becomes read only.



## AUTOWORK ONLINE Workflow & eVHC Maintenance

### Real Time Job Card Updates

All Status changes and RAG results, images and notes are synced directly to AUTOWORK ONLINE. We've made it easier to access this information.

Document Banner — A banner will now show on the job screen in AUTOWORK ONLINE to indicate when an eVHC is in progress - Clicking on it provides quick access to the report where you can review the items recorded and any images captured.
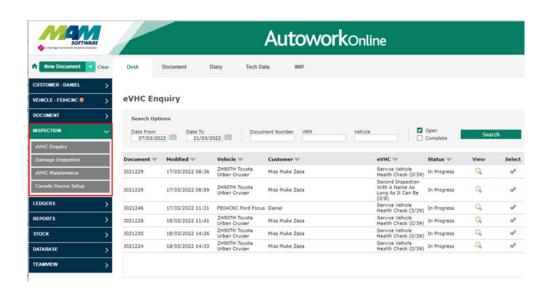


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**Suggested Jobs —** When the technician marks an eVHC as **Complete**, any Red or Amber items will automatically appear in the **Suggested Jobs** box on the Job Card. Clicking on any suggested job will add a new Job Group to the current job card, which you can then use to price up the necessary work. This is key to getting the most out of the workflow, helping your customer with their decision making and allowing you to report on eVHC inspection generated revenue.

By default, the suggested jobs will use category and item descriptions without you needing to set anything up. But you can further enhance this by linking your pre-set custom Jobs to your eVHC results. When you do this, selecting a suggested job will add the associated custom jobs to the job card, complete with any parts, labour and work description, saving time and helping you deliver a consistent experience.

## Inspection Menus

**CarSide** and **TeamView** users will now find all the eVHC and Damage options under the new **Inspection** menu. Carside users will be familiar with the functions, which are exactly the same for TeamView, with a few improvements which are outlined below.



**eVHC Enquiry & Auto Display option —** This is where you can find any existing eVHC reports, review their status and open them for editing. You can also print and email the document, which now includes a created and last modified date.

The screen will now pre populate your preferred date range and auto display using your existing Document Search settings for quick access. If you have not set these options, you can do so now in the user settings screen.

**Damage Inspection** — Find and Review any damage inspections and images that have been created from CarSide or TeamView. As with Carside, once a damage inspection is marked complete it cannot be modified, providing a record of the vehicle condition on arrival, complete with time stamped images. The print (which can also be emailed) now includes a separate Printed and Completed date.
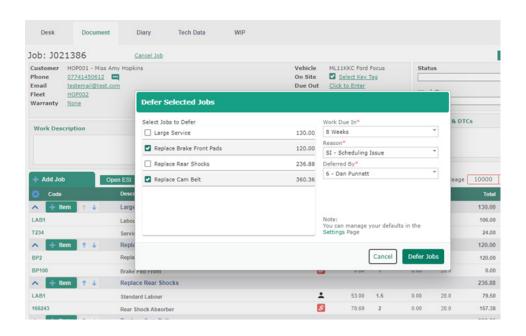
**eVHC Maintenance** — Create new or modify existing eVHCs, checklists and bespoke service lists. You can also enable / disable eVHCs as needed (for example seasonal specific check lists). Don't forget that you can also link any pre-defined custom jobs you have to checklist items, which can then be added to the job card from the suggested jobs panel with a single click.

If you were a CarSide user, all your existing eVHCs are now available in TeamView as well.

## Other Improvements and New Features

### Deferred Work Improvements

We've made it even easier to use the Deferred Work feature – which is an excellent way to recover previously recommended work, especially any created from an eVHC report. When used with the suggested jobs feature and the automatic SMS reminder service this is a very powerful tool for increasing revenue. Allowing you to target more of the job types you want to do and recover them with minimal effort – and of course you can report on the value of work generated from eVHC and Deferral with the existing report suite.

## Quickly Defer multiple job groups at once

When you select a job group to defer, you now have access to all other job groups that are on the estimate or job card. Simply tick any additional Job groups to defer them all at once. Note that each job group will use the same due in, reason and deferred by selected (you can still defer job groups individually or in multiple batches as needed). When deferring multiple job groups, they can still be reported on and recovered independently.

## Auto select Service Adviser or Technician

If you have set a Service Adviser or Technician in Charge for the estimate or Job, they will be pre-selected (in that order) in the deferral pop up. You can still change this if someone else is dealing with the customer. Remember that the person deferring the work is shown in the reporting that can be used to track performance in this area.

## Optional default values

You can set a default reason and recall time for the deferral – click the link on the pop up to open the settings screen. This may be useful if you do not routinely record a reason and/or set a specific work due in. Be aware that using generic values does reduce the value of any data, but you can still override any defaults.

## Coming Soon

We will be making further enhancements in this area in future releases. This will include making it easier to present different versions of an estimate to your customers, get approval and streamline the deferral of any declined work.
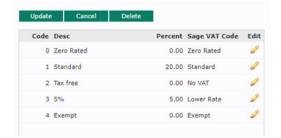
## SAGE Online Export

The SAGE export has a new option for the latest SAGE Accounting package. This is the online version, previously known as SAGE One.

To enable this format, simply select it in the SAGE/Xero export settings screen and configure the options as needed.



**SAGE VAT Codes —** Note that SAGE Accounting uses different VAT codes to SAGE Line 50.
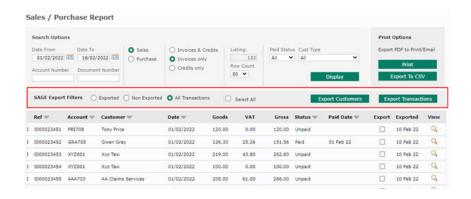
You will need to set the SAGE VAT Code description in the AUTOWORK ONLINE VAT Codes Maintenance screen to match what you have in SAGE.
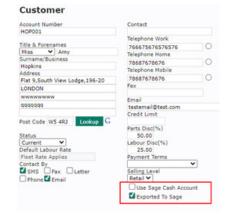
## Exporting

Exporting Customer & Supplier records, and Invoice / Credit transactions is done via the Sales / Purchase Report. These files can then be imported into SAGE Accounting via the Quick Entry screen. Please refer to the Sage documentation for more details.



**Customers** — Unlike SAGE Line 50, SAGE Accounting does not allow the re import / updating of existing customer or supplier records. It will report a problem if you attempt to do so.

To manage this, when a customer account has been exported from AUTOWORK ONLINE it is marked as exported. These records will be excluded from future exports. You can review and/or change the export status of a customer record in the Customer / Supplier Database. This does not affect transactions.
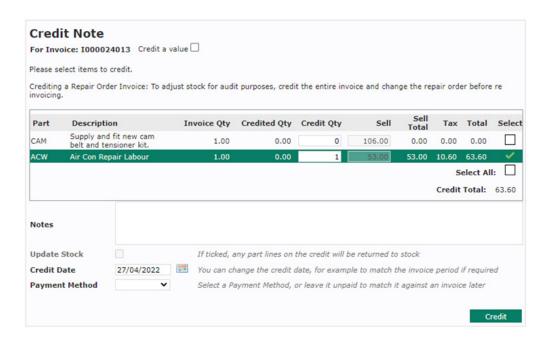
The same 'Use SAGE CASH Account' option is available for the new version of Sage as in Line 50. Setting this will use the specified SAGE Cash account value against any transactions for this customer.

# Improved Credit Screen

The Credit screen layout and workflow has been improved to make it easier to use with a clearer explanation on the use of payment and date options.



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# Misc Enhancements and Customer Requests

**Mobile number free entry** — The ability to free enter a mobile number for one off text messages has been added to the new SMS pop up. Clicking the icon next to the phone number field will clear the current number and allow the free entry of an alternative number. Once a new number is entered, you can send SMS messages to it directly.
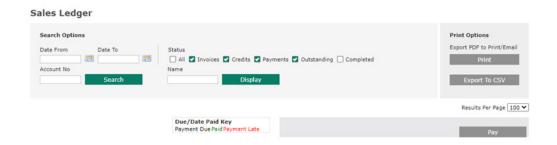
Messages sent this way are still added to the message history, but for the newly entered number (not the original one). Note, that while the message history is retained, the phone number entered is not saved and does not replace any number which is already saved against the current customer.

If you are using the message templates, any form fill information will be taken from the currently displayed document, **even if the free typed number belongs to a different customer.**

**Emailing Receipts —** When emailing a receipt to a customer the attachment name and email subject have been updated to make it clear that this is a receipt for payment and not an invoice.

**Sales & Purchase Ledger results —** We have re-instated the results per page option on the new Sales and Purchase account enquiry screens. Meaning you can select how many lines to return before displaying the results.

# MAMSoftware

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Get in touch with us today and discover how Autowork Online can transform your business ›

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