MAMSoftware
A Kerridge Commercial Systems Company

AutoworkOnline

R191 UK Release Notes

Release note summary for Autowork Online R191 September 2022.

Driving business performance

Table of Contents

Terms and Abbreviations

Please see below for any terms and abbreviations that will be used in the 191 Autowork Online release notes:

| Term / Abbreviation	Definition
BYO	Buy-it-yourself
eVHC	Vehicle Health Check
KPI	Key Performance Indicator
TV	TeamView
WIP	Work In Progress

KPI Dashboard

Available to all of UK and selected US customers

As part of our drive to continuously provide a better user experience, a new page has been created to house the Autowork Online reports along with exciting new reporting features, namely the KPI Dashboard.

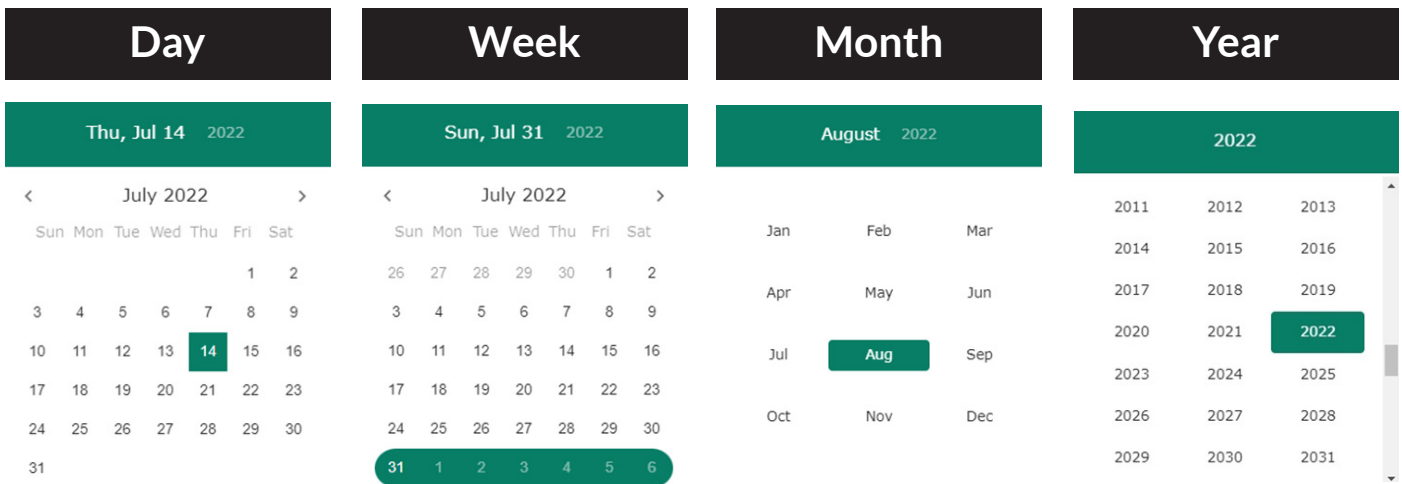Under the Reports section, a new link will be available to access the KPI Dashboard.

Once clicked, the user will be shown the new KPI Dashboard home page
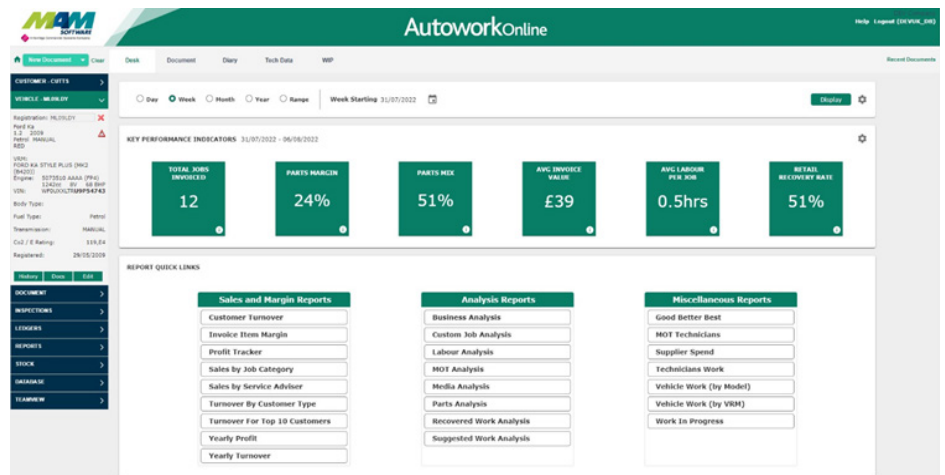
Improved date selector component

The date selector components previously seen on Analysis reports as well as TeamView reports have been improved to provide the user with as much flexibility as possible by allowing them to make use of a few quick select options surrounding Day, Week and Year. An option for manual selection is available if the quick selects don't match the required range.

| ◯ Day ● Week ◯ Month ◯ Year ◯ Range | Week Starting 11/07/2022 📅 | Display ⚙ |

Day	Week	Month	Year
Thu, Jul 14 2022	**Sun, Jul 31** 2022	August 2022	2022

Day

| ‹ | July 2022 | › |
| Sun Mon Tue Wed Thu Fri Sat |
					1	2
3	4	5	6	7	8	9
10	11	12	13	**14**	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31

Week

| ‹ | July 2022 | › |
| Sun Mon Tue Wed Thu Fri Sat |
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31 1 2 3 4 5 6

Month

Jan	Feb	Mar
Apr	May	Jun
Jul	**Aug**	Sep
Oct	Nov	Dec

Year

2011	2012	2013
2014	2015	2016
2017	2018	2019
2020	2021	**2022**
2023	2024	2025
2026	2027	2028
2029	2030	2031

The day selector option will allow the user to select a single day to display data. The user can navigate to different months using the forwards and backwards arrows and adjust the years by simply clicking on the currently selected year top left of the date selector.

The week selector option will allow the user to select data for a chosen week. The design is still displayed the same but the results returned will be an entire week starting from Monday. Similar to the day option, the user can navigate to different months using the forwards and backwards arrows and adjust the years by simply clicking on the currently selected year top left of the date selector.

The month selector option will allow the user to select data for a chosen month. They will be shown a pop-up that will allow them to select one of the 12 months of the year. They will also be able to easily adjust the year by clicking on the currently selected year in the top left corner.

The year selector option will allow the user to select data for a chosen year. They will be shown a pop-up similar to the month selector except this time it will be a list of available years.

Range

Finally, the user has the option to select a custom date range by using the range selector. A custom start and end date can be selected to get the required result.

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KPI dashboard settings pop-up

The user will be able to customise their KPI dashboard experience by clicking on the settings cog at the top right of the page.
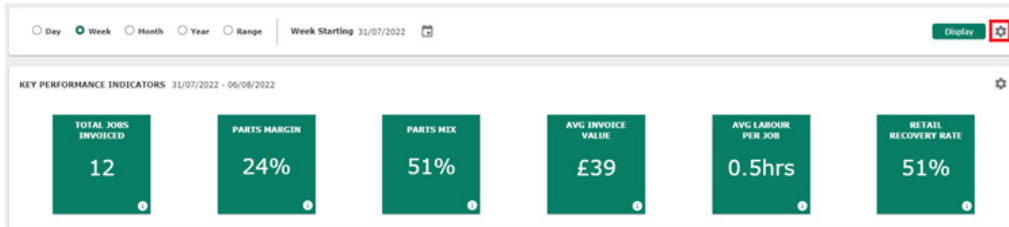
Once pressed, the user will be able to select their default preferences including date selector component and the retail labour rate that should be used for the KPI (Retail Recovery Rate).

KPI Dashboard Settings

Default Date Selection

Select the preferred default date range to be used on the date selector.

○ Day   ● Week   ○ Month

Retail Labour Rate

The retail labour rate would be the labour rate advertised as the garage's normal charged rate. In simpler terms the retail labour rate should represent the lowest available rate the garage can charge in order to break even in terms of labour costs.

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Cancel   Save

New Management Tools - Key Performance Indicators

The main feature of the KPI dashboard is the Key Performance Indicators (KPIs). These KPIs are there to provide the user with real time data at a glance. If a user wants to quickly view the figures from a period of time they can look at one of their 15* selectable KPIs.
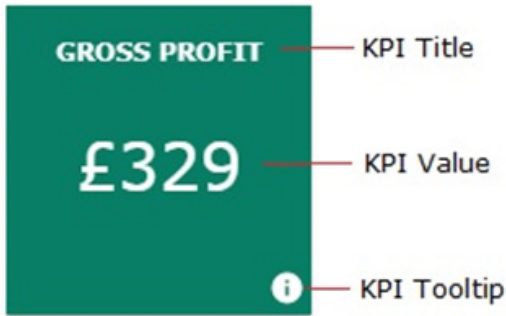
From the list of 15* KPIs the garage will be able to choose any combination to display. A total of 6 KPIs can be displayed simultaneously. These 6 can then also be ordered into the garage's preference.

*There are 15 KPIs currently available but later versions will have more options.
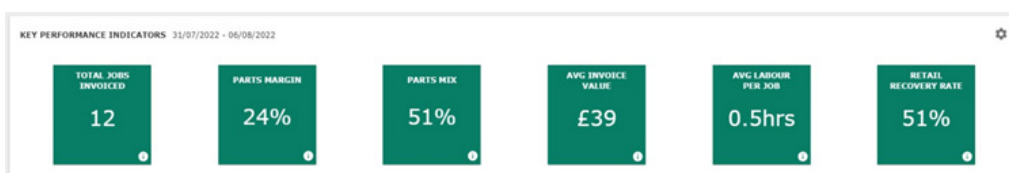
KPI Tile

Each KPI Tile will be made up as follows:

**KPI Title** — Easy to distinguish title section, identifying which KPI is being shown

KPI Value — Largest font section is dedicated to showing

the KPIs value along with any unit information if required (ex. %, hrs, £).

KPI Tooltip — Information icon bottom right, will provide the user with a longer description of what this KPI is currently showing.

Double clicking on the value section of the KPI takes the user to the most appropriate report if available. Not all KPIs have a report that has sufficient data to reflect the value displayed on the KPI.

KPI Configuration pop-up

Click on the cog icon in the KPI Tile to customise each of the 6 KPI's and the order in which to display on the screen.
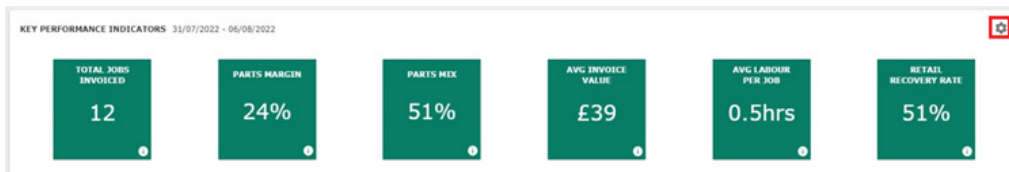
Once pressed, the Configure KPI Dashboard pop up is displayed:
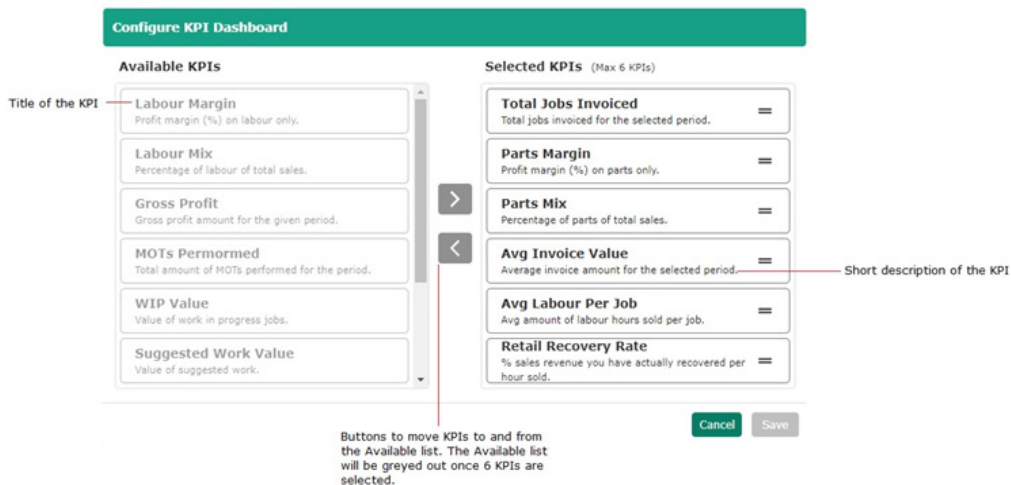
Additionally, any of the selected KPIs can be reordered by clicking and dragging them to the correct order. The pop-up also supports multi selection, meaning you can move multiple KPIs at a time to or from the selected KPI side.

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List of available KPIs

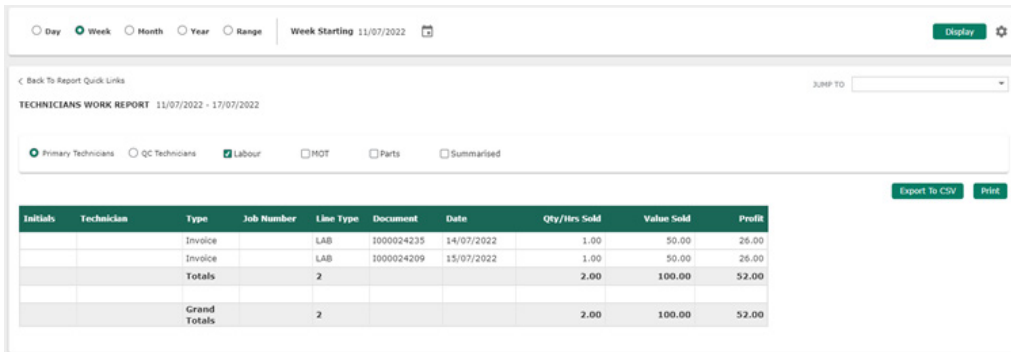| KPI	Short Description
Average Invoice Value	Average invoice amount for the selected period
Average Labour per Job	Average amount of labour hours sold per job
Average Invoice Profit	Average invoice profit for the selected period
Estimate Conversion	How many estimates end up with invoices shown as a percentage.
Gross Profit	Gross profit amount for the given period
Labour Mix	Percentage of labour of total sales
Parts Mix	Percentage of parts of total sales
MOTs performed	Total amount of MOTs performed for the selected period
Labour Margin	Profit margin (%) on labour only
Parts Margin	Profit margin (%) on parts only
Recovered Work Value	Value of work deferred and then completed
Retail Recovery Rate	Percentage sales revenue recovered per hour sold
Suggested Work Value	Value of suggested work that has been added to jobs.
Total Jobs Invoiced	Total number of jobs invoiced for the selected period
WIP Value	Value of work in progress jobs

Report Quick Links

A new report quick links section has been created to streamline the report finding process.

Instead of using a single dropdown to select a report, all reports are visible at once while also being grouped into one of the three categories namely: Sales and Margin reports, Analysis Reports and Miscellaneous Reports.

REPORT QUICK LINKS

Sales and Margin Reports	Analysis Reports	Miscellaneous Reports
Customer Turnover	Business Analysis	Good Better Best
Invoice Item Margin	Custom Job Analysis	MOT Technicians
Profit Tracker	Labour Analysis	Supplier Spend
Sales by Job Category	MOT Analysis	Technicians Work
Sales by Service Adviser	Media Analysis	Vehicle Work (by Model)
Turnover By Customer Type	Parts Analysis	Vehicle Work (by VRM)
Turnover For Top 10 Customers	Recovered Work Analysis	Work In Progress
Yearly Profit	Suggested Work Analysis	
Yearly Turnover		

Any reports that are currently unavailable or not active will be greyed out.

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Updated Report UI — The reports displayed are the same as previous versions of Autowork Online but redesigned and standardised. All reports now have the same layout for consistency and to aid analysis.

Dates that have been selected on the KPI dashboard page will be remembered and displayed automatically on the report.

--- Sales and Margin Reports ---

Customer Turnover

Invoice Item Margin

Profit Tracker

Sales by Job Category

Sales by Service Writer

Turnover By Customer Type

Turnover For Top 10 Customers

Yearly Profit

Yearly Turnover

--- Analysis Reports ---

Business Analysis

Custom Job Analysis

Inspection Analysis

Labor Analysis

Media Analysis

Parts Analysis

Suggested Work Analysis

Value of Recovered Work

--- Miscellaneous Reports ---

Good Better Best

Inspection Technicians

Supplier Spend

Technicians Work

Vehicle Work (by License)

Vehicle Work (by Model)

Work In Progress

From within the report the user can navigate to another report by using the 'jump to' navigation box in the top right of the screen. The dropdown will show a list of all available reports while highlighting the currently displayed report. The same categories are displayed in the report quick links section.

The back button above the report title will take the user back to the KPI dashboard.
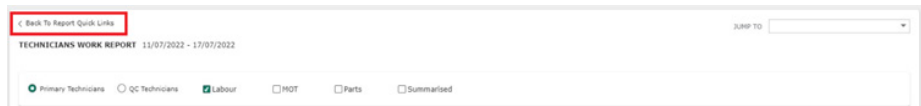
Report name changes — The following reports have had their names adjusted to allow for easier categorisation and to better reflect the contents of the reports:

Previous Report Name	Updated Report name
Parts Profit	Parts Analysis
MOT Report	MOT Analysis
Value of Suggested Work	Suggested Work Analysis
Value of Recovered Work	Recovered Work Analysis

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TeamView date picker update

The TeamView reports page has also received the updated date picker component, along with the ability to set the default date selection from the settings cog.
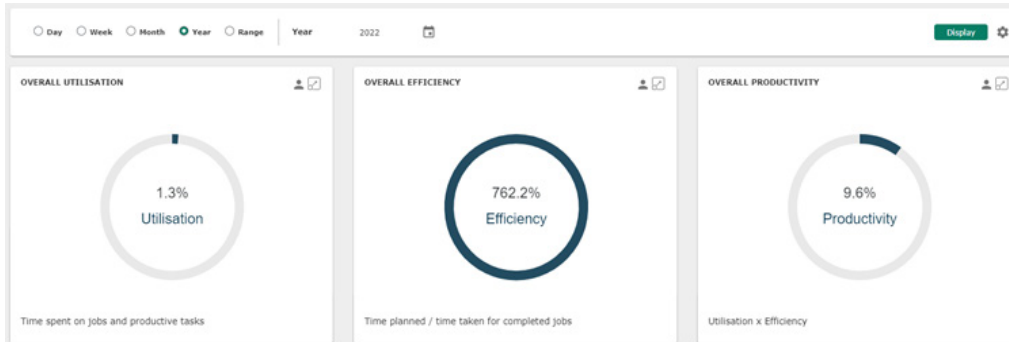
Sage export

Users will now be able to have control over which Customer and Supplier records to export.

If the user has enabled the Sage Accounting export, the Customer and Supplier database screens will now show a tick box. This will show the status of a new 'exported flag' field on the customer / supplier records.

Bugs / Defects

The following bugs / defects have been addressed within r191.

Ref nr	Bug / Defect description
148321	Unable to access eVHC Enquiry/Damage Inspection / eVHC Maintenance screens if CarSide is disabled
146512	The SignalR client will no longer be used if two-way messaging is switched off
146077	Error when accessing Card Payments or trying to pay via Paymentsense if customer set to IRL
149857	TeamView - Adding images on iOS 12 device resulting in a rotated image
149603	TeamView - The time clocked progress bar refreshes back to zero when moving between job details and vehicle inspection
149328	SMS - Value merge field includes value from open document when sending SMS from diary
149330	TeamView - Image Timestamp is not displayed on iPhone
149607	TeamView - Error when emailing images from an eVHC or damage inspection print
149648	TeamView - Deleting eVHC's does not remove them from TV
150825	Symptoms and suggested jobs not adding after initial document creation
150306	Autowork Online document screen unresponsive when zoom level of browser set to 80 and 90% (Chrome & Edge)
146069	Cash Customer contact number not displaying on doc screen
150188	TeamView - Error 500 when adding/viewing category images
149998	MTD String or binary data would be truncated error message when clicking 'Get Obligations' on VAT Return screen
150954	TeamView - Unable to set multiple days with fractional working hours for technicians
149978	TeamView - Pull to Refresh still enabled on iOS15 devices
152191	Document Screen Disabled after Check Stock
150069	Error in ATD catalogue for certain tyre size
151259	Credit screen - Select all tick box enabled when no lines to select
151662	Unable to load car template for damage Inspection on manager view
151602	TeamView - Productive and non-productive reports not displaying correctly
151259	Credit screen - Select all tick box enabled when no lines to select
152191	Document screen disabled after check stock
153348	Tick boxes not visible in Firefox
153170	Invoices not marked as paid in invoice search screen when part paying with a deposit
146811	Removing warranty causes error when re opening the job
154542	Work Schedule printout page format issue occurs when the Warranty Provider isn't select under the Warranty section
145869	Supplier Spend Report wrapping issue
150955	Spelling mistake in Document screen error pop up
151257	Good Better Best uncommitted job groups can be merged into an invoice
153861	Sage Online import error when customers using all address fields
142855	Record Purchase Order Method Consistently
154253	TeamView - Unable to order jobs in Manager View
155671	ECP Ordering not working
155129	Free entry SMS in the CRM screen may have been erroneously disabled
149883	TeamView is still accessible when the Autowork Online account is disabled
156707	VAT values posting to 3/4 decimal places
156496	Online Bookings are not populating the due in dates on jobs

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