![MAMSoftware — A Kerridge Commercial Systems Company]

AutoworkOnline

R192 UK Release Notes

**Release note summary for Autowork Online
R192 January 2023.**

Driving business performance

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Terms and Abbreviations

Please see below for any terms and abbreviations that will be used in the 192 AWOL release notes:

Term / Abbreviation	Definition
AWOL	Autowork Online
URL	Clickable link to be used to access a specific web page

Auto-Link

Auto-Link will be a generic portal (website) which will allow a customer (car owner) to view and respond to content generated from AWOL.
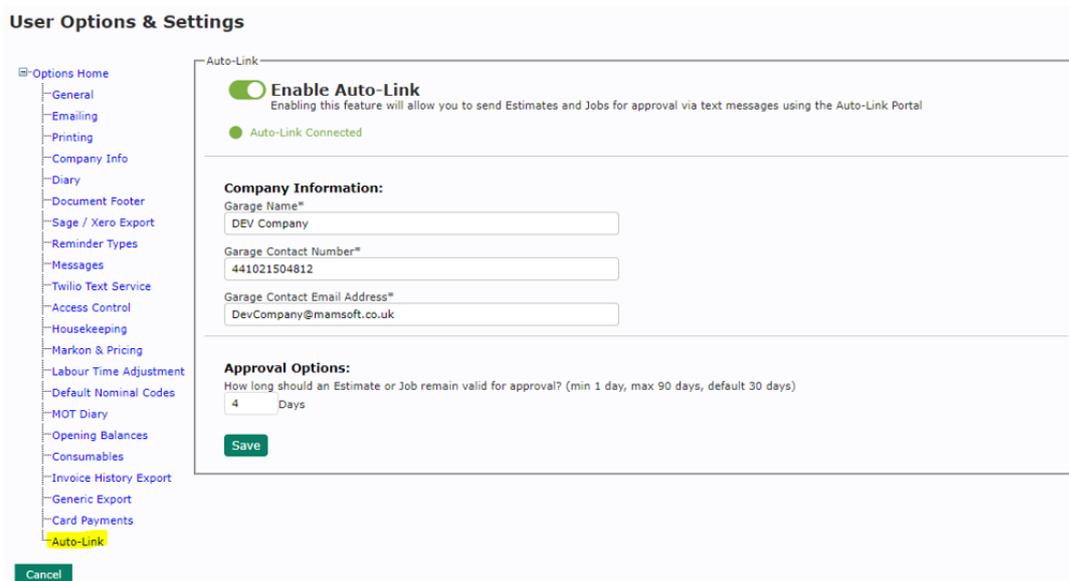
Initially this content will be in the form of an approval request for work to be done on the customers vehicle. The user will receive a text message with a URL included that will take the user to the Auto-Link Portal where they can view a .pdf version of the Quote / Job.

From there the customer can decide whether or not to approve or decline the work using two buttons available. Once selected, the document within AWOL will be updated with the customers decision and work can then be commenced (If approved) or stopped (If declined).

New settings menu item

Once Auto-Link has been enabled from the admin console a new settings page will become visible for the garage.

This will be under User Options > Auto-Link:

Included on the setup page is an enable toggle that will allow the garage to toggle the feature on and off. When enabled a connection status will be shown. If that connection fails an appropriate error message will be shown.

Basic company information will be shown, this will be auto-populated from the Company Setup page. The garage will be able to adjust this information should they wish too as this information will be included in the text message to the customer.

Finally, the garage will be able to decide on the duration that the approval URL should remain valid for. They can choose any value between 1 and 90 days, with it defaulted initially to 30 days.

Sending approval requests

A user can send approval requests from either an Estimate or a Job. In order to make use of the Approval request feature the following pre-requisites need to be met:

- A customer is added to the document
- The customer has a cell phone number
- The Document has some lines added with value attached (i.e. not a 0 Balance)

Once these criteria have been met, a button will become visible on the document page next to the customers cell phone number

When clicked AWOL will save the current Estimate or Job, create a pdf version of it and send it to the Auto-Link Portal. A unique URL will be returned to AWOL and will be sent to the customer via text message.

Once sent, AWOL will display a banner on the document showcasing that an approval request has been sent and that approval is pending:
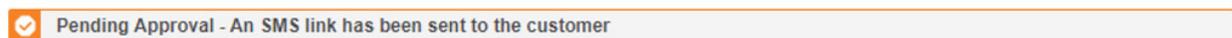
This pending banner cannot be dismissed and will remain for the lifetime of that approval until it expires or until the approval gets actioned (Approved / Declined / Cancelled).

Actioning approval requests

Once the approval request has been sent, the approval can be actioned in multiple ways:

The customer can (From the Auto-Link Portal) after opening the approval request, view a .pdf version of the Quote or Job and at the bottom of the page either approve or decline the work:

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Approving the request ─ Once the user clicks on approve, a datestamp of the approval will be shown on the Auto-Link portal and the document within AWOL will be updated to show that the approval has been approved by showing an approved banner. This banner can be dismissed.

Decline the request ─ Once the user clicks on decline, a datestamp of the decline will be shown on the Auto-Link portal and the document within AWOL will be updated to show that the approval has been declined by showing a declined banner. This banner can be dismissed.
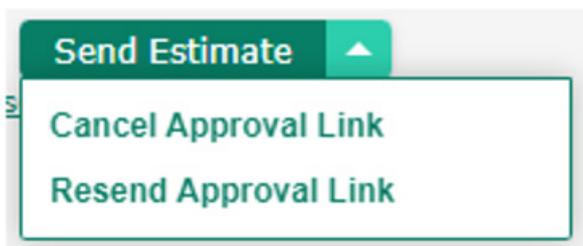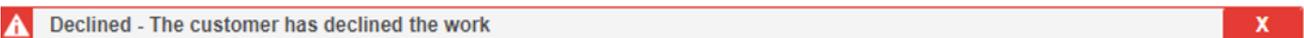
Once sent, the send button within AWOL will receive a dropdown with options to cancel or resend

Cancelling the approval request — If the user cancels the approval request then the URL that was sent to the user will be expired and a cancelled banner will be shown within AWOL to inform the user that the approval request has been cancelled. This banner can be dismissed.

| ✅ | Approval Cancelled | **X** |
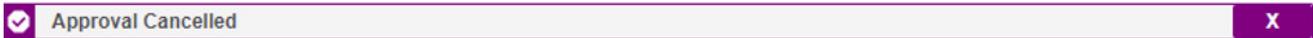
Resend approval request (in cases where adjustments are needed on the Quote / Job — Should the document need to amended after an approval request was made the user can simply click the dropdown and resend the approval request.

A confirmation popup will be shown to inform the user that a previous approval request is outstanding and that this will supersede that request. Should the user confirm a new text message will be sent with a new URL included. Should the user click on the old URL, the new updated Approval request will still be shown.

Auto-Link

You have already sent an Approval request for 63.60. Do you want to resend?
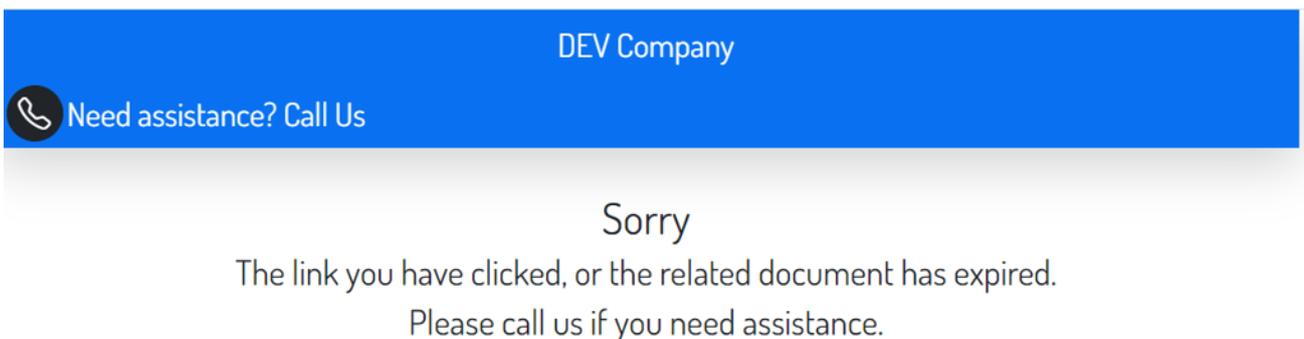
Yes   **No**
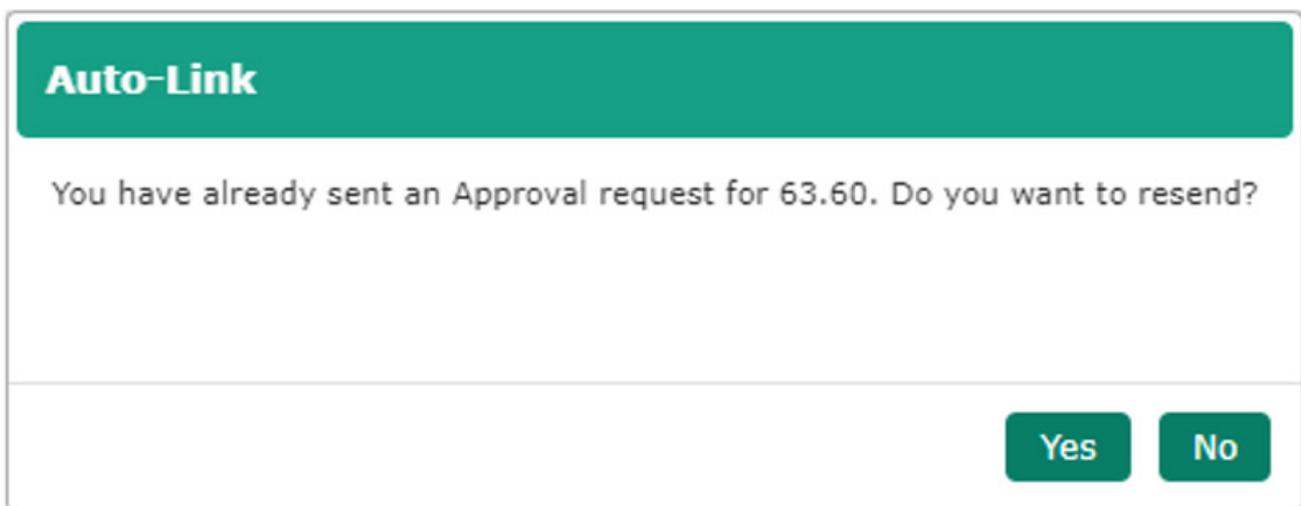
Finally, should the customer not action the approval request in time, the approval request will simply expire. Should this happen, then the customer will be shown an expired web page should they access the link and within AWOL an expired status banner will be shown to inform the user the link has expired. This banner can be dismissed.

In AWOL:

| ⚠ | Approval Expired - The approval link is no longer valid | **X** |

On the Auto-Link Portal:

DEV Company

📞 Need assistance? Call Us

Sorry
The link you have clicked, or the related document has expired.
Please call us if you need assistance.

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Approval History

Once approvals are sent for approval and start being actioned, the approval History will start to be built up. On the document the latest entry will be displayed and can clicked on the show the full approval history.

History will also be carried over from Estimates into Jobs so that full transparency is kept. In the popup the user will be easily able to see what happened at the Estimate stage and what happened at the Job stage.
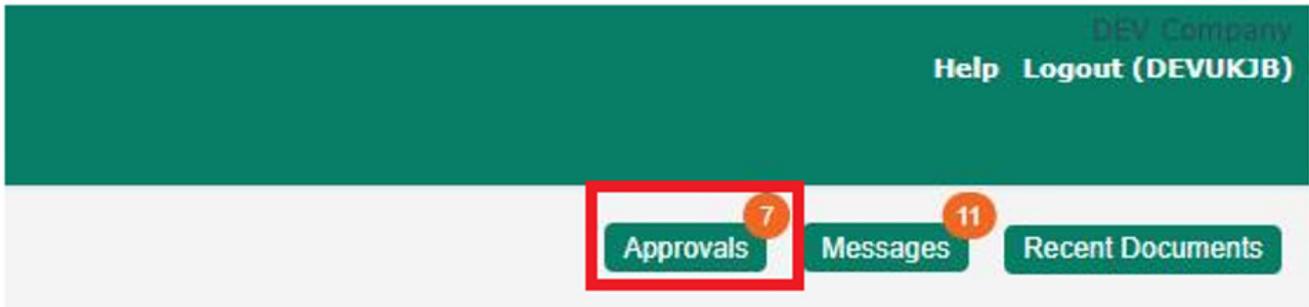
Approval notifications and reporting

Within the header bar of AWOL in the top right, a new button has been added titled approvals. This button will be highlighted should any of the active approvals be actioned (approved / declined) with a number badge telling the user how many unviewed approval changes there are.

Should the user click on the button then a pop out report will be shown which will showcase all approvals that are fall within the expiry date + 7 days with any unviewed actioned approvals highlighted. The report can be filtered by type (Estimate / Job) and by status.

The user can choose to navigate to a specific approval, or simply decide to close the report and carry on where they were. Once the report is closed, those approvals are marked as viewed and will no longer be highlighted.

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Bugs / Defects

The following bugs / defects have been addressed within r192.

Ref nr	Bug / Defect description
144328	Signal R is disconnecting and not reconnecting
145946	Xero - Error when posting VAT only invoices
148534	Clicking multiple times, quickly, on a suggested job adds the job more than once to the document
148654	Moving jobs in the MOT diary causes error if TeamView is enabled
149307	New vehicle VIN lookup - Doesn't report the VIN as invalid if it contains non-alpha numeric characters
149996	TVP - Category list not updating the amount filled in when back button is used
150055	Allicat sell prices not being used if part number is saved to database
150687	UK - SMS number entry icons displaying incorrect CSS when TeamView is enabled
150743	TeamView Manager View is blank when & or + is used in a technician's code
151267	Invoice Selected action in the Job enquiry screen is not checking for Jobs with hidden job groups
153062	Recovered Work Analysis report displays incorrect totals for split invoices
153464	Inspection report does not display license plates on print
154570	TeamView - Jobs with no lines displaying light green (Completed) banner when job opened
154763	TeamView - Assigning technician via enhanced diary does not automatically refresh job list
154766	TeamView - Jobs with Due In dates set by the diary do not automatically get added to TeamView
154767	TeamView - Jobs with Due In dates set by the MOT diary do not automatically get added to TeamView
155083	Duplicate sales credits can be created when automatic print preview is enabled
155260	Sales by Service Adviser - Labour and Parts sold totals incorrect when split VAT invoice included
156444	TeamView - Duplicate eVHC's can be created
156688	Customer Turnover - Amending a customer name adds an extra total line
156829	Suggested Jobs not locked down on cancelled or completed Estimates and Jobs
156679	Good Better Best throwing an error when job groups item(s) is empty
157720	MOT Analysis report doesn't display technicians in the technician column if they are only assigned at line level
157771	Credits with total of 50p or less cannot be raised without a payment method
157775	Split VAT invoices cause the yearly profit report totals to be incorrect
159358	Lead times are not ignoring weekends, depending on the options set (Custom Jobs)
159359	The MOT lead days is not used when returning availability.
160195	Vehicles on Site Report - Pagination displaying incorrect
161960	Returns Print email with incorrect filename, subject line & Body
162673	Selecting an existing customer record from the new customer quick search loses several pre-set account settings
163877	Online Booking - Issue encountered when Custom Job start time and MOT time slots do not match
164932	Online Booking - AvailabilityForCustomJobs responds with a 500 Internal Server Error

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

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