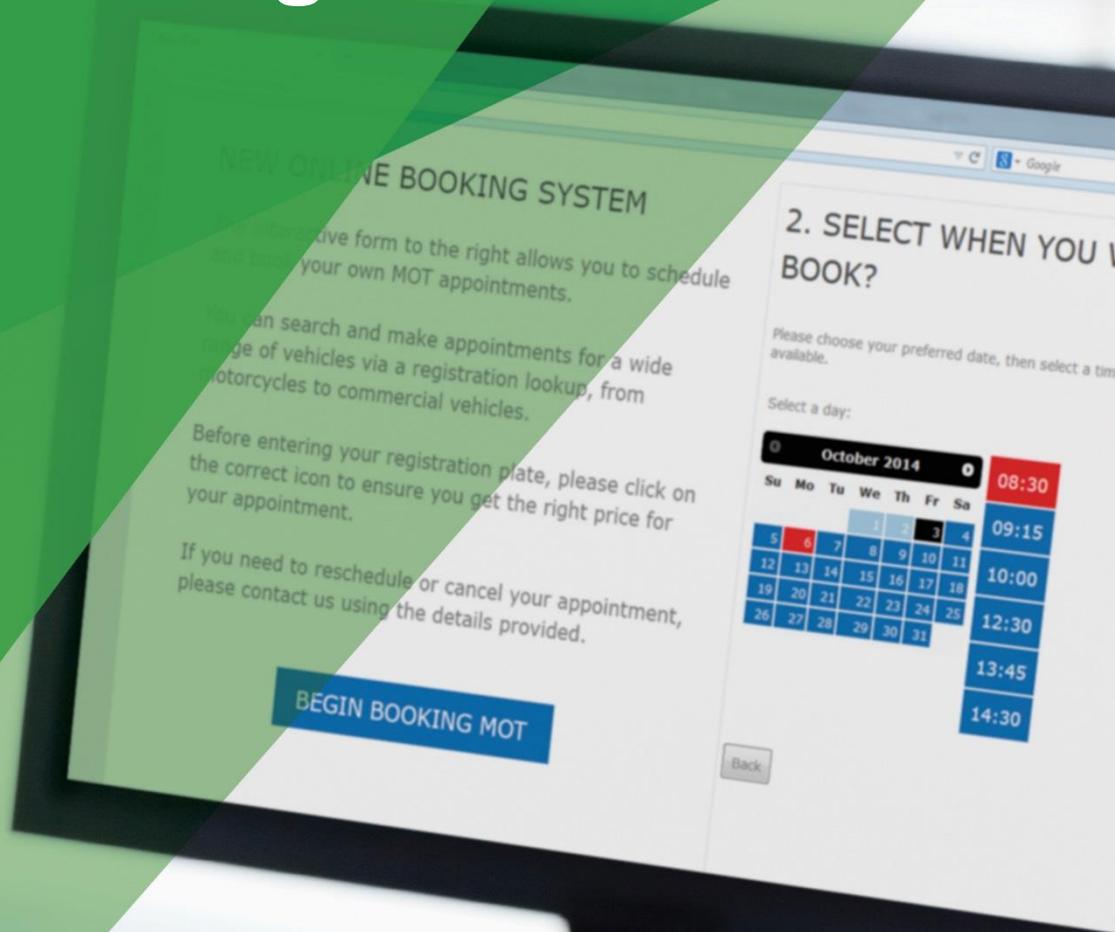


Online Booking

User Guide

Version 1.0



This guide describes how to set up and use the MOT Online Booking module in Autowork Online.

The Online Booking module is available as an optional add on module and comes with an Online Booking Micro Site which can be integrated into your new or existing website. There is a separate integration pack which includes documentation to allow your Web Developer to do this quickly and easily. Once integrated you will need to configure your Online Booking options in Autowork Online. How to do this is described below.

Overview

The Online Booking Micro Site is a self-contained web micro site which sits inside your own website and can be made to look like an integral part of it. The micro site connects directly to your Autowork Online system in real time. This means:

Any changes you make in Autowork Online to the settings described below will take immediate effect on the booking site.

Any bookings made via the site will appear immediately in your Autowork Online system.

Any changes to availability including walk in bookings made in Autowork Online will be reflected immediately on the booking site.

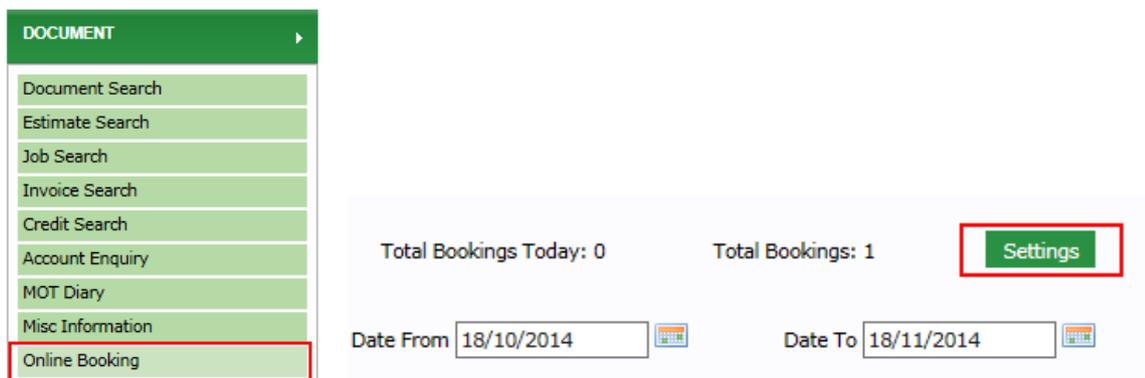
When a customer confirms a booking via the Online Booking site a Job Card is automatically created in Autowork Online and added to your MOT Diary with all the relevant details. You will be alerted to the new booking so you can confirm the details and match it with your existing customer records.

Setup

Before you can use your Online Booking facility you need to spend a little time configuring your options. You can change these settings at any time.

Step 1 – Online Booking settings

From the Document menu select Online Booking, then click on the Settings button on the Online Booking screen.



Online Booking – general settings screen

On this screen you can customise some of the information displayed on the Online Booking site.

Online Booking

General MOT

Custom Messages

Here you can set up some custom text which will be displayed to the user at various stages of their booking process.

Welcome (displayed on the first booking page)

Hello, if you are not sure what MOT class you required, please call us on 01226 352902

Summary (displayed on the last page before booking is confirmed)

Don't forget to ask about our special offers!

Confirmation (displayed after a booking has been made and confirmed)

If you have any questions, or need to change your booking please call us on 01226 352902

Email Address

bookings@thegarage.co.uk

Enabled Media codes (Tick this to ask your customer to choose one of your media codes when booking)

Close Save

Custom messages

Here you can enter any custom messages or text you wish to display on the booking site, for example additional contact information or cancellation details. This text is optional and the site is completely usable without it.

Email address

When a customer completes a booking they will be sent a confirmation email which includes your garage contact details and the date and time of their booking. You will also be sent a copy of this email to alert you to the booking, with the subject "New Online Booking" This is where you set the email address you would like your email alert sent to.

Enable media codes

This option enables the "Where did you hear about us?" selection on the Booking Site. This will allow the user to select from your list of media codes (You can manage these from Database > Codes > Media Codes). The media code the customer selects will be assigned to the Job that gets created when they complete their booking.

Click **Save** to update any changes you make.

Online Booking – MOT settings

On this screen you can enable/disable online booking for MOTs, specify which MOT Classes are supported and control pricing.

Online Booking

General MOT

Enable Online MOT Booking

Please select a Labour or MOT code for each MOT Class you want to make available for online booking. You can select which MOT classes are available for online booking in your MOT diary settings screen.

MOT Classes

Class	Description	Labour
Class I & II	Motor bicycles (up to 200cc with or without a sidecar)	MOT
Class III	3-wheeled vehicles (up to 450kg)	MOT
Class IV	Cars, Taxis, light Vans and small minibuses	Class 4 MOT
Class V	Private passenger vehicles and ambulances (13+ seats)	TRADE MOT
Class VII	Goods vehicles (over 3,000 kg up to 3,500 kg DGW)	

[Close](#) [Save](#)

Enable Online Booking

Tick this option to enable MOT bookings (other booking types of booking will be released in the future). You can use this option to disable Online Bookings at any time by un-ticking it. If disabled; "Online Booking Not Currently Available" will be displayed on the booking micro site.

MOT Classes

There are 5 MOT Classes available. Choose the Classes you want to allow to be booked online and select the MOT Labour code you want to use for each one from the drop down lists.

The price displayed on the Online Booking site will be taken from the MOT Labour code assigned to that MOT Class in this screen. You might want to create specific labour rates for online booking if you want to apply different pricing or report on them separately.

If you do not assign an MOT Labour rate to an MOT Class, that Class will not be shown on the Online Booking site.

Click **Save** to update any changes you make.

MOT diary setup

You now need to set up your MOT Diary, to specify which time slots should be made available for each MOT bay, as well as which MOT Classes each MOT bay can accept.

These settings are found under **Database > User Settings > MOT Diary**

User Options & Settings

MOT Diary

Bay No. Show Bay

Default Technician

Start (hh:mm):

Legend

No: Yes: Yes + Online:

Start (hh:mm)	Mo	Tu	We	Th	Fr	Sa	Su
09:00	X	✓	✓	✓	✓	✓	✓
10:00	X	✓	✓	✓	✓	✓	✓
11:00	X	✓	✓	✓	✓	✓	✓
12:30	X	✓	✓	✓	✓	✓	✓
13:30	X	✓	✓	✓	✓	✓	✓
14:30	X	✓	✓	✓	✓	✓	✓
15:15	X	✓	✓	✓	✓	✓	✓
15:30	X	✓	✓	✓	✓	✓	✓
16:00	X	✓	✓	✓	✓	✓	✓

Specify which MOT classes are valid in this bay (used for online booking)

Class I & II X

Class III X

Class IV X

Class V X

Bays and slots

If you haven't already set up your MOT bays and slots for manual booking, you need to do this before you can use Online Booking. Select a bay and tick the option Show Bay to enable it. You can also select a default MOT technician for the bay if you want.

MOT Diary

Bay No. Show Bay

Default Technician

Start (hh:mm): X

Next add your MOT booking slots by entering a start time in hours and minute and clicking 'Add' for each one. This allows you complete flexibility over the start times and duration of each slot.

Availability

Next you need to set the daily availability for each slot you have created. Do this by clicking in the box for each slot/day. Clicking again will cycle through the 3 options, which are:

- No: **Not available**
- Yes: **Available only in the MOT diary for manual booking**
- Yes + Online: **Available in the MOT diary AND via the Online Booking website.**

You have the flexibility to keep some slots available for manual booking only, which can not be booked online. For example if you want to keep some free for re-tests, trade or service and MOT work. Note that you will only see the Online option if you have the Online Booking module enabled.

Specify MOT Classes

Finally you must specify which MOT Classes this bay can accept. For example some bays may not have a large enough ramp for Class V MOT's.

Specify which MOT classes are valid in this bay (used for online booking)

Class IV

Class I & II

Class III

Select an MOT Class from the drop down and click Add. Note that only MOT Classes you have enabled for Online Booking in the MOT settings screen by assigning an MOT labour code to will be available to select.

Multiple MOT bays

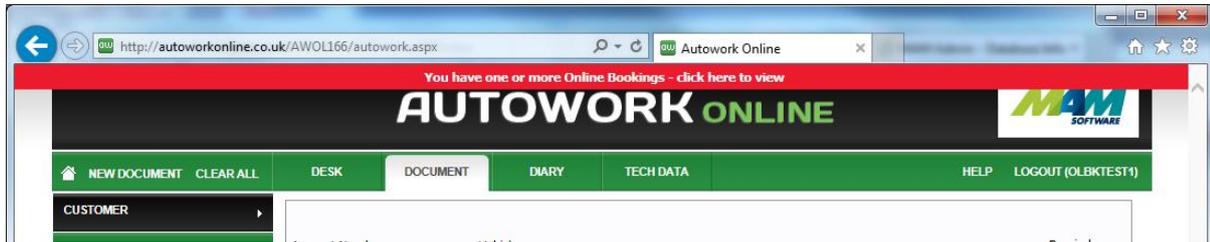
You can have up to 4 MOT bays, each of which can have their independent own settings. Repeat the process above for each bay as required.

When a customer uses the Online Booking site, they will be asked to select an MOT Class. They will then be shown a list of start times which will be obtained by looking at all the bays you have which support the requested MOT Class and have slots still available.

If you have multiple bays with the same time slot start times and supporting the same MOT Classes, when a customer confirms their booking it will be created in the first bay with availability for the time slot they select.

Receiving bookings

When you receive a new Online Booking it will automatically create a Job card and add it to your MOT diary. A banner will be displayed at the top of the screen when it is next refreshed to alert you.



Clicking on this banner will take you to the online booking screen (which you can also open at any time by clicking on Documents > Online Booking.)

Online Booking

Last Booking: 17/11/2014 14:27:11 Total Bookings Today: 0 Total Bookings: 1 [Settings](#)

Show Pending Show All for Date Range Date From: Date To:

Document	Date	Customer	Vehicle	Job	Status	Value	Select
J004322	17/11/2014	Online Booking	FE04CNC Ford Focus	Class I & II	Pending	50.00	✓

The Online Booking screen will show all pending bookings by default (pending bookings are ones which you have not yet acknowledged). It also shows you the date and time of the last booking received, total bookings and the option to review all previous bookings for a given date range.

Acknowledging a booking

Acknowledging a booking is a way of making sure you have reviewed the details, giving you a chance to let the customer know if there are any issues or make and amendments necessary. It also allows you to tie the Job to an existing customer where possible.

Whether acknowledged or not the Job has still been created and the booking has been confirmed with the customer, this simply lets you keep track of which Online Bookings you have seen.

To acknowledge a booking, click on the tick icon to open the Job.

An Online Booking that has yet to be acknowledged will show the **Click to acknowledge** banner at the top. Click on this banner to acknowledge.

(Note that until it has been acknowledged it will be set against a customer called "ONLINE".)

NEW DOCUMENT CLEAR ALL DESK DOCUMENT DIARY TECH DATA HELP LOGOUT (OLBKTEST1)

CUSTOMER - ONLINE BOOKING

Account Number: ONLINE ✖

Online Booking
Work Tel :
Home Tel :
Mobile :

History Docs Edit

VEHICLE - FE04CNC

DOCUMENT

CARSIDE

LEDGERS

REPORTS

STOCK

DATABASE

Online Booking - Click to Acknowledge

Job: J004322 Booked 20/11/2014 Cancel Job Vehicle on Site

Account Number: ONLINE Vehicle: Ford Focus Reminders

Online Booking Mileage: 10002 Confirm

Reg Number: FE04CNC

Technician: [dropdown]

Status: [dropdown]

Work Type: [dropdown]

MOT 23/04/2015

Service [dropdown]

Timing Belt [dropdown] Update

Options

Symptoms Work Description

Labour Jobs Repair Times Service

	Sell	Hrs	Disc	VAT	Total
MOT	50.00	1.00	0.0%	0.0%	50.00 ✖ MOT Diary

Parts Quick Parts Catalogue Tyre Sales

Advisory Notes

Planned Hours: 1.00

	Consumables	Goods	Vat	Total
	0.00	50.00	0.00	50.00

Check Margins

Estimate Update Job Assign Job Invoice Credit Print Discounts Order / Receive Split

A pop up will then be displayed showing the booking details on the left, including any notes the customer may have entered.

On the right, the customer details are displayed. At the top will be the details entered by the customer via the booking site. The system will attempt to match this to your existing customer and vehicle database and display a list of choices appropriate to what it finds.

Online Booking Acknowledgement

Booking summary	Customer details
Received: 17/11/2014 14:27	Daniel
Job Type: MOT Class I & II	110 Industry Street, SHEFFIELD, South Yorkshire, s6 2wx
Bay: Bay 1	Tel 3243433432
Date / time: 20/11/2014 11:00	This vehicle is currently assigned to the customer below
Vehicle: FE04CNC Ford Focus	SMI001 smith
Customer Notes:	27 rtr, tertertert, SOUtertert, NOTert, Tel 07795 383103 Mobile 07871004193
	<input checked="" type="radio"/> Use this account <input type="radio"/> Create New customer record <input type="radio"/> Use CASH Account <input type="radio"/> Select a different account <input type="checkbox"/> Update customer details

Close Acknowledge booking

Customer matching options

When acknowledging a booking you need to conform the customer details. The screen will provide several options, depending on the data available:

Use this account

Choose to use the suggested customer, which might be an existing customer

The system will suggest an existing customer record if the vehicle is recognised and is already assigned to an account.

Create new customer record

This will create a new customer record with the details entered by the customer. The vehicle will be assigned to this account and the Job updated.

Use CASH account

Choose to use the CASH sale account. The customer details will be set for the cash customer contact details for this job. But no new account will be created. You can still create one later.

Select a different account

This will display a list of existing customer records that have similar details. It checks names, telephone numbers and addresses to suggest the best matches.

Update customer details

If you tick this box when choosing to use an existing customer record the details against this record will be updated with the ones entered by the customer via the booking site. Use this option only if you are certain the account matches and you want to update it with the new details – for example the address match but the customer has provided a new mobile number. This option will overwrite the name, address and phone details of the existing record.

You can of course confirm the customer's details when they arrive and update them then.

Once you have acknowledged a booking its status will change from Pending to Acknowledged. This will also be indicated in the MOT diary.

The MOT diary

The MOT diary now also offers improved ease of use and the ability to block out individual slots / days.

Slots which are also available for Online Booking are shown in Yellow.

To make an individual slot unavailable for online booking click the box in the Block column. The slot will show in red. To unblock a slot just click on it again. Blocking slots override the default setting for that day/slot/bay only and will be made unavailable on the online booking micro site.

This is useful if you want to reserve a slot or slots for a specific job you know is coming in, or if a member of staff will not be available.

Start	Vehicle	RegNo	Tester	Job No	Online	Assign	Move	Delete	Block
09:00									<input checked="" type="checkbox"/>
10:00	Volkswagen Passat	AO57SDU		J004324	Acknowledged				
11:00	Ford Focus	FE04CNC		J004326	Acknowledged				
12:30									<input type="checkbox"/>
13:30	Ford Focus	FE04CNC	DP	J004325	Pending				
14:30									<input type="checkbox"/>
15:30									<input checked="" type="checkbox"/>
16:00									<input checked="" type="checkbox"/>

You can also block a whole day for a specific bay by clicking the Block Day button. This can be useful if you know you are going to be closed for a specific day in the future. You can make it unavailable for that day(s) only without changing your default settings. Remember that this setting is per bay and may need setting for each MOT bay you have enabled.

To make a specific slot permanently unavailable for online booking, use the MOT Diary settings screen described above.

Moving a booking

To move an existing booking to another slot first click the icon to select it, then click the icon against the new slot on the desired day / bay. If you do this for an online booking, remember to inform the customer of any changes.