

Workflow 2.0

In this guide you will know how to use our new Workflow 2.0 in AutoRepair Cloud application.

The screenshot displays the 'Quotes' section of the AutoRepair Cloud application. At the top, there is a header with 'Quotes' and a 'Change View' option. Below this is a table with columns: 'Started', 'Name', 'Phone#', 'Vehicle', 'Invoice', 'L/Plate', 'Worker', and 'Status'. A form is positioned below the table, containing input fields for '2010', 'Toyota', and 'Camry', followed by an 'Add' button and a 'Cancel' button. A dropdown menu is open under the 'Add' button, listing options: 'Base', 'LE', 'SE', and 'XLE'. A red arrow points from the '+ New Quote' button in the bottom navigation bar to the '2010' input field. Red curved arrows indicate the flow from the input fields to the 'Add' button.

Log into the application and choose Quotes & Repairs. As you already know, in order to start the repair, it is necessary to press “+ New Quote” button, fill out the form with the vehicle details and to complete the creation of the new repair by clicking the “Add” button.

You will start with the Quote stage or repair preparation. You can add the parts and works to receive the estimate evaluation of the time and cost of the repair. The “Quote” will be deleted in twenty-four hours (time can be modified in the application settings). It is necessary to start the repair in order to save the information about parts and works.

Quote

Confirmation

Try to find or add the new customer first

Yes No

2010 Toyota Camry - 16 km... Less

Add/Attach Customer

Vehicle: 2010 Toyota Camry Base

Mileage before: 16

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
Description	Labor	100	1.0			+ Add item
Total			0.00		0.00	

Quote Repair Order

Prime Technician: Dovie Mante

Time Started: 2018-05-09 09:10

Leave Your notes for this repair...

Help Open Invoice Delete

To start the repair, go to the Repair Order. This option will become available if you add the information about the vehicle owner.

Find / Add Customer & Vehicle

Phone* Email

First Name Last Name

Address City State Zip

VIN L/Plate State

Odometer, km* Approximate milage per year km

Vehicle*

Submodel # Doors

Transmission # Speeds Wheels Drive

Engine Size, cub. # Cylinders Configuration

Power, hs

Even though entering only the owner's phone number is sufficient, the additional information can help you and your customers in the future.

Besides, your invoice contains the additional information.

Repair # 84 

2010 Toyota Camry - 16 km... [More](#)

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
 Engine inspection	Diagnostics	150.00	2.00		300.00	Process 
Brake check	Diagno: 	150	1.0			
Total			2.00		312.00	

More

Initial Inspect Approval Part Delivery Wait Tech Labor Finished Cash Payment

Prime Technician: Dovie Mante

Time Started: 2018-05-09 09:48

Requests for repair: Accepted 0 Excluded 0 

Leave Your notes for this repair... 

You are now at the “Initial” stage. Let’s take a look at what is going on with your customer’s vehicle. Add “Diagnostics” to the *Repair Items*. Adding the “Diagnostics” will take your repair to the “Inspect” stage.

Repair Order # 84 

2010 Toyota Camry - 16 km... [More](#)

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
 Engine inspection	Diagnostics	150.00	2.00		300.00	 Suggested 
 Transmission Inspection	Diagnostics	150.00	1.00		150.00	 Approved 
 Brake check	Diagnostics	150.00	1.00		150.00	 Process 
 Tire Pressure check	Diagnostics	150.00	0.10		15.00	 Completed 
 Oil Level check	Diagnostics	150.00	0.10		15.00	 Rejected 



More Total 4.10 639.60

? Initial Inspect Approval Part Delivery Wait Tech Labor Finished \$ Cash Payment

Prime Technician

Time Started 2018-05-09 09:48

Requests for repair



Now, each repair item has its own life cycle. The added repair item has a “Suggested” status and can be either approved or declined by the vehicle’s owner directly or with your help.

The next status is “Process.” It means that the task is being performed. When the task is completed, one of your technicians can change the status to *Completed*.

Repair Order # 84 

2010 Toyota Camry - 16 km... [More](#)

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
 Engine inspection	Diagnostics	150.00	2.00		300.00	 Completed 
 Transmission Inspection	Diagnostics	150.00	1.00		150.00	 Completed 
 Brake check	Diagnostics	150.00	1.00		150.00	 Completed 
 Tire Pressure check	Diagnostics	150.00	0.10		15.00	 Completed 
 Oil Level check	Diagnostics	150.00	0.10		15.00	 Completed 

Description Labor Hours

Total 4.20 655.20

Initial Inspect Approval Part Delivery Wait Tech Labor Finished Cash Payment

Prime Technician:

Time Started: 2018-05-09 09:48

Requests for repair:

Leave Your notes for this repair...

05/10/18 11:16 **Mechanic**
 Notification - Inspection done

Type your message here...

[Help](#) [Email Invoice](#) [Workflow](#) [Open Invoice](#) [Delete](#)

So far, you are at the *Inspect* stage. Please, complete all diagnostics to go to the *Approval* stage.

Repair Order # 84 

2010 Toyota Camry - 16 km... [More](#) Wrenching  Add a repair tag, split with semicolon

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
 Engine inspection	Diagnostics	150.00	2.00		300.00	 Completed 
 Transmission Inspection	Diagnostics	150.00	1.00		150.00	 Completed 
 Brake check	Diagnostics	150.00	1.00		150.00	 Completed 
 Tire Pressure check	Diagnostics	150.00	0.10		15.00	 Completed 
 Oil Level check	Diagnostics	150.00	0.10		15.00	 Completed 
 Wrenching	Labor	100.00	1.00		100.00	 Approved 
 Hammering	Labor	100.00	1.00		100.00	 Approved 
		Total		6.20	863.20	

More Labor 100 1.0 + Add item

Initial Inspect Approval Part Delivery Wait Tech Labor Finished \$ Cash Payment

Prime Technician: Dovie Mante

Time Started: 2018-05-09 09:48

Requests for repair: Accepted 0 Excluded 0 +

Leave Your notes for this repair... 

05/10/18 11:16 Mechanic 

 Notification - Inspection done

  Type your message here... 

Help Email Invoice Workflow Open Invoice

As before, you can add parts and works necessary to complete the repair. To go to the next stage, all added repair items must be approved, rejected or completed.

Sometimes, it is necessary to wait for the parts delivery in order to complete the repair. This is what the next stage “Parts Delivery” is for. It looks like you have not added any details, please, add one.

Repair Order # 84

2010 Toyota Camry

Some of your items have the status - Suggested.

You cannot change the status to Part Delivery before all items are Rejected or Approved.

You could approve all items through the button here. Or you could do approve or reject on the repair page one by one item. Your customers could approve or reject also if they have the ARC Customer application.

Description	UFO	Status
Engine inspection	300.00	Completed
Transmission Inspection	150.00	Completed
Brake check	150.00	Completed
Tire Pressure check	15.00	Completed
Oil Level check	15.00	Completed
Wrenching	100.00	Approved
Hammering	100.00	Approved
OIL FILTER	18.57	Suggested

Total 6.20 882.88

Prime Technician: Dovie Mante
 Time Started: 2018-05-09 09:48
 Requests for repair: Accepted 0 Excluded 0
 Leave Your notes for this repair...

05/10/18 11:16 Mechanic
 Notification - Inspection done
 Type your message here...

Help | Email Invoice | Workflow | Open Invoice

It looks like you still have some repair items left. If you want to use them in repair, press "Approve all." Now, you are at the Part Delivery stage again and you have a part to be delivered.

Order

Order Number: 11 | Status: **Shipped** | Purchase
 Order Date: 05/10/2018 | Time Expected: 05/10 07:27 PM
 Tracking #: webquery | New/Used: New | OEM:
 Supplier Number: 0418065 | Supplier: Amazon | Warranty:

Part Number: 0418065 | Manufacturer: Beck/Arnley
 Description: OIL FILTER
 More about product: Specification

Price Unit, UFO	Quantity	Unit	UFO	Status
7.61	1	UFO	7.61	Completed
0.00				Completed
7.61				Completed
18.57	1	UFO	18.57	Approved
100.00	1.00	Labor	100.00	Approved
18.57	1	UFO	18.57	Shipped

Total 6.20 882.88

See this order in: Dovie Mante
 2018-05-09 09:48
 Requests for repair: Accepted 0 Excluded 0
 Leave Your notes for this repair...

05/10/18 11:16 Mechanic
 Notification - Inspection done
 Type your message here...

Help | Email Invoice | Workflow | Open Invoice

And, vice versa, all modifications of the repair item status will be reflected in the order.

It seems that we have ordered too many parts of this type, but we only need one for our repair. If you change the quantity of the repair items, then the rest of the parts from your order will get into your inventory.

Repair Order # 84

2010 Toyota Camry - 16 km... More

Wrenching Add a repair tag, split with semicolon

Description	Type	Price, UFO	Hours	Qty	Total, UFO	Status
Engine inspection	Diagnostics	150.00	2.00		300.00	Completed
Transmission Inspection	Diagnostics	150.00	1.00		150.00	Completed
Brake check	Diagnostics	150.00	1.00		150.00	Completed
Tire Pressure check	Diagnostics	150.00	0.10		15.00	Completed
Oil Level check	Diagnostics	150.00	0.10		15.00	Completed
Wrenching	Labor	100.00	1.00		100.00	Approved
Hammering	Labor	100.00	1.00		100.00	Approved
OIL FILTER	Parts	18.57		1	18.57	Received

Description Labor 100 1.0 + Add item

More Total 6.20 882.88

Initial Inspect Approval Part Delivery Wait Tech Labor Finished \$ Cash Payment

Prime Technician Dovie Mante

Time Started 2018-05-09 09:48

Requests for repair Accepted 0 Excluded 0 +

Leave Your notes for this repair...

05/10/18 11:16 Mechanic Notification - Inspection done

Type your message here...

If you change the status of all parts to Received, the system will read it as your readiness for the next stage.

The Wait Tech stage. At this stage the repair needs technicians. As before, each repair is assigned a Prime Technician responsible for the repair performance in general.

However, now, several specialists can take on each stage. So far, only our Prime Technician was responsible for the Part Delivery stage. Wait a minute, we have a manager, let him handle these tasks!

Configuration

Profile Settings
Financial
Technical
Inspection templ.
Repair templates
Message templ.
OBD II
List of Bays
Workflow

Workflow

Status	Step Name	Measure	Expected	Warning	Alert	Default Worker	
<input checked="" type="checkbox"/>	Initial	Minute	15	30	60	Prime Assigned	Edit
<input checked="" type="checkbox"/>	Inspect	Percent	100	120	150	Same as previous	Edit
<input checked="" type="checkbox"/>	Approval	Minute	30	60	120	Same as previous	Edit
<input checked="" type="checkbox"/>	Part delivery	Hour	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>	Jackeline Stracke	Save
<input checked="" type="checkbox"/>	Wait tech	Minute	60	120	180	Same as previous	Edit
<input checked="" type="checkbox"/>	Labor	Percent	100	150	200	Same as previous	Edit
<input checked="" type="checkbox"/>	Finish	Hour	8	24	48	Same as previous	Edit

Help Info

On the *Configuration – Technical - Workflow* page you can find the repair stages list. Press the Edit button in Part Delivery line, this will allow editing in the Part Delivery stage. Press the “Default Worker” in the fall out column list, do you see the list of workers? You can assign any of the available workers to this repair stage.

Configuration

- Profile Settings
- Financial
- Technical
- Inspection templ.
- Repair templates
- Message templ.
- OBD II
- List of Bays
- Workflow**

Workflow							
Status	Step Name	Measure	Expected	Warning	Alert	Default Worker	
<input checked="" type="checkbox"/>	Initial	Minute	15	30	60	Prime Assigned	Edit
<input checked="" type="checkbox"/>	Inspect	Percent	100	120	150	Same as previous	Edit
<input checked="" type="checkbox"/>	Approval	Minute	30	60	120	Same as previous	Edit
<input checked="" type="checkbox"/>	Part delivery	Hour	3	4	5	Jackeline Stacke	Edit
<input checked="" type="checkbox"/>	Wait tech	Minute	<input type="text" value="60"/>	<input type="text" value="120"/>	<input type="text" value="180"/>	Same as previous	Save
<input checked="" type="checkbox"/>	Labor	Percent	100	150	200	Same as previous	Edit
<input checked="" type="checkbox"/>	Finish	Hour	8	24	48	Same as previous	Edit

[? Help](#)

[i Info](#)

Think that your manager is responsible for both making purchases and creating the work schedule. Please, open the Wait Tech for editing and select 'Same as Previous' from the 'Default Worker' List. Now, if you change the manager who was responsible for the 'Parts Delivery' stage, he will be automatically changed for the 'Wait Tech' stage as well.

Note, that for this demonstration of the 'Wait Tech' stage we have set very short times in advance. We switched from the usual one hour duration time to three minutes. The warning times have also been modified.

And one more thing to consider while you are still in 'Configuration'. Let's get rid off the 'Inspect' stage – imagine that we conduct a scheduled service and do not need the whole cycle to clarify the what causes malfunctions.

Configuration

- Profile Settings
- Financial
- Technical
- Inspection templ.
- Repair templates
- Message templ.
- OBD II
- List of Bays
- Workflow**

Workflow							
Status	Step Name	Measure	Expected	Warning	Alert	Default Worker	
<input checked="" type="checkbox"/>	Initial	Minute	15	30	60	Prime Assigned	Edit
<input type="checkbox"/>	Inspect	Percent	<input type="text" value="100"/>	<input type="text" value="120"/>	<input type="text" value="150"/>	Same as previous	Save
<input checked="" type="checkbox"/>	Approval	Minute	30	60	120	Same as previous	Edit
<input checked="" type="checkbox"/>	Part delivery	Hour	3	4	5	Jackeline Stracke	Edit
<input checked="" type="checkbox"/>	Wait tech	Minute	60	120	180	Same as previous	Edit
<input checked="" type="checkbox"/>	Labor	Percent	100	150	200	Same as previous	Edit
<input checked="" type="checkbox"/>	Finish	Hour	8	24	48	Same as previous	Edit

[Help](#)

[Info](#)

This does not mean that we are unable to perform the Diagnostics. We are doing this only for convenience in order for the repair stages to better reflect the business processes of our workshop.

Let's go back to the Workflow Timeline of our repair. As you see, nothing has changed and all modifications will be reflected only in the new repairs.

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Workflow Timeline

Vehicle: 2010 Toyota Camry Base
Customer: +1 (555) 274-3338
Repair Order: 84

Activity	Start	End	Fact	Expected	Responsible	Status
Initial	05/09 09:48 AM	05/09 09:49 AM	0m	15m	Dovie Mante	In Time
Inspect	05/09 09:49 AM	05/10 11:13 AM	7h 24m	4h 12m	Dovie Mante	Delay - 3h 12m
Tire Pressure check			6m	6m	Dovie Mante	Completed
Engine inspection			2h	2h	Dovie Mante	Completed
Oil Level check			6m	6m	Dovie Mante	Completed
Transmission Inspection			1h	1h	Dovie Mante	Completed
Brake check			17m	1h	Dovie Mante	Completed
Approval	05/10 11:13 AM	05/10 11:40 AM	27m	30m	Dovie Mante	In Time
Part delivery	05/10 11:40 AM	05/10 11:51 AM	11m	7h 46m	Dovie Mante	In Time
OIL FILTER		05/10 11:51 AM		7h 46m	Order #11	Received
Wait tech	05/10 11:51 AM	05/10 12:51 PM		1h	Dovie Mante	In Process
Labor	05/10 12:51 PM	05/10 02:51 PM			Combo	Not Yet
Hammering				1h	Lazaro Lueilwitz	Approved
Wrenching				1h	Jackeline Stracke	Approved
Finish	05/10 02:51 PM	05/15 10:51 AM			Dovie Mante	Not Yet

Help
 Workflows
 Repair
 Configuration

For the 'Labor' stage, we will need several technicians at once. Select the corresponding specialists and you will see the results of their work in the Technician Timesheet report.

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Workflow Timeline

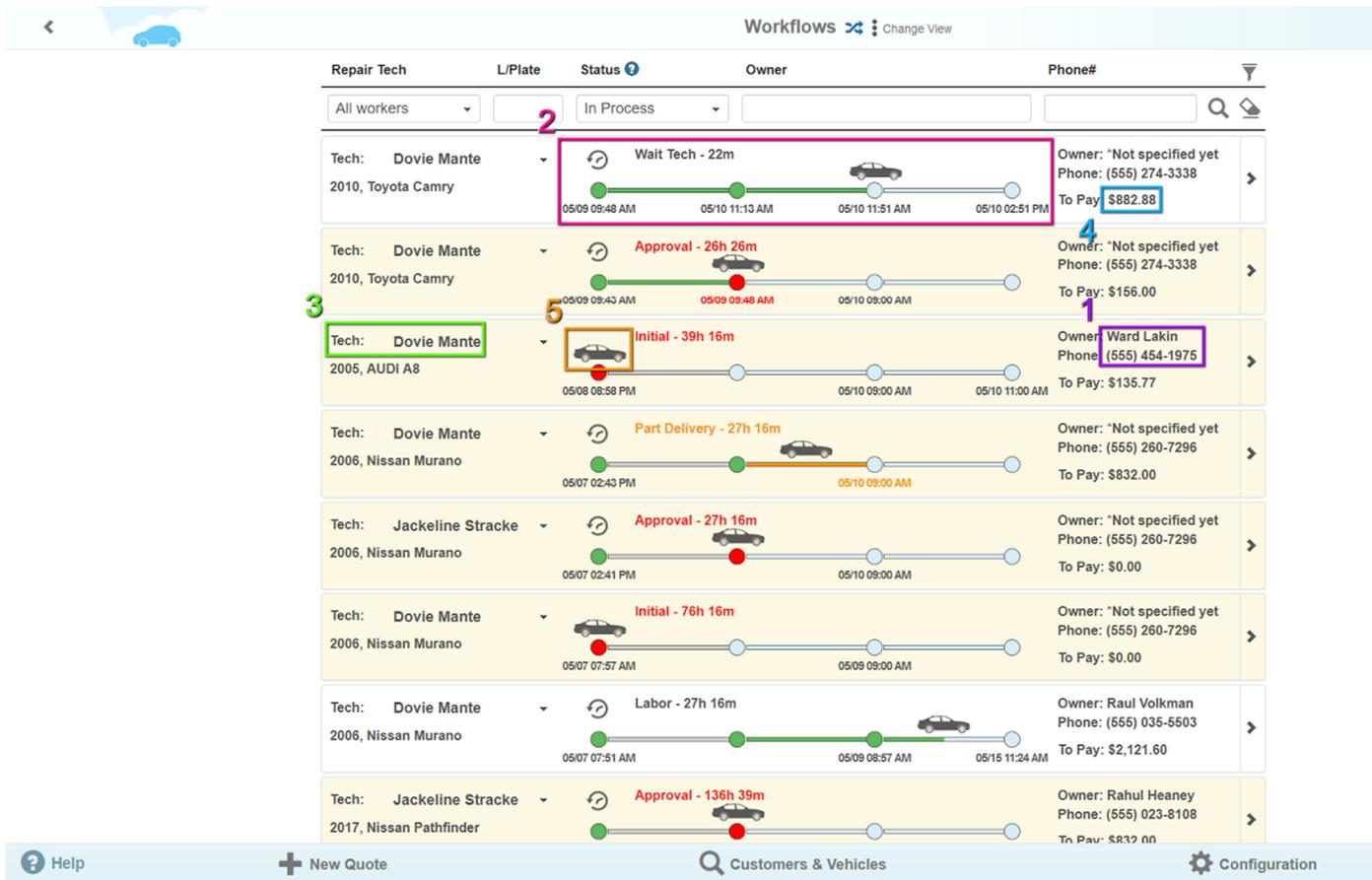
Vehicle: 2010 Toyota Camry Base
Customer: +1 (555) 274-3338
Repair Order: 84

Activity	Start	End	Fact	Expected	Responsible	Status
Initial	05/09 09:48 AM	05/09 09:49 AM	0m	15m	Dovie Mante	In Time
Inspect	05/09 09:49 AM	05/10 11:13 AM	7h 24m	4h 12m	Dovie Mante	Delay - 3h 12m
Tire Pressure check			6m	6m	Dovie Mante	Completed
Engine inspection			2h	2h	Dovie Mante	Completed
Oil Level check			6m	6m	Dovie Mante	Completed
Transmission Inspection			1h	1h	Dovie Mante	Completed
Brake check			17m	1h	Dovie Mante	Completed
Approval	05/10 11:13 AM	05/10 11:40 AM	27m	30m	Dovie Mante	In Time
Part delivery	05/10 11:40 AM	05/10 11:51 AM	11m	7h 46m	Dovie Mante	In Time
OIL FILTER		05/10 11:51 AM		7h 46m	Order #11	Received
Wait tech	05/10 11:51 AM	05/10 12:51 PM		1h	Dovie Mante	In Process
Labor	05/10 12:51 PM	05/10 02:51 PM			Combo	Not Yet
Hammering				1h	Lazaro Lueilwitz	Approved
Wrenching				1h	Jackeline Stracke	Approved
Finish	05/10 02:51 PM	05/15 10:51 AM			Dovie Mante	Not Yet

Help
 Workflows
 Repair
 Configuration

Wait a minute! While we have been changing the settings for the future repairs, the estimated time for the Wait Tech stage has run out. By default, the technician has one hour to start working in this stage, but, as we have explained earlier, you can set any value suitable for your workshop.

However, our technician was not able to start the repair on time, and now the Wait Tech stage is considered outdated and is reflected accordingly on the Workflow Timeline and in Workflows.



It is time to start working. The following data for the current repairs are reflected on the Workflows page: information about the customer (1), stages and time for their completion (2), responsible technicians (3), amounts to pay (4), stage control and repair items button (5). This page is a possibility to look at the workshop work performance from the “bird’s eye” height.”

Workflows Change View

Repair Tech	L/Plate	Status	Owner	Phone#
All workers		In Process		
Tech: Dovie Mante 2010, Toyota Camry		In Process		Owner: *Not specified yet Phone: (555) 274-3338 To Pay: \$882.88
Tech: Dovie Mante 2010, Toyota Camry		In Process		Owner: *Not specified yet Phone: (555) 274-3338 To Pay: \$156.00
Tech: Dovie Mante 2005, AUDI A8		In Process		Owner: Ward Lakin Phone: (555) 454-1975 To Pay: \$135.77
Tech: Dovie Mante 2006, Nissan Murano		In Process		Owner: *Not specified yet Phone: (555) 260-7296 To Pay: \$832.00
Tech: Jackeline Stracke 2006, Nissan Murano		In Process		Owner: *Not specified yet Phone: (555) 260-7296 To Pay: \$0.00
Tech: Dovie Mante 2006, Nissan Murano		In Process		Owner: *Not specified yet Phone: (555) 260-7296 To Pay: \$0.00
Tech: Dovie Mante 2006, Nissan Murano		In Process		Owner: Raul Volkman Phone: (555) 035-5503 To Pay: \$2,121.60
Tech: Jackeline Stracke 2017, Nissan Pathfinder		In Process		Owner: Rahul Heaney Phone: (555) 023-8108 To Pay: \$832.00

Help + New Quote Customers & Vehicles Configuration

The Repair Orders and Workflows offer you similar searching and filtering possibilities which you already know. This update offers the new search filter “Status” which allows you to select only the repairs at a certain stage. For example, the ‘In Process’ filter will choose only the repairs with stages until ‘Finished,’ and the ‘To Pay’ filter will choose only the unpaid repairs in the “Finished” stage.

You do not even need to leave the Workflows page to manage your repair! Press the button with a car image and you will see the short list of stages and repair items.

If necessary, you can come back to the previous repair stage directly from here but now we would like to go to the ‘Labor’ stage.

Workflows Change View

Repair Tech	L/Plate	Status	Owner	Phone#
Tech: Dovie Mante 2010, Toyota Camry		In Process		
Tech: Dovie Mante 2010, Toyota Camry		Wait Tech		Owner: "Not specified yet Phone: (555) 274-3338 To Pay: \$882.88
Tech: Dovie Mante 2005, AUDI A8		Labor		Owner: Ward Lakin Phone: (555) 454-1975 To Pay: \$135.77
Tech: Dovie Mante 2006, Nissan Murano		Part Delivery - 27h 16m		Owner: "Not specified yet Phone: (555) 260-7296 To Pay: \$832.00
Tech: Jackeline Stracke 2006, Nissan Murano		Approval - 27h 16m		Owner: "Not specified yet Phone: (555) 260-7296 To Pay: \$0.00
Tech: Dovie Mante 2006, Nissan Murano		Initial - 76h 16m		Owner: "Not specified yet Phone: (555) 260-7296 To Pay: \$0.00
Tech: Dovie Mante 2006, Nissan Murano		Labor - 27h 16m		Owner: Raul Volkman Phone: (555) 035-5503 To Pay: \$2,121.60
Tech: Jackeline Stracke 2017, Nissan Pathfinder		Approval - 136h 39m		Owner: Rahul Heaney Phone: (555) 023-8108 To Pay: \$832.00

Help
 New Quote
 Customers & Vehicles
 Configuration

This stage will be over only when all works are finished and their status changed to 'Completed.'
 Press the button with a car image again and change the status of all repair items to 'Completed.'

Workflows Change View

Repair Tech	L/Plate	Status	Phone#
Tech: Dovie Mante 2010, Toyota Camry		In Process	
Tech: Dovie Mante 2010, Toyota Camry		Approval - 26h 47m	Owner: *Not specified yet Phone: (555) 274-3338 To Pay: \$882.88
Tech: Dovie Mante 2005, AUDI A8		Initial - 39h 37m	Owner: Ward Lakin Phone: (555) 454-1975

Repair Order # 84

Make sure that you didn't miss any request which you going to finish.

All requests must be Excluded or Accepted

Description	#	Description	Importance	Source	Status	Status
Engine i	1	Please check my battery!	Important	Issue from Customer	<input checked="" type="checkbox"/>	Completed
Transmi					<input type="checkbox"/>	Completed
Brake ch					<input type="checkbox"/>	Completed
Tire Pres					<input type="checkbox"/>	Completed
Oil Level check			Diagnostics	150.00 0.10	15.00	Completed
Wrenching			Labor	100.00 1.00	100.00	Completed
Hammering			Labor	100.00 1.00	100.00	Completed
OIL FILTER			Parts	18.57 1	18.57	Received
Total				6.20	882.88	

Initial → Inspect → Approval → Part Delivery → Wait Tech → Labor → Finished → Cash Payment

05/10/18 12:28 Mechanic

Congratulations! With the completion of Labor stage you have finished the repair. We did not discuss the maintenance request, no problem, you can approve or reject them right now. If necessary you can go back several stages, add necessary works or parts and fulfill the requirements.

The repair is finished. You only need to accept the payment. This repair will remain 'In Process' for 12 more hours. During this time you can select it using the corresponding filter on the Workflows and Repair Orders pages.