



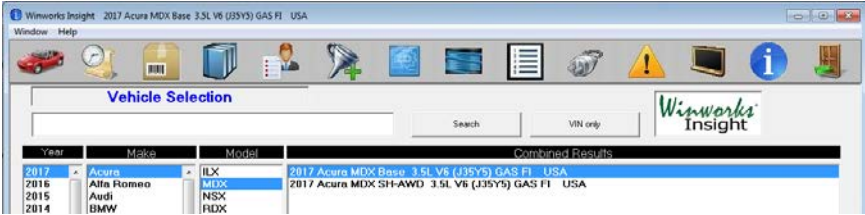
Release Notes

This booklet provides an overview of the new features in Winworks AutoShop Version 8. Since our last major release, Version 7, we have made over 1,000 changes based on your suggestions and necessary fixes. You may have already seen some of the Version 8 improvements in a Version 7 update if you have current tech support. Most of these new features have been incorporated into our full resolution version. If you are running our 800x600 resolution, you will not see all the new features. This new version can have a substantial impact on how the Winworks AutoShop software system contributes to your shop's success. Therefore, we highly recommend that you study these release notes to take full advantage of all the new features offered in this version.

Summary of New Features

Add-on Information System	Email Accounts Receivable Statements
Desktop Inspection System	Improved Customer List Window
Enhanced Lookup Window	Improved Vehicle List Window
Notifications System	More Premium Parts Integrations
Bay Management System	Updated Locality Information
Part Kits	Print Oil Change Stickers
CARFAX Service History	Multi-Segment Scheduling
Access 2007 Database Engine	Move Parts between Tasks
Work Order Attachments	Omni Directional Part Cross-referencing
More Merchant Processors	And much more ...

1. Winworks Insight – You now have a new option when it comes to automotive repair information. The Winworks Insight add-on is a full featured information system and is tightly integrated with Winworks AutoShop. We’ve also made Insight to



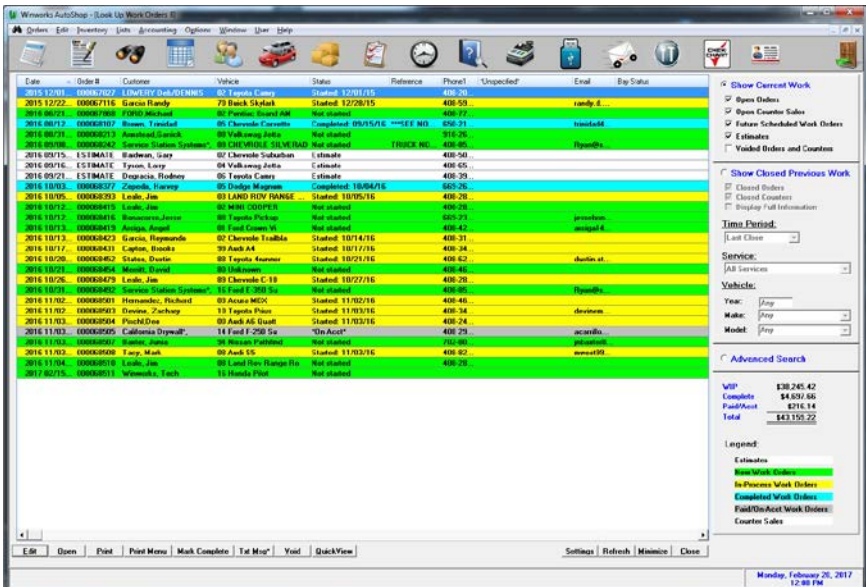
be extremely easy to use. Once you select a vehicle, you can obtain Parts and Labor Estimating information, Part Diagrams and Locations, Service Procedures, Maintenance Schedules, Fluids, Specifications, Wiring Diagrams, Diagnostic Trouble Codes, Component Locations, TSBs and Recalls by clicking an icon on the tool bar. Any repair information you view is in PDF format and is placed in the Insight Blackboard. Estimating data and Information documents in PDF can be sent to Winworks AutoShop and attached to the work order for future reference purposes. Add this new capability to your Winworks AutoShop software for **\$129 per month*** plus a one-time activation fee. A free ten day trial is available.

2. Desktop Inspection System – (Pro/Premium Editions) We have added a new Inspection System right inside of Winworks AutoShop. Starting with Version 8, the Desktop version of this feature is available at no charge for Professional and Premium Edition users. It just requires technical support to be kept active. Previously sold at \$79 per month, this Inspection System makes



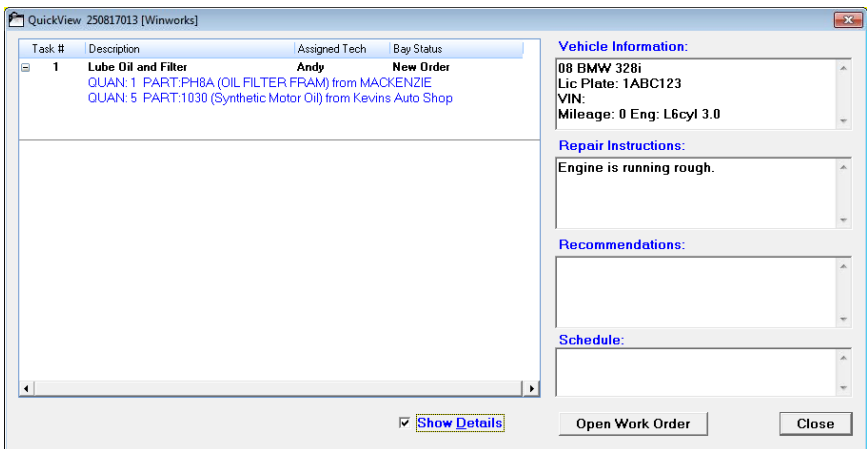
an inspection on every vehicle easy, giving additional value to your customer and finding important services that need to be performed for the safety and drivability of their vehicle. We provide 3 standard inspection templates. When performing an inspection, you can choose the status of each item (Ok, Next Visit or Urgent) and add notes or a picture to explain the issue. Inspections can easily be emailed as a PDF attachment. You can also subscribe to our Mobile Inspection system Add-on which takes inspections to IOS and Android phones and tablets for \$99 per month. To get started, from the Lists menu, select Standard Inspections. On the Inspections List window, click Import and select at least one of the pre-configured inspections such as State Inspection.idf and click Open. You can import others and once imported, you can customize the inspection to your liking. Winworks Tech Support can adjust Inspection if needed.

3. Enhanced Lookup Window – We’ve received more requests to enhance the Lookup window than just about any other part of



our software. The new Lookup window allows you to color code work orders based upon their status. You can also easily sort the list by clicking on the top headers. The right side selection bar is

smaller so that you can see more items in the list. Also, we present 10 columns of data, the first five are pre-set, the second five can be customized so that you view the data you choose. The new Settings button allows you to choose the default sort, select the colors and the columns, the font size and basically customize the way you want to see your Lookup window. You also can adjust the width of any column. We've also added a QuickView feature. Use either the Right Mouse button on a work order or select a work order and click the QuickView button to see a concise summary of the work order without opening it.



4. Notifications System – (Pro/Premium Editions only)

The Notifications window is a new list window designed to manage



multiple items in a convenient list format. Four

different types of daily notifications are presented:

Upcoming Appointments, Recommended Services

Due, Bay Management Status Changes and

Interoffice Messages. For **Upcoming Appointments**, you can

view just today's appointments or those within the next few days.

You can also view unscheduled appointments. Once you select

an appointment, you can choose to Email or Text your customer

advising them that they have an appointment coming up directly

from the Notifications window. For **Recommended Services**

Due, the Notifications window presents those recommendations

you have made that are coming due now. Once you select a

Recommended Service Due, like Appointments, you can Email or Text your customer advising them that a service is due. **Bay Management Status Changes** allow the interactions with our Bay Management System showing messaging when a vehicle moves into a new status, alerting you to action necessary on your part. Finally, **Interoffice Messages** allow your staff to message each other to coordinate vehicle repair issues conveniently. To view Bay Management Status Changes and Interoffice Messages, you need to be logged in as a user. Messages can be dismissed to remove them from the list. To view Dismissed Messages, click the Menu button at the right and select *Show Dismissed Only*. To open the Notifications window, click Notifications on the Orders menu. The Notifications icon can be included on the Winworks AutoShop tool bar for easy access. You can change tool bar settings in the Preferences window. Click Options/Preferences and select the *Other Settings* tab. Next on the right side under *Tool Bar Options*, find the Notifications line, click to select it and click the UP button to move it up the list and allow it to display. You can adjust all the tool bar buttons this way. Use the Search button to locate an item in the list. The Info button will present additional information on the selected item. You can also indicate important items by using the *Chg Priority button* to display a **Flag or !** next to any item to remind you of their higher priority. Finally, if you have selected which items to show by default on the Notifications window, select Menu and choose Save Display Options so that those preferences will be your default the next time you show Notifications.



5. Bay Management - (Premium users only) Bay Management is a completely different approach to showing you work order status. Instead of simple Not Started, In Process and Completed status indicators, a work order can pass through 10 status levels in the Bay Management System including New Work Order, Inspection,



Write-Up, Get Approval, Order Parts, Receive Parts, Ready for Technician, Servicing, Quality Check, Payment and Ready for Pickup. The Bay Management window assigned those status levels to four different employee Roles: **Service Advisor**, **Parts**

Status	Elapsed	Due	Customer	Vehicle	Fleet/Plate#	Order# / Task#	Description	Close
PICKUP			Wayne, Bruce	12 PORSCHE BO...	booster PROX	000031342-00	3 Tasks	Refresh
Task 1: REPLACE BRAKE PADS Task 2: Tire Rotation/Balance Task 3: 25K service								Print
								Find
								Menu

Logistics person, **Service Technician** and **Quality Control Manager**. In the Employee window, you can choose which Role or Roles each employee has. When that employee logs in, only the status values associated with the Role are shown. Just like the Lookup window, a work order can be double-clicked to open it. The same QuickView window can be launched for a work order by clicking it with the Right Mouse button and choosing QuickView. You can see all the tasks on a work order by clicking the + sign on the left hand side, or show the details of all work orders by clicking the Show Detail button on the right. Click the title of the status at the bottom to view all work orders in that status. The bottom information screen also shows the number of work orders in each Status and the average amount of time work orders are in that Status. Work orders can be dragged and dropped either on an Employee Role on the left or on a Status Item at the bottom to move them into a new status. Change the status for a work order by clicking it with the Right Mouse button and choosing the new status. Events such as a completed inspection can automatically change the status to Write Up. As in the Lookup window, you can assign colors to different status values. Click Menu on the right and choose Change Settings to set these values. The status

Status:	New WOs	Inspection	Write Up	Get Approval	Order Parts	Rec Parts	Ready for Tech	Servicing	Quality Chk	Payments	Pickup		
#/Avg Time	06	20	17:22					157	01:57	93	6	05:09	1

names such as Inspection or Rec Parts indicate that the work order is *waiting on* the Inspection or *waiting for* the Receipt of Parts. Whether status values change automatically such as when a payment is made or manual changes, a notification is sent to the employee responsible for the new status value. For example, if the Parts Logistics person is responsible for ordering parts and if the Service Advisor moves a work order to the Order Parts status, the Parts Logistics person will receive a notification (through the Notifications system) that a work order is now in their list and ready for parts to be ordered. Finally, work orders are presented

on a single line, unless they are in the Order Parts, Receive Parts, Ready for Tech or Servicing status conditions. In those cases, individual tasks are shown on their own line instead. Visit the Winworks You Tube channel to watch instructional videos describing the features and functions of Bay Management. It is normal for work order list loading to be longer than you'll find in the Lookup window. The Bay Management icon can be included on the Winworks AutoShop tool bar for easy access.

6. Part Kits – (Professional/Premium users) You can now create a *Part Kit* to include any number of parts that can be added to a work order task as a group. Give the kit a unique name and add it to a work order the same way you would add a part. All the kit parts will then be added to the task. Once added, you can remove or edit any parts on the task. Kit Parts must be first entered into the Inventory Parts List database.

Add Part Kit

Part Kit

PART KIT

Kit Number

Kit Description

Condition:

0 Part Kits in Stock

Group/Sub Group:

UPC Tag:

Parts included in this Kit

To create a part kit, click the *Add Part Kit* button on the bottom of the Inventory List window. After entering the Kit number and description, use the *Select* button to add your parts. View Part Kits on the Parts List window by clicking Menu, Part Type, Part Kits.

7. CARFAX Service History – If you participate in our CARFAX Service History program, we are adding new benefits; the ability to lookup Service History from CARFAX, view Recall Information and signup your customers for the myCARFAX program. Located on both the Work

myCARFAX (R2)

Order window and the Vehicle window, the myCARFAX button is red when recalls exist (R2 indicates 2 recalls). Click the myCARFAX button for this menu. View service history posted for this vehicle from any reporting facility.

- CARFAX Service History
- CARFAX Last Reported Service
- CARFAX Open Recalls
- myCARFAX Sign-up

If do not already participate in the CARFAX Service History

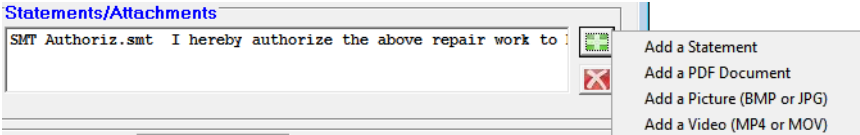
CARFAX Service History		
JTDBT1235Y		2000 TOYOTA ECHO Sedan 4 DR 1.5L L4 FI 16V
Date	Mileage	Services Performed
02/15/2016	272,957	Passed safety inspection Passed emissions inspection
02/28/2014	120,345	Passed emissions inspection
10/01/2010	74,627	Recommended maintenance performed Alignment checked Fluids checked Oil and filter changed Steering/suspension checked Steering/suspension lubricated Tire condition and pressure checked Transmission fluid changed MILEAGE INCONSISTENCY
02/25/2008	75,731	Pre-delivery inspection completed
06/01/2007		Drive belts checked Fluids checked Oil and filter changed Tire condition and pressure checked

program, here are the benefits: All services performed for customers who allow service history sharing with CARFAX will appear on that vehicles CARFAX report giving credit to your customer for regular maintenance and repairs and showing you as the repair facility. You can exempt a particular customer if they prefer not to have their maintenance information sent to CARFAX on the customer window. Customer names, addresses, phone numbers and email addresses are NEVER sent to CARFAX. As a participant, you'll also enjoy robust VIN decoding along with these new features.

8. Access 2007 Database Engine – Your Winworks AutoShop data has been stored in a Microsoft Access 97 database. With this release, we add support for the newer Access 2007 database engine for enhanced database performance, stability and compatibility with other software. You can convert your databases

to the Access 2007 structure using the Database Maintenance Utility. Be sure to backup your databases before conversion.

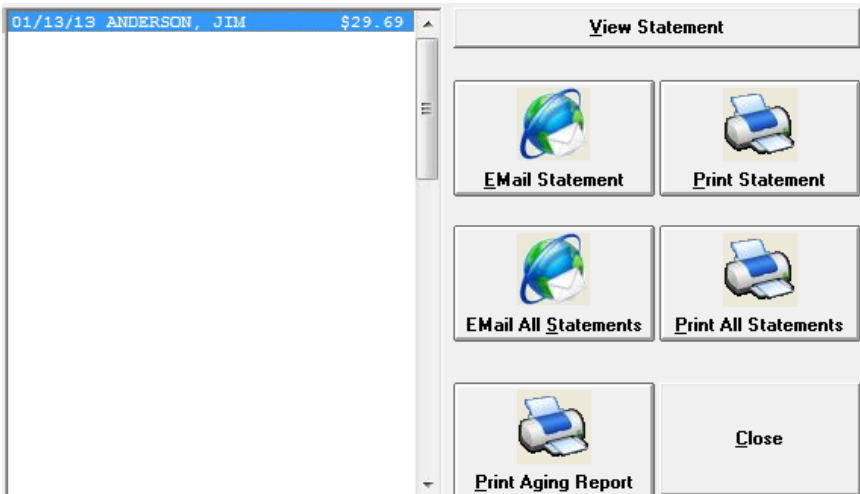
9. Work Order Attachments – You can now attach important documents, pictures and videos to the work order so that you will



have a complete history of the repair. If you use the Winworks Insight information system, documents from that system are also attached to the work order. Types of attachments include PDF documents, pictures (BMP & JPG) and videos (MP4 & MOV).

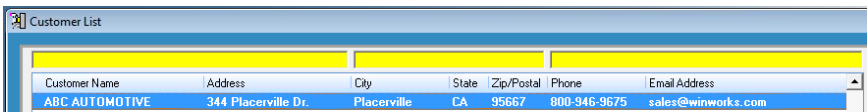
10. More Merchant Processors – Now in addition to XCharge by OpenEdge, we offer two more merchant processing integrations: 360 Payments and FirstMile Middleware. Processing credit card transactions directly in your Winworks AutoShop system saves both time and money. Any of these trusted merchant processors can analyze your current merchant account fees and offer a money saving solution. Contact us for more information.

11. Email Accounts Receivable Statements – You can now email your Accounts Receivable billing statements to your



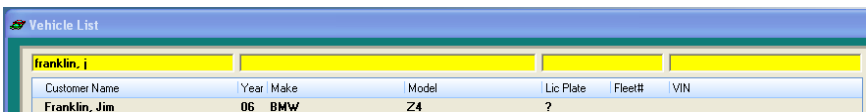
customers saving time, paper and postage. In the Billing listing, click Email All Statements and Winworks AutoShop will email as many statements as possible where there is a valid email address. You will be asked afterwards if you want to print the statements that couldn't be emailed. Your customers billing statement will be attached to the email as a PDF document. The text of the email message has been pre-configured for you. You can modify the message by editing the BillingSmsts.dat file using Notepad.

12. Improved Customer List Window – The customer list window has been re-engineered to be faster and better. The



yellow power search bar at the top allows you to apply filters to limit customers based on their name, location or phone number. For example, to show all customers in a particular state, click above City, State and Zip and search on .CA for California.

13. Improved Vehicle List Window – We've also enhanced the Vehicle List window. Aside from greatly improving the speed of this list, we've added a search bar that allows you to locate a vehicle faster by searching on the customer name, the Year, Make Model, License Plate, Fleet Number or VIN. When you search by Year, Make and Model, you can locate similar vehicles easy.



Enter the year to locate all vehicles with that year, or enter a make to locate all vehicles for that Manufacture. To only search on Model, enter a period (.Mustang) before the model name to search on Model only.

14. New Premium Parts Integrations – (Premium Edition Only) We've added 3 new integrations for Version 8, Epicor*, CARQUEST and Identifix. Contact our technical support staff to enable these integrations for your Premium Edition. Access to Premium interfaces requires current technical support.

15. Updated Vehicles and Locality Information – We've included an updated vehicle database and updated Locality information (City, State and Zip Codes) in Version 8.

16. Print Oil Change Stickers – You can now easily print oil change stickers for your customers, a convenient reminder when to bring their vehicle back. We selected the DYMO LabelPrinter 450 because of its low price (around \$50) and availability of the printer and label media. Labels can be printed from the special icon (the funnel with the odometer) on the work order window and from the Oil Change Sticker button on the vehicle window. We offer several label configurations. You can turn on this feature and select the label file to be used on the Interface Settings window, Other Interface Settings tab. Also on that tab, you can click the icon to get a test print. Be sure to first install the DYMO software. Month and mileage intervals can be customized for each vehicle; the defaults are 3 months and 3,000 miles. On the vehicle window, click the Oil Change Sticker button with the RIGHT mouse button to change these values. Finally, you can fully customize the label within the DYMO software. Just double-click one of the .label files using Windows File Explorer. The DYMO software will launch and allow you to change the logo, change the text and even change the size of the label you want to use. Be sure to save the changes under a new file name and then select that file in the Interface Settings window to use it.



17. Enter Recorded Hours on the Task Window – (Pro and Premium) We've added a new way to enter actual hours worked on tasks from the Task window. Previously, you could either enter actual recorded time using the TechLink program or enter a single hour total on the Task window. With this new feature, you can enter multiple recorded times even for different

Record Actual Hours

Technician: Steve s

Hours:

Note:

5/19/2017

Record Actual Hours

3 Hours previously recorded for this job:

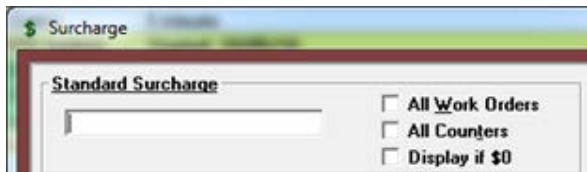
Technician	Date	Hours	Notes
s	05/19/2017	3.0	Job Complete

Report

Close

technicians on the task window and these times will automatically be entered into the TechLink system allowing you to accurately compare billed hours to actual hours when analyzing technician productivity. You can edit the hours entered in the TechLink program. The Labor Distribution Report by Timesheet Date will show the actual recorded hours whether or not End of Day Processing has been done. To enable this feature, click on the **Record hours from Task Window** option at the bottom of the Data/TechLink Options tab of the Preferences window.

18. Force \$0 Surcharges to appear on the Work Order – If you would like a surcharge item to appear on the work order printout even if it has a zero total, select the *Display if \$0* option for the Standard Surcharge.



19. Sales Tax Override – Occasionally, you may want to override the calculated sales tax amounts on a work order. You can now do that easily on the work order window by double clicking the Tax line in the Cost Details list on the work order window. You will need to enter the Override Password to modify the calculated tax. The Tax Override will allow you to enter the amount of Parts and Labor Tax and includes a warning that the amounts you enter will be used regardless of whether you add or remove any parts or labor amounts. Therefore, you should only override the automatic tax calculations once the work order is complete.

20. Move Parts Between Tasks – You can now move a part from one task to another. On the work order window, click the **Details** button to expand the work order task list to show parts assigned to tasks. Next, select the part you want to move and click either the Up or Down button on the right to move it to the previous or next task accordingly.

21. Omni Directional Parts Cross-Referencing – This feature simplifies parts cross-referencing. Previously if you referenced

part A to part B, part B would not automatically be referenced to part A. With this new feature, if you reference part A to B and then reference part B to C, they would all be automatically cross referenced to each other. You can turn this feature on in the Inventory Settings window (select Inventory Settings from the Inventory window) and choose *Automatic Omni-directional parts cross-referencing*. AutoShop will update all previously entered cross-references at that time.

22. Multi-Segment Scheduling - We've enhanced the scheduler with the ability to schedule one job on multiple times or days or technicians. This way, large jobs shared by multiple techs or scheduled over multiple days can have that reflected on the scheduler. To turn this feature on, select *Allow Multiple Segment Scheduling* on the Data/TechLink Options tab of the Preferences window.

23. Other Enhanced Windows – In addition to the enhanced customer and vehicle windows, we have also enhanced the employee list, backup, vendor list, and database maintenance windows.

24. More Standard Task Capability – Many of our users have seen just how powerful the standard task system is and some have reached the previous 9,800 standard task limit. That limit has been removed to allow for virtually unlimited standard tasks.

25. Snapshot Backups – The system automatically creates a backup during the End of Day cycle. We call these Snapshot backups. They are NOT a substitute for regular off-site backups of your AutoShop data. The file name of these backups starts with an S and then the date in this format: mmddyyyy followed by either a zip or arc file extension. To extract the backed up files, change the extension to zip and use Windows explorer to view and copy the files.

26. Flat Rate option for Labor Costing – This option will calculate labor costs based on the technicians labor rate times the estimated hours on each task instead of using actual hours.

27. New Full Details Report – We've added a Full Details Report that includes all the sales details for each work order. You can launch this report from the Accounting Menu, Accounting Reports and click on Full Details Report.

28. New Work in Progress (WIP) Report – This report shows information for work orders in progress (not closed via End of Day processing). It provides a total and the amount deposited (payments received) and is available on the Accounting menu, Accounting Reports.

29. New Service Profit Details Report – This report provides service level details showing totals for sales, cost and profit for both labor and parts as well as the profit percentage and is available on the Accounting menu, Accounting Reports.

30. New Open Payments Report – This “Show Open Payments” option on the Payments Received report shows the list of payments received that have not yet been closed via End of Day Processing.

31. End of Day Reports PDF View Option – All End of Day reports can now be viewed in PDF format instead of printed on paper. When you perform End of Day, just select the **Show Reports in PDF Viewer** option at the bottom of the right column. Instead of printing the selected reports, each report will be presented within the Winworks PDF Viewer.

32. Right Click to Open Work Order – Even if your Lookup window is not open, click the Lookup Icon binoculars with the Right Mouse button and enter a work order number to open it.

33. Interface Settings Window revision – We have moved some settings from the Preferences Window to the new *Other Interfaces* tab of the Interface Settings window; namely, Cash Drawer settings, Oil Change Sticker/DYMO Label Printing settings, Payment Processing settings such as selection of the Credit Card processor among other settings.

34. Company Email Address – You can now enter the company email address in the Preferences window. This email address can be used for oil change stickers and will be used in other ways as well as version 8 is enhanced.

*Prices subject to change without notice. The Epicor interface requires a monthly subscription from Epicor.

More Paperless Features coming – In addition to the more than 1,000 changes to the software, we have plans for even more in future updates to Version 8. We are moving in the direction of a paperless environment. We hope to include features such as paperless signature capture and the ability to email work orders and inspections from mobile devices soon.

Program Optimization: If you are running Winworks AutoShop on a network and would like to increase performance, please request our document on Network Performance. It contains the latest information to improve the speed and reliability when multiple users access your Winworks AutoShop information across a network.

Tech Support Fee Increase: Beginning September 1, 2017 technical support annual fees increase by \$50 per year. Our last support increase was over 3 1/2 years ago. Considering support now includes access to our Inspection System, annual technical support gives you more value than ever.

In total we've made over 1,000 changes and more major improvements than any previous version. Thank you for your suggestions! It is our partnership with you that has made Winworks AutoShop one of the most popular automotive management systems available today! We hope you'll enjoy the new features and enhancements.

The Winworks Team: Kevin, George, Kathee, Aaron, Luke, Katey, Jesse, Steve, Chris, Hannah, Andrew and Jenny.

Installation Instructions

1. Make a backup of your Winworks AutoShop databases.
2. Make sure all users are out of the Winworks AutoShop system.
3. Shut down the Network License Server, Premium License Server and Winworks Mail Client if they are running.
4. On the main computer, either download the Version 8 setup or install from the Winworks Version 8 CD.
5. In the Windows File Explorer, either run the downloaded Version 8 installer or right mouse click the CD and select Install Software. You can also double-click the Setup.exe icon. Run the setup using the **As Administrator** option.
6. You may need to enter an Upgrade Key number during installation. This number is included with your upgrade packet along with the Version 8 setup download location.
7. This upgrade does not need to be installed on the networked workstations; however, they must install the new system files. Installation of those files will be prompted when you first run AutoShop on that workstation.

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