ALLDATA MANAGE[®] Online

Advantages of Invoicing a Repair

Order with my CARFAX

Why Invoice?

- Invoicing creates shop business reports, enables credits, refunds, media analysis etc.
- Invoicing is required in order to use myCARFAX features:
 QuickVIN and Service History.
- Register customers for myCARFAX mobile app to make your shop a preferred location.



Available Reports After Invoicing

- Profit Tracker: breaks down each invoice within a selected date range, to a dollar amount of cost price, sell price, margin amount and margin percentage.
- Business Analysis: shows totals and averages of parts, labor, inspection, consumables and miscellaneous items.
- Parts Profit: Lists each part sold within a date range showing the profit and margin on each part.

Media Analysis: Displays each media code and the amount of invoices associate with the each code. Shows the financial impact on the shop of each medium.

Setting Up Invoices

Code	Description		Sell	Qty	Disc	Tax	Total	R			
	Check Engine Light Diagnos	tic					86.35	0	×		
CELDIAG	Check Engine Light Diagnostic		79.95	1.00	0.0%	8.000%	86.35		×		
	Battery						203.45	•	×		
LAB1	Replace - Battery		95.00	0.30	0.0%	0.000%	28.50		×		
JCI86FT-DLG	Battery		161.99	1.00	0.0%	8.000%	174.95		×		
	Starter						487.77	•	×		
LAB1	Replace - Starter Motor		95.00	1.40	0.0%	0.000%	133.00		×		
DURDLG5104S	Starter		328.49	1.00	0.0%	8.000%	354.77		×		
Planned Hours	s: 0.00	Shop Supplies	10.00		0.0%	8.000%	10.80				
		Hazmat	0				0.00				
					Goods	Тах	Total				
					741.93	46.44	788.37				
Estimate Update R/O Assign R/O		oice Credit	Print	D	iscounts	Order / I	Receive	Split			

1 Create an Invoice from an existing Estimate or Repair Order

Invoice Confirmat	tion			
Customer	ASH001 Miss Ashley Ashleigh Individual		E	Vehicle on Site
Invoice Date	08/21/2015			
Customer Order Number				
Assign Sales Class to invoice	×			
Service Writer :	003 - Quentin Q. Quarrel 💙			
Technician :	001 - Aaron A. Aaronson 🗸			
Mileage In :	54000 Confirm			
Mileage Out :	54000 Confirm			
Media Code :	~]		
Invoice Summary		Goods	Tax	Total
Payment Details		133.83	10.46	144.29
			Deposits	0.00
Method : 🗸 🗸	Ref Paid Aug 21 2015		Payment	144.29
			Balance	0.00

- **2** Confirm mileage in and out.
- **3** Record payment method.
- 4 Capture media code, how did your customer hear about you?

You're finished. Note: the "Invoice" button will be grayed out, showing you have succefully completed the invoice.

Watch This Video

Manage Online: Processing an Invoice

https://www.youtube.com/watch?v=62Tvile5U3s

ALLDATA	MANAGE	Online										Contact Us	Help Logout (johnshinav
New Document Clear All	Home	Work	Schedule	WIP									Recent Docum
CUSTOMER - ASHLEIGH	Repair Or	der: J00	L072 Cancel Re	epair Order								Options Dep	osit Time 🎴 🔂
VEHICLE - 6AGM919 CA ⓓ , icense: 6AGM919 ★ ear 2011 take Jeep		6-555-1122					On Due Loa	Site: 🔽				Symptoms & DTCs 🖉	
lodel Patriot ub Model Latitude	Add Job	Mileage 1	In: 97852 Cont	firm Mileage Ou	t: 97852 <u>Con</u>	<u>firm</u>						Work Description	
ngine 2.4 ody Type Sport Utility uel Type GAS ransmission Automatic CVT IN:	Code	Description	ine Light Diagnos		07/28/2016 13:1 Sell		Disc	Tax	Total 🖌	0		Customer requests diagnosis of Check Engine Light. Provide the code(s) recommended repair(s). Please perform and advise. Customer requests removal and replacement of Battery. Please perform	
View Deferred Jobs	CELDIAG	-	ne Light Diagnostic		79.95	1.00	0.0%	8.000%	86.35		<u> </u>	and advise. Customer requests removal and replacement of Starter based on	
History Docs Edit		Battery Replace - Bi	attan		95.00	0.30	0.0%	0.000%	203.45 28.50	<u> </u>		Technician's recommendation. Please perform and ensure correct operation.	
SHOP DOCUMENTS	JCI86FT-DLG	Battery	attery		161.99	1.00	0.0%	8.000%	174.95		×		
инс •		Starter							487.77	0	×	Service Writer QQQ - Quentin Q. Quarrel	
	LAB1	Replace - Si	tarter Motor		95.00	1.40	0.0%	0.000%	133.00		×	Technician	
REPORTS	DURDLG5104S	Starter			328.49	1.00	0.0%	8.000%	354.77		×	AAA - Aaron A. Aaronson	
IVENTORY +	Planned Ho	urs: 0.00		Shop Supplies	10.00 0		0.0%	8.000%	10.80 0.00			Status In Bay	
SETUP							Goods	Тах	Total			Work Type	
							741.93	46.44	788.37			General Repair 🛟	
	Estimate	Update R/O	Assign R/O In	voice Crec	lit Print	D	Discounts	Order / I	Receive	Split		Advisory Notes Show Previous 🖉	
												Reminders Inspection 01/21/2016	
												Service 01/05/2016 Timing Belt Update	