

Job Aid: Working with Electronic Invoices

Purpose When you create electronic Purchase Orders, electronic Invoices return automatically. This saves re-keying and allows you to quickly match Received Parts to Invoices. This job aid describes the process and steps for working with electronic Invoices in CCC ONE™ Repair Workflow.

Parts Dashboard The Parts Dashboard includes a Draft Invoices list that contains ALL your Invoices both manual and electronic.

The screenshot shows the 'Parts Dashboard' interface. At the top, there are summary cards for 'Not Ordered' (52), 'On Backorder' (0), 'Not Received' (56), 'Draft Invoices' (34), and 'Pending Credit' (3). A 'Quick Links' sidebar is on the right. Below is a 'Draft Invoices' table with columns: RO Number, Linked, Owner, Vehicle, Estimator, Vehicle In, Vehicle Out, Invoice Number, Received Items, Invoice Total \$, Invoice Date, and Source. A search bar is at the top of the table. Two callouts are present: one pointing to the 'Draft Invoices' card stating 'All electronic Draft Invoices have a green bar by their name.' and another pointing to the 'Complete' button in the table stating 'Use Complete to save Draft Invoice as Completed Invoice.'

RO Number	Linked	Owner	Vehicle	Estimator	Vehicle In	Vehicle Out	Invoice Number	Received Items	Invoice Total \$	Invoice Date	Source	
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			inv-7652	2	275.38	9/26/2013	Keystone	
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			inv-7601	1	275.38	9/27/2013	Keystone	
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			SF826983				Keystone	
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			SF826984	2	163.80	9/27/2013	Keystone	
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY					1.58	9/27/2013	Keystone	
1075		Ed, Test	2009 HOND CIVIC LX	Ed					6.20	9/27/2013	Keystone	
1076		Parts Pres, 9272013	2009 HOND CIVIC LX	Ed					4.40	9/27/2013	Keystone	
1076		Parts Pres, 9272013	2009 HOND CIVIC LX	Ed	Cardenal	9/26/2013	9/26/2013	SF 9600222	3	305.40	9/27/2013	Keystone

Process

Scenario #1



Scenario #2

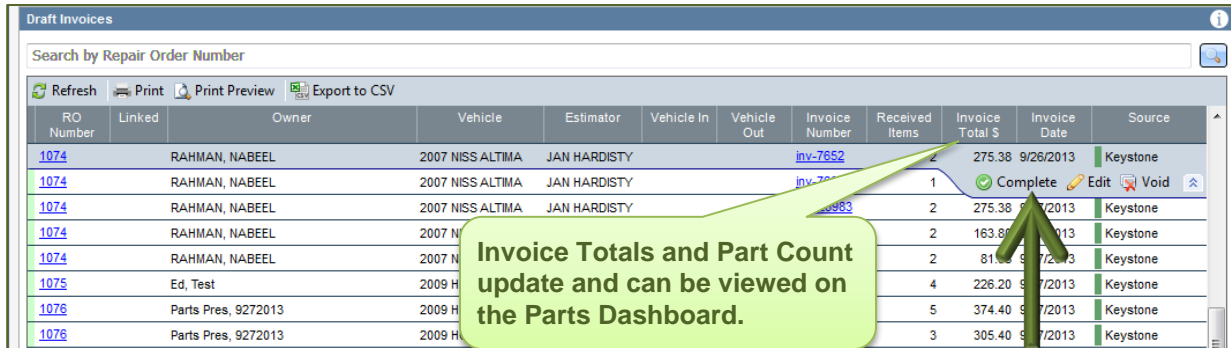


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Job Aid: Working with Electronic Invoices, Continued

Scenario #1: Complete Invoice With Electronic Invoicing, you can process Invoices using the Complete button on the mini-toolbar of the selected Workfile:

Step	Action
1	Go to the Parts Dashboard ; highlight the Invoice to select it.



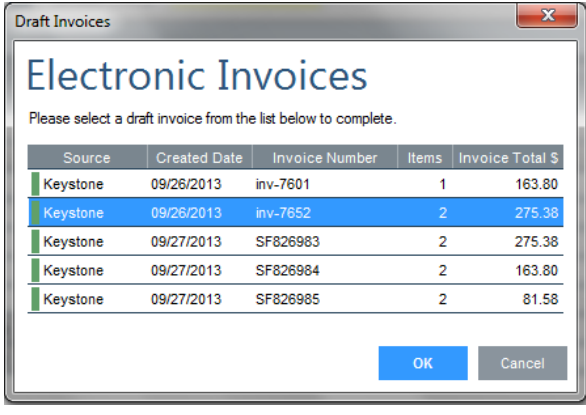
RO Number	Linked	Owner	Vehicle	Estimator	Vehicle In	Vehicle Out	Invoice Number	Received Items	Invoice Total \$	Invoice Date	Source
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			inv-7652	2	275.38	9/26/2013	Keystone
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			inv-7652	1	163.80	9/26/2013	Keystone
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			SF826983	2	275.38	9/27/2013	Keystone
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			SF826984	2	163.80	9/27/2013	Keystone
1074		RAHMAN, NABEEL	2007 NISS ALTIMA	JAN HARDISTY			SF826985	2	81.58	9/27/2013	Keystone
1075		Ed, Test	2009 HONDA					4	226.20	9/27/2013	Keystone
1076		Parts Pres, 9272013	2009 HONDA					5	374.40	9/27/2013	Keystone
1076		Parts Pres, 9272013	2009 HONDA					3	305.40	9/27/2013	Keystone

2	Click Complete .
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The system will attempt to save the Draft Invoice as a completed Invoice without actually opening the Invoice document. If there are any variances, the Draft Invoice will open for you to edit as needed.

Scenario #2: Create New Invoice With electronic Purchasing and Invoicing, if there is a Draft Invoice, the System will let you know automatically when you create a New Invoice.

Step	Action
1	<p>Go to the Parts Dashboard and click New Invoice.</p> <p>If there are any Draft Electronic Invoices, a prompt displays for you to select the draft.</p> <p>Click OK.</p>



Source	Created Date	Invoice Number	Items	Invoice Total \$
Keystone	09/26/2013	inv-7601	1	163.80
Keystone	09/26/2013	inv-7652	2	275.38
Keystone	09/27/2013	SF826983	2	275.38
Keystone	09/27/2013	SF826984	2	163.80
Keystone	09/27/2013	SF826985	2	81.58

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Job Aid: Working with Electronic Invoices, Continued

Scenario #2: Create New Invoice (Continued)

Step	Action
2	The Invoice opens for you to update as needed. Make your changes as needed.

3	Click Save and Close . The Invoice is saved.
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Parts Tab

Either way, once you have completed the Invoice, you will see it displayed as shown here in the RO Parts Tab.