

# Mobile Invoice – Scan Invoice Tool

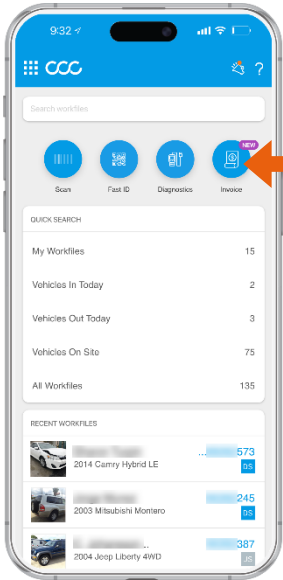
**Introduction** The Scan Invoice Tool allows Shop users to scan and manage invoices within the Mobile Invoice app before they are finalized in CCC ONE®.

This job aid will review

- I. How to scan the invoice
- II. Review AI data extraction and confirm parts
- III. Finalize invoice in CCC ONE®

**Scan Invoice** The Shop user will use the Mobile Invoice app on their mobile device to scan a parts invoice and begin the invoicing process.

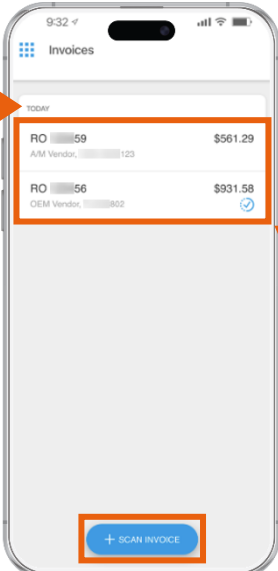
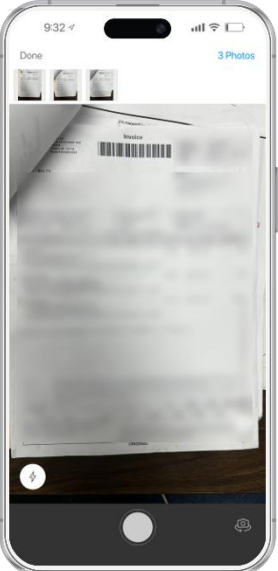
Complete the following steps to successfully scan an invoice using the mobile app.

STEP	ACTION
1	<p>To begin the process, select the <b>Invoice</b> button at the top.</p>  <p>The screenshot shows the mobile app interface with a blue header containing the CCC logo and a search bar. Below the search bar are four circular icons: 'Scan', 'Fast ID', 'Diagnostics', and 'Invoice'. An orange arrow points to the 'Invoice' icon. Below these icons is a 'QUICK SEARCH' section with a list of workfiles and their counts: 'My Workfiles' (15), 'Vehicles In Today' (2), 'Vehicles Out Today' (3), 'Vehicles On Site' (75), and 'All Workfiles' (135). At the bottom is a 'RECENT WORKFILES' section with three entries: '2014 Camry Hybrid LE' (573), '2003 Mitsubishi Montero' (245), and '2004 Jeep Liberty 4WD' (387).</p>

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## Mobile Invoice – Scan Invoice Tool, Continued

### Scan Invoice, Continued

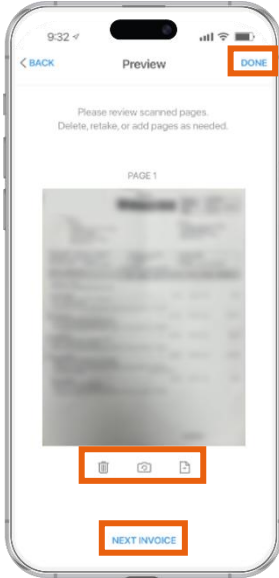
STEP	ACTION
2	<p>Select the <b>Scan Invoice</b> button at the bottom of the screen, to begin scanning an invoice.</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 10px;"> <p>Invoices are grouped by <b>Invoice Date</b>, with the most recent date appearing first.</p> </div>  <div style="border: 1px solid black; padding: 5px; margin-left: 10px;"> <p>The <b>Invoices</b> screen lists all invoices scanned by users at the shop location. If no invoices have previously been scanned at the shop location, the page will appear blank.</p> </div> </div>
3	<p>Place the invoice on a flat surface, and then use your mobile device camera to capture an image of the invoice.</p> <div style="display: flex; align-items: center;">  <div style="margin-left: 20px;"> <p>✎ Prior to scanning, verify that the invoice is clearly visible and the sheet is not folded or written on, to ensure optimal quality for AI to read and extract the invoice data.</p> </div> </div>

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## Mobile Invoice – Scan Invoice Tool, Continued

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### Scan Invoice, Continued

STEP	ACTION
4	<p>Review the scanned page(s). If needed, use the <b>Delete</b>, <b>Retake</b>, and <b>Add Page</b> icons located below the image. Select the <b>Next Invoice</b> button to scan multiple invoices at once. When you are finished, select <b>Done</b> at the top of the screen.</p> 

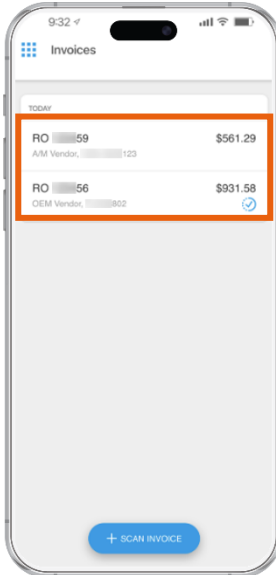
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## Mobile Invoice – Scan Invoice Tool, Continued

### AI Data Extraction

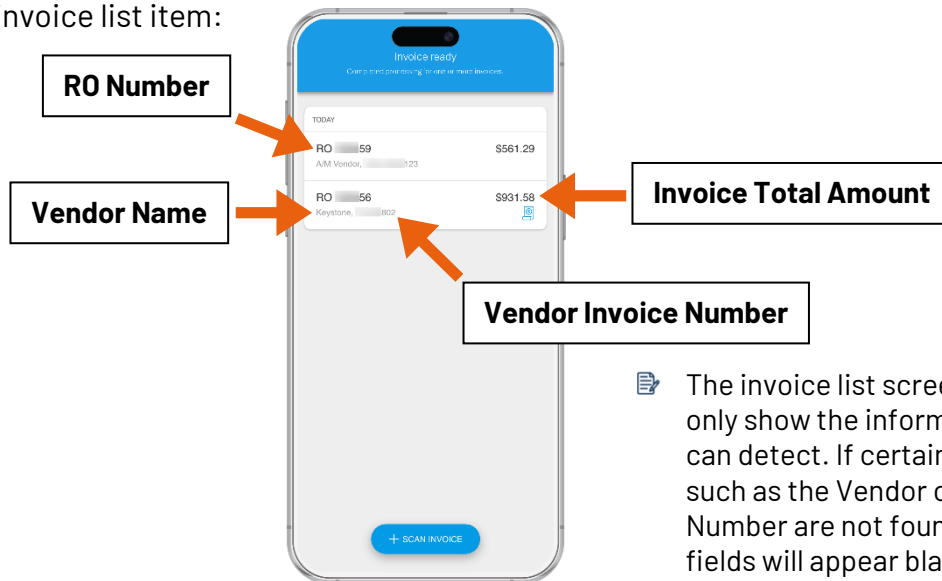
Once the Invoice has been scanned, advanced AI technology will extract relevant details from the image(s), creating digital documents for a streamlined review and processing.

After scanning the invoice, you will be redirected to the **Invoices** screen. Invoices that are currently being processed will appear at the top of the list.



You may continue using the app while the images are being processed. You will receive an in-app notification once the invoices are ready.

Once AI Processing is complete, the **Invoices** page will reflect the following information for each invoice list item:



The invoice list screen will only show the information it can detect. If certain values, such as the Vendor or RO Number are not found, those fields will appear blank.

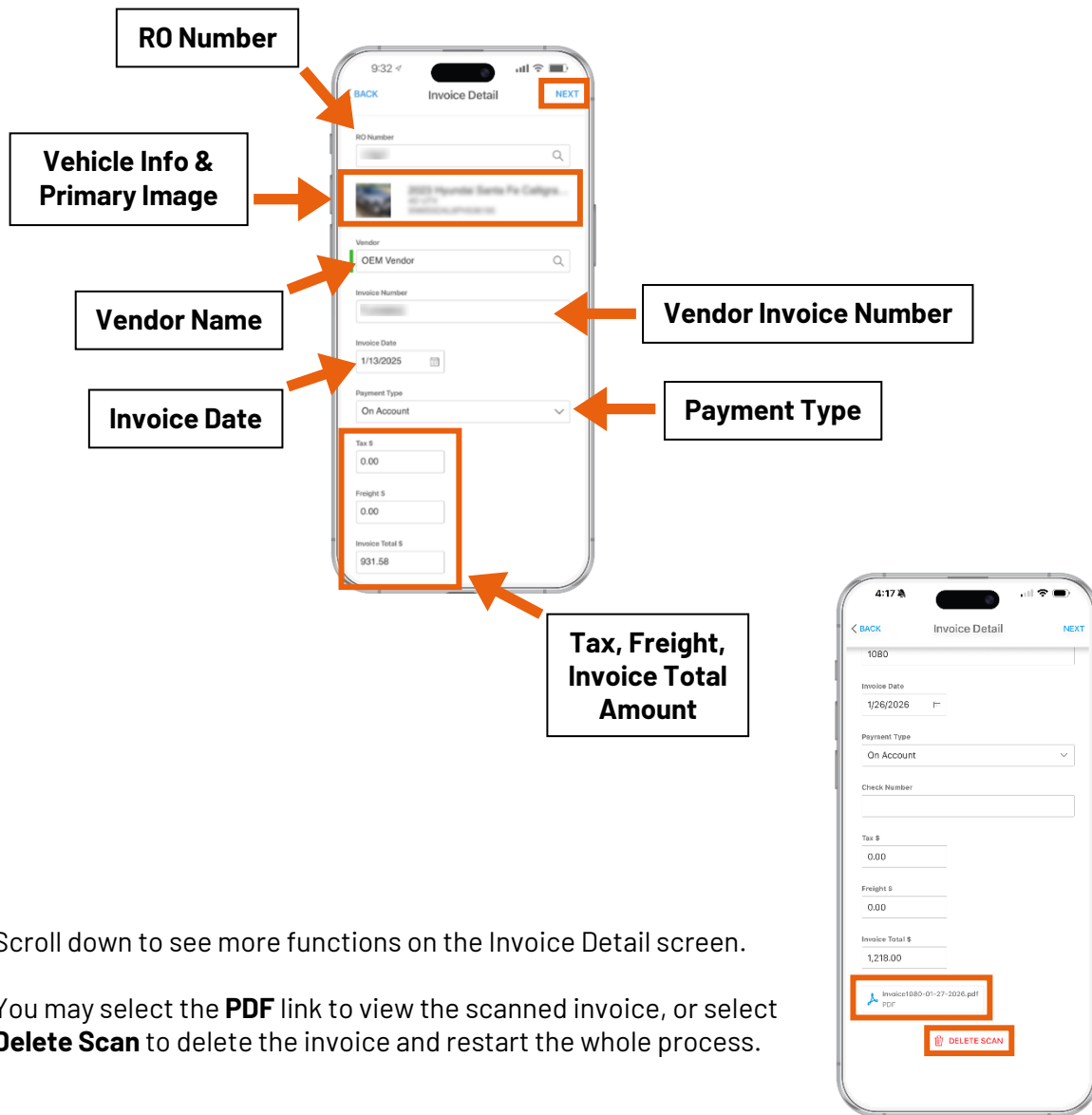
Tap on an **invoice list item** to review invoice details.

## Mobile Invoice – Scan Invoice Tool, Continued

**Review Invoice Data** The **Invoice Detail** screen is populated with data extracted by AI from the scanned invoice images.

Review the information populated into the fields via AI data extraction from the scanned invoices. This screen will only show the information it can detect. If certain values, such as the vendor or RO #, are not found, those fields will appear blank, which can be filled in by the user.

Select **Next** at the top of the screen to proceed to Confirm Parts.



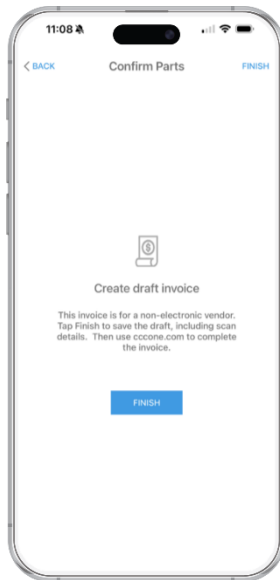
Scroll down to see more functions on the Invoice Detail screen.

You may select the **PDF** link to view the scanned invoice, or select **Delete Scan** to delete the invoice and restart the whole process.

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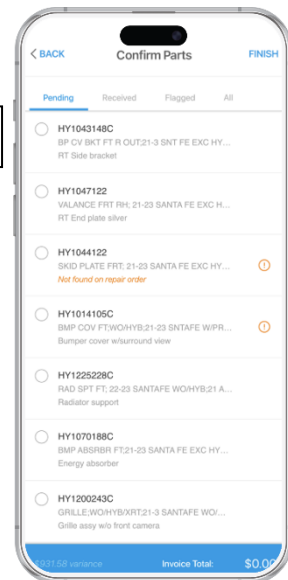
## Mobile Invoice – Scan Invoice Tool, Continued

**Confirm Parts** For non-electronic vendors the Scan Invoice tool will create a PDF draft of the invoice and users will continue updates in CCC ONE® Desktop. However, for electronic vendors, users will proceed to the **Confirm Parts** screen to check-in parts via the mobile app.



**Non-Electronic Vendor**

**Electronic Vendor**



The Confirm Parts screen features four tabs: **Pending**, **Received**, **Flagged**, and **All**.

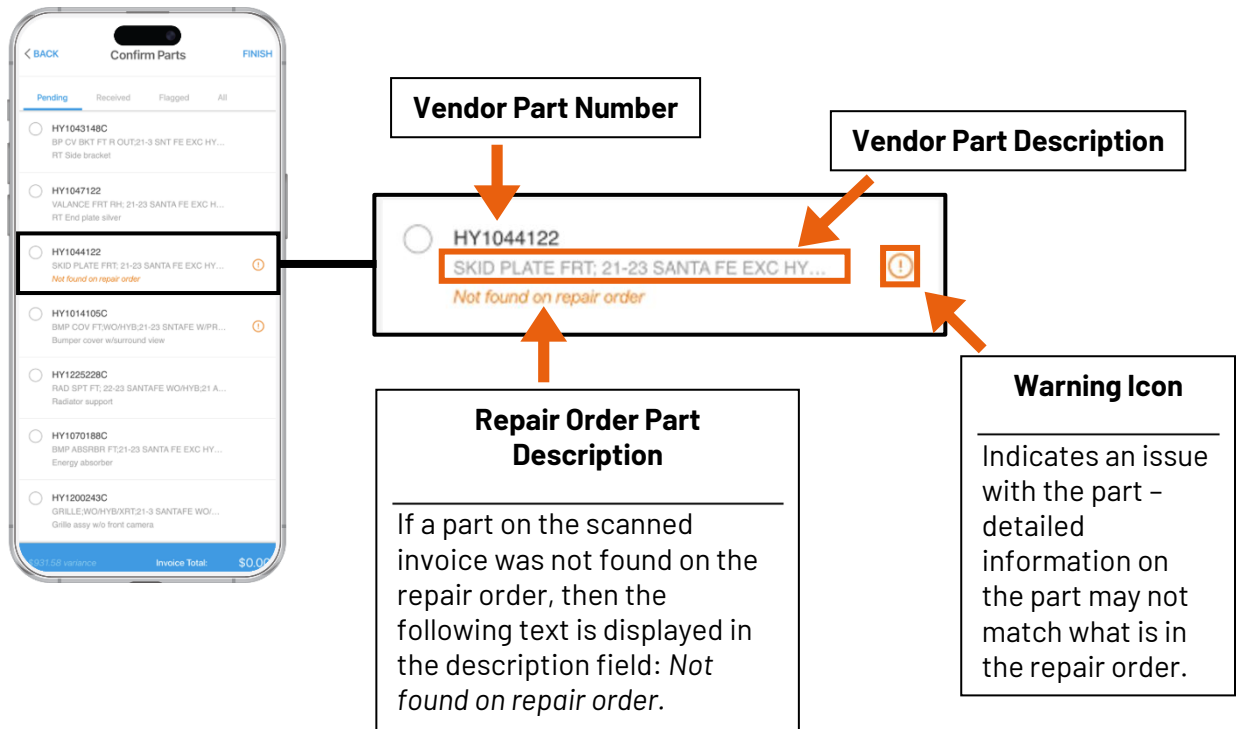
- **Pending** lists all parts being processed
- **Received** lists all parts that have been checked-in
- **Flagged** lists parts flagged with issues (e.g. damaged, missing, etc.)
- **All** lists all parts – Pending, Received, Flagged

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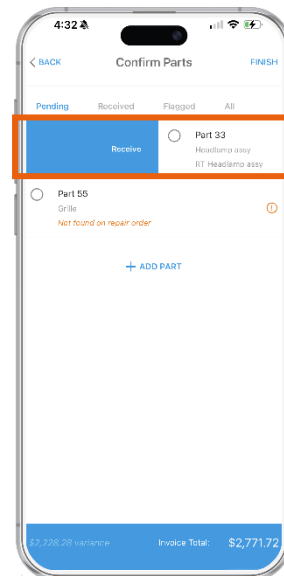
# Mobile Invoice – Scan Invoice Tool, Continued

## Confirm Parts, Continued

Each part item listed contains the following information:



From the Pending tab you may either tap the radio button or swipe right on a part list item to mark the part as **Received**.

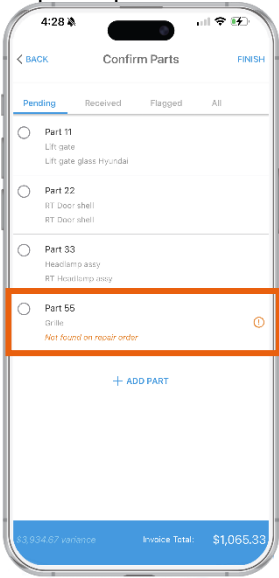
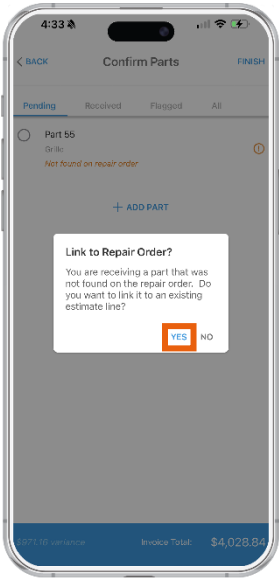


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# Mobile Invoice – Scan Invoice Tool, Continued

## Confirm Parts, Continued

In instances when the Scan Invoice tool cannot identify the part number (e.g. if you are ordering from a different vendor), it will be indicated by a warning icon. ⚠️ You must link the Received part to the correct part on the estimate by completing the following steps:

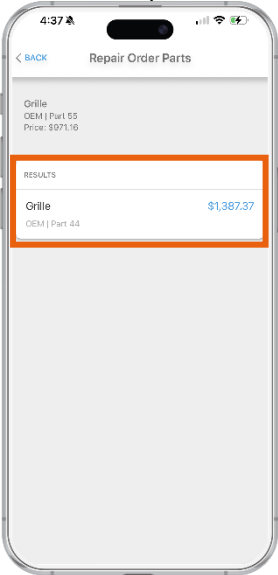
STEP	ACTION
1	<p>Tap the part list item with the warning icon.</p> 
2	<p>Select <b>Yes</b> from the pop-up that appears, to Link to Repair Order.</p> 

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## Mobile Invoice – Scan Invoice Tool, Continued

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### Confirm Parts, Continued

STEP	ACTION
3	<p>Select the part to automatically match it the part on the estimate.</p> 

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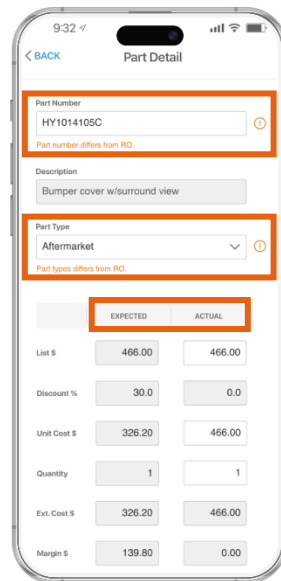
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## Mobile Invoice – Scan Invoice Tool, Continued

### Confirm Parts, Continued

To view the details of a part list item on the Confirm Parts screen, select the item to open the Part Detail page.

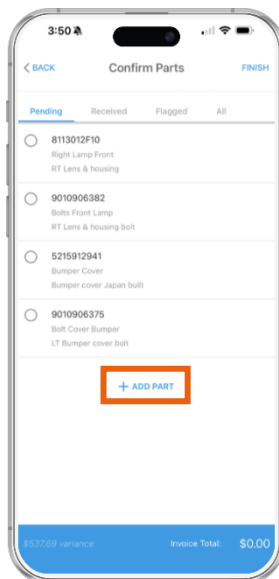
If either the **Part Number** or **Part Type** on the scanned invoice do not match the values from the repair order, then a warning is indicated with the orange icon. ⚠️



The **Expected** value is the value from the repair order.

The **Actual** value is the value from the scanned invoice.

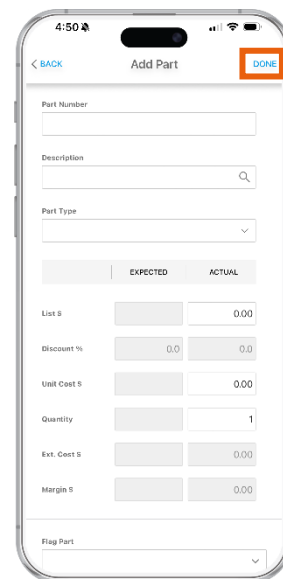
Both the Expected and Actual values are listed for the value details.



From the Confirm Parts screen if you notice that a "part" from the scanned invoice is not listed on the Pending list, you may add it by selecting **Add Part** at the bottom of the screen.

Fill in the part details in the Add Part screen, then select **Done** at the top of the screen.

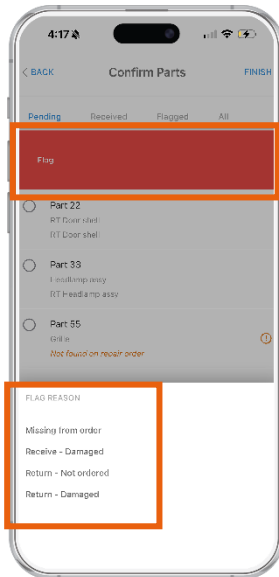
📄 Users may also link a part to an estimate by using the Search icon located to the right of the Description field textbox.



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## Mobile Invoice – Scan Invoice Tool, Continued

### Confirm Parts, Continued

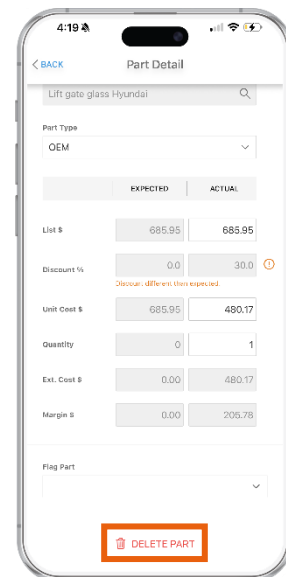


To flag a part in the Pending list of the Confirm Parts screen, swipe left on the part to select **Flag**, and then choose a Flag Reason from the pop-up menu:

- **Missing from order**
- **Receive - Damaged**
- **Return - Not ordered**
- **Return - Damaged**

📄 Flagged parts will be visible in the workfile.

Finally, you may delete a part from the Pending list by tapping the part list item to open the Part Detail page, and then select **Delete Part** at the bottom of the screen.



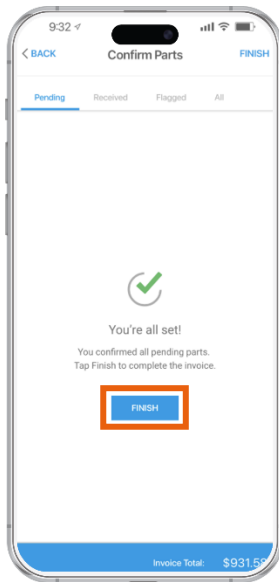
📄 **All parts must be cleared from the Pending list in order to complete the invoice.**

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## Mobile Invoice – Scan Invoice Tool, Continued

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### Confirm Parts, Continued



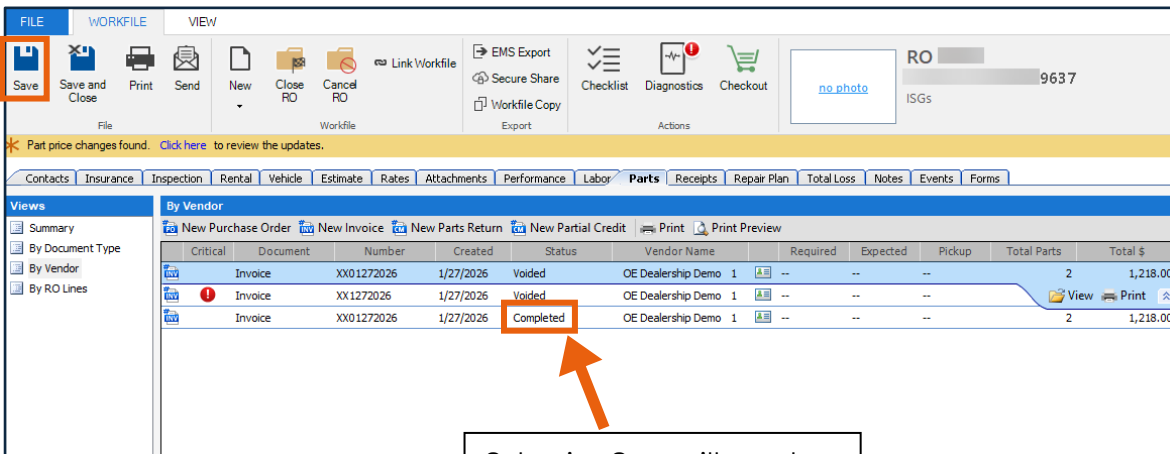
Once all the part items have been cleared from the Pending list, select the **Finish** button to confirm parts.

## Mobile Invoice – Scan Invoice Tool, Continued

### Finalize Invoice in CCC ONE®

When the Scan Invoice process is completed, if validation passes without issue, the invoice is saved as **Complete** in CCC ONE®, and the scanned invoice record is removed from the mobile app.

After completion of the mobile app process, you may navigate to CCC ONE® Desktop. To view the scanned invoice, select the **Save** icon from the ribbon at the top.



The screenshot shows the CCC ONE Desktop interface. The top ribbon has a 'FILE' tab with a 'Save' icon highlighted by a red box. Below the ribbon, there's a navigation bar with tabs like 'Contacts', 'Insurance', 'Inspection', 'Rental', 'Vehicle', 'Estimate', 'Rates', 'Attachments', 'Performance', 'Labor', 'Parts', 'Receipts', 'Repair Plan', 'Total Loss', 'Notes', 'Events', and 'Forms'. The main area displays a table of invoices under the 'By Vendor' view. The table has columns: Critical, Document, Number, Created, Status, Vendor Name, Required, Expected, Pickup, Total Parts, and Total \$. The third row in the table has the status 'Completed' highlighted with a red box and an orange arrow pointing to it.

Critical	Document	Number	Created	Status	Vendor Name	Required	Expected	Pickup	Total Parts	Total \$
	Invoice	XX01272026	1/27/2026	Voided	OE Dealership Demo 1	--	--	--	2	1,218.00
	Invoice	XX1272026	1/27/2026	Voided	OE Dealership Demo 1	--	--	--		
	Invoice	XX01272026	1/27/2026	Completed	OE Dealership Demo 1	--	--	--	2	1,218.00

Selecting Save will populate the "Completed" invoice into the workfiles list.

- 📄 If a variance is detected between the Invoice Total amount and the Received parts, then you will be prompted to edit the invoice details or save the invoice as a draft in CCC ONE®.