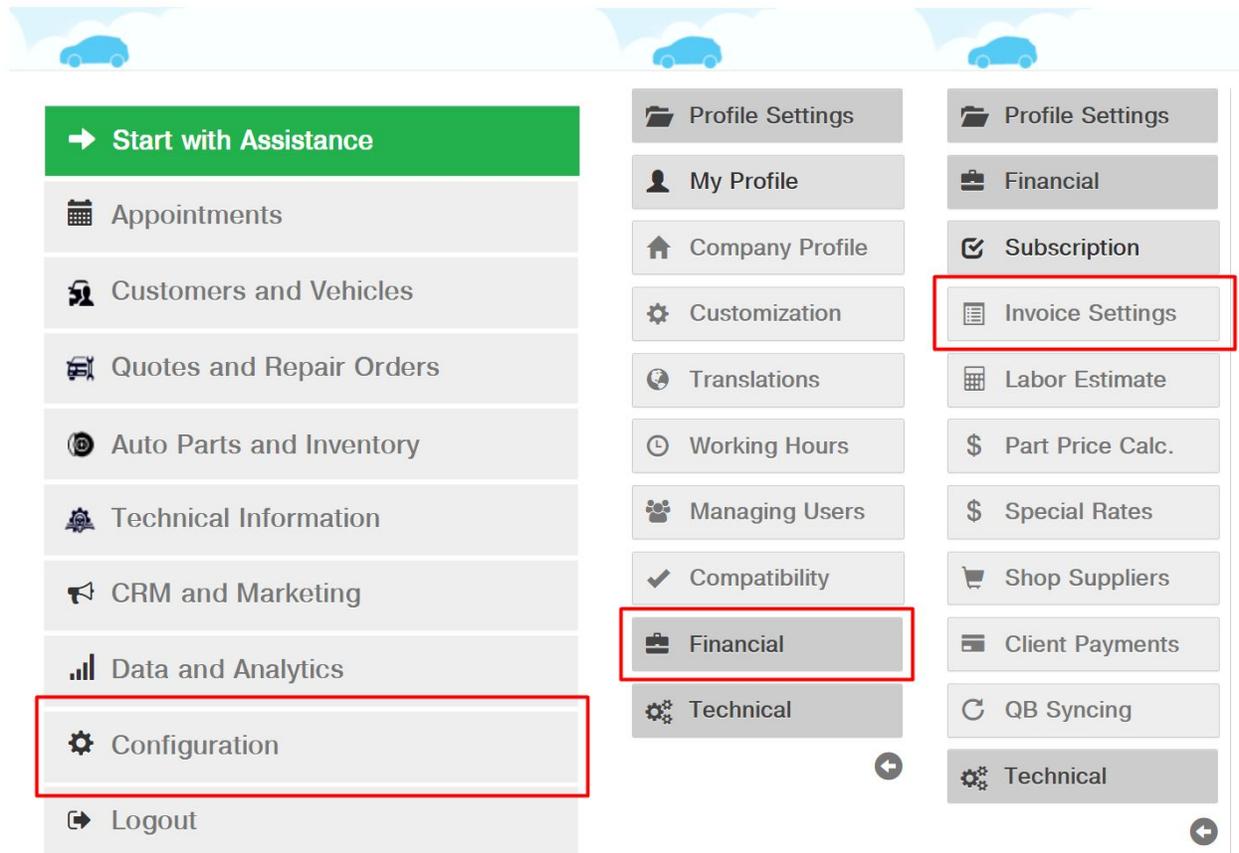


We will help you to set up invoices, establish labor tax rates and Parts tax rates specified by your country or state and talk about information contained in the invoice.

Please note, not everything described in this file is applicable for all invoice types. Not all of the fields mentioned in this video are used in the printed invoice format.

Let's begin with the settings.

To set up invoices, go to:



- Configuration
- Then go to Financial
- Select Invoice Settings

The Invoice Settings section opens up.

Here you can choose an invoice template suitable for you and your workshop.

Each invoice template contains all necessary information.

Further in this video we will discuss types of information contained in the invoice.

To select the invoice you need, simply click on it. The selected invoice will be framed in blue.

Before selecting the necessary invoice, you can preview it by pressing this button:

**Configuration**

- Profile Settings
- Financial
- Subscription
- Invoice Settings
- Labor Estimate
- Part Price Calc.
- Special Rates
- Shop Suppliers

Invoice Settings

TEMPLATE










Let's go to any Repair Order and check the invoice we selected.  
 Now let's go to Quoted and Repair Orders

- Start with Assistance**
- 📅 Appointments
- 👤 Customers and Vehicles
- 📄 Quotes and Repair Orders**
- 🔍 Auto Parts and Inventory
- 🔧 Technical Information
- 📣 CRM and Marketing
- 📊 Data and Analytics
- ⚙️ Configuration
- 🚪 Logout

Select Repair Order

Started	Name	Phone#	Vehicle	Invoice	L/Plate	Worker	Status
All time						All workers	All
10-01-19	Dk, Jony	(066) 140-8...	2013, Mercedes-Be...	1			Inspect

Select Open Invoice in the Repair Order under Invoice

**Repair Orders # 1**

2013 Mercedes-Benz E-Class - 10 mi... More

Description	Price, \$	Hours / Qty	Total, \$
NAPA Ultra Premium Front Brake Pads Semi-Metallic	129.00	1	129.00
Enter Labor Title - OR - Click Estimate →	54.96	1.00	
<b>Total</b>		0.00	

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

Prime Technician: Kostya Junior

Time Started: 2019-10-01 11:56  
Time Ended: 2019-10-01 11:58

Requests for Repair / Concerns +

Maintenances ...

Leave

- Send to Customer
- Send to Me
- Open Invoice**
- Open Job Card

10/02/19 16:01 Notification - Repair is finished

10/02/19 16:01 Notification - Repair is finished

Type your message here...

Invoice Workflow Settings

We can see the Invoice in the PDF format – the one that we selected in the settings. But it is totally empty.

view 1 / 1

ATL  
1280 Caroline St NE, Atlanta, GA 30307,  
+1(111)222-3333

Invoice # 1  
Date: 12/05/2019 7:54  
Page 1 of 1

Owner	Jony Dk	Authorized		Shop Contact	Kostya Junior	Vehicle	2013 Mercedes-Benz E-Class	Engine	3.5L 6V
Phone	380661408863	Phone		Office Phone	+1(111)222-3333	VIN	WDDHF8JB7DA664253	L/P	
Address				Cell	+1(111)222-3333	Odometer	10 mi	Save Parts	No
Diag. Rate	\$ 54.96 Per hour	Labor Rate	\$ 54.96 Per hour	Concerns and Approval	<a href="#">Consents from Customer</a>	Start Date	10/01/19 08:56	Completion	10/01/19 08:58

Consents from Customer: .

#	Work Description	Price	Hours	Qty	Total, \$
1	NAPA Ultra Premium Front Brake Pads Semi-Metallic	129.00		1.00	129.00

Notes from Technician		Labor, \$	Parts, \$	Total, \$
		Prices	0.00	129.00
		Discounts	0.00	0.00
		Taxes	0.00	0.00
			*Cash payment	*Total
				129.00

Signature: \_\_\_\_\_ Date: \_\_\_\_\_


Let's see what we can add to it.  
Click on settings and select Invoice Settings. This is Invoice Settings.

Repair Orders # 1 

2013 Mercedes-Benz E-Class - 10 mi... Add a repair description, split with s...

Description	Price, \$	Hours / Qty	Total, \$	Status
NAPA Ultra Premium Front Brake Pads Semi-Metallic	129.00	1	129.00	Shipped
Enter Labor Title - OR - Click Estimate →	Estimate 54.96	1.00		<span>More</span> <span>Add Item</span>
<b>Total</b>		0.00	129.00	

Initial **Inspect** Approval Part Delivery Wait Tech Labor Finished Paid 0.00

Prime Technician: Kostya Junior

Time Started: 2019-10-01 11:56  
Time Ended: 2019-10-01 11:58

Requests for Repair / Concerns +

Maintenances ...

Leave Your notes for this repair... ✎

-  **Invoice Settings**
-  Repair Templates
-  Translations
-  Client Payments

 Invoice
 Workflow
 Settings
 Delete

This is how we get to the Invoice Settings.

Configuration ☰

-  Profile Settings
-  Financial
-  Subscription
-  **Invoice Settings**
-  Labor Estimate
-  Part Price Calc.
-  Special Rates
-  Shop Suppliers
-  Client Payments
-  QB Syncing
-  Technical

### Invoice Settings

TEMPLATE






MANAGE INFO FROM PREVIOUS REPAIRS

Copy Previous Rejected Items:

Copy Previous Not Closed Concerns:

SETTINGS FOR NOTES IN REPAIR

 Help
 Info
 Chat

We already know that we have several types of invoice templates. Let's see how we can use the settings.

**MANAGE INFO FROM PREVIOUS REPAIRS**

---

Copy Previous Rejected Items

Copy Previous Not Closed Concerns

**SETTINGS FOR NOTES IN REPAIR**

---

Do not print note in repair by default  Print note in repair by default

Do not print note in repair item by default  Print note in repair item by default

What we see first is MANAGE INFO FROM PREVIOUS REPAIRS

Before creating a new Repair, you can select the following actions from the settings:

- Copy Previous Rejected Items
- Copy Previous Opened Concerns

**MANAGE INFO FROM PREVIOUS REPAIRS**

---

Copy Previous Rejected Items

Copy Previous Not Closed Concerns

Select the required action by clicking this button:

**MANAGE INFO FROM PREVIOUS REPAIRS**

---

Copy Previous Rejected Items

Copy Previous Not Closed Concerns

*(Note: A red arrow points to the dropdown menu for the first setting, which is open and shows the selected option highlighted in blue.)*

This function is very useful and convenient. If your customer Rejects the parts that he does not want to replace at the moment, then at the next visit to your workshop and when creating a new repair order for this vehicle, all rejected item will be copied into a new order.

Repair Orders # 11246445159

2005 Nissan Sentra - 10 mi... More

Test 2 - Lights

Description	Price, \$	Hours / Qty	Total, \$	Status
Test 2	50.00	1.00	50.00	Completed
Test 2 - Lights	40.00	1.20	48.00	Rejected
<b>Total</b>		<b>2.20</b>	<b>50.00</b>	

Initial Inspect Approval Part Delivery Wait Tech Labor Finished Paid 0.00

Prime Technician: John Dev

Time Started: 2019-12-10 07:53  
Time Ended: 2019-12-10 20:31

Requests for Repair / Concerns

- Test 2 - Lights
- Test 2 - Antifreeze / Coolant
- Test 2 - AC Operation

12/10/19 20:33 Notification - Repair is finished (Mechanic)

12/10/19 20:34 Notification - Repair is finished (Mechanic)

It is the most important that all information from Requests for Repair and Concerns is cross-linked and added to the orders:

Repair Orders # 11246445159

Description	Price, \$	Hours / Qty	Total, \$	Status
Test 2	50.00	1.00	50.00	Completed
Test 2 - Lights	40.00	1.20	48.00	Rejected
<b>Total</b>		<b>2.20</b>	<b>50.00</b>	

Initial Inspect Approval Part Delivery Wait Tech Labor Finished Paid 0.00

Prime Technician: John Dev

Time Started: 2019-12-10 07:53  
Time Ended: 2019-12-10 20:31

Requests for Repair / Concerns

- Test 2 - Lights
- Test 2 - Antifreeze / Coolant
- Test 2 - AC Operation
- Test 2 - Engine Oil

12/10/19 20:33 Notification - Repair is finished (Mechanic)

12/10/19 20:34 Notification - Repair is finished (Mechanic)

There are several ways to do this. You can either press this button and select the way you want to create a link,

engine cool	60.00	1	60.00	Suggested
labor	40.00	2.20	88.00	Suggested
other	40.00		40.00	Suggested
new inspection (Test 3)	60.00	10.00	600.00	Suggested
Enter Labor Title - OR - Click Estimate →	Estimate	40.00	1.00	More Add Item
Total		19.40	1305.90	

Part Delivery > Wait Tech > Labor > Finished

Paid 0.00

SMS This is link from repair shop, click it to see details for your repair order: <https://is.gd/MLzemB>

or simply move the needed request from Requests for Repair and Concerns and it will be mapped in orders.

You can also delete requests:

Labor	
engine	
engine cool	
77	X
other	

You can watch our video on how to work with Repair Orders to learn how it works.

All information about Requests for Repair and Concerns will be added to the invoice when you print it out or send it to the email.

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899  
Florida Registration: MV-00000

Quote # 11246445167  
Date: 12/12/2019 8:04  
Page 1 of 1

Owner	Jony Dk	Authorized		Shop Contact	John Dev	Vehicle	2005 Nissan Sentra	Engine	2.5L 4L
Phone	380661408863	Phone		Office Phone	+1(408)555-5899	VIN	3N1AB51D45L580508	L/P	
Address				Cell	+1(131)000-0000	Odometer	10 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	Concerns from Customer	Start Date	12/12/19 19:57	Promised End	
Concerns from Customer: . Concerns from Technician: Test 2 - Antifreeze / Coolant, Test 2 - Engine Oil, Test 2 - AC Operation, Test 2 - Lights									

	Labor, USD	Parts, USD	Total, USD
Prices	0.00	0.00	0.00
Discounts	0.00	0.00	0.00
Taxes	0.00	0.00	0.00
*Cash payment		*Total	0.00

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The following settings are SETTINGS FOR NOTES IN REPAIR.

**SETTINGS FOR NOTES IN REPAIR**

Do not print note in repair by default



Print note in repair by default

Do not print note in repair item by default



Print note in repair item by default

These settings help turn on or turn off the repair notes by default. We can also turn them on/off in the repair order itself:

Description	Price, \$	Hours / Qty	Total
Control Computer ECU Replac	41.00	2.00	82
Engine Control System	0.00	0	0
Enter Labor Title - OR - Click Estimate →	40.00	1.00	
Notes	Tax 8.25	Time Fact 1.00	Stat
Total		2.00	



Prime Technician: John Dev

Time Started: 2019-12-13 00:59

Requests for Repair / Concerns +

77

Leave Your notes for this repair...

12/13/19 01:02  
 SMS This is link from repair shop, click it to see details: <https://is.gd/sFLyNX>

Type your message here..

Let's see how this works.

We will write a note for the current repair and see how it reflects in our invoice. The crossed "eye" symbol indicates that the notes will not be shown in the invoice.

🔄 Description

🔧 Control Computer ECU Replac

🔧 Engine Control System

🔧 Enter Labor Title - OR - Click Estimate → Estimate

👁️ Test [✎] Sammie Jaskolski Tax 8.25

Initial Inspect Approval Part Delivery Wait Tech

Prime Technician John Dev

Time Started 2019-12-13 00:59

12/13/19 (SMS) This is I r: https

Requests for Repair / Concerns +

👤 77 [⋮]

👁️ Test [✎]

To activate the “eye,” click on it and the notes will become visible in the invoice.

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899  
Florida Registration: MV-00000

Quote # 11246445170  
Date: 12/16/2019 11:06  
Page 1 of 1

Owner	Alex Strel	Authorized		Shop Contact	John Dev	Vehicle	2012 Honda Accord	Engine	2.4L 4L
Phone	380974917476	Phone		Office Phone	+1(408)555-5899	VIN	1HGCP3F75CA004222	L/P	
Address				Cell	+1(131)000-0000	Odometer	15,000 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	<a href="#">Consens from Customer.</a>	Start Date	12/12/19 22:59	Promised End	
Consens from Customer: . Consens from Technician: 77									
#	Work Description				Price	Hours	Qty	Total, USD	
1	Control Computer ECU Replac				41.00	2.00		82.00	
2	Engine Control System				0.00		0.00	0.00	
Notes from Technician						Labor, USD	Parts, USD	Total, USD	
Test					Prices	82.00	0.00	82.00	
					Discounts	0.00	0.00	0.00	
					Taxes	0.00	0.00	0.00	
					*Cash payment		*Total	82.00	

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

As a reminder, if you want to hide the notes by default, you can disable them in the settings.

#### SETTINGS FOR NOTES IN REPAIR

Do not print note in repair by default



Print note in repair by default

Do not print note in repair item by default



Print note in repair item by default

Then the notes will not be shown in the invoices by default.

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899  
Florida Registration: MV-00000

Quote # 11246445166  
Date: 12/16/2019 11:41  
Page 1 of 1

Owner	Jony Dk	Authorized		Shop Contact	John Dev	Vehicle	2005 Nissan Sentra	Engine	2.5L 4L
Phone	380661408863	Phone		Office Phone	+1(408)555-5899	VIN	3N1AB51D45L580508	L/P	
Address				Cell	+1(131)000-0000	Odometer	10 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	<a href="#">Consens from Customer.</a>	Start Date	12/12/19 19:44	Promised End	
Consens from Customer: . Consens from Technician: Test 2 - Antifreeze / Coolant, Test 2 - Engine Oil, Test 2 - AC Operation, Test 2 - Lights									
						Labor, USD	Parts, USD	Total, USD	
					Prices	0.00	0.00	0.00	
					Discounts	0.00	0.00	0.00	
					Taxes	0.00	0.00	0.00	
					*Cash payment		*Total	0.00	

You can also select the currency type appropriate for your country.

CURRENCY

Currency

USD

You can set tax rates for labor and spare parts in accordance with your country or state regulations. Select and enable the needed parameter. Here are the tax rates before and after the discount:

TAX RATES

Labor, %

0

Parts, %

2.2

Tax after Discount



Tax before Discount

Email Options settings will help you choose and send the invoice to the customer with an attachment or notification by email to let the customer know that s/he can see the invoice in the customer app:

EMAIL OPTIONS

Send Invoice to Customer without Attachments



Send Invoice to Customer with Attachments

The QUOTE will be removed when you select the number of days under QUOTE LIFETIME settings. The invoice will be removed within the period selected in the settings.

QUOTE LIFETIME

Days

10

Quote will be removed after this period

FOOTER PRIM

Footer Prim

FOOTER STATIC TEXT

1

2

3

5

7

10

14

30

60

90

FOOTER PRIM and FOOTER STATIC TEXT settings are designed mostly for the first invoice template. The margins are intended for adding additional information such as, for example, company's policy or vehicle repair regulations, or for signing the vehicle's repair agreement.

**FOOTER PRIM**

Footer Prim

**FOOTER STATIC TEXT**

Footer Static Text

For instance, the text that the workshop accepts the vehicle for repair and that the customer agrees with our company's terms and regulations can be added to the FOOTER PRIM.

**FOOTER PRIM**

PLEASE READ CARE FULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SEE:  
I UNDERSTAND THAT, UNDER STATE LAW, I AM ENTITLED TO  
A WRITTEN ESTIMATE IF MY BILL WILL EXCEED \$100. \_\_\_\_\_ I REQUEST A WRITTEN ESTIMATE.  
I DO NOT REQUEST A WRITTEN ESTIMATE AS LONG

In the Footer Static Text we can add the agreement statement about vehicle's estimate not to exceed the earlier specified amount:

Now, let's see how this looks in the invoice.

Go to the required repair order, open the invoice and you will see the rules that we have been adding in the settings:

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899

Quote # 11246445167

Date: 12/16/2019 1:32

Page 1 of 1

Florida Registration: MV-00000

Owner	Jony Dk	Authorized		Shop Contact	John Dev	Vehicle	2005 Nissan Sentra	Engine	2.5L 4L
Phone	380661408863	Phone		Office Phone	+1(408)555-5899	VIN	3N1AB51D45L580508	L/P	
Address				Cell	+1(131)000-0000	Odometer	10 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	<u>Consens from Customer.</u>	Start Date	12/12/19 19:57	Promised End	

Consens from Customer: . Consens from Technician: Test 2 - Antifreeze / Coolant, Test 2 - Engine Oil, Test 2 - AC Operation, Test 2 - Lights

	Labor, USD	Parts, USD	Total, USD
Prices	0.00	0.00	0.00
Discounts	0.00	0.00	0.00
Taxes	0.00	0.00	0.00
	*Cash payment	*Total	0.00

All Estimates good for 30 days. Not responsible for damage caused by theft, fire, or act of nature. I hereby authorize the above repairs, including sublet work, along with the necessary materials. You and your employees may operate my vehicle for the purpose of testing, inspection and delivery at my risk. If I cancel repairs prior to the completion for any reason, a tear down and reassembly fee of \$ \_\_\_\_\_ will be applied.

Signature \_\_\_\_\_ Date \_\_\_\_\_

PLEASE READ CAREFULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SEE:

I UNDERSTAND THAT, UNDER STATE LAW, I AM ENTITLED TO A WRITTEN ESTIMATE IF MY BILL WILL EXCEED \$100. \_\_\_\_\_ I REQUEST A WRITTEN ESTIMATE. \_\_\_\_\_ I DO NOT REQUEST A WRITTEN ESTIMATE AS LONG

AS THE REPAIR DOES NOT EXCEED \$ \_\_\_\_\_. THE SHOP MAY NOT EXCEED THIS AMOUNT WITHOUT MY WRITTEN OR ORAL APPROVAL. \_\_\_\_\_ I DO NOT REQUEST A WRITTEN ESTIMATE.

Now, let's see what the invoice contains.

The Quote status is shown in the upper right corner of the invoice when creating a new invoice for repair.

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899

Quote # 11246445155

Date: 12/16/2019 2:04

Page 1 of 1

Florida Registration: MV-00000

Owner	Carl Ramos	Authorized	Name	Shop Contact	John Dev	Vehicle	1967 Renault R10	Engine	5.0L 6V
Phone	+3(352)585-3973	Phone		Office Phone	+1(408)555-5899	VIN	B2720973539358347	L/P	98537855268686
Address	905 Algoma Lane, Phoenix, AZ 85025			Cell	+1(131)000-0000	Odometer	357,291 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	<u>Consens from Customer.</u>	Start Date	12/10/19 05:49	Promised End	

Consens from Customer: .

Notes from Technician		Labor, USD	Parts, USD	Total, USD
	Prices	0.00	0.00	0.00
	Discounts	0.00	0.00	0.00
	Taxes	0.00	0.00	0.00
	*Cash payment	*Total		0.00

PLEASE READ CAREFULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SEE:

All Estimates good for 30 days. Not responsible for damage caused by theft, fire, or act of nature. I hereby authorize the above repairs, including sublet work, along with the necessary materials. You and your employees may operate my vehicle for the purpose

After you conducted the inspection and added the necessary parts, you can send the Quote to your customer to confirm. After the customer confirms the Quote, the order status changes to Invoice.

Repair broth.  
595 Piedmont Ave NE, Atlanta, GA 30308,  
+1(408)555-5899  
Florida Registration: MV-00000

Invoice # 11246445155

Date: 12/16/2019 2:07

Page 1 of 1

Owner	Carl Ramos	Authorized	Name	Shop Contact	John Dev	Vehicle	1967 Renault R10	Engine	5.0L 6V
Phone	+3(352)585-3973	Phone	Office Phone	+1(408)555-5899	VIN	B2720973539358347	L/P	98537855268686	
Address	905 Algoma Lane, Phoenix, AZ 85025			Cell	+1(131)000-0000	Odometer	357,291 mi	Save Parts	No
Diag. Rate	\$ 65.25 Per hour	Labor Rate	\$ 40 Per hour	Concerns and Approval	<a href="#">Consens from Customer.</a>	Start Date	12/10/19 05:49	Completion	

Notes from Technician	Labor, USD	Parts, USD	Total, USD
	Prices	0.00	0.00
	Discounts	0.00	0.00
	Taxes	0.00	0.00
	*Cash payment	*Total	0.00

PLEASE READ CARE FULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SEE:  
I UNDERSTAND THAT, UNDERSTATE LAW, I AM ENTITLED TO A WRITTEN ESTIMATE IF MY BILL WILL EXCEED \$100. \_\_\_\_\_

All Estimates good for 30 days. Not responsible for damage caused by theft, fire, or act of nature. I hereby authorize the above repairs, including sublet work, along with the necessary materials. You and your employees may operate my vehicle for the purpose of testing, inspection and delivery at my risk. If I can cancel repairs prior to the completion for any reason, a tear down and reassembly fee of \$\_\_\_\_\_ will be applied.

The invoice contains information about your customer such as:

- Customer's name and last name
- Phone number
- Customer's company registration address or home address

Information about the vehicle such as:

- VIN code
- Vehicle's license plate
- Vehicle's brand
- Mileage on odometer

is also available.

Payment method selected for vehicle's repair will be reflected in the repair order:

TOTAL
2.00
02.00

---

Wait Tech
Labor
Finished

Paid
0.00

12/13/19 01:02

This is link from repair shop, click it to see details for  
r: <https://is.gd/sFLyNX>

**Cash**

**Check**

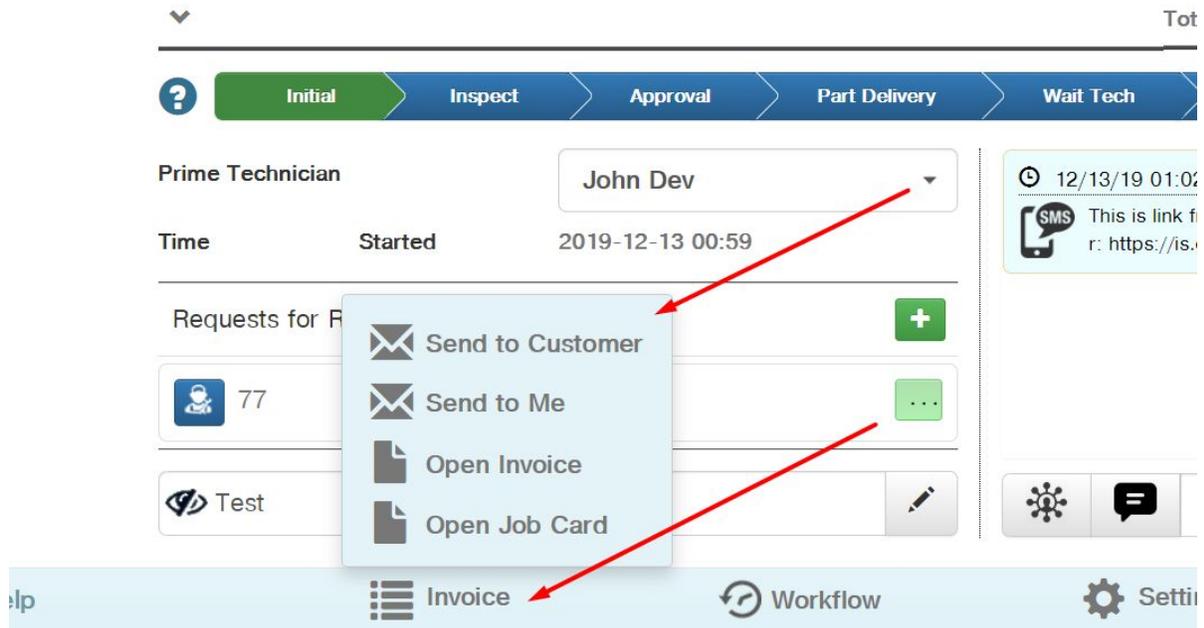
**Credit Card**

**Debit Card**

**Split Payment**

There are several ways to send the invoice.

To send and print out the invoice, click on Invoice button and select how you want to send the invoice.



- You can send an invoice to your customer by email
- You can send the invoice to your own email address
- Open the invoice for printing
- Open the job card where the work process is reflected

Repair broth.  
 595 Piedmont Ave NE, Atlanta, GA, 30308  
 Phone: +1(408)555-5899

Job Card # 11246445170

Date: 12/16/2019 2:38

Page 1 of 1

Owner	Alex Strel		Phone	380974917476	Vehicle	2012 Honda Accord	RO # 13726 via Cell
Company			Email		VIN	1HGCP3F75CA004222	
Address			Notes:	L/P			
City				Engine	Code		
State		Zip			Trans	Automatic 5 FWD	

Technician	Start Date	Odometer In	Odometer Out	Tag
John Dev	12/12/19 22:59	15,000 mi	15,000 mi	

#	Work Description	Fact Time	Scheduled Time
1	Control Computer ECU Replac	1.0	2.00
2	Engine Control System		0.00

● This is all we wanted to tell you about in our file.