

# Create an invoice in MyFleetCenter



FLEET CENTER

# Objectives

1. Create an invoice
2. Edit an in-progress invoice
3. Submit an invoice for billing



## Create an invoice

1. Login to Midas.MyFleetCenter.com using your Store User Login
2. Click on Create Invoice

The screenshot shows the MyFleetCenter.com website interface. At the top, there is a navigation bar with the following links: [Lookup Fleet](#), [Create Invoice](#), [Invoices](#), [Contact Us](#), and [Log Out](#). The [Create Invoice](#) link is highlighted with a blue arrow. Below the navigation bar, the website header includes the MIDAS logo, the text "MyFleetCenter.com", the slogan "Extending the Midas Touch to your fleet billing", the URL "midasdealer.myfleetcenter.com", and the text "Invoicing that moves as fast as your business". On the right side of the header, it says "Powered by: iM3 Invoice Management technology".

The main content area is titled "Fleet Lookup Tool". It contains a welcome message and instructions for using the tool. A search box is located on the right side of the page, with a "Search local only" toggle switch set to "ON". The search results section is currently displaying a "Data error." message.

**Fleet Lookup Tool**

Welcome to the MyFleetCenter.com fleet lookup tool! This tool has provided for your convenience to assist you in making the decision of whether or not to provide service to a fleet customer.

To get started just start typing some information (at least 4 characters) about the fleet into the search box to the right. The following items are searchable using the fleet lookup tool:

- Account #
- Company name
- Company address
- Company phone
- License plate
- VIN

By default searches are restricted to your state and surrounding states. To search all states click the "Search local only" switch to toggle it from "On" to "Off".

If any matches are found they will be displayed in the section to the right.

To ensure you have the correct fleet, click on an account number to view detail about that fleet.

**Search Criteria**

Search for:  Search local only:  ON

**Search Results**

Account	Co. Name	Address
Data error.		

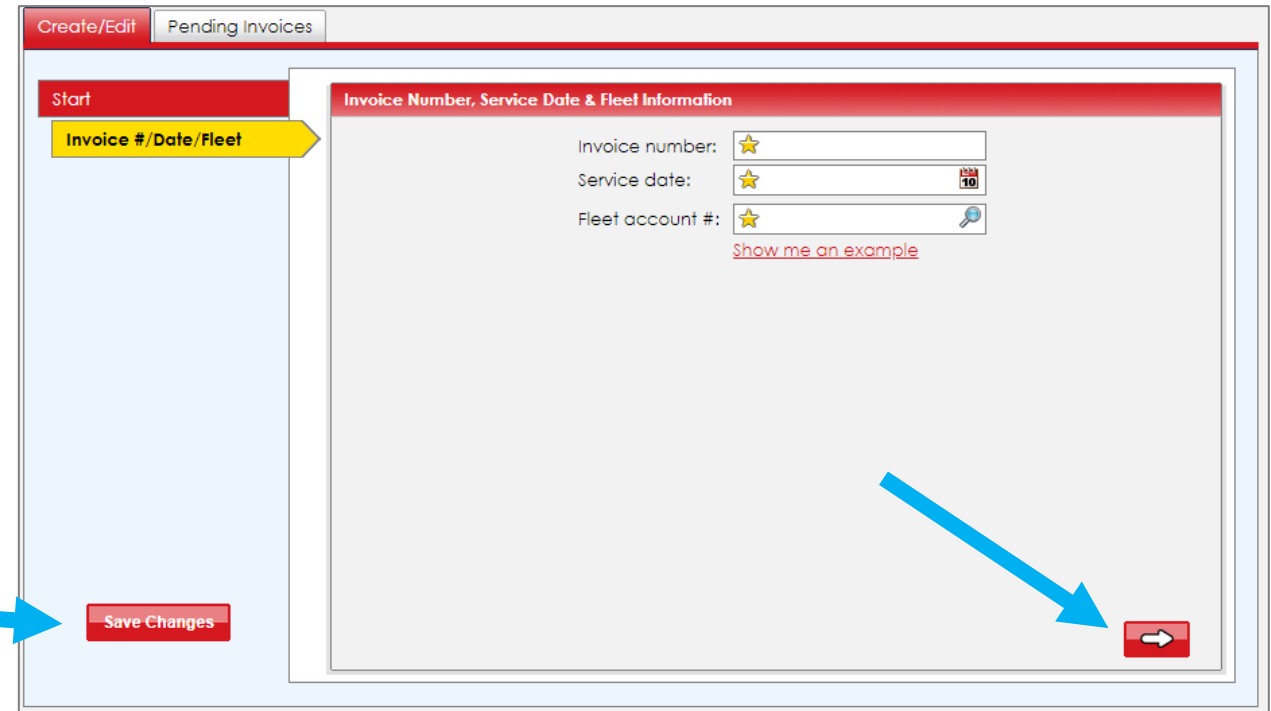
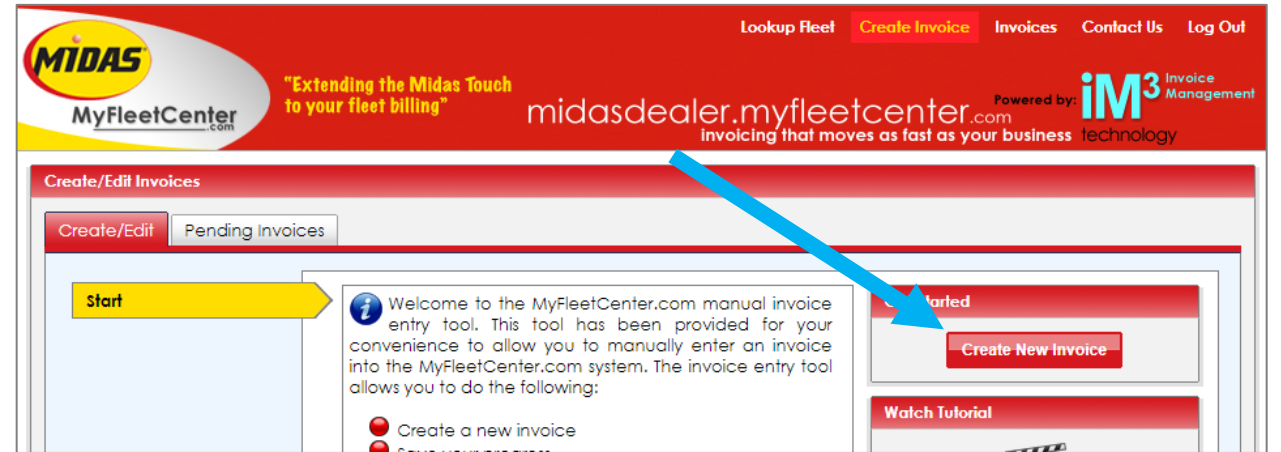
## Create an invoice

1. Click Create a New Invoice
2. Enter the information from your invoice:
  - Invoice number
  - Service date
  - Fleet account #

*Tip! If you don't know the fleet account number, you can look it up using the magnifying glass! Remember to enter at least 4 characters to search.*

3. Click the right arrow to continue

*Tip! You can save at any time and come back to the invoice later by clicking Save Changes!*





## Create an invoice – Enter driver & vehicle information

1. Complete all the boxes in the Driver Information Screen
2. Click the right arrow to continue
3. Enter Vehicle and mileage information
4. Click the right arrow to continue

**Tip!** Fields with a star are required. Mileage is critically important to getting paid, as is correct vehicle information.

**Create/Edit Invoices**

Create/Edit Pending Invoices

Start  
Invoice #/Date/Fleet  
Driver

**Driver Information**

Driver name: Joe Smith  
Address: 12345 Test Street  
Country: United States  
City: Middleton  
State: Washington  
Zip: 53562  
Phone: 888-999-9497

The invoice information has been changed and has not been saved yet.

Save Changes

← →

**Create/Edit Invoices**

Create/Edit Pending Invoices

Start  
Invoice #/Date/Fleet  
Driver  
Vehicle

**Vehicle Information**

Vehicle make: ★ Ford  
Vehicle model: ★ Focus  
Vehicle year: ★ 2020  
License plate: ★ ABC123  
Vehicle country: United States  
Vehicle state: Wisconsin  
Mileage: ★ 15246  
VIN: ★ 1FMCU9J91KUC36716

The invoice information has been changed and has not been saved yet.

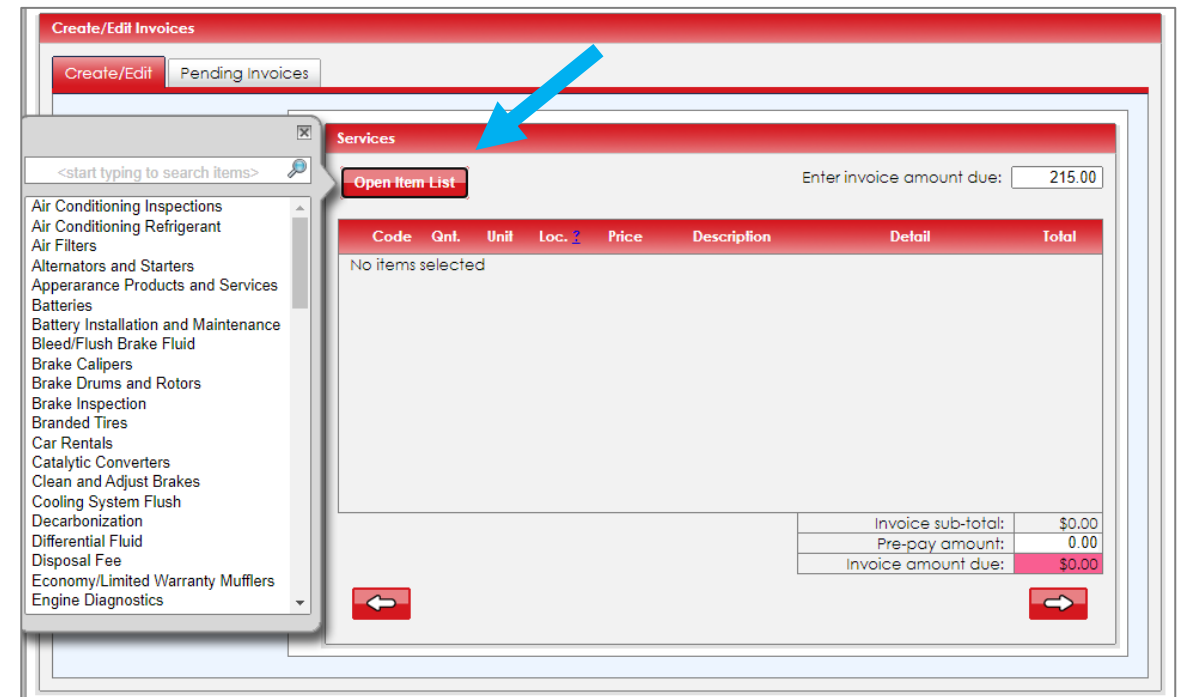
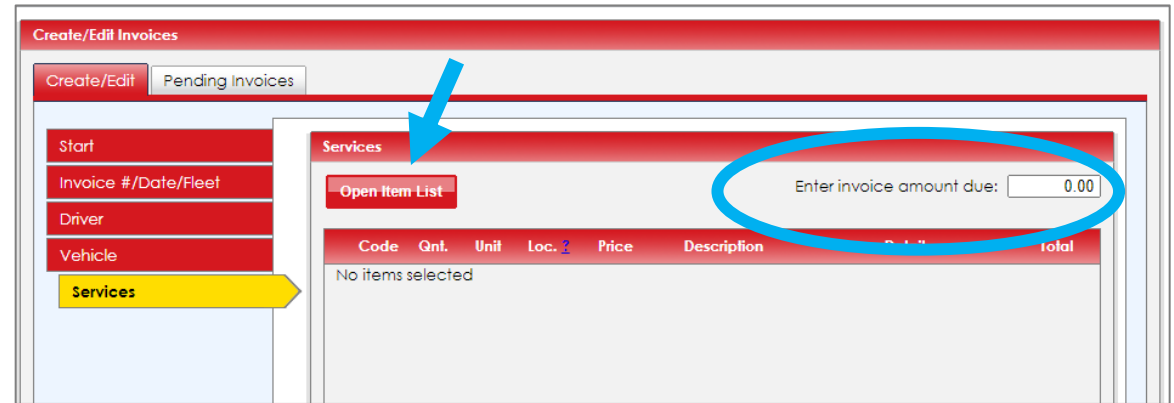
Save Changes

← →

## Create an invoice – Enter services

1. Enter the total amount of your invoice, including tax in the box in the upper right corner.
2. Click Open Item List to open up the list of service categories
3. Scroll through the list until you find the category you want and double click to enter.

As you enter each category, you will need to enter the unit, location, price and description. (See next page)





## Create an invoice – Enter services

1. Make sure each item has:
  - Unit (each, hour, n/a, pint or quart)
  - Location (N/A, F, FL, R, RR, RL)
  - Price
  - Detail – this is where you enter any details regarding the service, or special notes. (Can be blank if nothing to add.)
2. Don't forget to select the appropriate category for sales tax, as this is an item selection.
3. When you have everything entered, your invoice amount due must balance the invoice amount entered at the top. The invoice amount due box will turn green.
4. Click the right arrow to continue.

Lookup Fleet Create Invoice Invoices Contact Us Log Out

**MIDAS** MyFleetCenter.com "Extending the Midas Touch to your fleet billing" midasdealer.myfleetcenter.com Powered by: iM<sup>3</sup> Invoice Management Invoicing that moves as fast as your business technology

Create/Edit Invoices

Create/Edit Pending Invoices

Start  
Invoice #/Date/Fleet  
Driver  
Vehicle  
Services

Services

Open Item List Enter invoice amount due: 275.00

Code	Qnt.	Unit	Loc.	Price	Description	Detail	Total
151	1	EA	N/A	80.00	Synthetic or semi-Synthetic Oil and Filters		80.00
240	1	EA	N/A	25.00	Air Filters		25.00
290	1	EA	N/A	150.00	Branded Tires	Replaced Driver's Side front tire	150.00
600	1	EA	N/A	20.00	Sales Tax- US		20.00

The invoice information has been changed and has not been saved yet

Save Changes

Invoice sub-total: \$275.00  
Pre-pay amount: 0.00  
Invoice amount due: \$275.00



## Create an invoice – Enter authorization information

1. Complete as many boxes on this screen as possible. The more information you provide the Fleet Management Company, the easier it will be for them to pay you. At the very least, you should have an authorization number and/or PO number.
2. Click the right arrow to continue.

Look up Fleet **Create Invoice** Invoices Contact Us Log Out

**MIDAS**  
MyFleetCenter.com

"Extending the Midas Touch to your fleet billing"

midasdealer.myfleetcenter.com Powered by: **iM3** Invoice Management technology

Create/Edit Invoices

Create/Edit Pending Invoices

Start  
Invoice #/Date/Fleet  
Driver  
Vehicle  
Services  
Miscellaneous

Miscellaneous

Authorization #:  
Authorizer name:  
PO #:  
Vehicle/Unit #:  
Employee #:  
Additional notes:

The invoice information has been changed and has not been saved yet

Save Changes

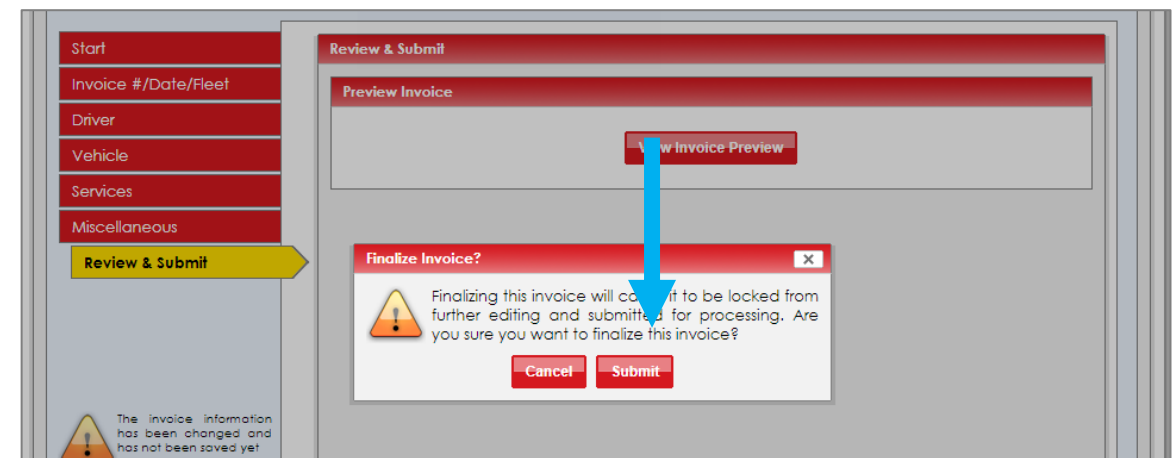
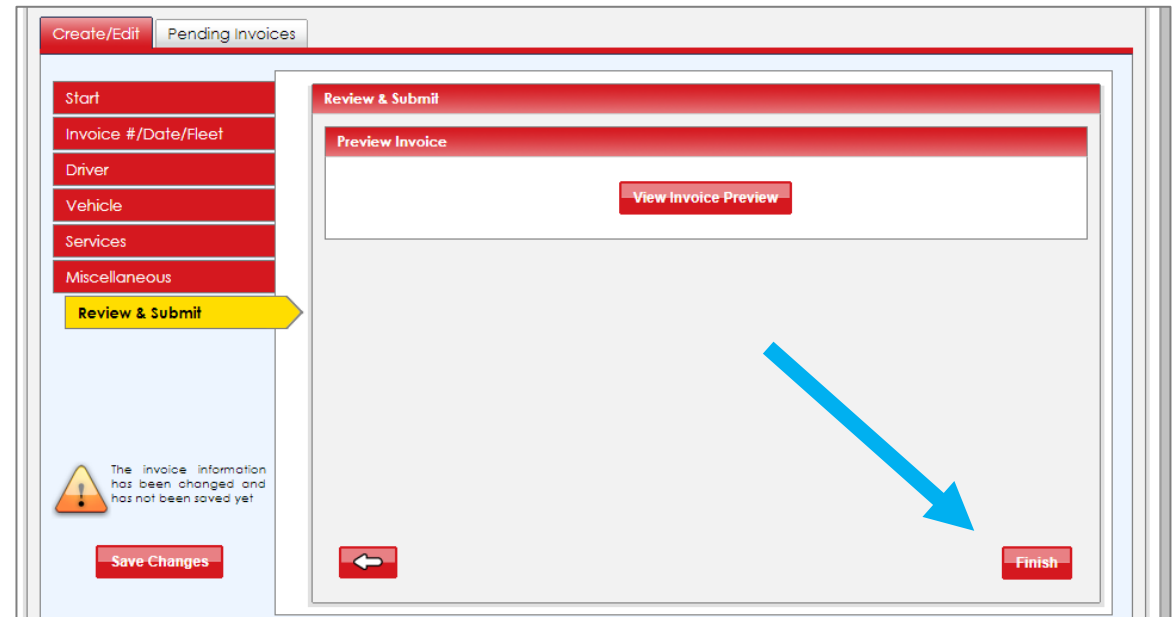


## Create an invoice - Finish

When you are done entering all your information, you can double check your entries by clicking the View Invoice Preview box.

If everything looks right, click Finish.

When the Finalize Invoice? Popup box shows up, click Submit to send the invoice to MyFleetCenter to be billed.





## Edit a pending invoice

If you saved a partially completed invoice that you need to finish:

1. Click on the Pending Invoices tab
2. Click on the Edit button in the Action column to continue entering your invoice detail
3. Follow the same create an invoice steps shown on previous pages until you submit the invoice

**TIP:** If you no longer need to enter this invoice, click the red X in the Action column to delete it

**TIP:** To view the invoice, click the invoice number



Lookup Fleet **Create Invoice** Invoices Contact Us Log Out

**MIDAS** MyFleetCenter.com "Extending the Midas Team to your fleet billing" midasdealer.myfleetcenter.com Powered by: **iM3** Invoice Management technology

Create/Edit Invoices

Create/Edit Pending Invoices

<< first < prev 1 next > last >>

Action	Invoice#	Service	Driver	License	Store	Total	Disc.	Prmts	Balance
 	<a href="#">12345</a>	4/29/2021	Joe Smith	ABC123	MDS00000	275.00	0.00	0.00	275.00

# Recap

1. Create an invoice
  1. Create a New Invoice
  2. Follow the steps to enter all invoice details
  3. Finish and submit
2. Edit or delete a pending invoice
  - Click the pending invoice tab
  - Select the appropriate action



FLEET CENTER