

Manager Guide to Reviewing Invoices Daily

Expectation

To better understand your business, create and maintain a daily cadence of reviewing all invoices (work orders).

Setting aside deliberate and undisturbed time each day to review the day's invoices will:

- Give you management insights into all transactions in your store
- Provide opportunities to coach and mentor employees
- Develop the skills needed to analyze your business
- Create consistency and a daily routine for you to follow.

Reviewing invoices

When reviewing invoices, ask these questions and follow up for additional information and/or provide coaching as needed:

Compare pricing Were all Tire, Wheel, Installation, Accessory, and disposal invoiced at set retail?

If not, was there a logical explanation for the deviation?

If trade-in was invoiced, was it legitimate or was it used as a tool to discount product?

Was a Rebate Code used and invoiced properly per current promotions?

Were adjustments invoiced accurately with details that reflect the actual transaction or was this used as a tool to discount the purchase? If applicable, were the tires saved?

Product recommendation Was Treadwell used?

Was product:

- In-stock or special order?
- Core product?
- GBB?

Certificates Were certificates invoiced?

Wiper blades Were wiper blades invoiced? If not, did we ask questions and consider sales person's current %?

Service orders Was tread depth 4/32 or less?

Was vehicle age & spare tire inspection performed?

Was mileage entered accurately

Comment Line Were the instructions for the service area clear and accurate?

Contact

If you have questions or concerns, please contact your AVP or VP.
