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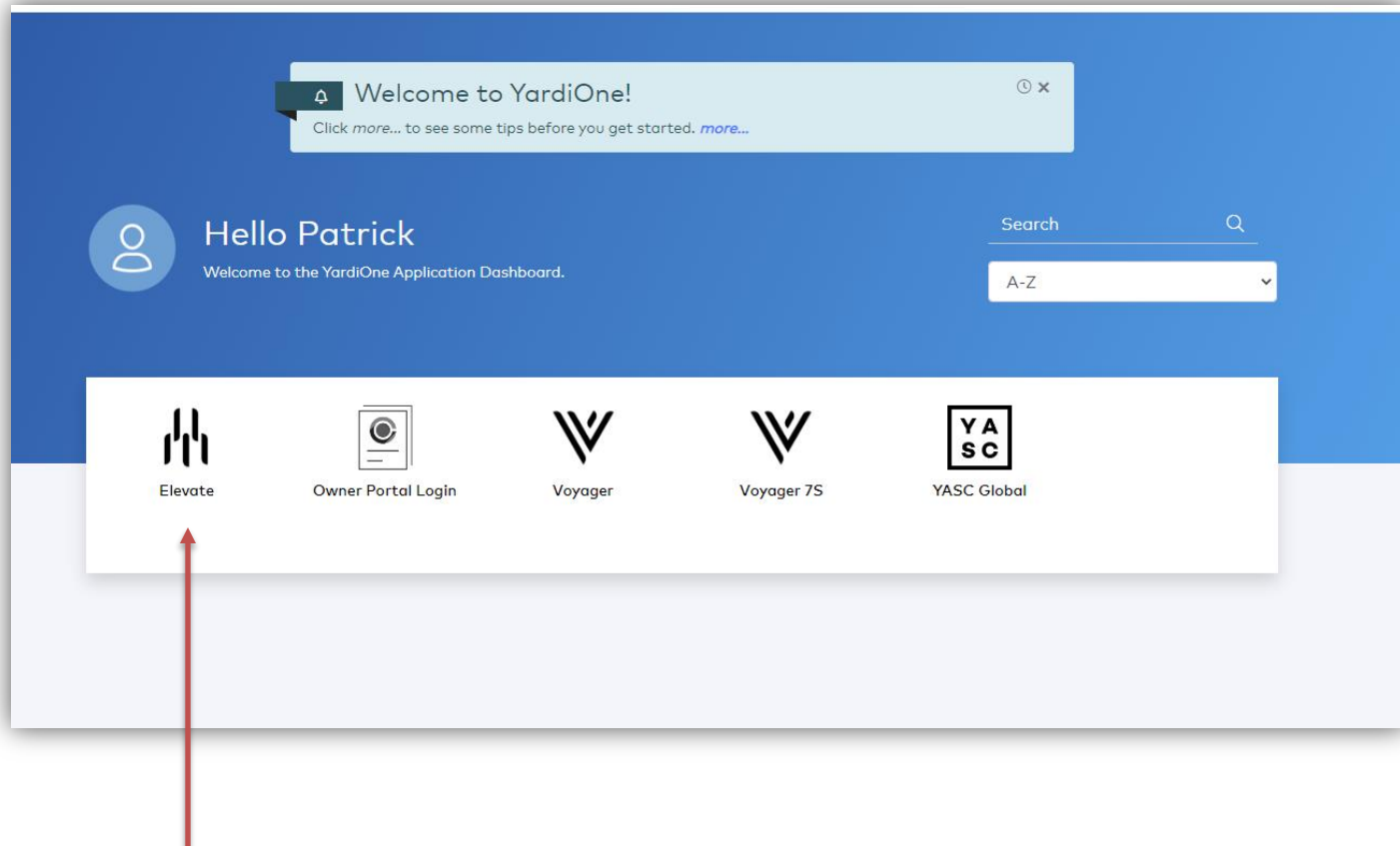
Board Invoice Approval Dashboard



YardiOne Dash Board

- Once logged in you will now be on your YardiOne Dashboard

Go into the Elevate Tab



Invoice Dashboard

Click the arrow next to Invoice

You will now need to go to your Workflow Dashboard to approve invoices

Shortcut: Click # next to Awaiting Approval or My Approval

Procure to Pay

Invoice ▾ Purchase Order ▾ Accounts Payable ▾ Marketplace VendorCafe Reports ▾ Full Service ▾

Invoices

Dashboard Workflow Dashboard Add IR Import IR Search IR Analytics My Invoices Invoice Image Export AP Template

Invoices By Status

Invoices By Expense Type

Invoices Due In

Action Items

6 Awaiting Approval for 10+ Days
0 My Approval
181 No Approver
19 Pending Post

Filtered By: No Approver X

Go To Invo Add Invoice

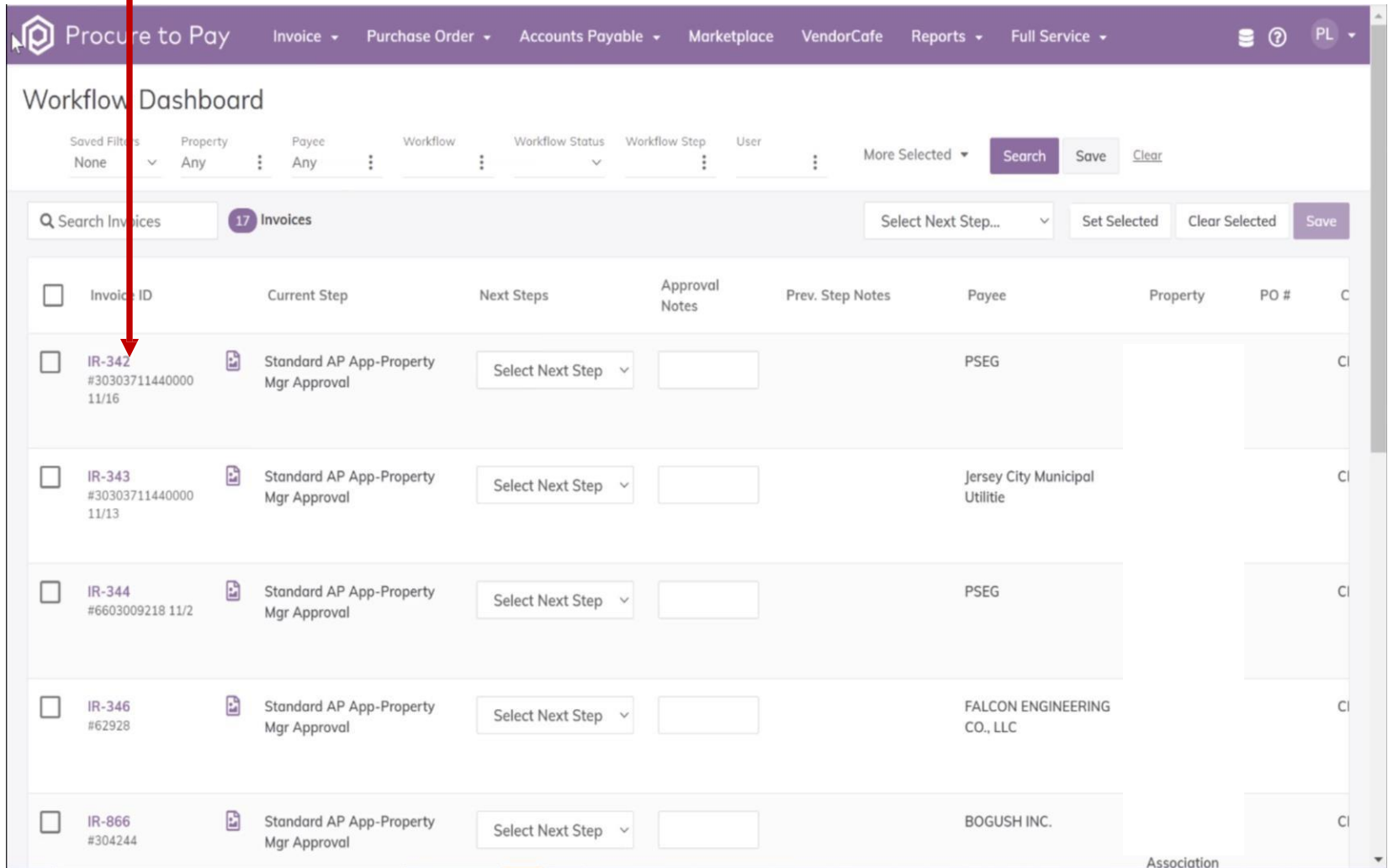
Invoice	Batch	Status	Payee	Invoice Date	Post Month	Expense Type	Total	Property	PO
49 #19883	30	In Progress	SMALL - THAT'S ALL v0000672	1/4/2021 View Milestones	01/2021	Expenses	\$1,199.53		
115 #81586	96	In Progress	DENALI PROPERTY MANAGEMENT v0000233	1/1/2021 View Milestones	11/2020	Expenses	\$875.19		
170 #81568	151	In Progress	DENALI PROPERTY MANAGEMENT v0000233	1/1/2021 View Milestones	01/2021	Expenses	\$1,277.08		
214 #5337	195	In Progress		12/21/2020 View Milestones	11/2020	Preliminary	\$200.00		

Important: Always Clear Your History First



Select the Invoice:

Select an invoice by clicking on the invoice ID.



The screenshot displays the 'Procure to Pay' Workflow Dashboard. The top navigation bar includes links for Invoice, Purchase Order, Accounts Payable, Marketplace, VendorCafe, Reports, and Full Service. The dashboard title is 'Workflow Dashboard'. Below the title, there are filter tabs for Saved Filters, Property, Payee, Workflow, Workflow Status, Workflow Step, and User. A search bar is present with a 'Search' button. The main section shows a list of 17 invoices. A red arrow points to the first invoice, 'IR-342', which has the ID '#30303711440000' and a date of '11/16'. The invoice is currently in the 'Standard AP App-Property Mgr Approval' step. The table columns are: Invoice ID, Current Step, Next Steps, Approval Notes, Prev. Step Notes, Payee, Property, and PO #.

Invoice ID	Current Step	Next Steps	Approval Notes	Prev. Step Notes	Payee	Property	PO #
<input type="checkbox"/> IR-342 #30303711440000 11/16	Standard AP App-Property Mgr Approval	Select Next Step ▾			PSEG		
<input type="checkbox"/> IR-343 #30303711440000 11/13	Standard AP App-Property Mgr Approval	Select Next Step ▾			Jersey City Municipal Utilities		
<input type="checkbox"/> IR-344 #6603009218 11/2	Standard AP App-Property Mgr Approval	Select Next Step ▾			PSEG		
<input type="checkbox"/> IR-346 #62928	Standard AP App-Property Mgr Approval	Select Next Step ▾			FALCON ENGINEERING CO., LLC		
<input type="checkbox"/> IR-866 #304244	Standard AP App-Property Mgr Approval	Select Next Step ▾			BOGUSH INC.		

Association



Invoice Details:

Once the invoice has been selected you will see all of the invoice details

Procure to Pay Invoice Purchase Order Accounts Payable Marketplace VendorCafe Reports Full Service

Work Invoice ID#342 >

INVOICE ID
342

PAYEE
v0000607
PSEG

INVOICE #
30303711440000 11/16

AMOUNT
\$9,162.96

Workflow
Standard AP App

Previous Step Notes

Current Step Property Mgr Approval

Next Step

Step Notes

Click to View Invoice

View Image(s) Save and Next Go to invoice

Details

Entity	Account	Net (\$)	Tax	Shipping	Gross	GL Notes
a153 (Inc, 26 Boulev 07306 ,	2207 (Accounts Payable Tops)	9,162.96	0.00	0.00	9,162.96	9/15-10/13



Invoice Approval:

Click on the next steps tab to make your approval or return to AP with comments if any.

Procure to Pay

Invoice - Purchase Order - Accounts Payable - Marketplace - VendorCafe - Reports - Full Service -

Work

Invoice ID#342 >

INVOICE ID
342

PAYEE
v0000607
PSEG

INVOICE #
30303711440000 11/16

AMOUNT
\$9,162.96

Workflow
Standard AP App

Previous Step Notes

Current Step Property Mgr Approval

Next Step

Step Notes

Board Approval

AP Final Review

Return to AP

View Image(s) Save

Details

Entity	Account	Net (\$)	Tax	Shipping	Gross	GL Notes
a153 (2600 Association Inc, 2600 Kennedy Boulevard, Jersey City, NJ 07306)	2207 (Accounts Payable Tops)	9,162.96	0.00	0.00	9,162.96	9/15-10/13



Send Next Step:

Click Save and Next this will complete your process for this invoice and move to the next invoice.

Procure to Pay Invoice • Purchase Order • Accounts Payable • Marketplace • VendorCafe • Reports • Full Service •

Work Invoice ID#342 >

INVOICE ID
342

PAYEE
v0000607
PSEG

INVOICE #
30303711440000 11/16

AMOUNT
\$9,162.96

Workflow
Standard AP App

Previous Step Notes

Current Step
Property Mgr Approval

Next Step

Step Notes

View Image(s) Save and Next Go to invoice

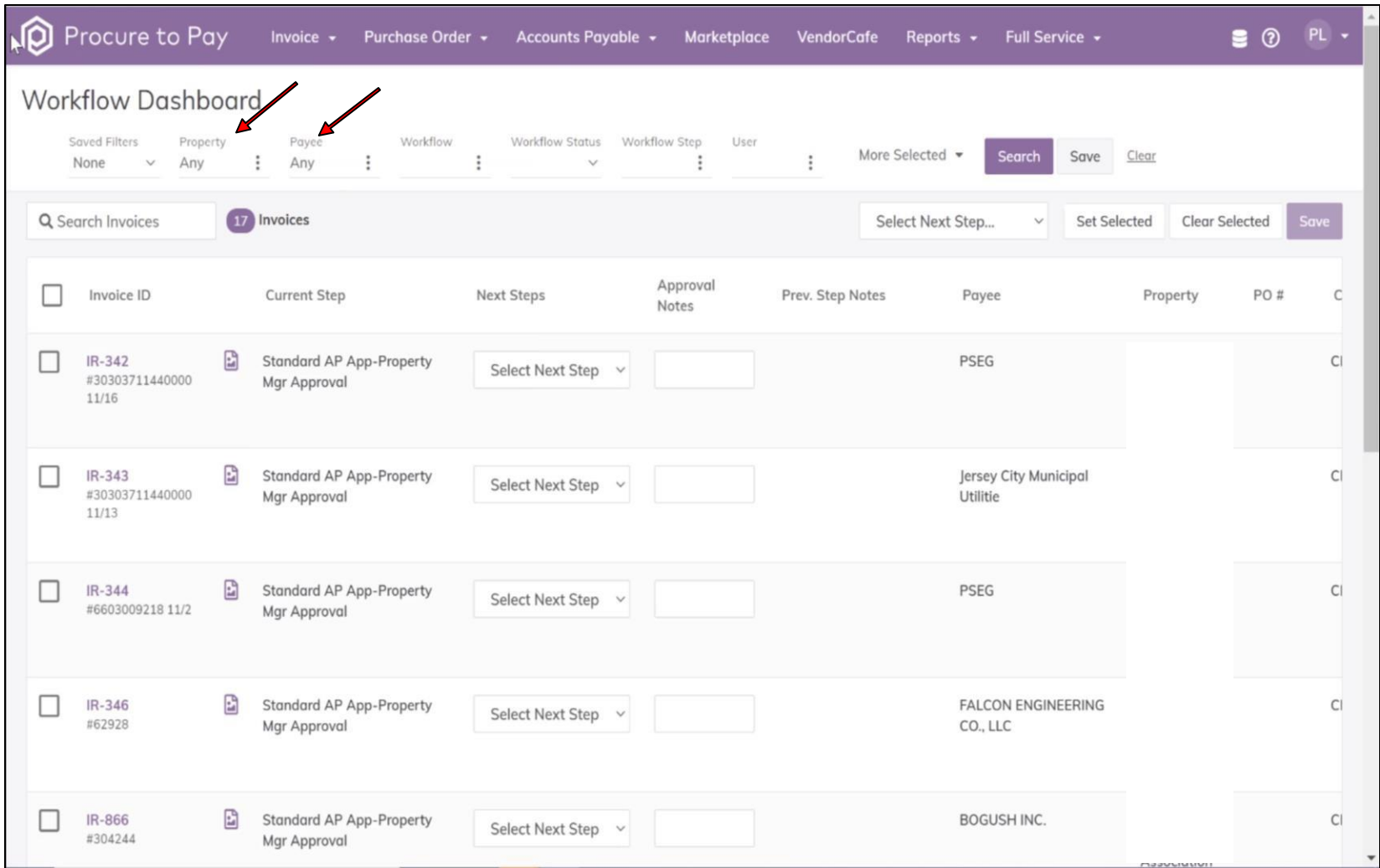
Details

Entity	Account	Net (\$)	Tax	Shipping	Gross	GL Notes
	2207 (Accounts Payable Tops)	9,162.96	0.00	0.00	9,162.96	9/15-10/13



Searching for Past Invoices:

You can search for past invoices with different filters.



The screenshot displays the 'Procure to Pay' Workflow Dashboard. The top navigation bar includes links for Invoice, Purchase Order, Accounts Payable, Marketplace, VendorCafe, Reports, and Full Service. The dashboard title 'Workflow Dashboard' is on the left. Below it, a filter bar shows 'Saved Filters' set to 'None', and various filter categories: 'Property' (Any), 'Payee' (Any), 'Workflow', 'Workflow Status', 'Workflow Step', and 'User'. Two red arrows point to the 'Property' and 'Payee' filter dropdowns. To the right of the filters are buttons for 'Search', 'Save', and 'Clear'. Below the filter bar, a search bar labeled 'Search Invoices' is followed by a badge indicating '17 Invoices'. To the right of the search bar are buttons for 'Select Next Step...', 'Set Selected', 'Clear Selected', and 'Save'. The main area contains a table with the following columns: Invoice ID, Current Step, Next Steps, Approval Notes, Prev. Step Notes, Payee, Property, and PO #.

Invoice ID	Current Step	Next Steps	Approval Notes	Prev. Step Notes	Payee	Property	PO #
<input type="checkbox"/> IR-342 #30303711440000 11/16	Standard AP App-Property Mgr Approval	Select Next Step ▾	<input type="text"/>		PSEG		
<input type="checkbox"/> IR-343 #30303711440000 11/13	Standard AP App-Property Mgr Approval	Select Next Step ▾	<input type="text"/>		Jersey City Municipal Utilitie		
<input type="checkbox"/> IR-344 #6603009218 11/2	Standard AP App-Property Mgr Approval	Select Next Step ▾	<input type="text"/>		PSEG		
<input type="checkbox"/> IR-346 #62928	Standard AP App-Property Mgr Approval	Select Next Step ▾	<input type="text"/>		FALCON ENGINEERING CO., LLC		
<input type="checkbox"/> IR-866 #304244	Standard AP App-Property Mgr Approval	Select Next Step ▾	<input type="text"/>		BOGUSH INC.		



Exporting Invoices as a PDF:

You can export some or all invoices as PDFs. First, click on “PayScan” on the top menu bar, then click on “Invoice”, then click on “Invoice Image Export”:

The screenshot shows the 'Procure to Pay' system interface. The top navigation bar includes 'PayScan', 'VendorCafe', 'Marketplace', 'Payments', 'Analytics', and 'Reports'. The 'Invoices' page is active, showing a search bar, filters, and a table of invoices. The 'PayScan' menu is open, and 'Invoice Image Export' is highlighted. The page also features several charts: 'Invoices By Status' (donut chart showing 35 Workflow in Progress), 'Expense Type' (donut chart showing 34 Expenses and 1 Preliminary), and 'Invoices Due In' (donut chart showing 26 Overdue, 6 11 to 30 Days, and 3 10 Or Less). The 'Action Items' section shows 0 Awaiting Approval for 10+ Days, 0 My Approval, 0 No Approver, and 34 Pending Post.

Invoice	Batch	Status	Payee	Invoice Date	Post Month	Expense Type	Total	Property	PO
679 #137826324	656	In Progress	ADT Commercial v0000817	12/27/2020 View Milestones	01/2021	Expenses	\$2,689.46		
704 #32384	681	In Progress	STAR BUILDING SERVICES v0000683	1/15/2021 View Milestones	01/2021	Expenses	\$356.66		
718 #81626	695	In Progress	DENALI PROPERTY MANAGEMENT v0000233	12/31/2020 View Milestones	01/2021	Expenses	\$295.00		
849 #81643	826	In Progress	DENALI PROPERTY MANAGEMENT v0000233	12/31/2020 View Milestones	01/2021	Expenses	\$445.59		



Exporting Invoices as a PDF #2:

You will be taken to the Filter Page (below.) Please set your parameters, then click on “Display”.

Procure to Pay PayScan VendorCafe Marketplace Payments Analytics Reports

Invoice Image Export Display Clear

Property	<input type="text" value="a151"/>	Post Month	<input type="text"/>	To	<input type="text"/>	Contract	<input type="text"/>	Commerical Recovery?	<input type="checkbox"/>
Payee	<input type="text"/>	Invoice Date	<input type="text"/>	To	<input type="text"/>	Funding Source	<input type="text"/>		
Expense Type	<input type="text"/>	Invoice ID	<input type="text"/>	To	<input type="text"/>	Job	<input type="text"/>		
Batch	<input type="text"/>	Payable ID	<input type="text"/>	To	<input type="text"/>	Draw Date	<input type="text"/>		
PO#	<input type="text"/>	Payment ID	<input type="text"/>	To	<input type="text"/>	Include Invoice?	<input type="checkbox"/>		
Invoice Number	<input type="text"/>	Check #	<input type="text"/>	To	<input type="text"/>	Sort By	<input type="text" value="Ctr"/>	<input type="text" value="Ascendi"/>	
Account	<input type="text"/>	Check Date	<input type="text"/>	To	<input type="text"/>				

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Exporting Invoices as a PDF #3:

You will be taken to the Results Page (below.) Choose the invoices you would like by checking the box next to each (or the top box to “Select All”. Then, click on “Download Images to PDF”.

<input type="checkbox"/>	Invoice ID	Invoice Number	Payee	Invoice Date	Property	Invoice Amount	Invoice Status	Check #
<input type="checkbox"/>	136	81583	DENALI PROPERTY MANAGEMENT (v0000233)	1/1/2021	a151	\$1,454.85	Posted	1006
<input type="checkbox"/>	187	63883	ASSOCIATED WATER CONDITIONERS (v0000096)	1/5/2021	a151	\$315.61	Posted	1005
<input type="checkbox"/>	316	C002434	EVCO Mechanical Corporation (v0000824)	1/1/2021	a151	\$1,700.67	Posted	1013
<input type="checkbox"/>	368	32287	STAR BUILDING SERVICES (v0000683)	1/1/2021	a151	\$8,584.19	Posted	1012
<input type="checkbox"/>	407	03483405	GRANITE TELECOMMUNICATIONS LLC (v0000331)	1/1/2021	a151	\$638.99	Posted	1015
<input type="checkbox"/>	409	262676	LIBERTY ELEVATOR CORPORATION (v0000454)	1/1/2021	a151	\$1,119.56	Posted	1014
<input type="checkbox"/>	588	2002854585	Philadelphia Insurance Company (v0000582)	1/4/2021	a151	\$558.67	Posted	1010
<input type="checkbox"/>	704	32384	STAR BUILDING SERVICES (v0000683)	1/15/2021	a151	\$356.66	Workflow in progress	





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For Further Instructions:

Call 888-315-7773 Customer Service
Contact Your Property Manager or Administrator

