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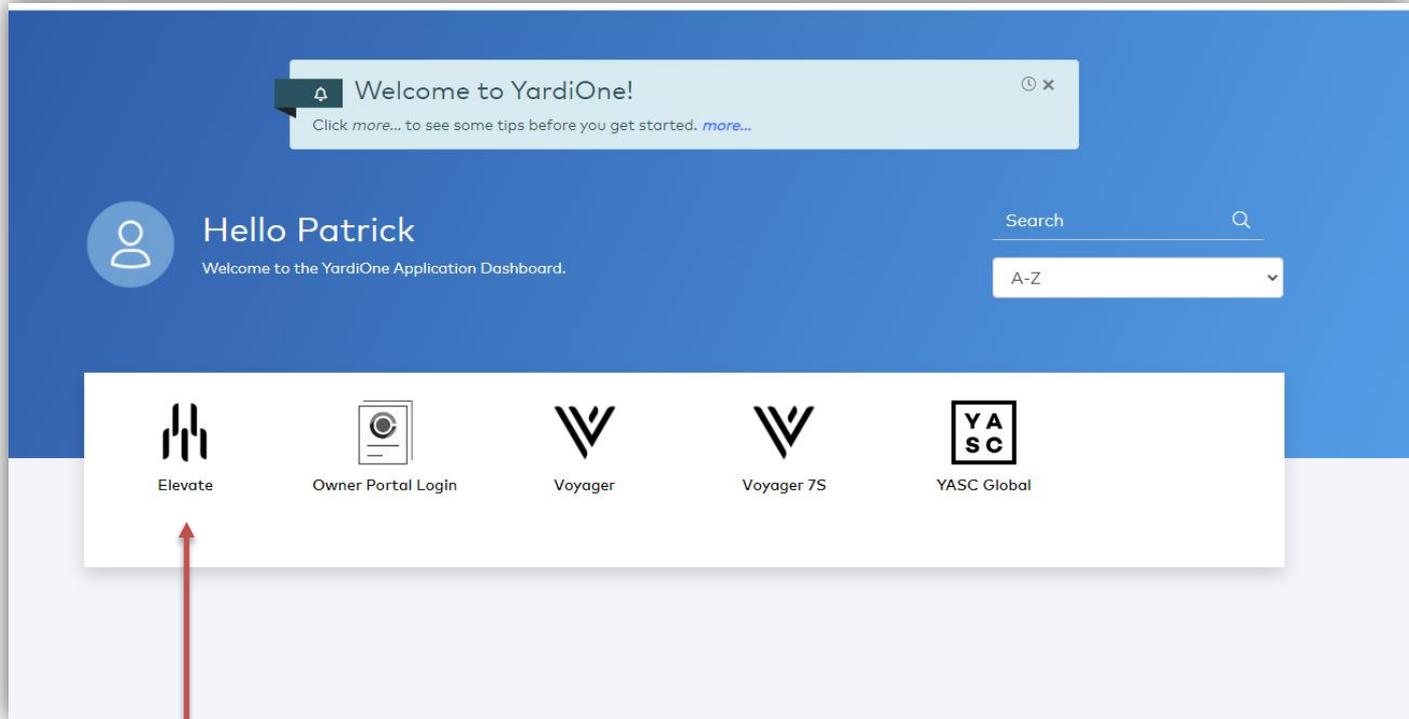
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## **Board Invoice Approval Dashboard**



# YardiOne Dashboard

Log in to the YardiOne Dashboard. Select the Elevate Tab.



Click the arrow next to Invoice

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

## Invoice Dashboard

Click the number next to Awaiting Approval or My Approval. **Important: Always Clear Your History First**

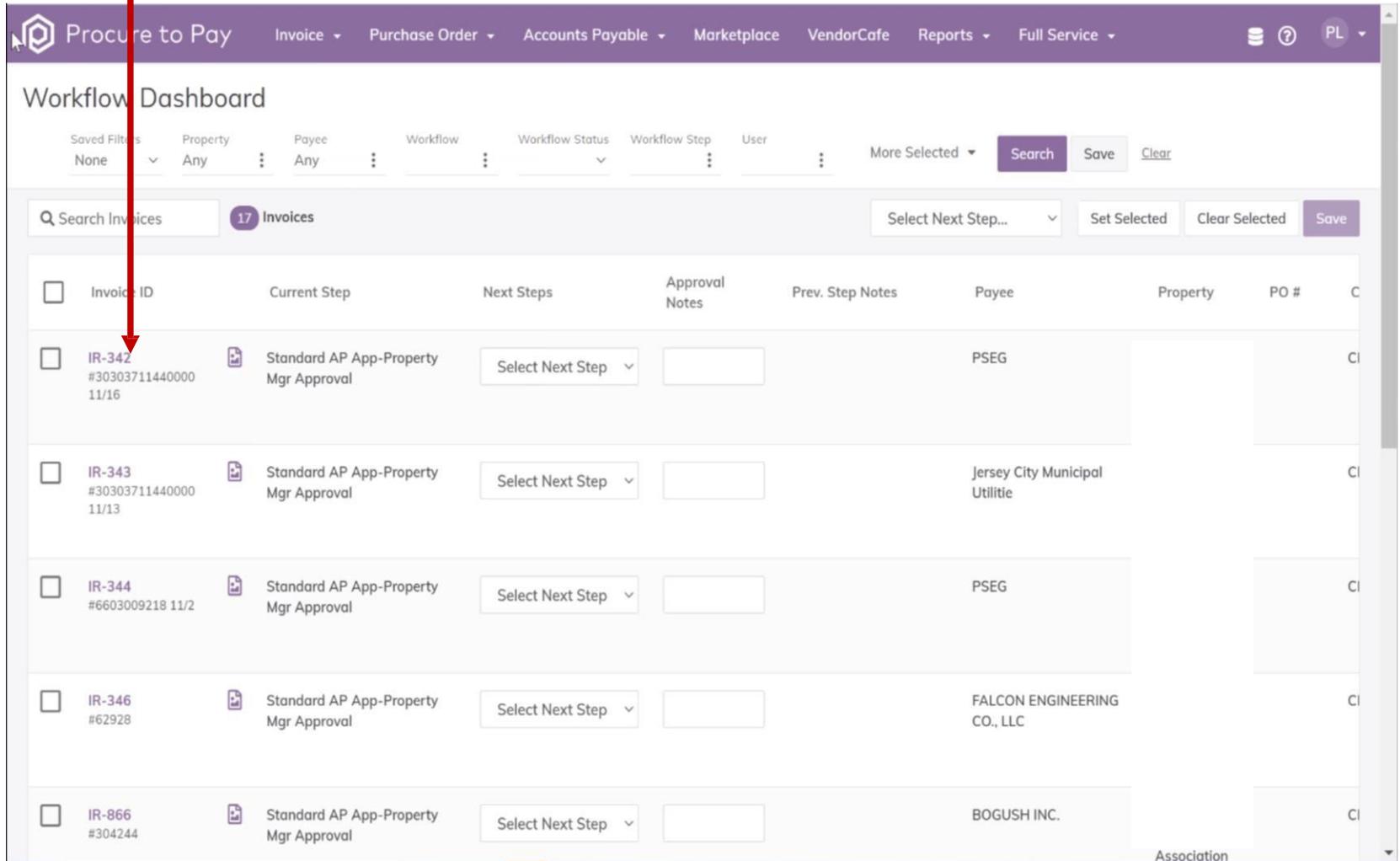
The screenshot shows the Procure to Pay Invoice Dashboard. The top navigation bar includes 'Procure to Pay', 'Invoice', 'Purchase Order', 'Accounts Payable', 'Marketplace', 'VendorCafe', 'Reports', and 'Full Service'. The 'Invoice' dropdown menu is open, showing options like 'Dashboard', 'Workflow Dashboard', 'Add IR', 'Import IR', 'Search IR', 'Analytics', 'My Invoices', 'Invoice Image Export', and 'AP Template'. The 'Workflow Dashboard' option is highlighted with a red arrow. The dashboard features several charts: 'Invoices By Status' (a donut chart), 'Invoices By Expense Type' (a donut chart with a legend: Other Expense Types: 146, Preliminary: 29, Expenses: 6), and 'Invoices Due In' (a donut chart with a legend: Overdue: 138, 10 Or Less: 34, 11 to 30 Days: 8, Over 30 Days: 1). The 'Action Items' section shows a list of items with counts: 6 Awaiting Approval for 10+ Days, 0 My Approval, 181 No Approver, and 19 Pending Post. A red circle highlights the 'Clear' button in the top right corner. Below the charts is a search bar for invoices (28 results) and buttons for 'Go To Invo' and 'Add Invoice'. The main table lists invoices with columns for Invoice #, Batch, Status, Payee, Invoice Date, Post Month, Expense Type, Total, Property, and PO.

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		



## Select the Invoice:

Select an invoice by clicking on the invoice ID.



The screenshot displays the 'Procure to Pay' Workflow Dashboard. At the top, there is a navigation bar with various menu items: Invoice, Purchase Order, Accounts Payable, Marketplace, VendorCafe, Reports, and Full Service. Below the navigation bar, the dashboard title 'Workflow Dashboard' is visible. A filter section includes 'Saved Filters' (None), 'Property' (Any), 'Payee' (Any), 'Workflow', 'Workflow Status', 'Workflow Step', and 'User'. There are buttons for 'Search', 'Save', and 'Clear'. A 'More Selected' dropdown is also present.

The main content area shows a table of invoices. A search bar on the left contains 'Search Invoices' and a badge indicates '17 Invoices'. On the right, there are buttons for 'Select Next Step...', 'Set Selected', 'Clear Selected', and 'Save'. The table has 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.		

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: [Text Area]

Current Step: Property Mgr Approval

Next Step: [Dropdown]

Step Notes: [Text Area]

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).

Invoice ID#342

INVOICE ID: 342  
PAYEE: v0000607  
PSEG

INVOICE #: 30303711440000 11/16  
AMOUNT: \$9,162.96

Workflow: Standard AP App

Previous Step Notes: [Text Area]

Current Step: Property Mgr Approval

Next Step: [Dropdown Menu]

Step Notes: [Text Area]

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](#)

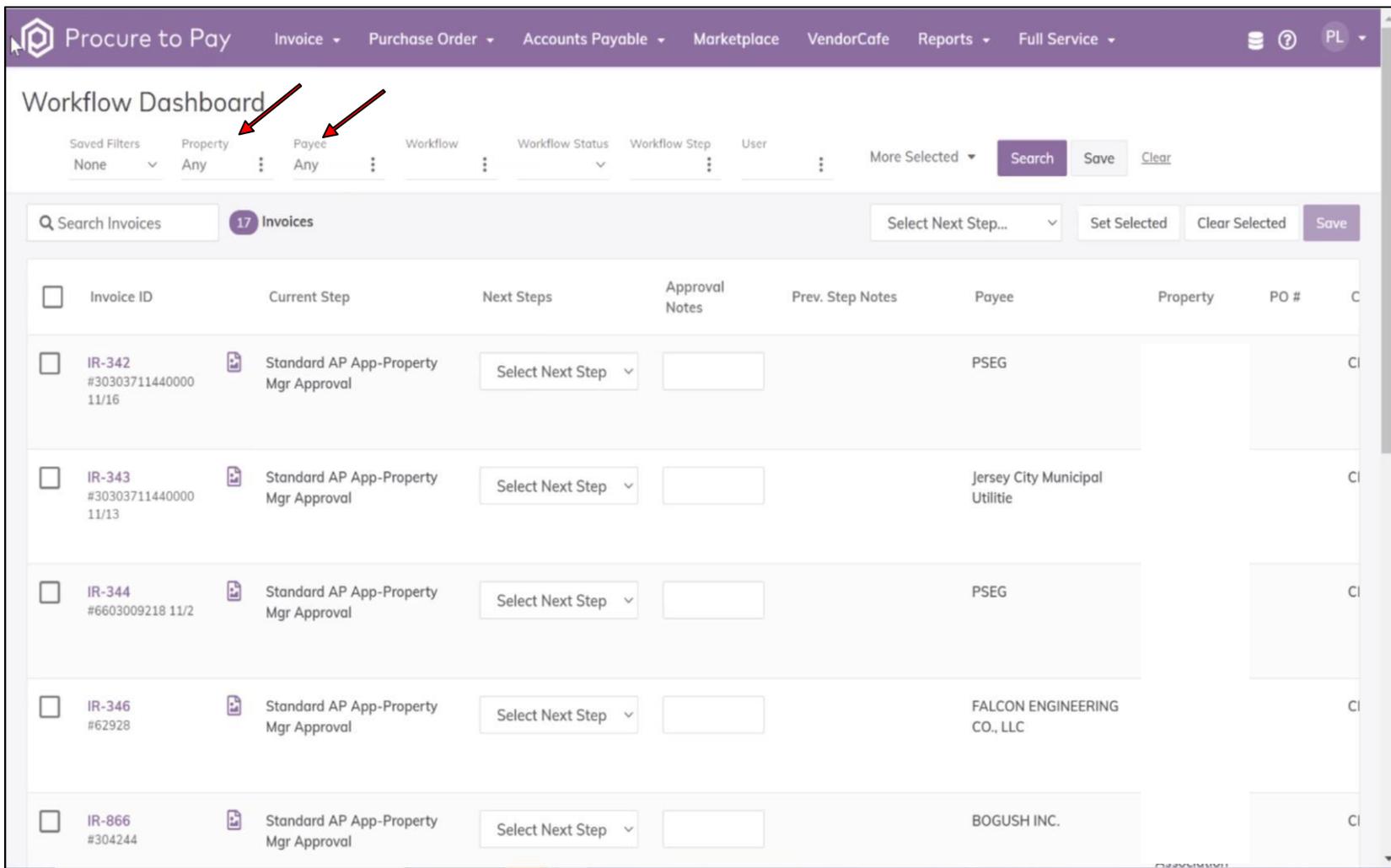
Details

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. At the top, there is a navigation bar with the following items: Invoice, Purchase Order, Accounts Payable, Marketplace, VendorCafe, Reports, and Full Service. The main header area includes the text "Workflow Dashboard" and a search bar labeled "Search Invoices" with a dropdown menu showing "17 Invoices". Below the search bar, there are several filter options: Saved Filters (None), Property (Any), Payee (Any), Workflow, Workflow Status, Workflow Step, and User. A "Search" button is visible next to the filters. Below the filters, there is a table of invoices with the following columns: Invoice ID, Current Step, Next Steps, Approval Notes, Prev. Step Notes, Payee, Property, and PO #. The table contains six rows of invoice data.

Invoice ID	Current Step	Next Steps	Approval Notes	Prev. Step Notes	Payee	Property	PO #
IR-342 #3030371144000 11/16	Standard AP App-Property Mgr Approval	Select Next Step			PSEG		
IR-343 #3030371144000 11/13	Standard AP App-Property Mgr Approval	Select Next Step			Jersey City Municipal Utilitie		
IR-344 #6603009218 11/2	Standard AP App-Property Mgr Approval	Select Next Step			PSEG		
IR-346 #62928	Standard AP App-Property Mgr Approval	Select Next Step			FALCON ENGINEERING CO., LLC		
IR-866 #304244	Standard AP App-Property Mgr Approval	Select Next Step			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 displays the Procure to Pay system interface. The top navigation bar includes 'PayScan', 'VendorCafe', 'Marketplace', 'Payments', 'Analytics', and 'Reports'. The 'PayScan' dropdown menu is open, showing options: 'Invoice', 'Purchase Order', and 'Full Service'. The 'Invoice' option is selected, and its sub-menu is visible, containing: 'Dashboard', 'Workflow Dashboard', 'Add IR', 'Import IR', 'Search IR', 'My Invoices', 'Invoice Image Export', 'Search AP Template', and 'Add AP Template'. A red arrow points from the 'PayScan' menu to the 'Invoice' option, and another red arrow points from the 'Invoice' sub-menu to the 'Invoice Image Export' option.

The main content area shows 'Invoices' with a search bar and a '35 Invoices' indicator. Below the search bar are three charts: 'Invoices By Status' (donut chart showing 'Workflow in Progress: 35'), 'Expense Type' (donut chart showing 'Expenses: 34' and 'Preliminary: 1'), and 'Invoices Due In' (donut chart showing 'Overdue: 26', '11 to 30 Days: 6', and '10 Or Less: 3'). To the right is an 'Action Items' section with a list of items and a total of 34 pending posts.

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 | HB

### Invoice Image Export

**Display** Clear

Property: a151 ( x )

Payee: [ ]

Expense Type: [ ]

Batch: [ ]

PO#: [ ]

Invoice Number: [ ]

Account: [ ]

Post Month: [ ] To: [ ]

Invoice Date: [ ] To: [ ]

Invoice ID: [ ] To: [ ]

Payable ID: [ ] To: [ ]

Payment ID: [ ] To: [ ]

Check #: [ ] To: [ ]

Check Date: [ ] To: [ ]

Contract: [ ]

Funding Source: [ ]

Job: [ ]

Draw Date: [ ]

Include Invoice?

Sort By: Ctr Ascendi

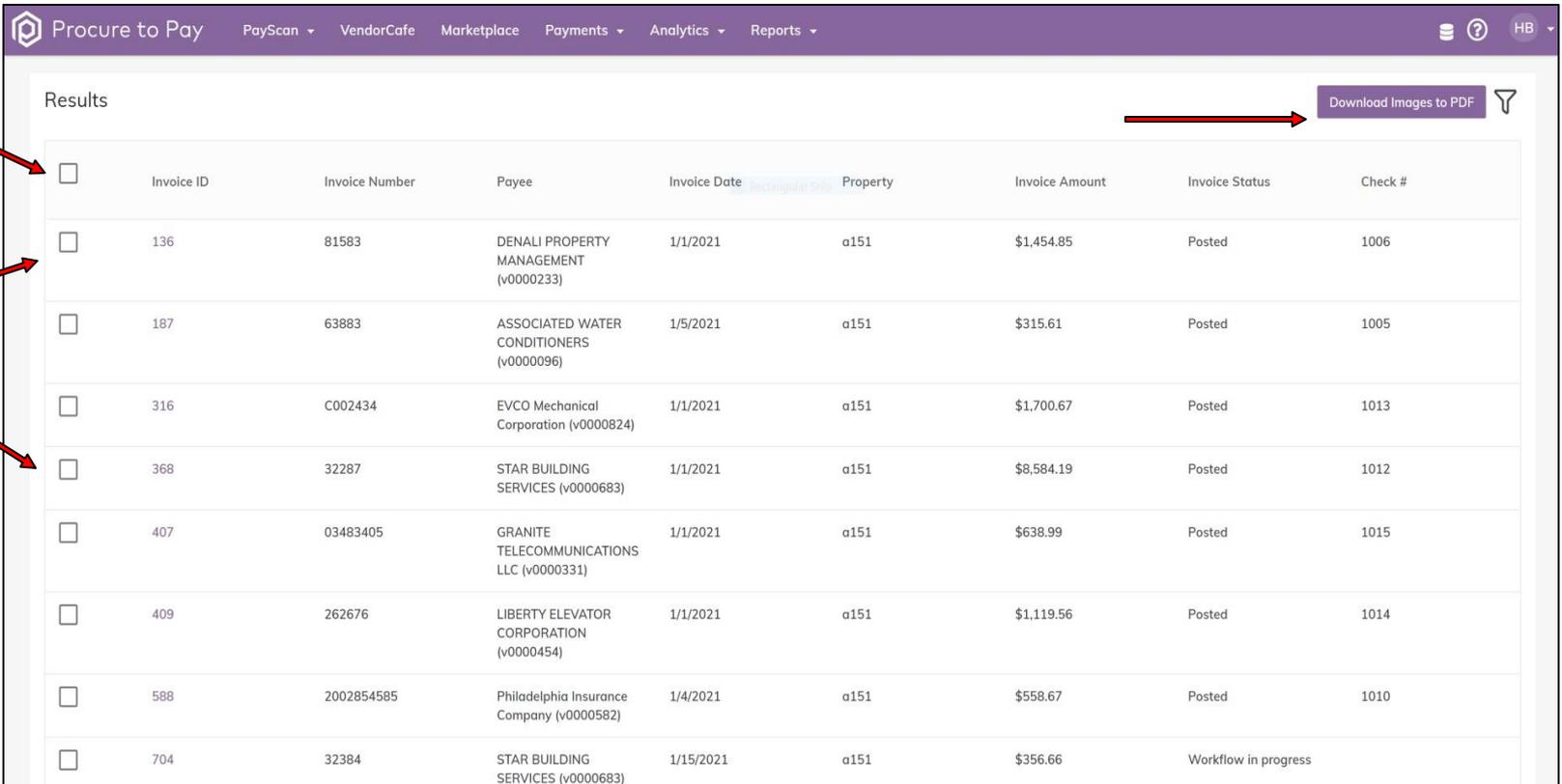
Commerical Recovery?

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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”.



The screenshot displays the 'Results' page of a Procure to Pay system. The page features a purple header with navigation menus: PayScan, VendorCafe, Marketplace, Payments, Analytics, and Reports. A 'Download Images to PDF' button is located in the top right corner, with a red arrow pointing to it. The main content is a table of invoices with columns for Invoice ID, Invoice Number, Payee, Invoice Date, Property, Invoice Amount, Invoice Status, and Check #. Each row has a checkbox in the first column, with red arrows pointing to them. The table contains 9 rows of invoice data.

<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:**

Email [support@mypropertybilling.com](mailto:support@mypropertybilling.com)

Call 888-406-2221 Customer Service

Or Contact Your Property Administrator

