

Table of Contents

Getting to the correct dashboard.....	2
To input a new invoice:	3
Red Row:	4
Accounting / Coding:	6
Project Manager Approvals.....	7
Final Signer	9
Working with Attachments:	11

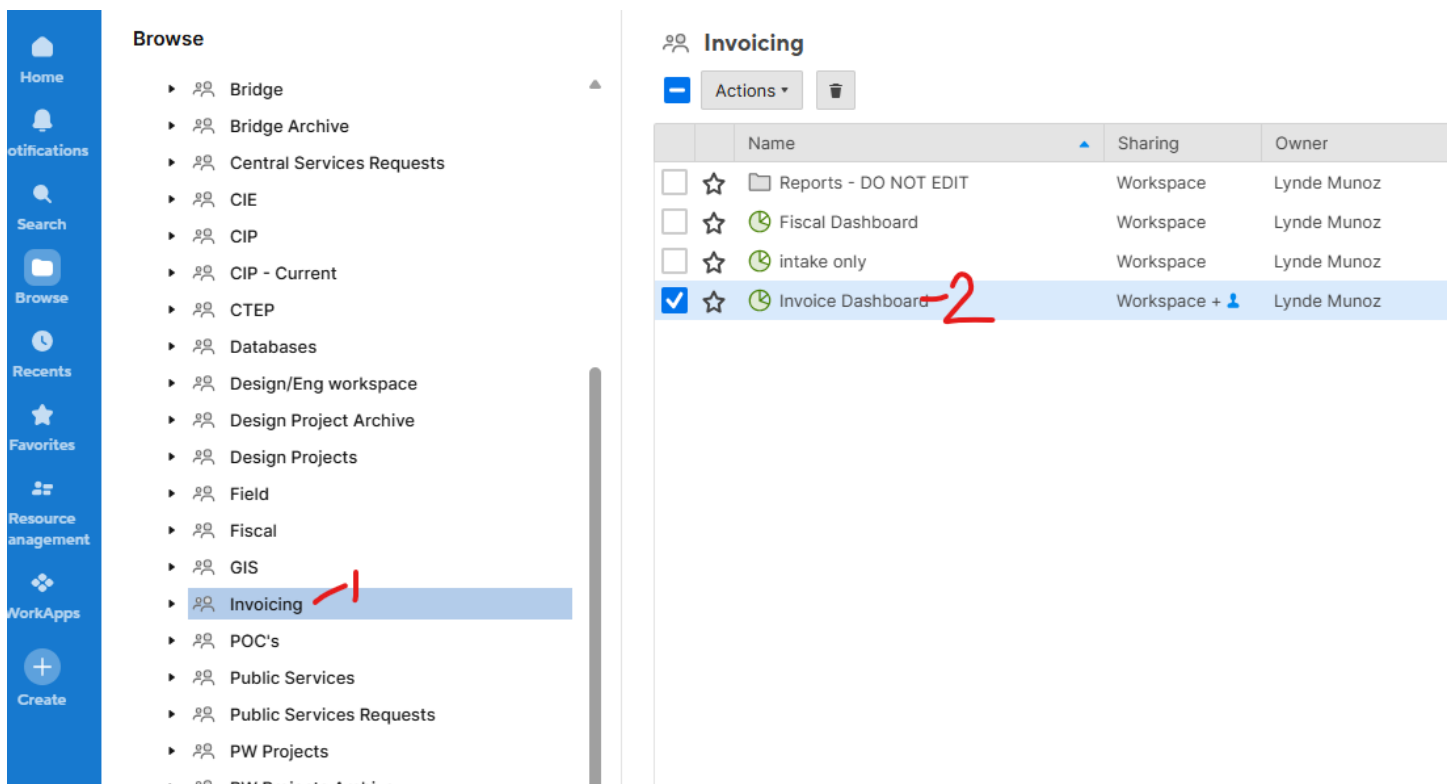
FYI: Smartsheet is Cloud-based. You need to 'Save' and/or 'Refresh' on a regular basis.

Getting to the correct dashboard.

You can find the input form at this link,

<https://app.smartsheet.com/b/form/d3d5c6deebf74dc18f213ef910a4fa3f>

NOTE: If you log into Smartsheet directly without a link to the dashboard, you will click the 'Invoicing' workspace, and then choose the Invoice Dashboard for the following directions.



The screenshot shows the Smartsheet interface. On the left is a blue sidebar with navigation options: Home, Notifications, Search, Browse, Recents, Favorites, Resource management, WorkApps, and Create. The 'Browse' section is expanded, showing a list of workspaces. The 'Invoicing' workspace is highlighted with a red checkmark. On the right, the 'Invoicing' workspace is open, showing a list of dashboards. The 'Invoice Dashboard' is highlighted with a blue background and a red '-2' next to it. The dashboard list has columns for Name, Sharing, and Owner.

	Name	Sharing	Owner
☐	Reports - DO NOT EDIT	Workspace	Lynde Munoz
☐	Fiscal Dashboard	Workspace	Lynde Munoz
☐	intake only	Workspace	Lynde Munoz
☒	Invoice Dashboard -2	Workspace +	Lynde Munoz

***If any dashboard says "You're not shared to this view" then email lsmunoz@sjgov.org and let her know which dashboard you cannot see.**

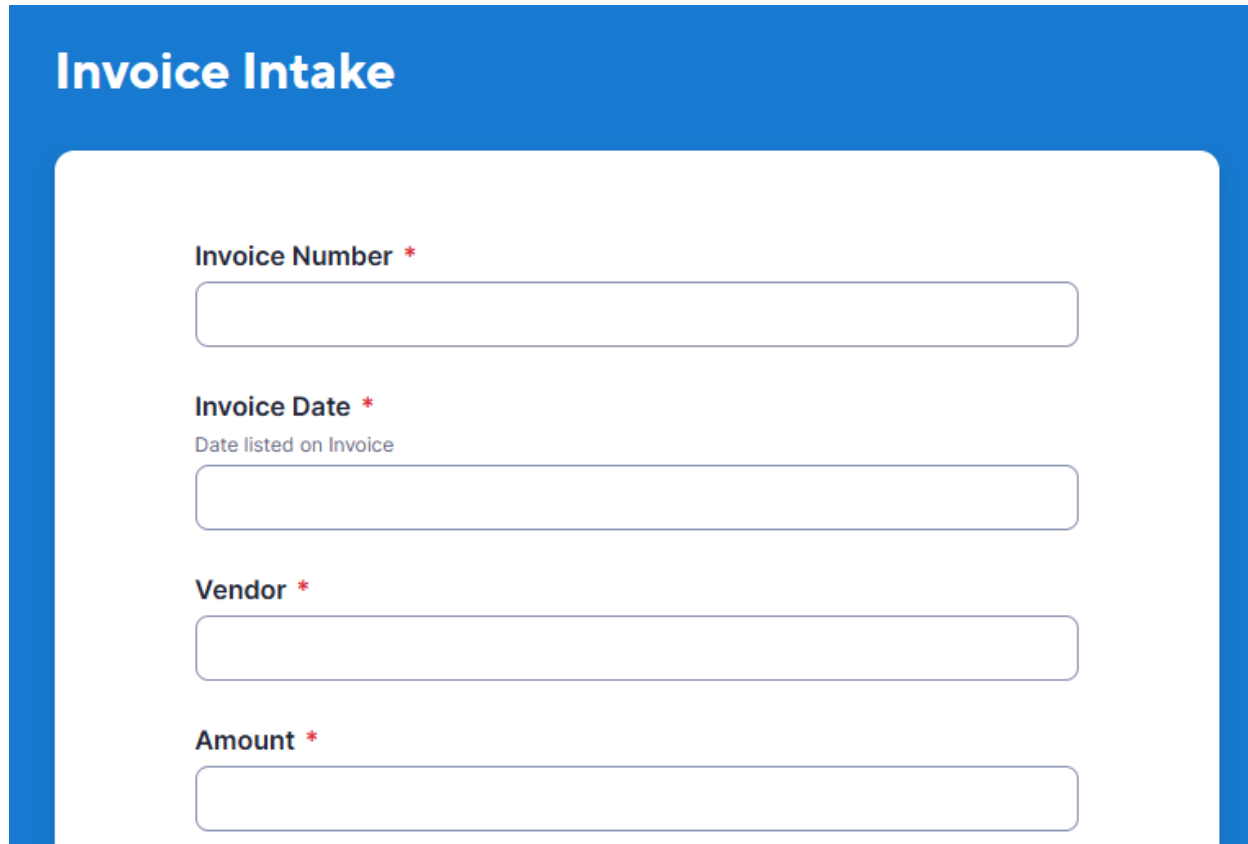
***If any dashboard view says "There's nothing to show" it means you CAN see, there is just nothing assigned to you currently.**

***If you are going to enter multiple invoices, it is easier to either use the intake form on the toolkit or use the 'Intake Only' dashboard and refresh after each entry.**

To input a new invoice:

All areas with the red asterisk are required.

The top half of the intake form (below) is required for every invoice. It is for basic information and routing to the division. You just enter the total amount of the invoice. No PO lines or accounting information needed. These items will just make it easy to sort and find what we need.

The image shows a screenshot of a web form titled "Invoice Intake" in a blue header. Below the header is a white rounded rectangle containing four input fields. Each field is preceded by a label in bold black text, followed by a red asterisk indicating it is required. The fields are: "Invoice Number", "Invoice Date", "Vendor", and "Amount". The "Invoice Date" label is followed by a smaller, lighter grey text "Date listed on Invoice". Each field is represented by a white rectangular box with a thin grey border and rounded corners.

Invoice Intake

Invoice Number *

Invoice Date *
Date listed on Invoice

Vendor *

Amount *

The fields in the bottom half (Below) are to help with routing correctly. The division is a drop-down menu and cannot be changed so that we can ensure the correct people are notified.

An invoice is required to be added prior to submission (File Upload).

Click Submit

SMARTSHEET INVOICING (FOR DIVISIONS)

Division *

Notes

Any special processing details?

File Upload *

Make sure you have stamped the invoice prior to dropping here

Submit

The page will need to be refreshed after each entry if you are entering multiple invoices.

Red Row:

1. If an invoice is a duplicate it will turn red. It will only occur if it has been put in THIS system before. Only the divisions will verify and either rename or delete these. Fiscal will ignore them.
 1. If you see a red row, make sure you have a TRUE duplicate and not one that is similar. We are comparing invoice numbers only and though rare, sometimes there may be a different vendor with the same invoice numbering.

☆ Invoice Approval Tracking ⓘ

Filter										
Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer	Date to FinalSigner	Notes
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer	08/13/25	
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz		
4567	8/2/25	08/14/25	Protech	750.00	☐					
4567	8/2/25	08/14/25	Protech	750.00	☐					

2. If an invoice is a duplicate or you do not want it paid for some other reason. You can click the Cancel/Archive button, and then the 'Save' button at the bottom of the menu. This moves the whole thing out of all tracking. ****Please do not cancel something unless you are sure you do not want it in the system. Otherwise you will need to resubmit.**

SMARTSHEET INVOICING (FOR DIVISIONS)

☆ Invoice Approval Tracking ⓘ

Filter   

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz
4567	8/2/25	08/14/25	Protech	750.00	☐			
4567	8/2/25	08/14/25	Protech	750.00	☐			

Details

[Data](#) [Attachments \(1\)](#) [Comments](#)

☐

Notes

Cancel / Archive

☒

Save

If you change the invoice number, the row will return to white. If you cancel/archive it, the row will disappear upon refreshing the page.

Accounting / Coding:

Once an invoice is input, the person(s) listed in the division group (i.e. Invoices - Utilities Maintenance, Invoices - Water Resources, etc.) will automatically receive an email from Smartsheet that they have a new invoice. It will link them to this dashboard: [Invoice Dashboard - Smartsheet.com](https://smartsheet.com/invoice-dashboard)

Below is a screenshot of the Invoice approval section of the dashboard.

☆ Invoice Approval Tracking ⓘ

Filter   

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer	Date to Final Signer	Notes
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer	08/13/25	
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☐	Lynde Munoz		Lynde Munoz		
4567	8/2/25	08/14/25	Protech	750.00	☐					

***This dashboard is called 'dynamic' meaning that everyone logs in to the same dashboard but will only see things that are assigned to them. If it says you do not have access, that will have to be granted. If it is just blank, then you currently have nothing assigned to you.*

Here you can see 3 invoices in different stages.

#1 has already been started and is routed to the signer

#2 has been assigned to a PM and a signer, but the “accounting” (or coding) is not finished so it has not routed yet.

#3 is a new entry. We can tell because nothing is assigned.

When you want to make any changes, you will click anywhere on the row of the invoice you want to work on. You will see a menu pop up on the right-hand side that is specific to the invoice you clicked. Below we have clicked on the 2nd invoice. We can tell because the second row is blue.

☆ Invoice Approval Tracking ⓘ

Filter   

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☐	Lynde Munoz		Lynde Munoz
4567	8/2/25	08/14/25	Protech	750.00	☐			

Details ×

[Data](#) [Attachments \(1\)](#) [Comments \(0\)](#)

Accounting Completed

☐

Project Manager

 Lynde Munoz ×

Project Manager approval

×

Final Signer

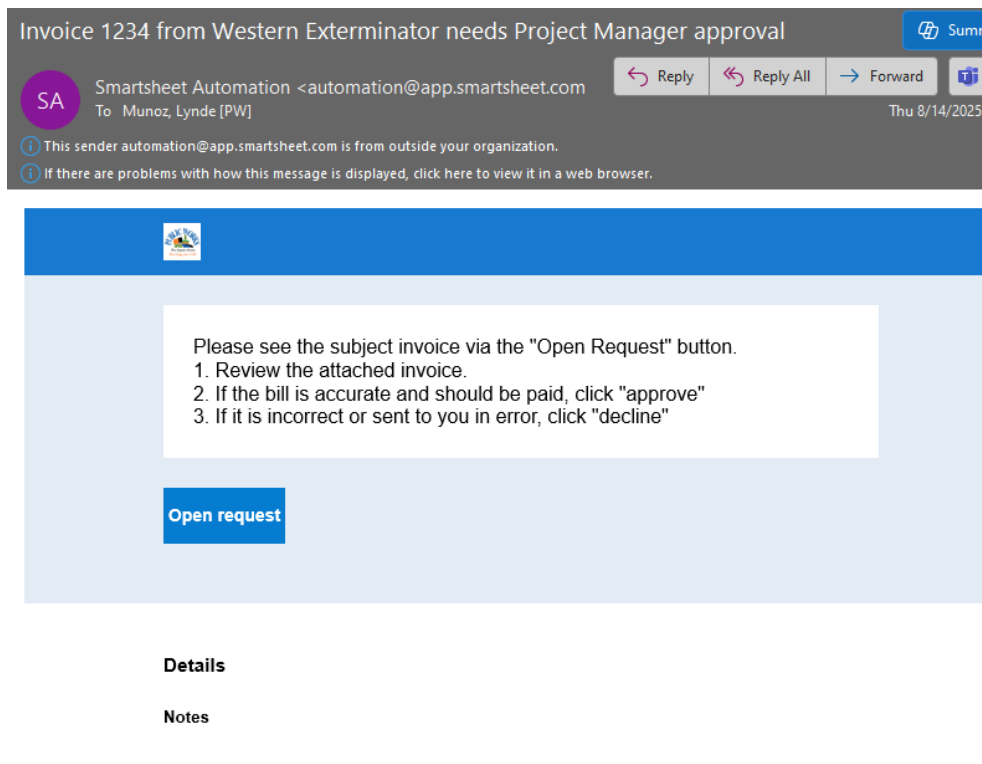
 Lynde Munoz ×

The “Details” menu will pop up on the right. Here you will whatever coding is necessary, reattach (see ‘Working with Attachments’) and assign a Project Manager (PM) if there is one, and a Final Signer. One or both must be filled in for an automation to be possible.

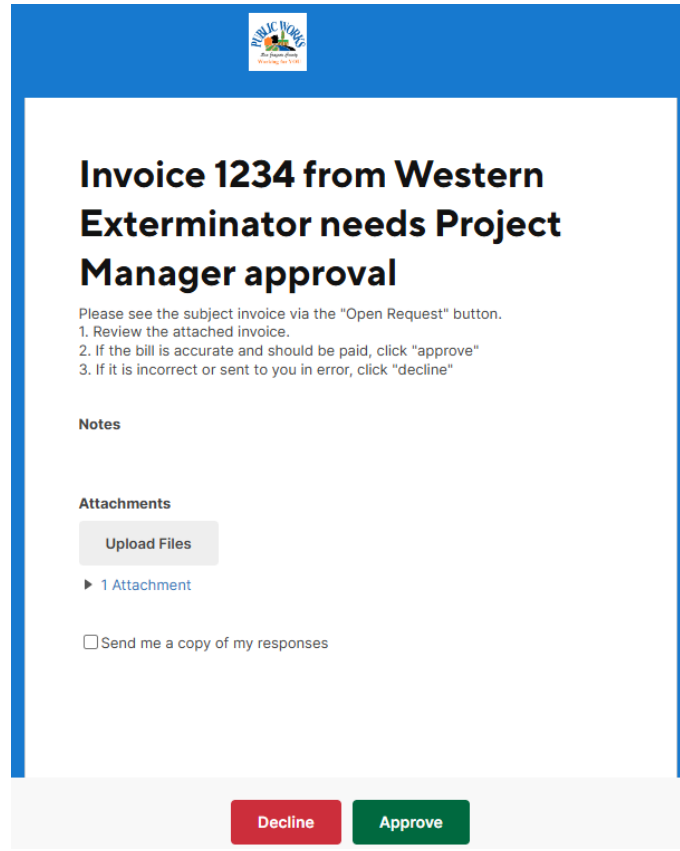
In this example I have assigned myself to PM and final signer. At this point I will just have to click the “Accounting Completed” box at the top of the menu and click ‘Save’. That will start the process to the PM (if there is one) and then the Final Signer. I will now be able to see where it is in the workflow on the dashboard.

Project Manager Approvals

PMs get an approval request email. It has its own directions and looks like this:



When the PM opens the request, they can look at the attachment and then click Approve or Decline.



Invoice 1234 from Western Exterminator needs Project Manager approval

Please see the subject invoice via the "Open Request" button.
 1. Review the attached invoice.
 2. If the bill is accurate and should be paid, click "approve"
 3. If it is incorrect or sent to you in error, click "decline"

Notes

Attachments

Upload Files

► 1 Attachment

☐ Send me a copy of my responses

Decline Approve

PM approves the invoice:

If they select 'Approve' they will receive a completion email and they are done.

PM declines the invoice:

If they select 'Decline' they will receive an email requesting a reason for the decline.

☆ Invoice Approval Tracking ⓘ

Filter [Icons]

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Project Manager approval	Reason for Decline	Final Sig
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒					Natisha
4567	8/2/25	08/14/25	Protech	750.00	☒	Lynde Munoz	08/15/25	Declined	this is not my invoice	

Once they give a reason, an email will go back to the "Accounting" contact(s) to let you know, and above is what it will look like.

To reassign, you will have to open the details menu by:

1. clicking on the correct invoice line,

2. uncheck the Accounting Completed box,
3. change the project manager,
4. x out the 'Declined' status,
5. delete the reason and
6. save.

Details ×

Data Attachments (1) Comments (0)

Accounting Completed
☒ ✓

Project Manager
 LM Lynde Munoz ✓

Project Manager approval
 Declined × ✓

Reason for Decline
~~this is not my invoice~~

Final Signer

Once it is fixed in whatever way it needs, you can re-check the Accounting Completed box / Save. That will restart the flow.

Final Signer

When the final signer gets the email it looks like this:

SMARTSHEET INVOICING (FOR DIVISIONS)

Invoice # 1234 from Western Exterminator needs approval

Summary



Lynde Munoz via Smartsheet <automation@app.smartsheet.com>
To: Munoz, Lynde [PW]

Reply

Reply All

Forward



Thu 8/14/2025 1:12

This sender automation@app.smartsheet.com is from outside your organization.

If there are problems with how this message is displayed, click here to view it in a web browser.



Invoice # 1234 from Western Exterminator needs approval

The subject invoice needs your signature.

Click the link to go to the dashboard.

Please sign/date, reattach to the line, and click the Final Signer approved box.

<https://app.smartsheet.com/dashboards/xwW77MhGr63Mf4JW2WQxXphpwF6vM3P5JqwJhp61>

Invoice Tracking

This final signer will go through the steps for “Working with Attachments” and once they are finished, they will click the “Final Signer Approved” button in the ‘data’ tab and ‘Save’

Invoice Approval Tracking

Filter

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz
4567	8/2/25	08/14/25	Protech	750.00	☐			

Details

Data Attachments (1) Comments (0)

Project manager approval

Approved

Final Signer

LM Lynde Munoz

Final Signer approved

☒

Notes

Cancel / Archive

☐

SMARTSHEET INVOICING (FOR DIVISIONS)

Once the final signer approved button is clicked and saved, it will automate an email to Fiscal, notifying them that they have an invoice that is ready for processing. (the line turns yellow as well)

For DIVISIONS, on your dashboard, the line on the “Invoice Approval Tracking” section will disappear, and it will then appear in the lower left section titled “With Fiscal” as shown below:

☆ With Fiscal ⓘ					☆ In Workday ⓘ			
▼ Filter					▼ Filter			
Invoice Number	Vendor	Amount	Sent to Fiscal	Notes	Vendor	Invoice Number	Amount	Date in Workday
47399	Olympic Cleaning	10025.77	07/24/25		Allied Security	17523128	2,366.00	09/16/25
12869515	ARC Documents Solutions	453.21	07/24/25		ALLIED UNIVERSAL	IN1-910440656	1440.00	09/09/25
IN1-910430645	Allied TECH	1440	07/29/25		ALLIED UNIVERSAL TECHNOLOGY	IN1-910446446	1440.00	10/09/25
41088	Protech	2868	07/30/25		ARC DOCUMENT	12936181	458.53	10/14/25
41089	Protech	600	07/30/25		ARC DOCUMENT SOLUTIONS	12908166	450.24	09/10/25
41090	Protech	1500	07/30/25		Batteries Plus	P80251656	1152.00	10/21/25
76729-2025-06	SY Communications	700.00	08/05/25		CELLGATE	0112207-IN	479.40	10/02/25
41249	PRO Tech	120.00	08/01/25		COMCAST	8155 60 067 0085276	50.71	09/22/25
47606	Olympic Cleaning	10025.77	08/01/25		Haakenson Consulting LLC	1213	\$18,900.00	09/10/25
12884684	ARC	514.43	08/07/25		MVP Ops	INV0124	4,800.00	09/17/25
582633C	Western Exterminator	646.54	08/08/25		MVP OPS	INV0127	1,200	10/14/25

This report is also dynamic, so you will only see what is assigned to you.

Currently, when it is ready for Fiscal’s attention it turns yellow. This notifies the fiscal team that it is ready for processing. When someone there is working on it, they will put their name on it, and then when it can be found in Workday, it will disappear off this report and move to your right hand side “In Workday” box where it is there to show you what has been entered into Workday in the last 7 days.

NOTE: There is an automated report set up that can send you an Excel spreadsheet once a month with everything that was entered for you in the last 31 days. If you want that and do not have it, email LSMunoz@sjgov.org to ask for it. Some divisions are OK with it just showing up on this dashboard for the 7 days.

Working with Attachments:

Unfortunately, the system cannot (yet) allow pdf editing in the system. Instead, you will have to download/edit/reattach. This section will help you do just that:

Recommendations:

- Keep a folder on your desktop titled “Invoices” and use that for editing.
- Use a naming convention that will allow you to easily identify which is which.
- Delete them from the folder upon completion. OR file them in your area however you choose.

SMARTSHEET INVOICING (FOR DIVISIONS)

- ✓ Click on the invoice line you want (it will be light blue so you can ensure you have the right one) and the details menu will pop up on the right. Click the 'Attachments' tab as shown:

☆ Invoice Approval Tracking ⓘ

Filter    

Invoice Number	Invoice Date	Date Received	Vendor	Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
INV00118674	8/7/25	08/13/25	Pingboard	7670.40	☒			Natisha Plummer
1234	8/1/25	08/14/25	Western Exterminator	1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz
4567	8/2/25	08/14/25	Protech	750.00	☐			

Details ⓘ

Data Attachments (1) Comments (0)

 Pingboard INV00118674s.pdf
Aug 13, 2025, 7:53 AM by Form User (189k)

 Attach a File

- ✓ Next, click on the pdf and save as (your naming convention)

🕒 Invoice Dashboard ☆   **Share** ▼

Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
7670.40	☒			Natisha Plummer
1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz
750.00	☐			

Details ⓘ

Data Attachments (1) Comments (0)

 Pingboard INV00118674s.pdf ✓
Aug 13, 2025, 7:53 AM by Form User (189k)

Downloads   ...

 What do you want to do with Pingboard INV00118674s.pdf?

 What do you want to do with Pingboard INV00118674s.pdf?

 Manager Checklist - Dec 2024.pdf
Removed

 Single Sign-on in Smartsheet.pdf
Removed

 Learning-Excel-Data-Analysis.pdf
Removed

- ✓ Go to your folder and edit however you do. Either coding or signing as usual and save there.
- ✓ Now go back to Smartsheet and 'Attach a File'.

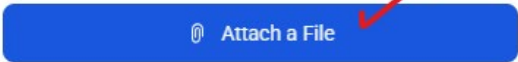
SMARTSHEET INVOICING (FOR DIVISIONS)

Amount	Accounting Completed	Project Manager	Date to PM	Final Signer
7670.40	☒			Natisha Plummer
ator 1200.00	☒	Lynde Munoz	08/14/25	Lynde Munoz
750.00	☐			

Details
×

Data
[Attachments \(1\)](#)
Comments (0)


Pingboard INV00118674s.pdf
Aug 13, 2025, 7:53 AM by Form User (189k)



- ✓ Once it is attached, before you hit complete,
 - Make sure it is the correct row
 - Check the name in the menu to ensure it is the right pdf
 - Go back to the 'Data' tab
 - On the Data menu you will either check 'Accounting Completed' if you are the invoice coder, or "Final Signer Approve" if you are the final signer.
 - Refresh to ensure everything has worked correctly

If Fiscal is requesting more information or updates from the division, OR if the division wants updates on something from Fiscal, they can bring attention to it by turning the row purple (clicking the 'Attention' box. This will show you that something needs attention. In the "with fiscal" report section, click the invoice you want, and the data tab will show notes and an 'attention' box.

Example below:

SMARTSHEET INVOICING (FOR DIVISIONS)

'With Fiscal' view

- Yellow = Approved and sent to Fiscal
- Purple = Unanswered questions in Notes

The screenshot displays the Smartsheet Invoicing interface. On the left, a table titled 'With Fiscal' shows a list of invoices. The first row is highlighted in purple, indicating an unanswered question in the notes. The table has columns for 'In process' and 'Invoice Number'. The first row shows 'Corie Kapahu' and 'P80251656'. To the right of the table is a 'Details' panel for the selected invoice. It shows the 'Notes' section with the text 'Can I get an update on this please?' and an 'Attention' button with a checkmark icon. On the far right, a sidebar titled 'In Wo' shows a list of vendors, including 'Allied', 'ALLIE', 'ALLIE TECH', 'ARC I', and 'ARC I'.

In process	Invoice Number
Corie Kapahu	P80251656

Details

Notes

Can I get an update on this please?

Attention

☒

In Wo

Vend

Allied

ALLIE

ALLIE TECH

ARC I

ARC I

You can answer the question or update however requested, then unclick the attention button when updates are complete. This will remove the purple color and they will know it is done.

If there are any questions, please email LSMunoz@sigov.org