NAVIGATION

The links for everything you'll need can be found on the Navigation bar on the left side of the screen. Click on a category with a small arrow next to it to see all of the options under the category. For easy access, you can also click the **Quick Links** to your right on the home page.

INVOICES

Dashboard

The Dashboard is where you can find agreements and work on invoices. On your Dashboard you will see two tabs: **Open Agreements and Invoices** and **Invoices in Review**.

Current open invoices will be listed in the table on the right under **Open Agreements and Invoices**. If your list of open invoices is lengthy, you can easily locate an open invoice by typing in the search bars under the **Open Invoices** header. Open invoices can be located by Organization, Agreement or Contract Number, Invoice Number, or Status. Invoices being reviewed by FDOT are located under the **Invoices in Review** tab. You may view the invoices that are in review, but will not be able to make changes.

View Invoice

This is a shortcut where you can search invoices. You can look up invoices by agreement or invoice number, or by organization name. When you click on this shortcut, a search window will pop up. Begin typing in the search bar and invoice options will populate. Select the desired invoice.

If you have already selected an invoice in the Dashboard, when you click the **View Invoice** shortcut you will see the invoice you are already working on. You can also view invoices under the **Actions** button in the Dashboard.

When you view an invoice, two icons will appear on the green bar beside the invoice name at the top of the screen. Use the arrows button to switch to another invoice, and the check box button to edit the invoice (if not yet submitted).

Activity Log Summary Report

If you have already selected an invoice in the Dashboard, you can use this shortcut to quickly view an Activity Log Summary Report of that invoice. If you have not selected an invoice, when you click on this shortcut, a search window will pop up. Begin typing in the search window bar, invoice options will populate.

You can also view the Activity Log Summary Report for an invoice under the **Actions** button in the Dashboard.

HELPFUL TIPS

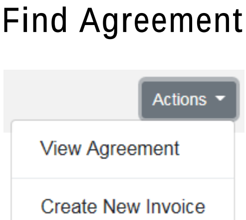
Create a PDF

You can create a PDF of an invoice by clicking the blue button with the Adobe Acrobat icon at the top of the screen. This button is only available when you are viewing an invoice (or when relevant).

Search Tables

Find a document by typing in the input box below the corresponding field. As you type, options will appear.

Find Agreement Invoice History and Status



Under **Open Agreements**, select **Actions** and **View Agreement** to see details about an agreement. This includes the history and status of the invoices created for the agreement.

PREPARING YOUR INVOICE

Create an invoice

Create New Invoice

To create a new invoice under an agreement, go to your **Dashboard** and click on **Actions** next to your open agreement, then click **Create New Invoice**. Complete the fields, then click **Save**. Once saved, you will be automatically routed to your next task.

Complete and submit an open invoice

All forms and reports supporting invoicing tasks are located under **Actions** beneath the Open Invoices heading.

Click the **Actions** button to the right of the invoice you want to work on.

A drop-down menu will appear:

- View an invoice
- Activity Log Summary Report
- Prepare Advance Pay Request (only appears for Advance Pay Agreements)
- Edit Expenses and Receipts
- Summarize Agency Activities
- Log Agency Activity
- Finalize and Submit Invoice

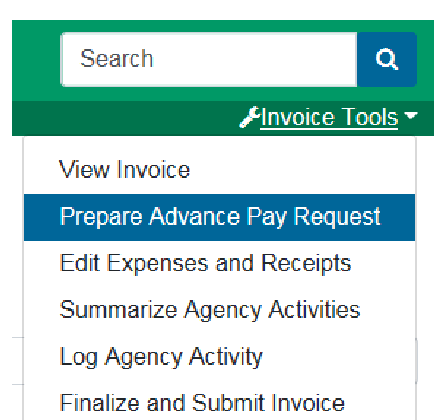
The tasks on this menu are arranged from top to bottom in the order they typically occur.

Invoice Tools

Click the **Invoice Tools** button in the top right corner of the screen to move to the next section.

Getting Started

If you need to submit an advance pay request, begin with the **Prepare Advance Pay Request** task. (This option only appears for agencies with Advance Pay agreements.) For reimbursements, begin with the **Edit Expenses and Receipts** task.



Once you have completed this first task, you can easily navigate to the next by clicking **Invoice Tools** at the top right of the screen located next to the wrench icon.

A drop-down menu will appear containing the required tasks for completing and submitting the invoice (Note: This is the same list of tasks found under the **Actions** button in the Dashboard). When all tasks are complete you will be able to submit the invoice under the **Finalize and Submit Invoice** task.

Log Agency Activities

Upload | Create

Click **Upload** to find instructions to load a list of activities from Excel and the Excel spreadsheet. Use **Create** to enter new activities individually. After an activity is created, you can edit or delete it using the buttons that appear next to the activity.

Check Invoice Status

/08/2018 Internal Draft

You can check the status of a specific invoice by viewing it. The status appears next to the name in the green bar at the top of the page.