



System Integrated Vendor Invoicing Portal

Step One: Log into the vendor portal. Verify “Make Checks Payable To” is correct. If it is not, add the correct information and click “Save and Continue”

Step Two: To submit an invoice, select the small receipt icon in the upper left. This will take you to the invoice section.

The screenshot shows the 'Vendor Details List' page. The top navigation bar includes links for 'Order FAQs', 'Order Guidelines', and a user profile 'Hi Dan Test New Service Vend... (test.inspire.vendor.pw+DTSV@gmail.com)'. A sidebar on the left contains a receipt icon, which is highlighted by a red arrow. The main content area is titled 'Vendor Details List' and features a 'Save and Continue' button. The 'Vendor Profile' section is expanded, showing fields for 'Vendor Name (DBA)' (Dan Test New Service Vendor [DO NOT USE]), 'DBA of' (empty), 'Email' (test.inspire.vendor.pw+DTSV@gmail.com), 'Phone' (123-123-1231), 'Phone Extension' (empty), 'URL' (empty), 'PO/Certificate Receiving Email' (test.inspire.vendor.pw+DTSV@gmail.com), and 'Make Checks Payable To' (Dan Test). Below the 'Vendor Profile' section are three collapsed sections: 'Contact Information', 'Product and Service Details', and 'General Attachments'. The 'School Details' section is also expanded, showing a 'Select School' dropdown menu with 'Monarch River Academy' selected. Below this are three more collapsed sections: 'Detailed List of Services and Prices', 'School Attachments', and 'Vendor Agreement'. The page is set against a teal background with a dark grey footer containing three white dots.

Step Three: Set the “Status” filter to “For Invoicing.” This provides a list of all certificates available to invoice against. **Note: you will only see certificates with start dates that are current or past. Future services will not appear until the first day of services starts. Certificates will appear for 90-days after the start date before expiring. Please submit invoices promptly after services are rendered to avoid expiration.*

The screenshot displays the 'Invoice' page for 'Vendor Invoicing'. The interface includes a top navigation bar with links to 'Order FAQs', 'Order Guidelines', and a user profile. Below the navigation bar, there are filter fields for 'School' (School Selection), 'School Year' (2021-2022), 'Start Date' (Aug 31, 2021), 'End Date' (Nov 29, 2021), and 'Status' (For Invoicing). A search bar for 'Certificate Number' and a 'Clear Filters' button are also present. The main table lists certificates with columns for Certificate Number, Student Name, Service, Order Amount, Start Date, End Date, Processed Date, Status, and Actions. A red arrow points to the 'Status' filter dropdown, which is currently set to 'For Invoicing'.

Certificate Number	Student Name	Service	Order Amount	Start Date	End Date	Processed Date	Status	Actions
0-C006-YVS	Test Student One	Dance Lessons	\$100.00	Nov 26, 2021	--	Nov 08, 2021	For Invoicing	[Menu]
0-C002-YVS	Test Student One	Piano Lessons Test 2	\$100.00	Nov 15, 2021	--	Nov 08, 2021	For Invoicing	[Menu]
1-C002-MRA	Test Student Two	Weekly 30 minute piano les...	\$25.00	Nov 12, 2021	--	Nov 12, 2021	For Invoicing	[Menu]
4-C008-YVS	Test Student Five	per week	\$2.00	Oct 15, 2021	Oct 19, 2021	Nov 08, 2021	For Invoicing	[Menu]
4-C004-YVS	Test Student Five	per month	\$5.00	Nov 15, 2021	--	Nov 08, 2021	For Invoicing	[Menu]

Step Four: Review the student name, service, amount, and start date for accuracy. If correct, click the small invoice icon in the “actions” column to submit your invoice. **Note: not all services will have an end date listed. For example, monthly services will only have a start date.*

Vendor Invoicing

School

School Selection

School Year

2021-2022

Start Date

Aug 31, 2021






End Date

Nov 29, 2021

Status

For Invoicing

Search by Certificate Number

Certificate Number	Student Name	Service	Order Amount	Start Date	End Date	Processed Date	Status	Actions
0-C006-YVS	Test Student One	Dance Lessons	\$100.00	Nov 26, 2021	--	Nov 08, 2021	For Invoicing	
0-C002-YVS	Test Student One	Piano Lessons Test 2	\$100.00	Nov 15, 2021	--	Nov 08, 2021	For Invoicing	
1-C002-MRA	Test Student Two	Weekly 30 minute piano les...	\$25.00	Nov 12, 2021	--	Nov 12, 2021	For Invoicing	
4-C008-YVS	Test Student Five	per week	\$2.00	Oct 15, 2021	Oct 19, 2021	Nov 08, 2021	For Invoicing	
4-C004-YVS	Test Student Five	per month	\$5.00	Nov 15, 2021	--	Nov 08, 2021	For Invoicing	

Step Five A: Review the details of the order. If the details are incorrect, click “HERE” at the top of the screen. This will launch a pre-populated survey entry with room to describe the necessary changes. Submit your changes and click “Cancel” to return to the previous screen.

Order Request

Order FAQs | Order Guidelines | Hi Dan Test New Service Vend... (test.inspire.vendor.pw+DTSV@gmail.com) ▾

Cancel

Proceed

Please review certificate details for accuracy. If the details are correct, please click proceed. If you need revisions, please submit your changes to the Order Accounting Department [HERE](#).

Order ID: 2021-200490

Order Request

Order FAQs | Order Guidelines | Hi Dan Test New Service Vend... (test.inspire.vendor.pw+DTSV@gmail.com) ▾

Cancel

Proceed

Please review certificate details for accuracy. If the details are correct, please click proceed. If you need revisions, please submit your changes to the Order Accounting Department [HERE](#).

Order ID: 2021-200490

Order Request Info

Certificate Number:

0-C006-YVS

Student Name:

Test Student One

School Name:

Yosemite Valley Charter Sch...

Activity/Class:

Dance Lessons

Vendor Name:

Dan Test New Service Vendor [DO NOT USE]

Payment Mailing Address:

Test Address Test City TE 1121

Payable To:

Dan Test

Order Items

Order Item #1

Item Total: \$100.00

Service

Dance Lessons

Service Unit Dates

Per Session ▾

Start Date

Nov 26, 2021

Item Description

Materials Fee

\$0.00

Unit Price

\$100.00

CENTRAL VALLEY
CHARTER SCHOOLS

Vendor Invoicing Portal - Revisions

Student Name *

Test Student One

Service *

Dance Lessons

Amount *

100.00

Service Unit Dates *

Per Session

Start Date *

Nov 26, 2021

Please describe the revisions you are requesting: *

Type here...

Submit

**Note: Once submitted, the Order Accounting department will contact the parent to make the requested changes. Once complete, the team will notify you via email that your certificate is ready to invoice.*

Step Five B: Review certificate details. If the information is correct, click “Proceed.”

Step Six: A pop up with an auto-generated invoice number and invoice date will appear. You may leave notes or leave this section blank. Click “Invoice.”

The image displays two screenshots from a web application. The left screenshot shows the 'Order Request' page with a teal header and a sidebar. The main content area includes a 'Cancel' and 'Proceed' button at the top right. Below this is a red warning message: 'Please review certificate details for accuracy. If the details are correct, please click proceed. If you need revisions, please submit your changes to the Order Accounting Department [HERE](#).' The 'Order ID: 2021-200490' is displayed. The 'Order Request Info' section contains the following details:

Certificate Number: 0-C006-YVS	Vendor Name: Dan Test New Service Vendor [DO NOT USE]
Student Name: Test Student One	Payment Mailing Address: Test Address Test City TE 1121
School Name: Yosemite Valley Charter Sch...	Payable To: Dan Test
Activity/Class: Dance Lessons	

The 'Order Items' section shows 'Order Item #1' with an 'Item Total' of '\$100.00'. The item details are as follows:

Service	Item Description
Dance Lessons	
Service Unit Dates	Materials Fee
Per Session	Unit Price
	\$0.00
	\$100.00
Start Date	
Nov 26, 2021	

The right screenshot shows the 'Invoice' pop-up window. It contains the following information:

Invoice

Invoice Number: 21-200490-03

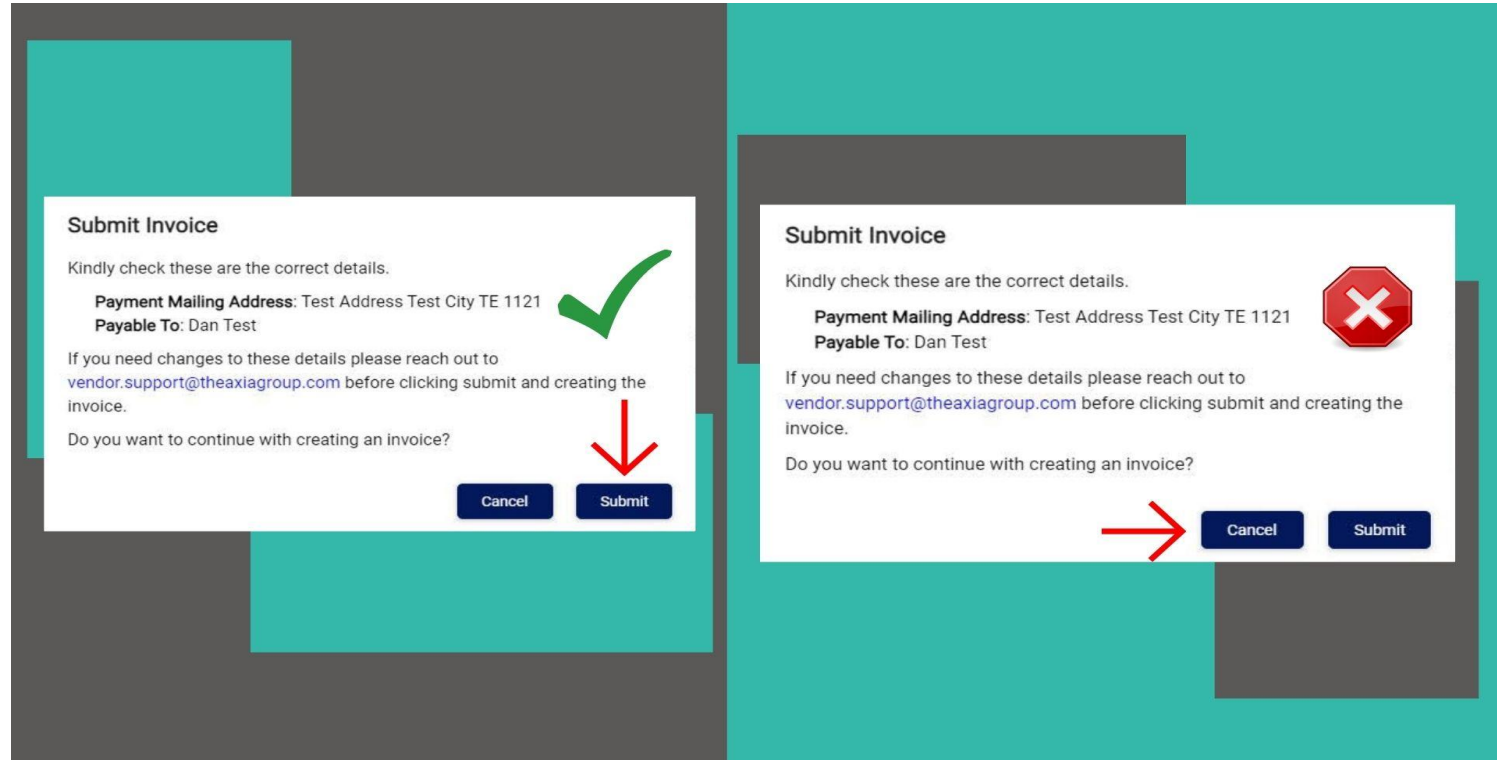
Invoice Date: Nov 29, 2021

Notes: You May Add Notes Here

At the bottom of the pop-up are 'Cancel' and 'Invoice' buttons. Red arrows point from the 'Proceed' button in the first screenshot to the 'Invoice' button in the second screenshot.

Step Seven: After clicking invoice, you will be prompted to verify your payment mailing address and checks made payable to name. If these are correct, please click “Submit.” This concludes the submission of your invoice for processing.

If these details are incorrect, you may update them in your portal or you can email Vendor Relations for assistance with updates. *Press cancel and do not submit your invoice if these details are incorrect!*



For Invoicing



For Approval



Processed



The system will allow you to set your Status as ***For Invoicing, For Approval, and Processed***.

For Invoicing = lists certificates available to invoice against.

For Approval = lists certificates you have submitted an invoice for and are awaiting School approval for.

Processed= lists certificates which have been approved by the School for payment. *(More details on the next page)*

Vendor Invoicing

School

School Selection

School Year

2021-2022

Start Date

Jun 25, 2021

End Date

Jun 24, 2022

Status

For Approval



Search by Certificate Number



Clear Filters

Certificate Number	Student Name	Service	Order Amount	Start Date	End Date	Processed Date	Status	Actions
0-C005-YVS	Test Student One	Dance Lessons	\$100.00	Nov 18, 2021	--	Nov 08, 2021	For Approval	--

School

School Selection

School Year

2021-2022

Start Date

Jun 25, 2021

End Date

Jun 24, 2022

Status

Processed

Search by Certificate Number



Certificate Number	Student Name	Service	Order Amount	Start Date	End Date	Processed Date	Status	Actions
4-C001-YVS	Test Student Five	per session	\$3.00	Sep 12, 2021	--	Nov 08, 2021	Processed	

From the “Processed” status you may download a copy of the invoice you submitted. You may save this copy for your records.

School
School Selection

School Year
2021-2022




Start Date
Jun 25, 2021

End Date
Jun 24, 2022

Status
Processed

Download

Search by Certificate Number

Certificate Number	Student Name	Service	Order Amount	Start Date	End Date	Processed Date	Status	Actions
4-C001-YVS	Test Student Five	per session	\$3.00	Sep 12, 2021	--	Nov 08, 2021	Processed	
4-C002-YVS	Test Student Five	per session	\$2.00	Oct 13, 2021	--	Nov 08, 2021	Processed	
0-C004-YVS	Test Student One	Dance Lessons	\$100.00	Nov 02, 2021	--	Nov 08, 2021	Processed	

Dan Test New Service Vendor [DO NOT USE]

YVS
INVOICE

Payment Mailing Address

Test Address
Test City TE 1121

LCAP: 1304

Invoice Date

11/08/2021

Invoice #

21-200493-02

Bill To: Yosemite Valley Charter School

3610 E. Ashlan Ave.
Fresno, CA 93726

Student Name	Order #	Certificate #
Test Student Five	2021-200493	4-C001-YVS
Service Dates	Amount/Unit	Materials Fee
09/12/2021	\$2.00	\$1.00
Total		\$3.00



System Integrated Vendor Invoicing Portal