

Stampli

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- [Utility Guide - Electric \(For Property Management\)](#)
- [Cost Coding Field Responsibilities](#)

Approver Guide w/o Coding

STAMPLI

Customer Training: Approvers

User Guide




**Welcome
to Stamp!i!**

Your AP team is using Stamp!i to take control over the invoice lifecycle.

As an Approver, our intuitive platform makes it easy for you to quickly review and approve vendor invoices and bills.

Sign Up for Stampli

If you already have a Stampli account, go to Page 7.

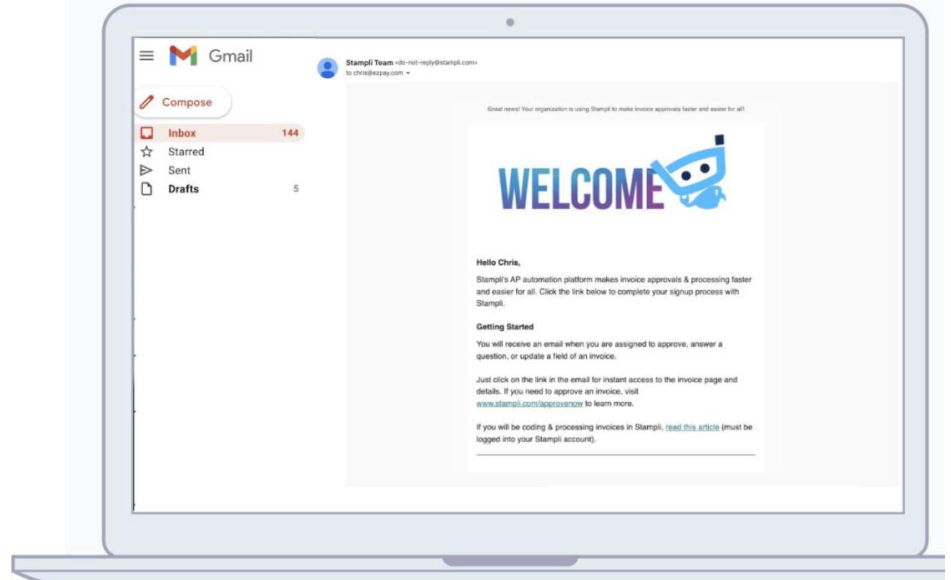
1.

Welcome Email

You will receive a **Welcome to Stampli** email.

Go to the bottom of the email and note your **Customer ID**, **Email**, and **Temporary Password**.

Click on **Take Me to Stampli**.



3

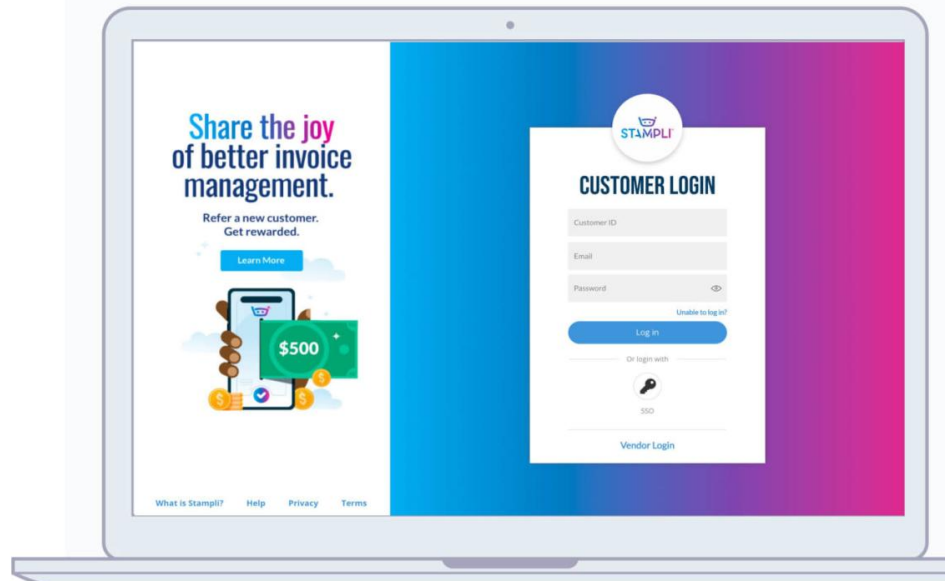
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Login + Create Password

In the login page, verify the **Customer ID** and **Email address** with the Welcome email.

Enter the temporary password provided in the email.

Click **Log In**. You will be prompted to create a new password.



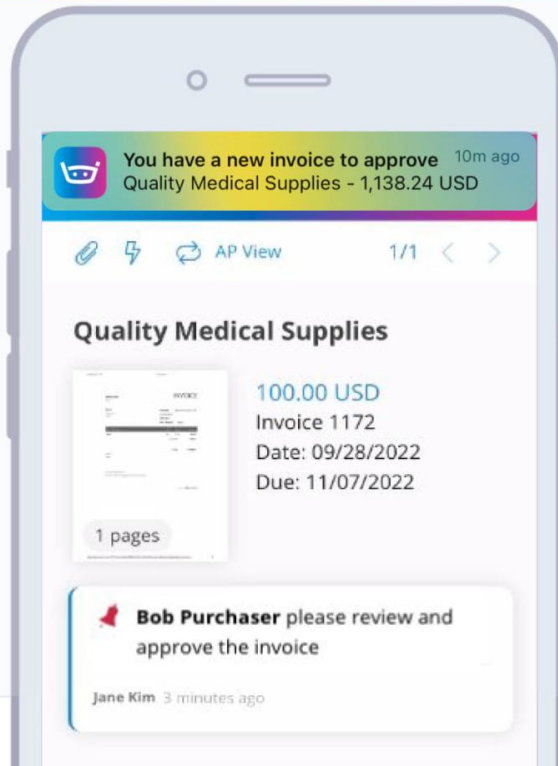
4

Approval Request

When AP needs your approval on an invoice, you will receive an **email** or **push notification**

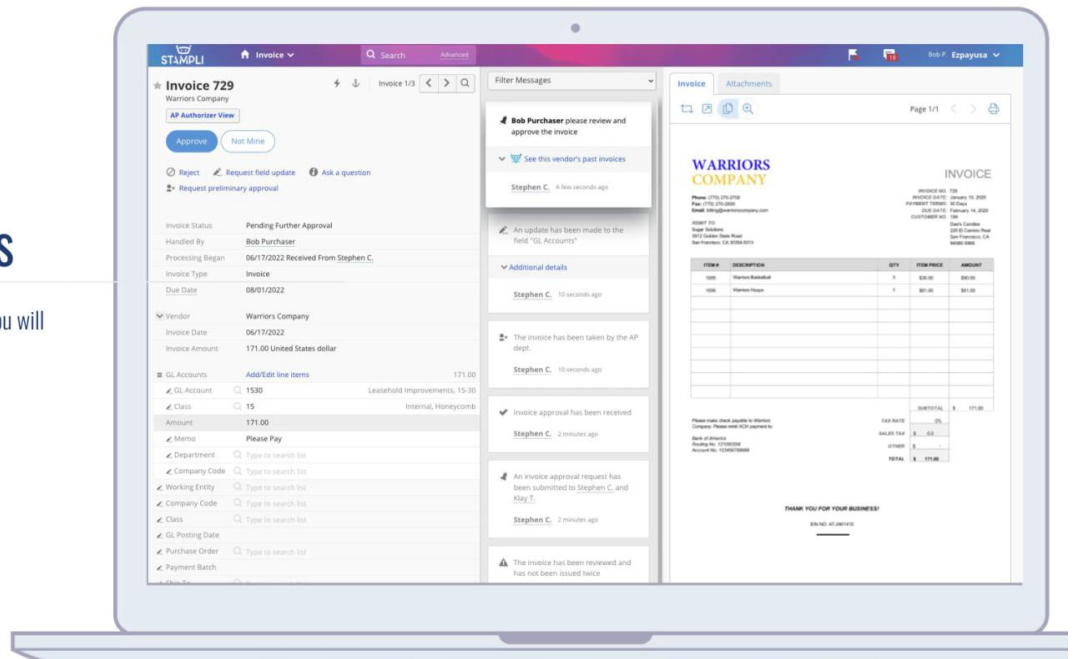


Tip: download the Stampli mobile app and approve invoices while on the go



Invoice Details

When you click on the email link, you will see the **Invoice Details** page.



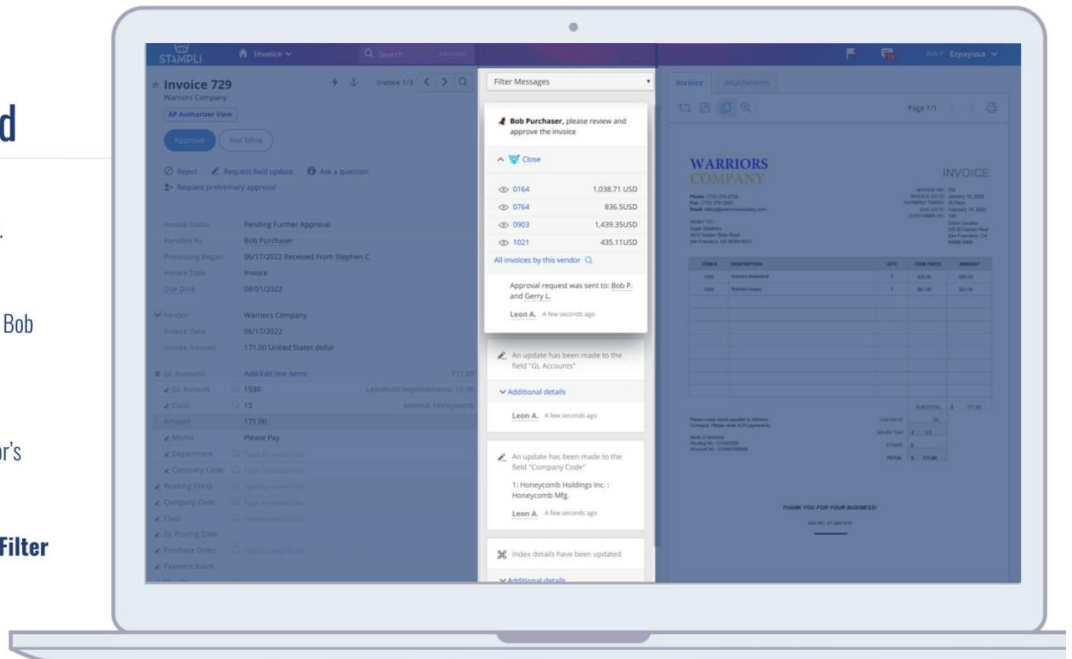
Conversation Feed

A feed of all communications and activities for the invoice is available.

The most recent activity is shown at the top. Here you see that Bob received an approval request from Jeanney.

Additionally, you can view the vendor's past bills.

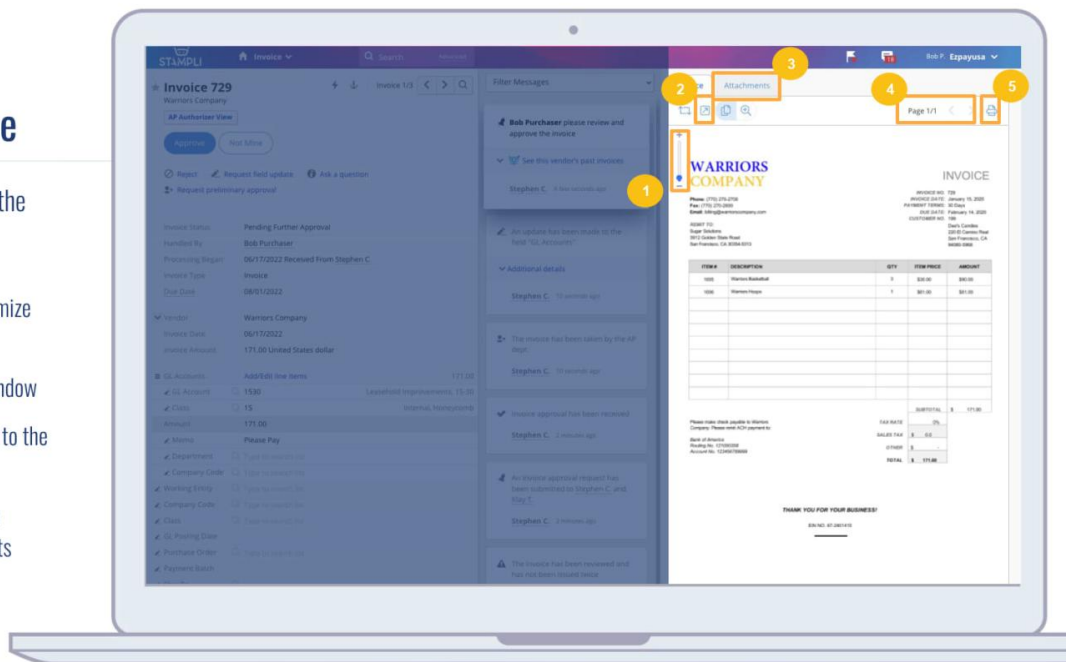
To view only specific activities, use **Filter Messages**.



Viewing the Invoice

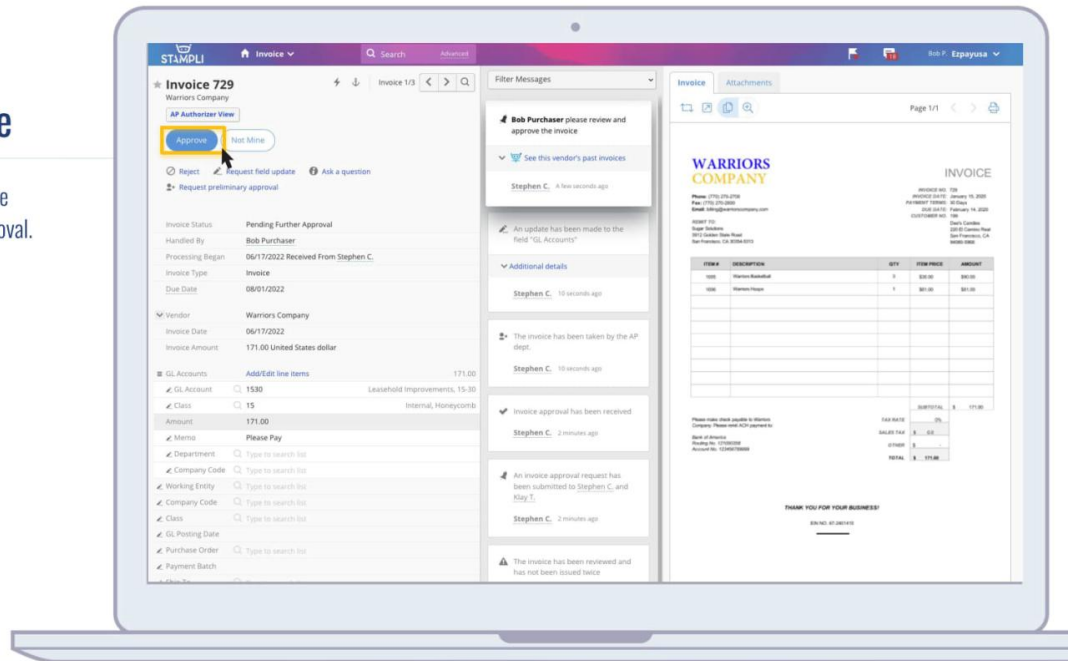
A copy of the invoice PDF is on the right side.

1. Use slider to enlarge or minimize invoice image
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3. View all attachments related to the invoice
4. View other pages if there are multiple pages or attachments
5. Print the invoice



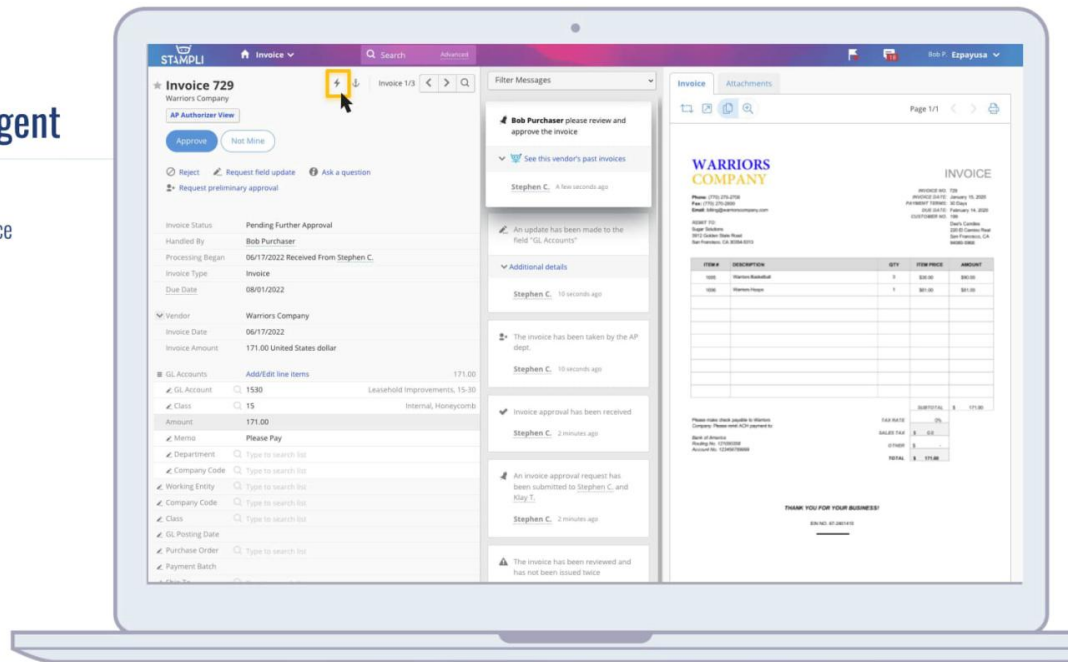
Approve the Invoice

After reviewing the invoice, click the **Approve** button to send your approval.



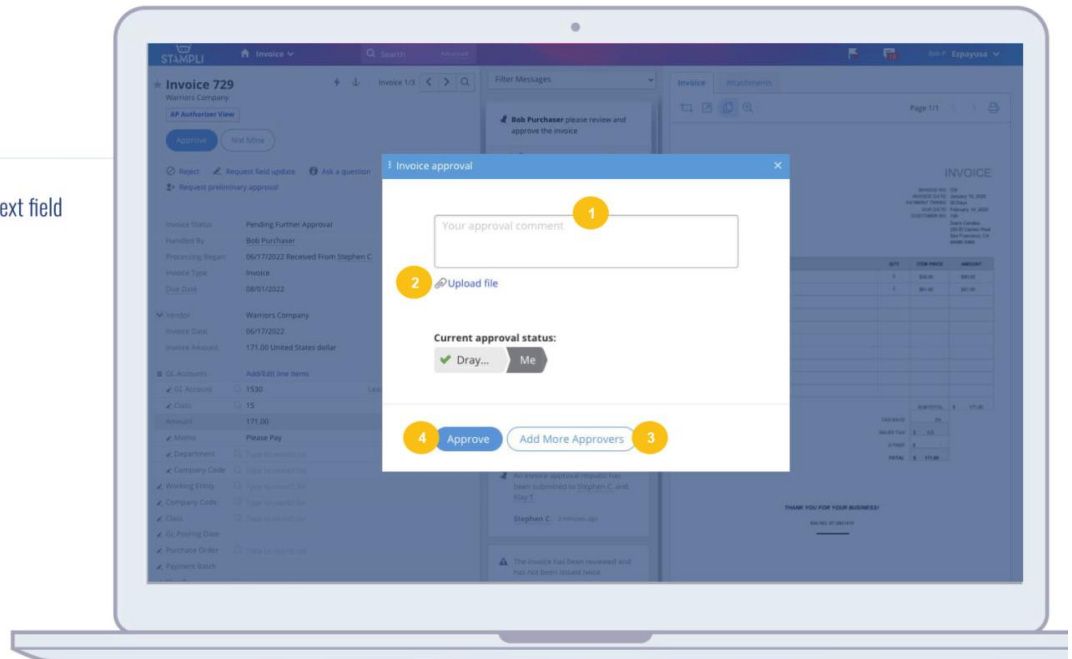
Mark Invoice as Urgent

If the invoice is urgent, click the **Lightning Bolt** to mark the invoice as urgent.



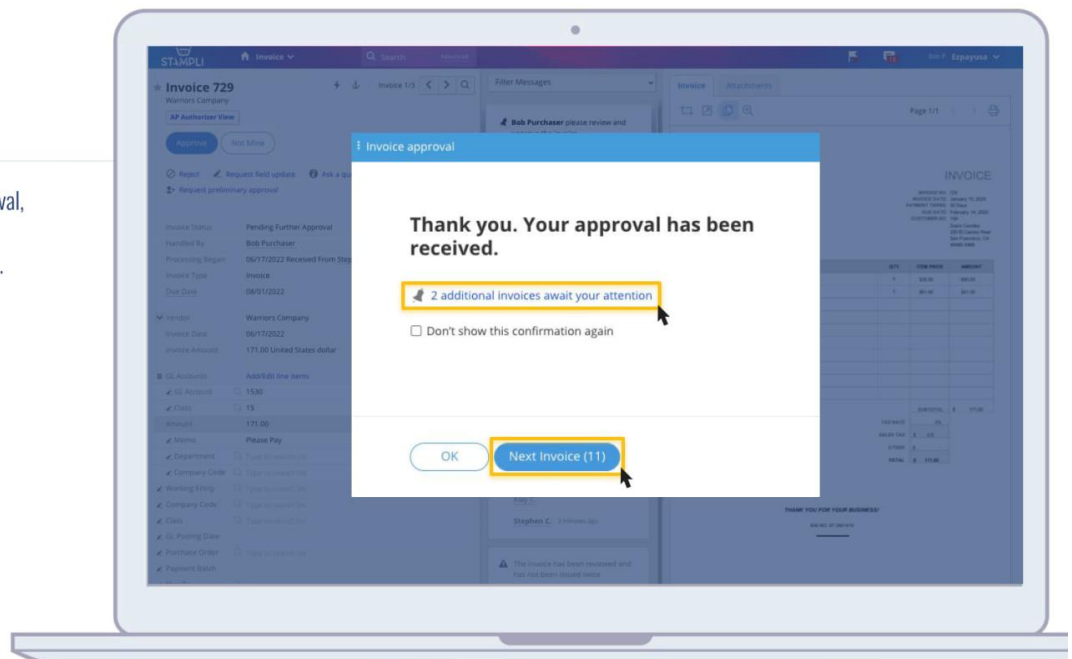
Options when Approving

1. Enter comments in the free text field
2. Attach file
3. Add more approvers
4. Submit approval



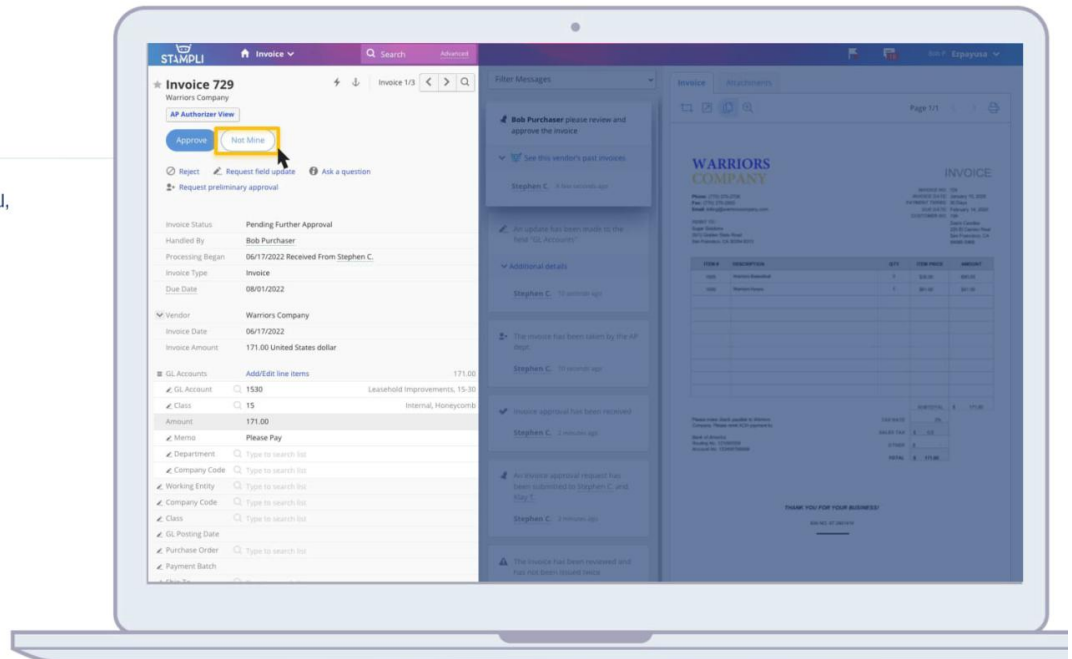
Approve other Invoices

If other invoices require your approval, click **Additional invoices await your attention** or **Next Invoice**.



Indicating Not Mine

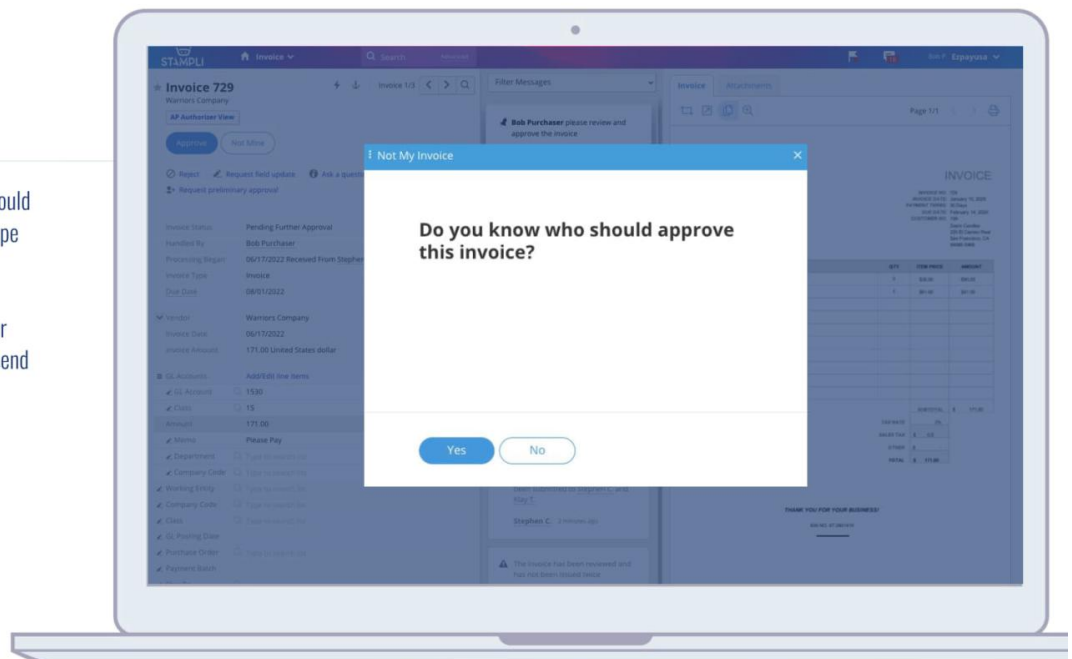
If the invoice does not belong to you, click the **Not Mine** button.



Indicating Not Mine

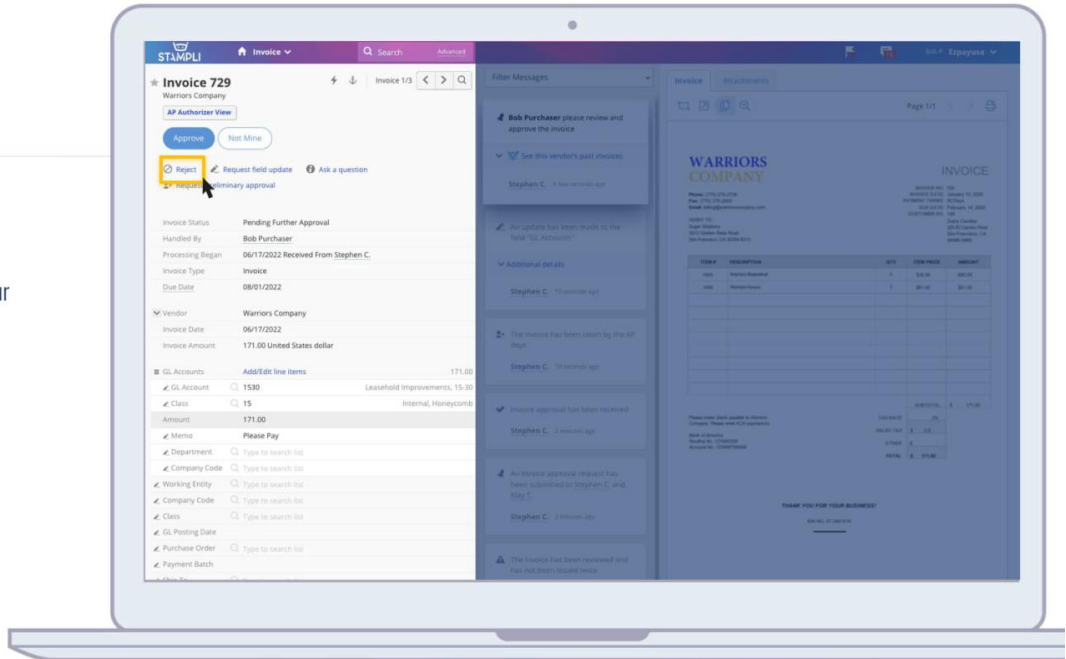
If you know to whom the invoice should be sent, click the **Yes** button and type in their name.

If you do not know who the approver should be, click the **No** button to send back to your AP team.



Reject the Invoice

When **Reject** is clicked, select the reason for the rejection from the drop-down box that appears. The invoice will then be sent back to your AP Team

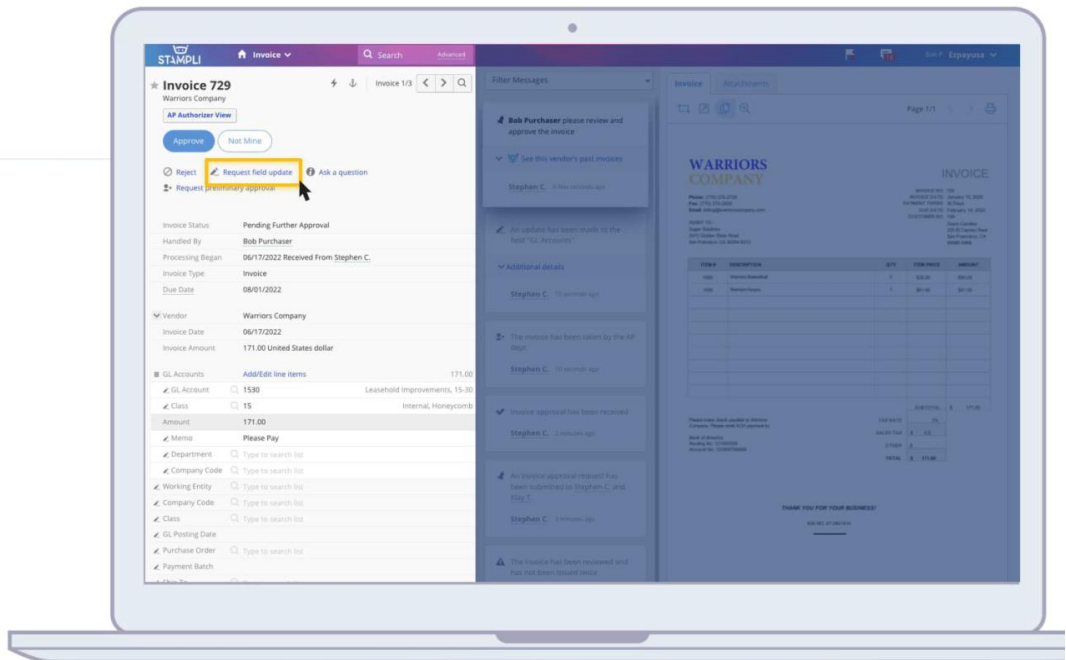


Field Update Request

Request an update to an invoice field (e.g., location, GL account, cost center, department, etc) by:

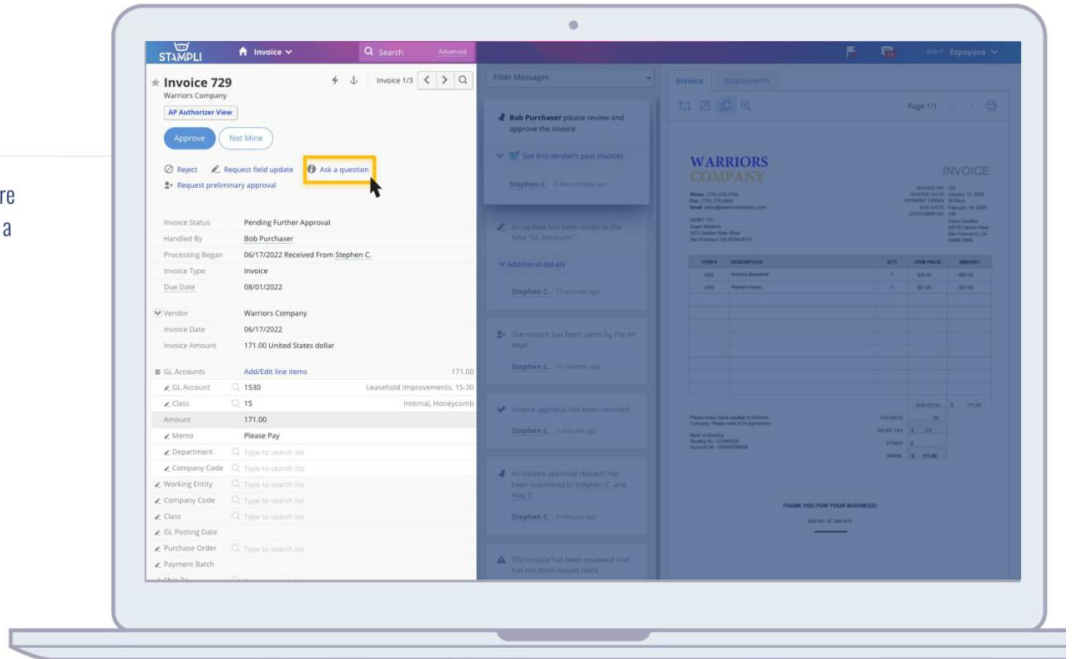
1. Selecting a field from the drop-down box
2. Enter the contact (If the person is not on the list, contact AP or your Stampli Admin)

**This option may not be available if all invoice fields are editable by AP only*



Ask a Question

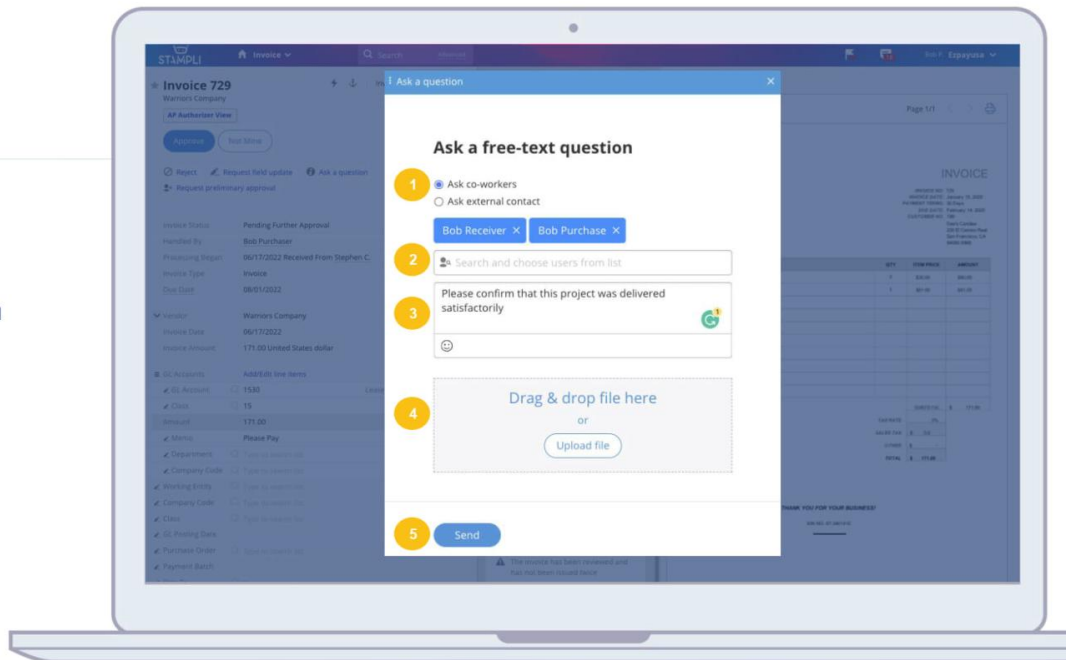
If you need further information before approving the invoice, you can send a question to a coworker, vendor, or other external contacts.



Ask a Question: Internal

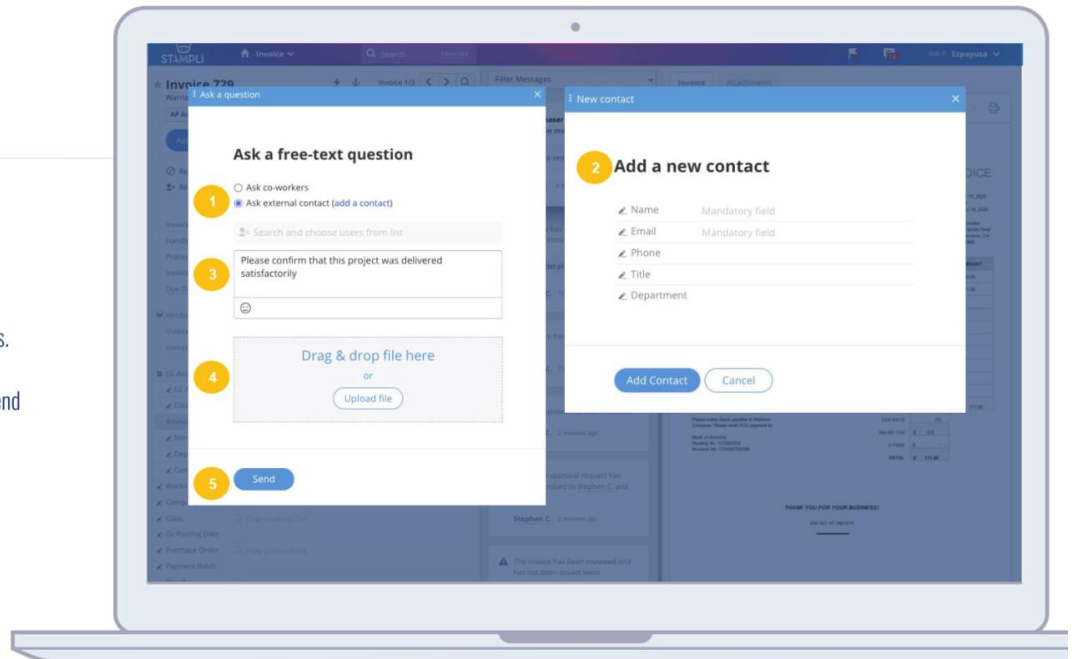
1. Select Ask **Co-Workers**.
2. Start typing a colleague name to see autofill options. Select from the list.* You can select multiple people.
3. Type your question.
4. Attach a file, if needed.
5. Click **Send**.

*If the person does not appear in the list, contact AP or your StampLi Admin to add the person.



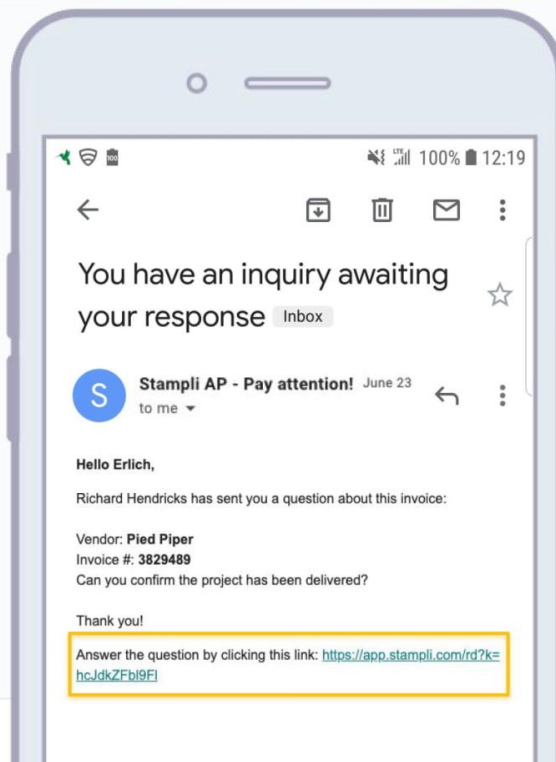
Ask a Question: External

1. Select Ask External Contact option and click **Add a Contact**.
2. In **Add a New Contact** window, enter contact details. The vendor name is automatically provided. To send a question to a non-vendor contact, uncheck **Add as a Vendor Contact**.
3. Type your question.
4. Attach a file, if needed.
5. Click Send.



Recipient of a Question

An email is sent to the person who has been asked a question. A link to the invoice is available in the email.



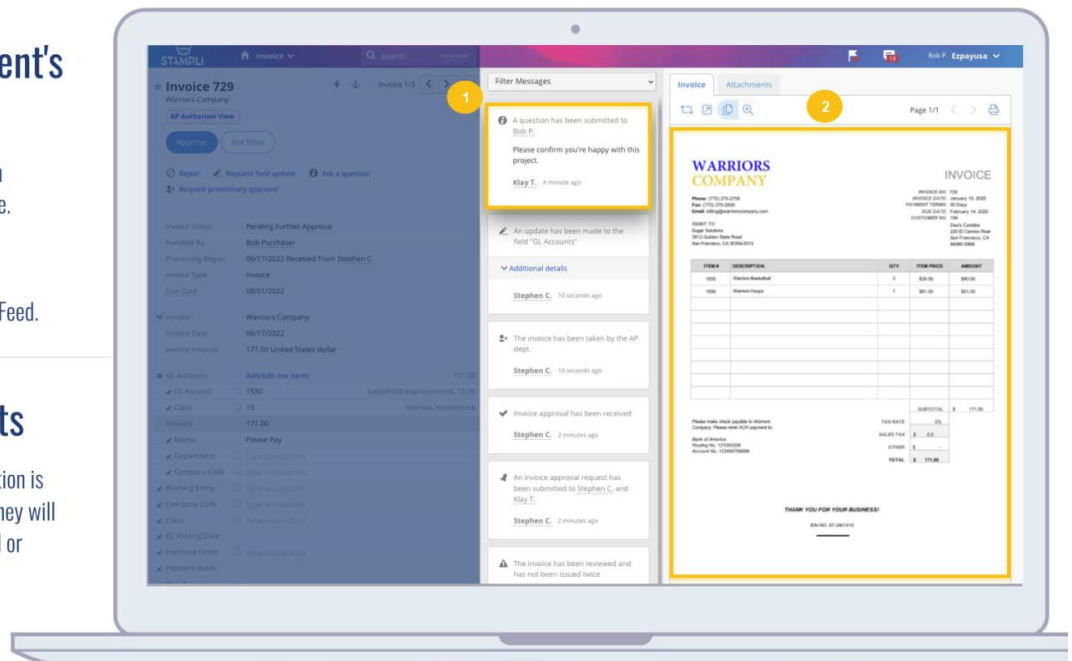
1 Question Recipient's View of Invoice

Similar to Approvers, question recipients can view the invoice.

To respond to a question, the recipient just needs to type a response in the Conversation Feed.

2 External Contacts

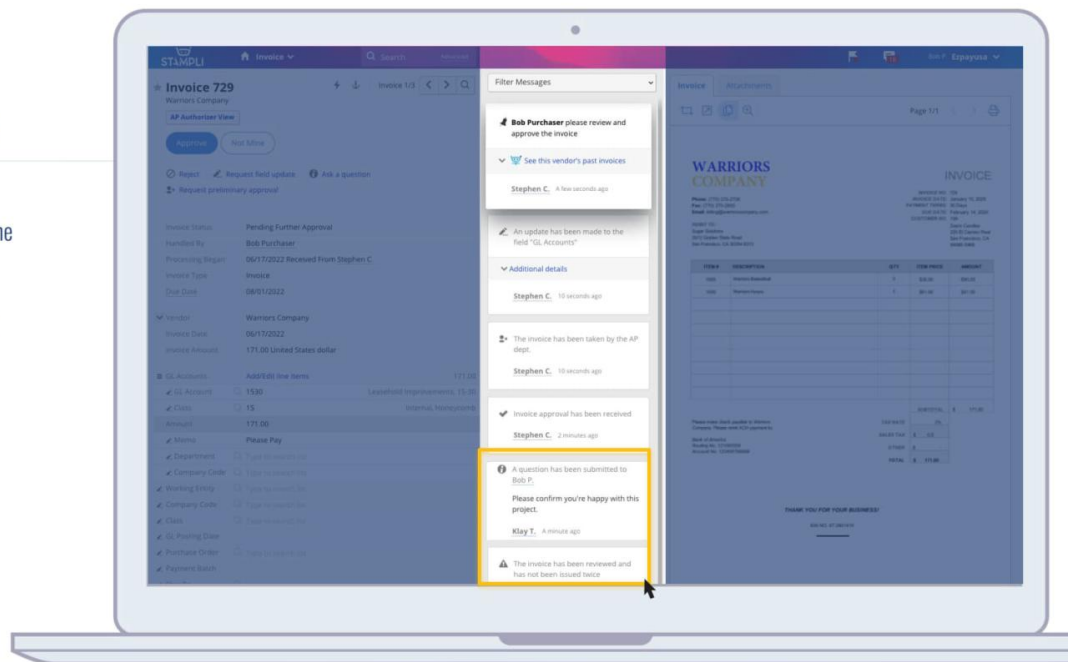
Only the invoice and the question is visible to external contacts. They will not see the Conversation Feed or invoice coding information.



Question Response

Responses to questions or field update requests can be viewed in the Conversation Feed.

If further clarification is needed, an Approver can click **Reply**.



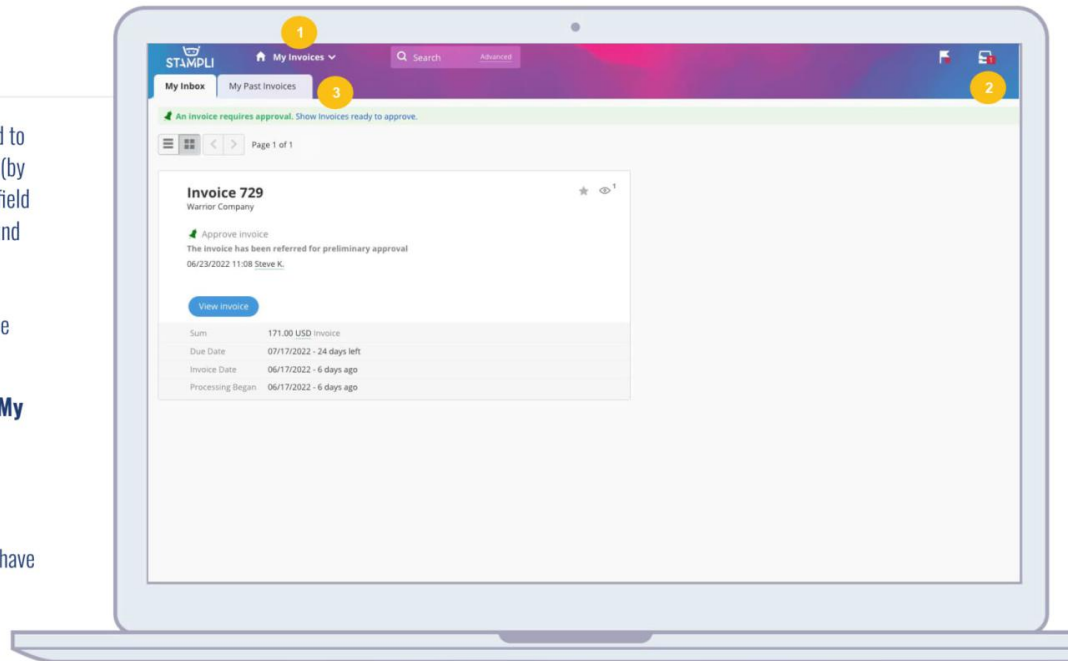
My Inbox

All invoices that have been assigned to you for Approval or for clarification (by receiving a question or request for field update by someone else) can be found in My Inbox.

There are several ways to access the Inbox:

1. From the main menu, select **My Invoices**.
2. Click on the **Inbox tray**.

To view all invoices with which you have been involved, go to **My Past Invoices (3)**.



Coder Guide

STAMPLI

Customer Training Coders/Routers



User Guide



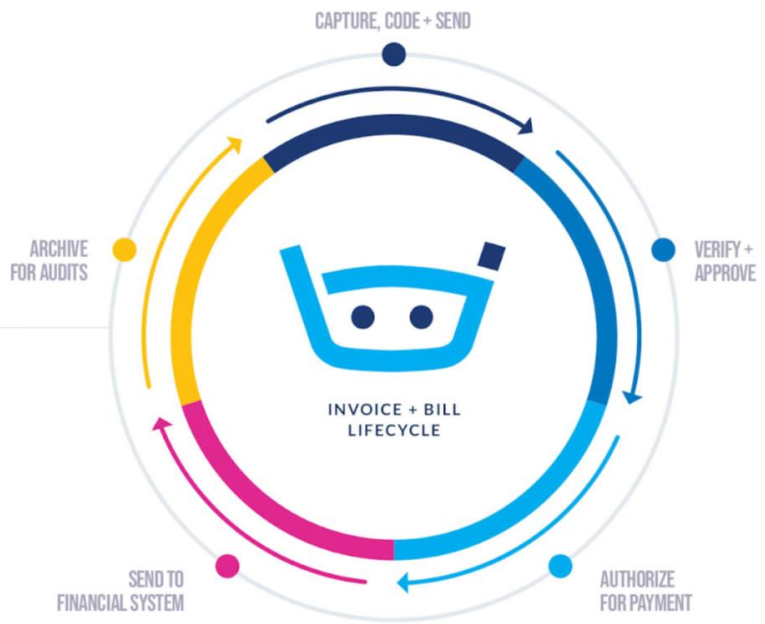

**Welcome
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Your AP team is using Stampli to take control over the invoice lifecycle.

As a Coder/Router, our intuitive platform helps automate invoice capture, coding, and approval workflows.

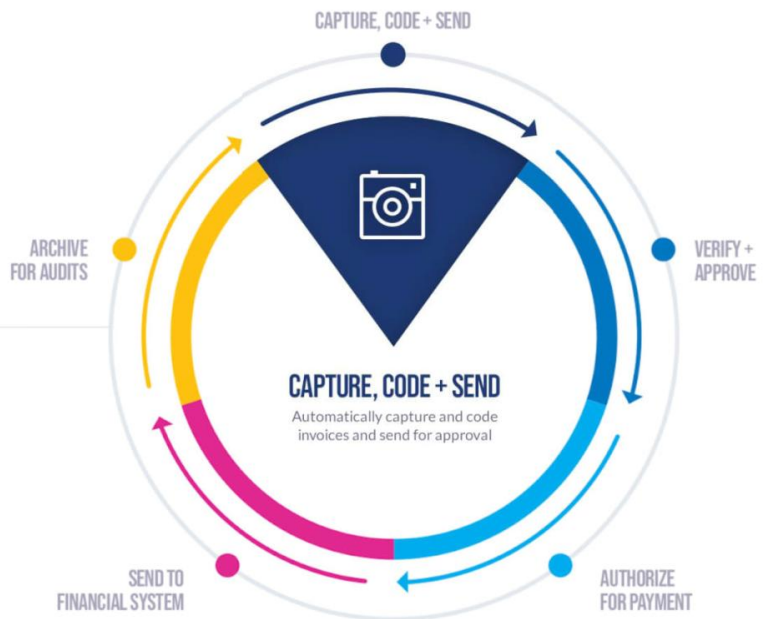
Invoice Lifecycle

Lifecycle of an invoice within Stampli



Capture, Code, Send

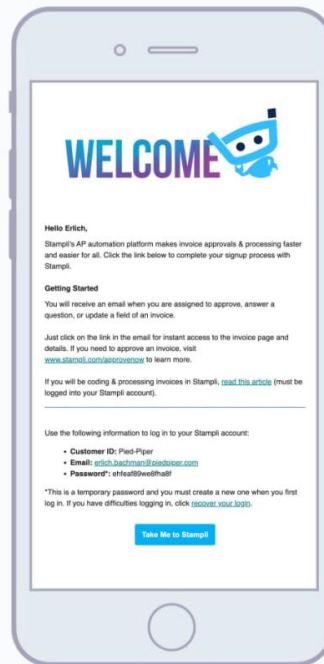
When **Coder/Routers** are brought into the process.



Sign Up for Stampli

If you have not yet signed up for a Stampli account, you will need to sign up.

If you already have a Stampli account, go to Page 7.



1.

Welcome Email

You will receive a **Welcome to Stampli** email.

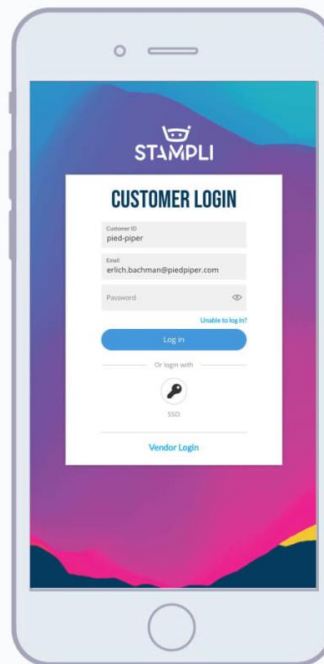
Go to the bottom of the email and note your Customer ID, Email, and Temporary Password.

Click on **Take Me to Stampli**.

Sign Up for Stampli

If you have not yet signed up for a Stampli account, you will need to sign up.

If you already have a Stampli account, go to Page 7.



2.

Login + Create Password

In the login page, verify the Customer ID and Email address with the Welcome email.

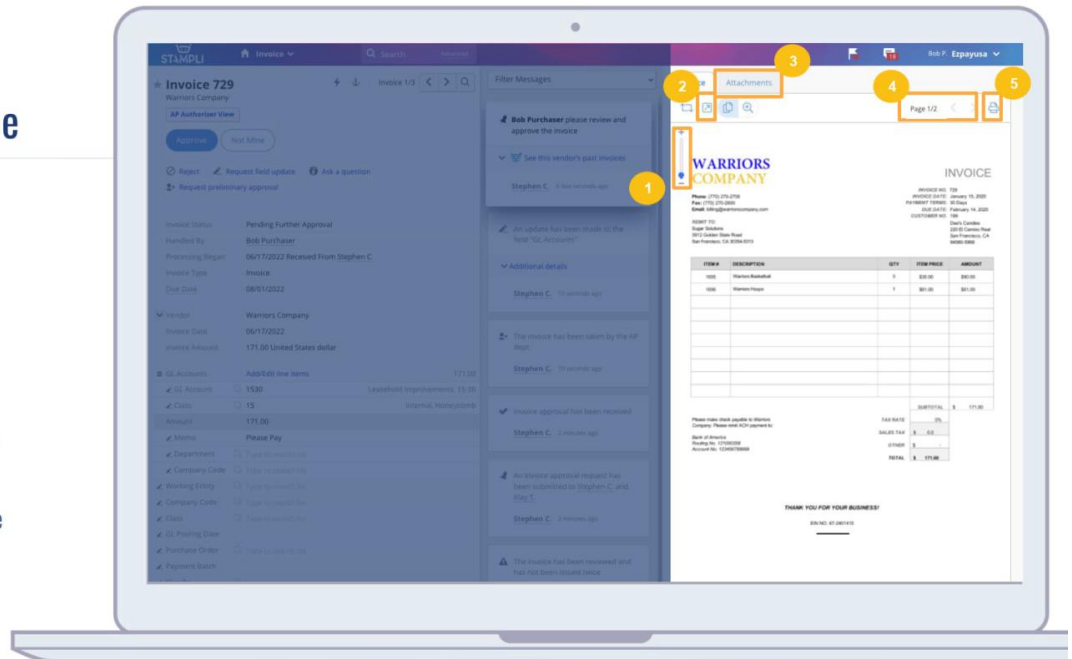
Enter the temporary password provided in the email.

Click Log In. You will be prompted to create a new password.

Viewing the Invoice

A copy of the invoice PDF is on the right side.

1. Use slider to enlarge or minimize invoice image
2. Open the invoice in a new window
3. View all attachments related to the invoice
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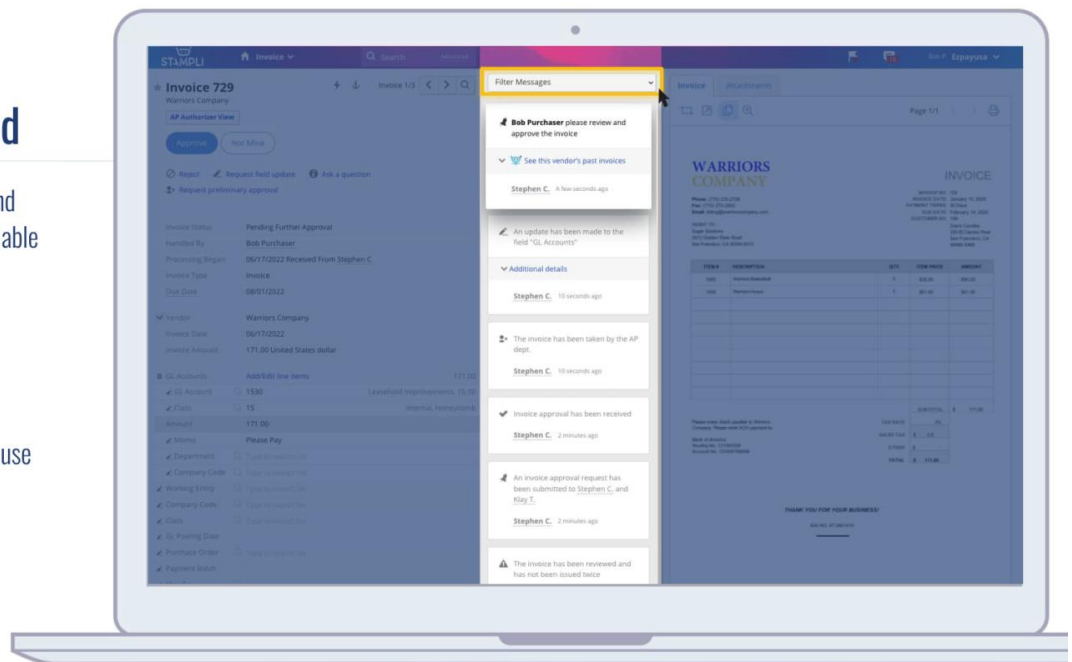


Conversation Feed

A feed of all communications and activities for the invoice is available in the middle of the screen.

The most recent activity is shown at the top.

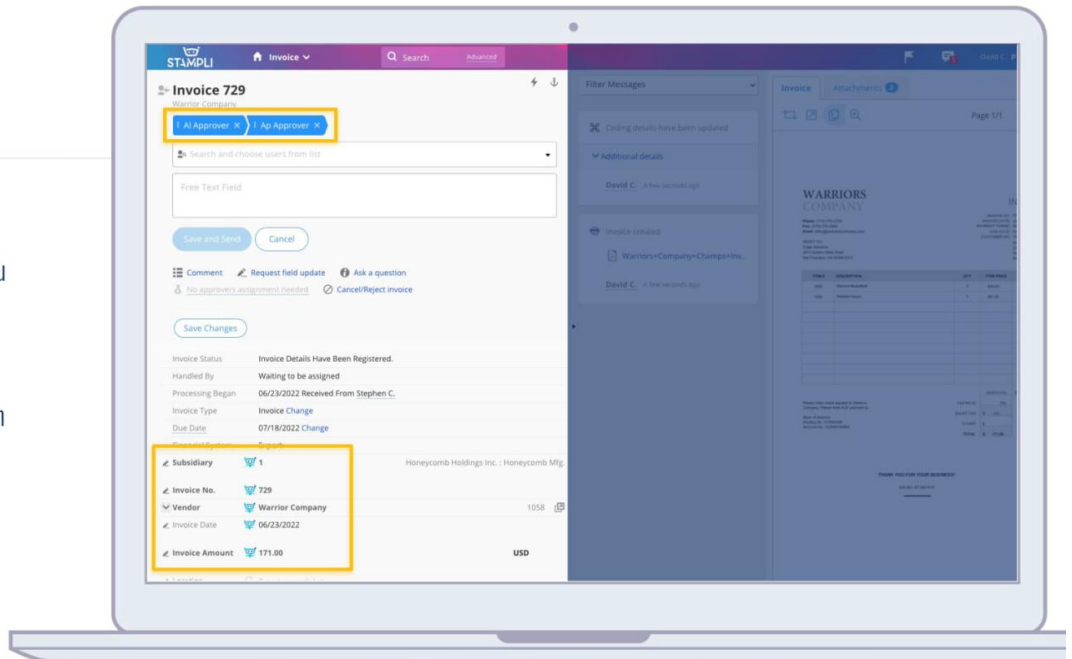
To view only specific activities, use **Filter Messages**.



Billy the Bot

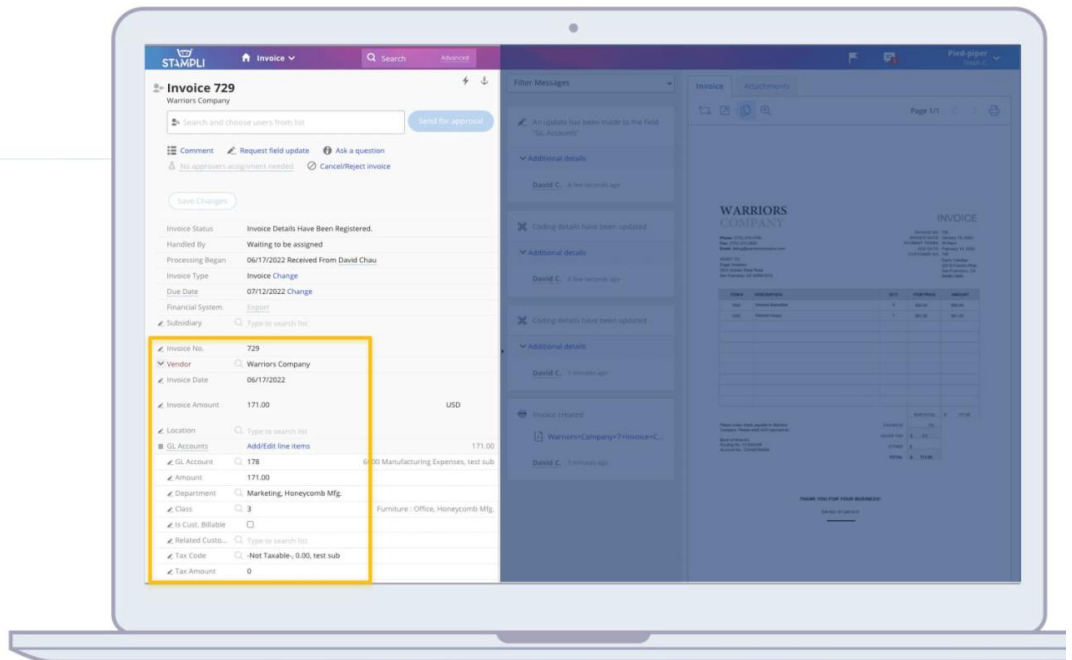
Billy the Bot uses AI and machine learning to populate invoice fields. The more that you use Stampli, the smarter Billy will become.

All areas that have the Billy icon are auto-filled values.



Coding

Using Billy and manual data entry, fill in Invoice information including GL, department, and other required information.



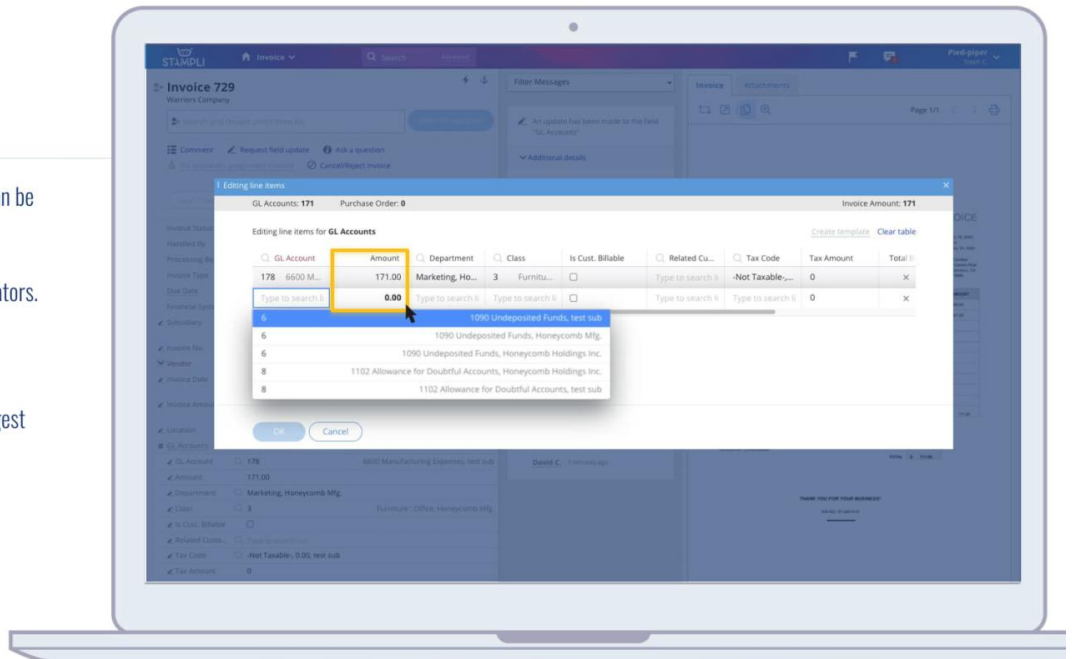
Line Items

With Stampli, multiple line items can be easily handled by using a table.

All numerical fields are auto-calculators. Enter formulas and Stampli will automatically calculate the results!

Billy will also auto-populate or suggest fields based on past invoices.

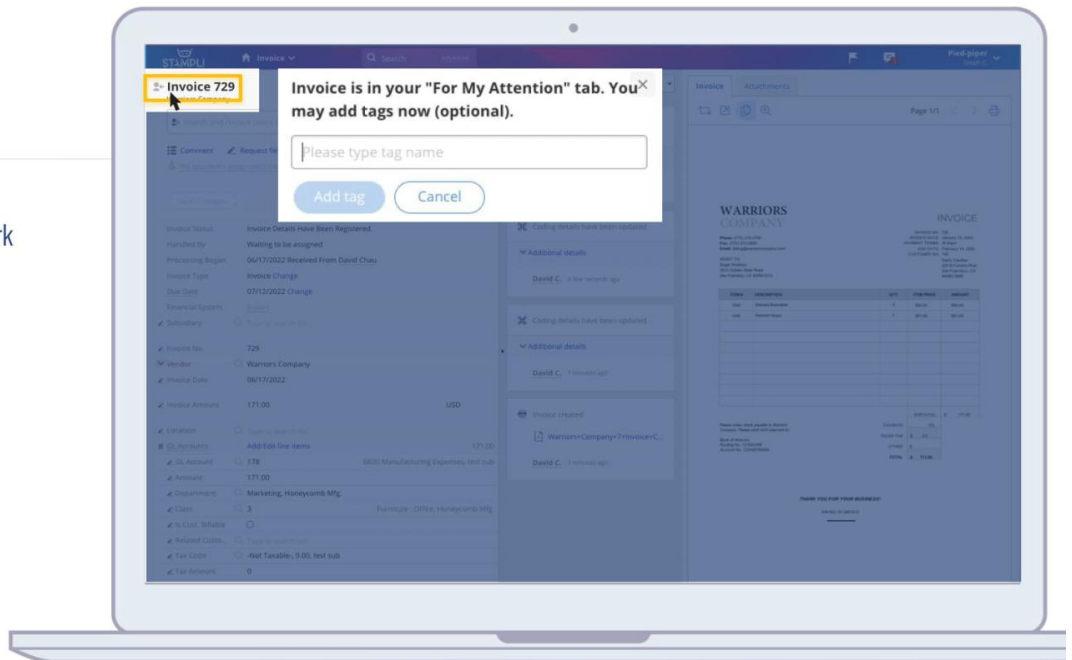
If you have multi-line invoices from specific vendors, you can use table templates.



For My Attention

To put invoices out of queue so other Coder/Routers do not work on them or to flag specific invoices for follow up, select person icon beside the invoice number.

You can select tags to group similar invoices together.

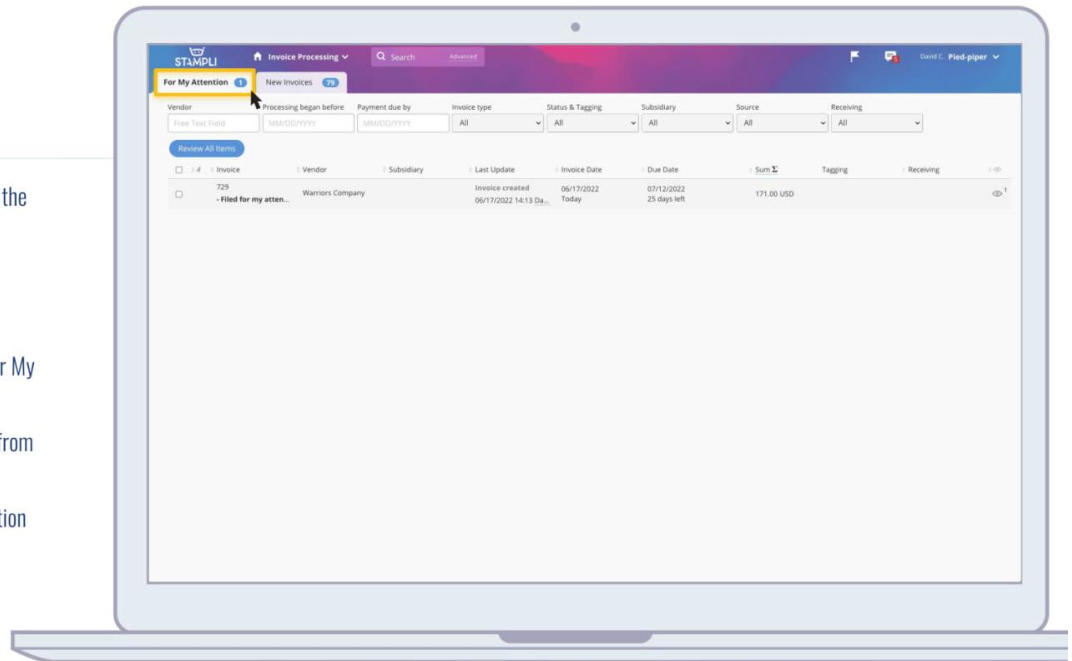


For My Attention

Select **Invoice Processing** from the main menu and go to the **For My Attention** tab.

This folder displays:

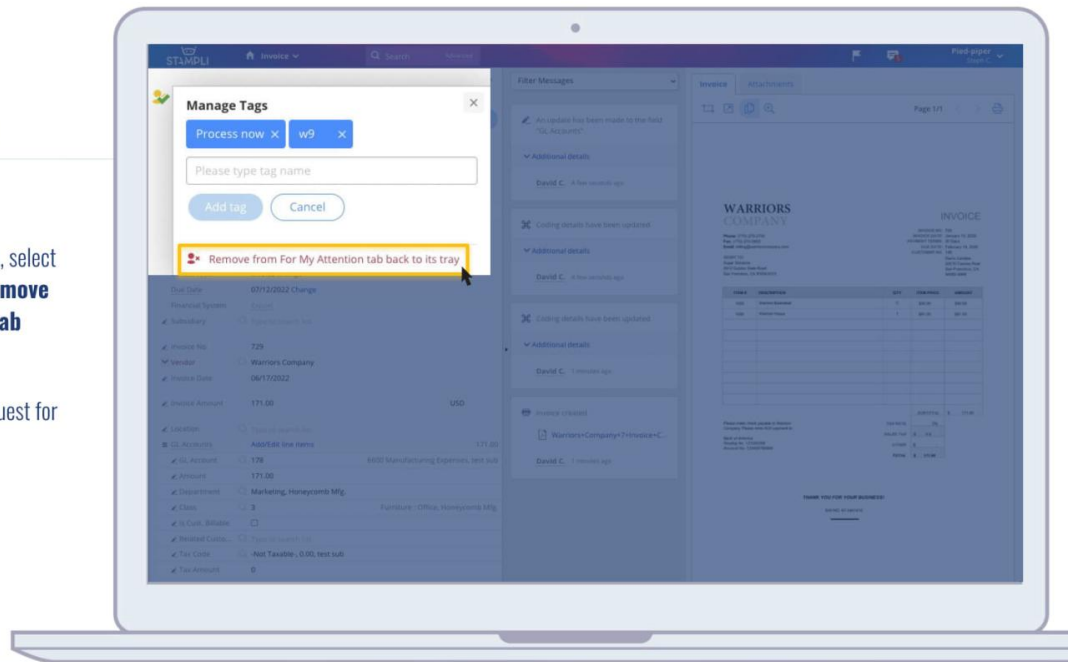
- Invoices you have marked For My Attention
- Invoices requiring an action from you
- Invoices you are awaiting action from someone



For My Attention

To remove items from the folder:

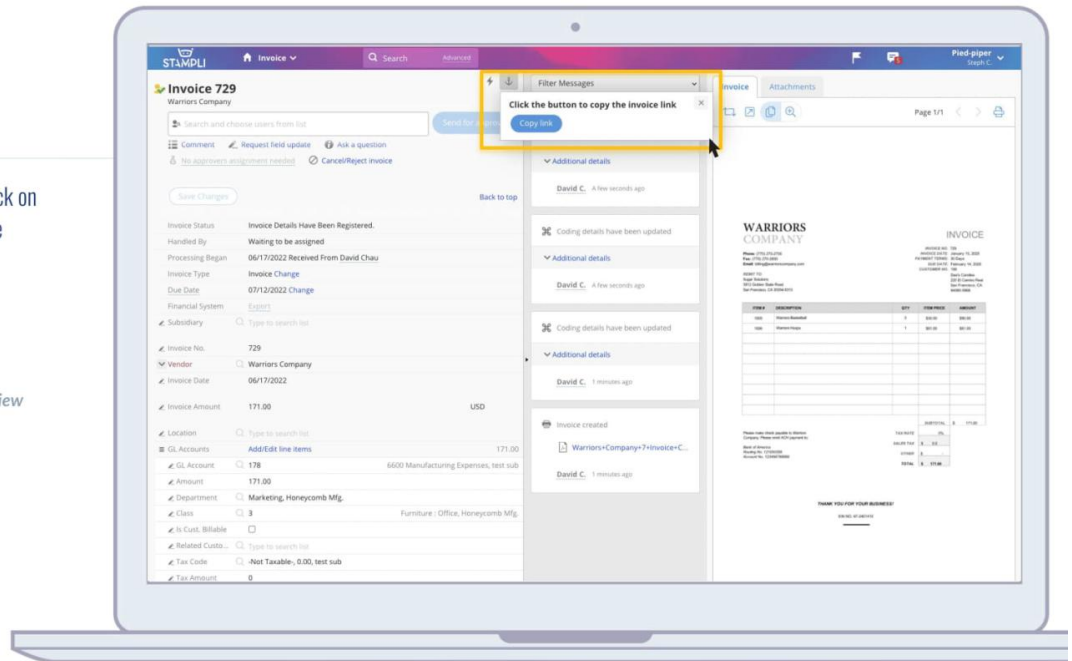
1. For invoices manually moved, select the person icon and click **Remove from For My Attention tab back to its tray**
2. Respond to an inquiry or request for update or approval.



Anchor Link

To share the URL of the invoice, click on the **Anchor** icon beside the invoice number and click the **Copy Link** button.

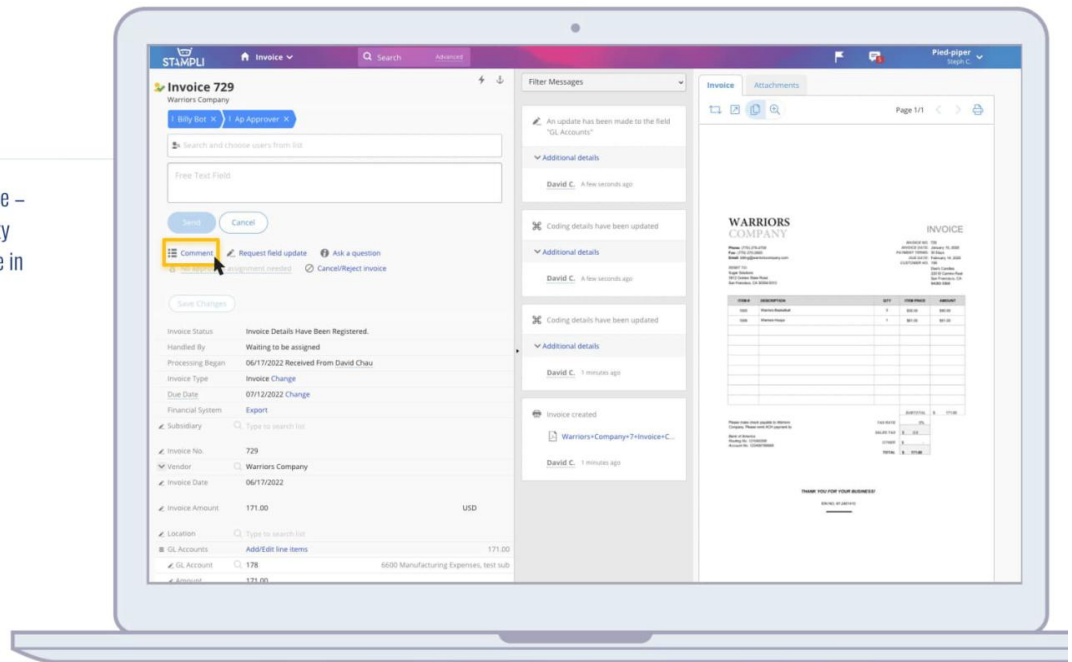
NOTE: Only users with permission to view the invoice will be able to see it.



Comment

To provide a comment on the invoice – which will be viewable in the activity thread – click **Comment** and write in the free text field.

Attachments can also be added.

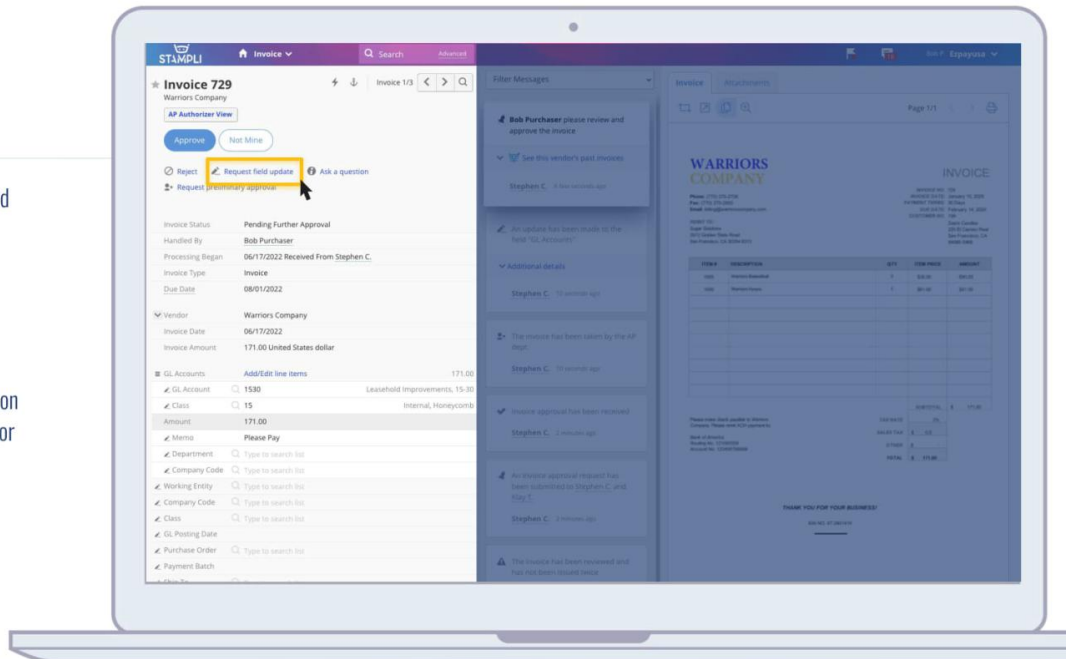


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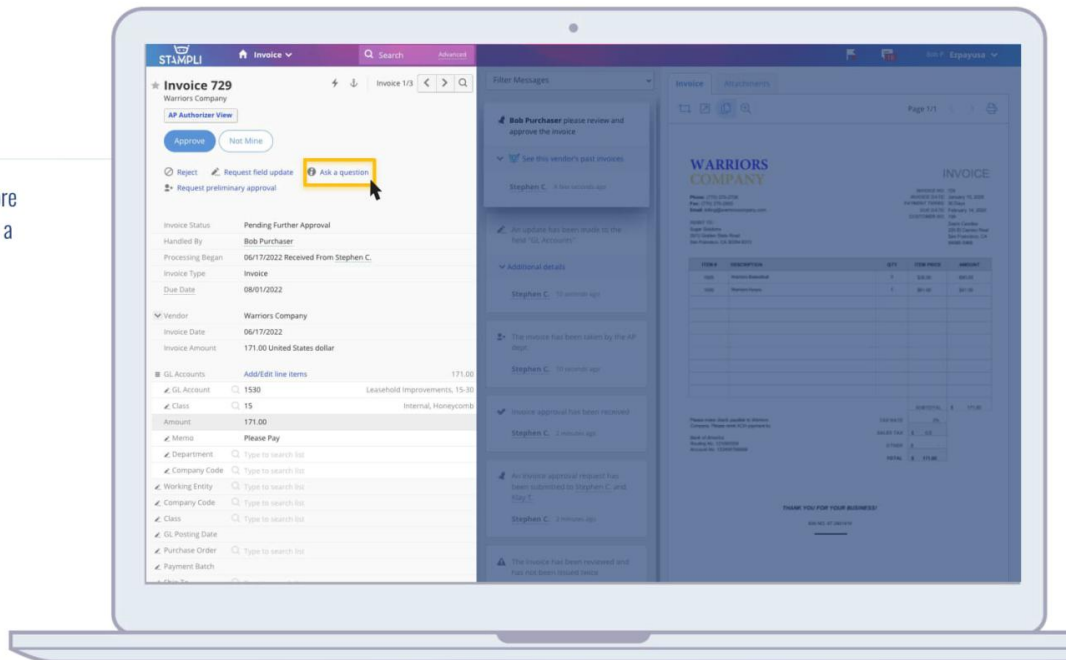
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Ask a Question

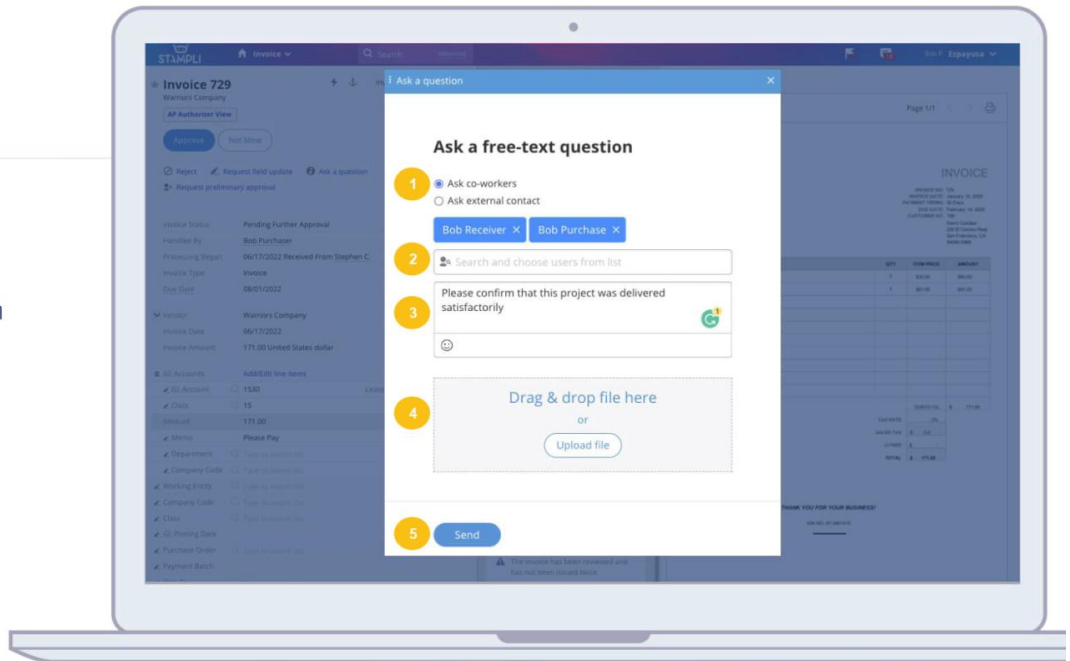
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Ask a Question: Internal

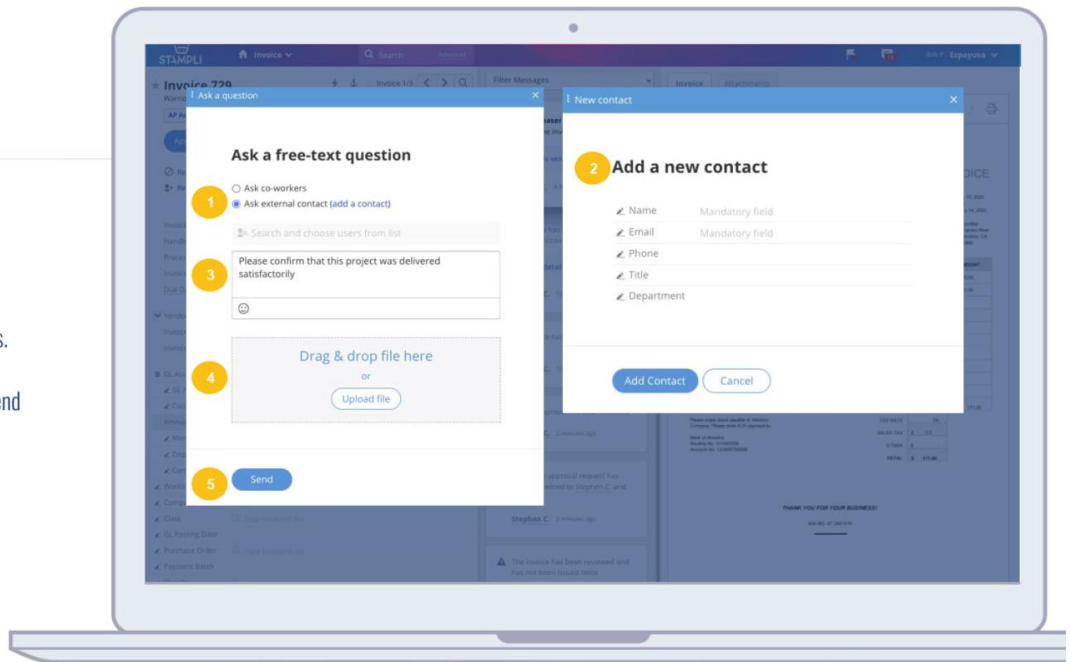
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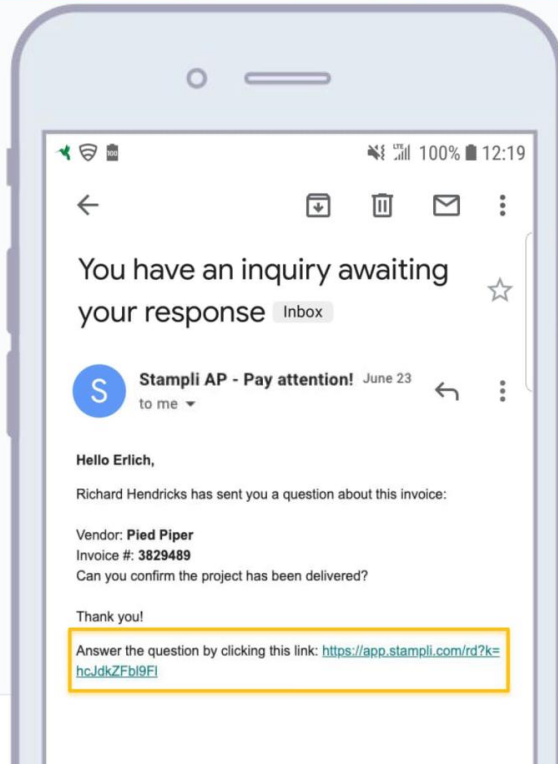
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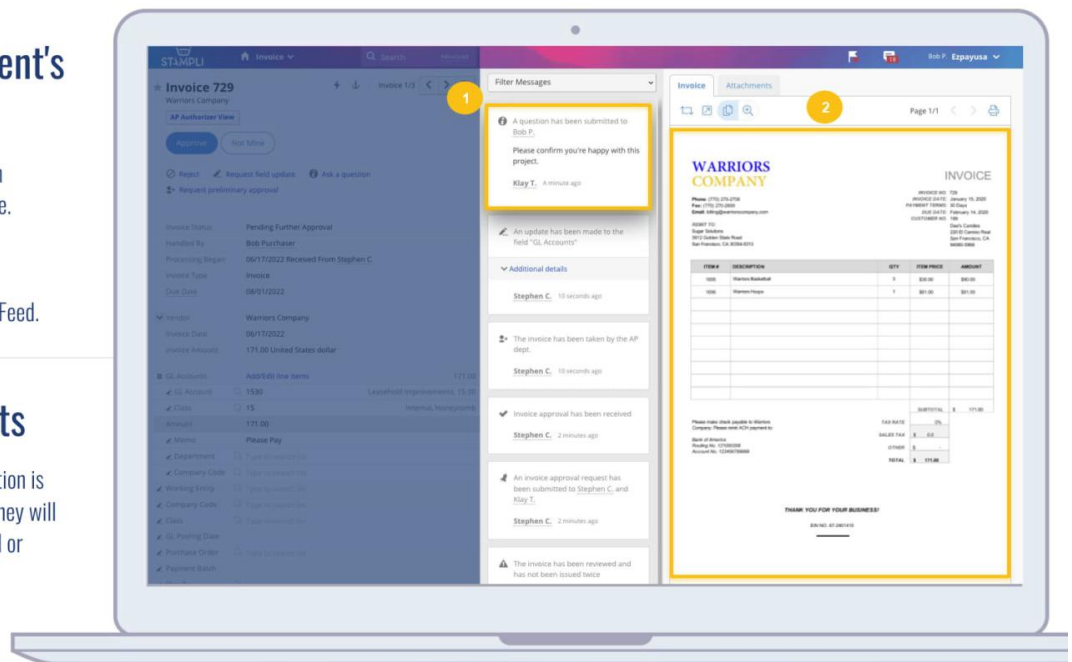
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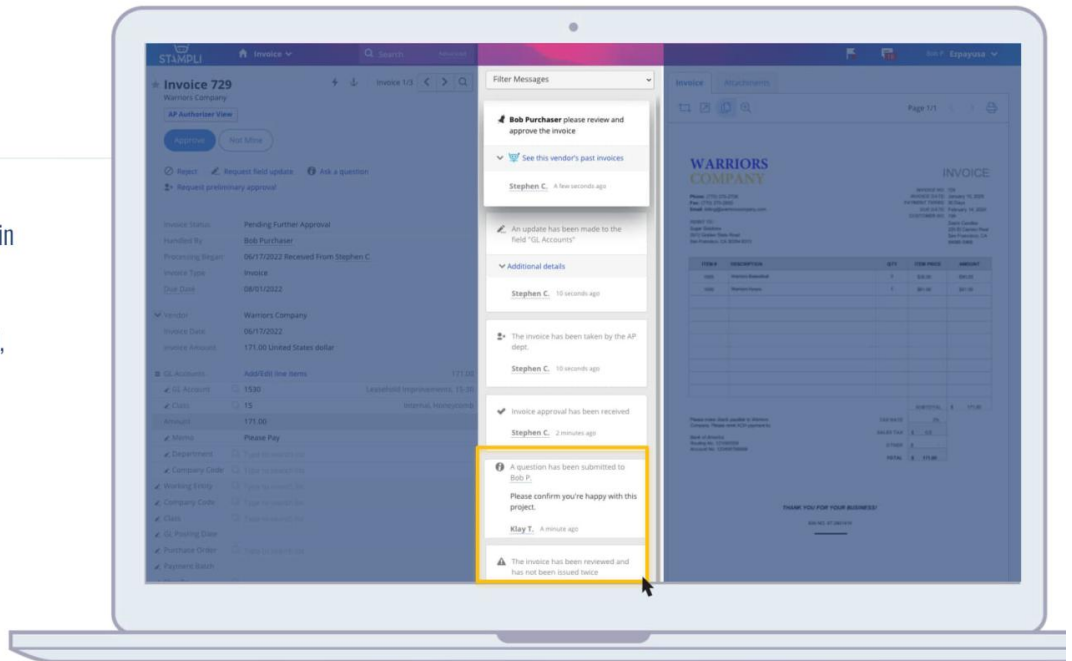
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Question Response

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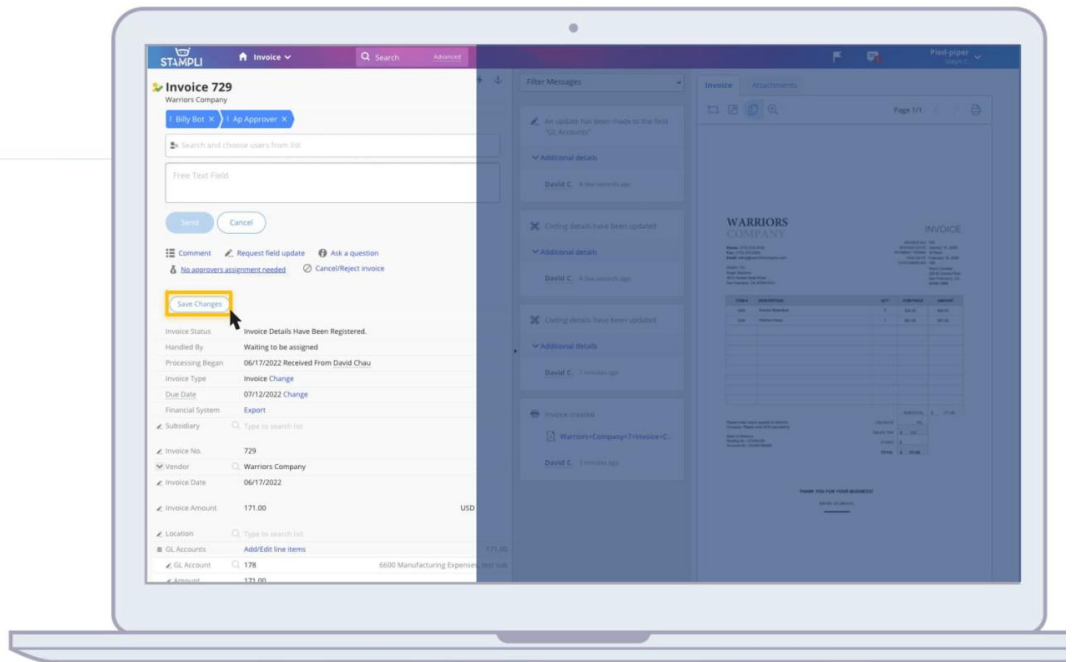
If further clarification is needed, an Approver can click **Reply**.



Save Changes (Register Invoice)

After coding the invoice, click **Save Changes**.

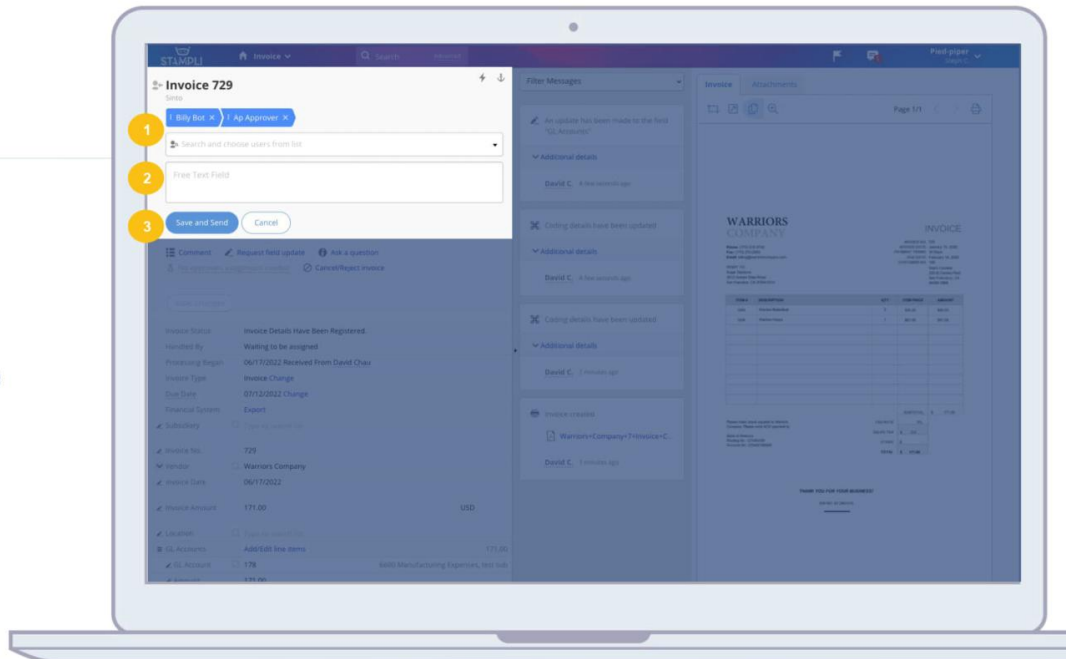
At this point the invoice is registered and will be displayed in the Vendor Portal.



Route for Approvals

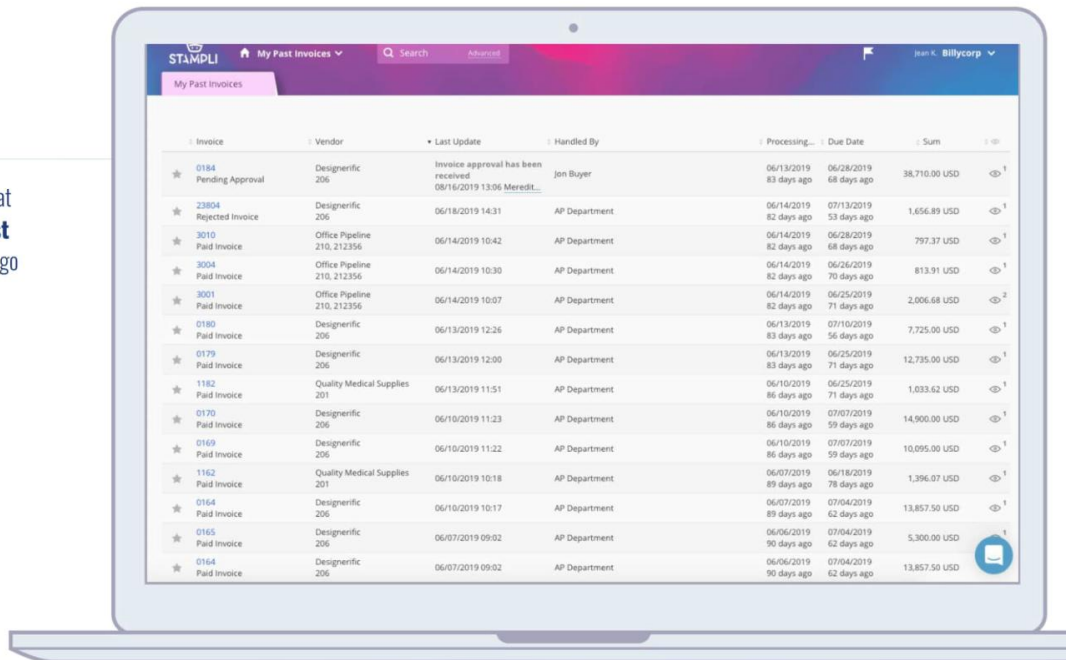
Once the invoice is ready for approval:

1. Use Billy's auto-suggestions or manually enter approver names. With multiple approvers, the invoice will be sent in the order that approvers are entered.
2. Enter comment as needed.
3. Click **Save and Send**.



My Past Invoices

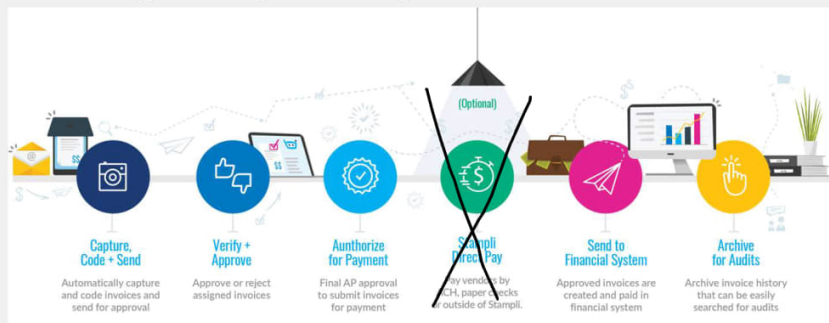
To view the status of all invoices that you have processed, select **My Past Invoices** from the main menu and go to the **My Past Invoices** tab.



Invoice Submittal & Processing

SUBMITTING INVOICES TO STAMPLI FOR PROCESSING

- Create a Purchase Requisition and obtain the required approvals in Sage Intacct.
- This Purchase Requisition will then be converted into a PO after approval.
- Submit all (**NON-PROJECT RELATED**) invoices to scsapinvoices@mystampli.com
- **PDFs are REQUIRED. Do not send multiple invoices in one attachment, they must be separate.**
- **DO NOT SEND INVOICES TO Accounting Email after 9/1.**
- **Update your vendors if they have been sending directly to the Accounting email.**
- When the invoice arrives, it will match to the Purchase Order in Stampli and cost code the bill with auto-coding capabilities. All invoices will require approvals. Some will auto sort to those approvers, or you will receive a forward for approval within Stampli from the Accounting AP team.



Utility Guide - Electric (For Property Management)

Property	Property Address	Unit Count	Property Manager	Utility Company (Electric)	AP Responsible Contact
Alexander Estates	2015 Webster Street Merrill, WI 54452	14	Tanya Kleinschmidt	WPS	Jennifer M
Birchwood Apartments	2921 George Rd Apartment 102 Wisconsin Rapids, WI 54495	64	Sandra Hanson	Water Works and Lighting Commission	Jacob T
Blue Stone Estates	940-950 Blue Stone Ln Marathon City, WI 54448	58	Ryan Malone	WPS	Jennifer M
Gibson Estates	765-767 S Gibson St Medford, WI 54451	32	Cathy Wierzb	Medford Electric Utility	Jacob T
Hilltop Apartments	625 E Chesak Ave Edgar, WI 54426	16	Ryan Malone	We Energy	Jennifer M
Hill Street Estates	724 W Hill St Eagle River, WI 54521	56	Cathy Wierzb	Eagle River Light & Water Utility	Jacob T
Moon Lake Estates	515 Moon Lake Dr Apartment 12 Rice Lake, WI 54968	204	Wendy Holub	Rice Lake Utility	Jacob T
Northside Estates	1201 N Memorial Dr / 2401 Semling Dr Merrill, WI 54452	12	Cathy Wierzb	WPS	Jennifer M
Pine View Estates	1620 Old Hwy 51 Apartment 5 Kronenwetter, WI 54455	90	Ryan Malone	WPS	Jennifer M
River Trail Estates	6903 Weston Ridge Dr. Apartment 2 Weston, WI 54476	113	David Marshall	WPS	Jennifer M
River View Apartments	1200 River View Ave Apartment 26 Stevens Point, WI 54481	160	Deb Wisinski	WPS	Jennifer M
SCS Athens	713 Caroline Street Athens, WI 54411	0	<i>In Construction</i>	Excel Energy	Jennifer M
SCS Black River Falls	N6695 Riverview Drive Black River Falls, WI 54615	96	Julia Hutchinson	Black River Falls Municipal Utilities	Jacob T
SCS Chilton	1110 S. Irish Road Chilton, WI 53014	102	Randi Zimmer	WPS	Jennifer M
SCS Eau Claire	4395 Christopher Drive Eau Claire, WI 54703	188	Mechelle Holland	Excel Energy	Jennifer M
SCS Florence	5863 Chapin Street #33 Florence, WI 54121	44	Laura Munn	Florence Utilities	Jacob T
SCS Fox Point	1901 E 14th Street Merrill, WI 54452	56	Cathy Wierzb	WPS	Jennifer M
SCS Hortonville	121 Givens Road Hortonville, WI 54944	112	Austin Emunson	WE Energy	Jennifer M
SCS Investments/SFR Homes	401 Ranger Street Mosinee, WI 54455	25	Ali Manebroeker	WPS	Jennifer M
SCS Marshfield Estates	1306 N Hume Ave Apartment 48 Marshfield, WI 54449	160	Paulina Khemajli	WE Energy	Jennifer M
SCS Merrill	2301 W. Jackson St. Merrill, WI 54452	160	Tanya Kleinschmidt	WPS	Jennifer M
SCS Niagara	865 Coodidge Ave #17 Niagara, WI 54151	45	Laura Munn	WE Energy	Jennifer M
SCS Oshkosh	4105 State Road 91 Oshkosh, WI 54904	172	Rebecca Willoughby	WPS	Jennifer M
SCS Rapids	3320 Norton St Apartment 101 Wisconsin Rapids, WI 54494	128	Sandra Hanson	Water Works and Lighting Commission	Jacob T
SCS Rothschild	10000 Calumet Street Rothschild, WI 54474	68	David Marshall	WPS	Jennifer M
SCS Shawano	1090 Engel Drive Shawano, WI 54166	200	Amanda Schley	Shawano Municipal Utilities?	Jacob T
SCS Stanley	1419 Pine St Stanley, WI 54788	48	Jeano Lehr	Clark Electric Cooperative	Jacob T
SCS Sturgeon Bay Estates	4115 S. Grant Ave Apartment 3 Sturgeon Bay, WI 54235	56	Amanda Schley	Sturgeon Bay Utilities	Jacob T
SCS Sunset Estates	845 N 8th Avenue Sturgeon Bay, WI 54235	26	Amanda Schley	Sturgeon Bay Utilities	Jacob T
SCS Waupaca	1318 Stone Ridge Rd Apartment 12 Waupaca, WI 54981	152	Tim Mueller	WPS	Jennifer M
SCS Wolf River	305 West Wolf River Avenue New London, WI 54961	0	<i>In Construction</i>	New London utilities	Jacob T
Urban West	1425 N 12th Ave. Wausau, WI 54401	66	Erin Besteman	WPS	Jennifer M
Village Estates	1190 Kronenwetter Dr Kronenwetter, WI 54455	40	David Marshall	WPS	Jennifer M
Westhaven Apartments	1000 Rangeline Rd / 1000-1004 20th St / 1001 19th St / 1920 Beaver Rd Mosinee, WI 54455	58	Ryan Malone	WPS	Jennifer M
Westwood Estates	1470 Westwood Dr Apartment 33 Wausau, WI 54401	90	Erin Besteman	WPS	Jennifer M
Willow Estates	3500 Willow Dr Apartment 5 Plover, WI 54467	183	Nadia Ockwig	WPS	Jennifer M

Utility Processing Guidelines

- Utilities will be sent to Stamppli for processing scsapinvoic@mystamppli.com Only send PDFs to this email. Separate by utility company, do not separate the invoice by unit/page. Property Managers - if you receive a bill at your location, please send in, ALWAYS.
 - Once received in Stamppli, the AP Contact will route the appropriate invoices to the Property Manager. The AP Contact will complete their fields as far down as they can go.
 - All invoices for electric utilities will be required to be billed to the unit accordingly.
 - The AP Contact will add any notes for clarification as part of the approval process before sending to the Property Manager.
 - Once the Property Manager receives their electric invoices to be cost centered- the Property Manager will complete the next few steps: *Invoices will arrive in your "For My Attention" tab in Stamppli, you will also receive an email notification.*
 - You are reviewing if the Units on the bill are indeed "Vacant" and SCS should be paying for the electric for the unit.
 - You are also reviewing if the Units on the bill should be charged to a tenant as they failed to change over the utilities properly as part of the lease agreement, or they took them out of their name too early.
 - BE CRITICAL!! This step is to ensure SCS does not pay for utilities that should be in the customer's name. You as Property Managers know your tenants, their move in dates, etc.
 - Upon your review, you will comment on the invoice in Stamppli (only, do not email, or Teams), regarding the status of each unit. You will cost code all others as possible, using the GL Accounts line item feature, to add additional line items.
 - Comment Option -1: This is a vacant unit (AppFolio Unit #) - SCS charge. Thank you
 - Comment Option -2: This charge is for Tenant [NAME] in unit (AppFolio Unit #) - tenant charge should be added to the tenant ledger. I will follow up with the tenant to switch utilities to their name. Thank you
 - Once you have commented on the invoice in Stamppli, you will contact your tenants for follow up that they need to change the electric bill to their name. Once this contact is complete, please make a note in the tenant file regarding the follow up conversation in AppFolio
 - ***There was a great idea during training by Deb W to reduce errors, she requests a confirmation when following up with the tenant their first week or so (via email or text) - confirming they have indeed changed over the utilities as instructed as in the lease agreement
 - ***The more diligence you have to ensure that units' electrical has been changed appropriately as part of the tenants first week or so, will reduce the invoices you must review at the end of the month!
 - Lease Up properties will have a bit more to manage, as occupancy increases you will have less to review. You can make one comment listing any units that are vacant.
 - ***Any properties under construction and still being built and NOT turned over to leasing will be sent to Construction via SCM. If you receive these bills at your location, please send to scs@invoices.corecon.com. This will ensure they are charged to project costs.
 - Once you have verified the invoice, entered your cost centers, and made your comments, you will use the route/approval feature to send it back to the appropriate AP contact.
 - ***Cost Center Reminder: GL Account: 60030 Utilities, Company: E200, Department: D25 Utilities, Property: You must get to the Unit Level Here (Unit Numbers match AppFolio), Project: Utilities Pass Thru, Cost Code: UT0002 Electric & Gas, Cost Type: UT Utilities
 - The AP Contact will then review, ensure cost centering is accurate, and submit the invoice for final processing in Stamppli to Sage Intacct.
 - The AP Contact will enter tenant ledger charges for all units that should have been charged to the tenant.
 - If the charge is for a vacating tenant, the Property Manager will enter as part of the Security Deposit reconciliation/deduction upon the tenant departure.
- ***If there are any questions during the process, please message via Stamppli your AP Contact for direction or help. You will use the "Ask a question" option to request clarification or ask any questions.

Callouts:

- Top Left:** This is where you will assign the next approver or person in the workflow.
- Top Right:** Use this to page through the invoice, there may be multiple pages!
- Left Side (Comment):** Use this button to leave your comments as part of this process.
- Left Side (Request Field Update):** Use this to ask a question to direct person in Stampli, by searching their name.
- Right Side (Attachments):** Use these icons to rotate, make larger, or zoom.
- Bottom Center:** If you edit anything, make sure you click Save when available!
- Bottom Right:** This is your help button for help with Stampli as a system, not for questions about SCS processes.
- Source Field:** Remember Billy is learning, and if he appears he is filling in fields for you, you are still required to VERIFY for accuracy.

STAMPLI INVOICE FIELDS

Accounting Fields

- Source
- Invoice #
- Vendor
- Invoice Date
- Amount** (verify the math)
- PO # (Verify Match)
- GL Account (GL Accounts if **splitting**)
- Allocation (if applicable)
- Subtotals (verify all of the taxes on invoice)

Approver/Coder Fields

- PO # (Review for accuracy)
- GL Account (Review for accuracy)
- Amount**
- Company
- Department
- Property
- Project
- Cost Code
- Cost Type
- Memo (Business Purpose)

Cost Coding Field Responsibilities

Search and choose users from list

Save Changes Back to top

Handled By: Waiting to be assigned

Processing Began: 08/01/2024 Received From Jerry Hauck

Invoice Type: Invoice Change

Due Date: 08/31/2024 Change

Financial System: Export

Source: N/A Change

Invoice No: Mandatory field

Vendor: Amazon Business - American Express

Invoice Date: 08/01/2024

Invoice Amount: 37.84

GL Posting Date: MMDDYY

Purchase Order: Type to search list

GL Accounts: Add/Edit line items

GL Account: Type to search list

Amount: Numerical value

Company: Type to search list

Department: Type to search list

Property: Type to search list

Project: Type to search list

Cost Code: Type to search list

Cost Type: Type to search list

Item: Type to search list

Allocation: Type to search list

Memo: Type to search list

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Cost Code

Cost Type

Memo (Business Purpose)