

# CAL-E-GRANTS REFERENCE GUIDE: INVOICING

1. From the **Grants** tab, select the grant you wish to create an invoice for

G. ↑	Grant Number	Funding Opportunity	Application	Total Gran...	Status	Record Type	C
G-0346	test-grant-bb2	AB 628 Breaking Barriers to Employment Initiative 2.0	Test-BB2-1/26(SH)	\$250,000.00	Active	AB 628 Breaking Barriers to Empl...	1,

2. The search bar can also be used to locate the grant

G. ↑	Grant Number	Funding Opportunity	Application	Total Gran...	Status	Record Type	C	
1	G-0346	test-grant-bb2	AB 628 Breaking Barriers to Employment Initiative 2.0	Test-BB2-1/26(SH)	\$250,000.00	Active	AB 628 Breaking Barriers to Empl...	1,

3. Click on the **New Invoice** button to create an invoice

Grant Name	Project Period	Total Grant Amount	Adjusted Grant Amount	Total Invoiced Amount
Test-BB2-1/26(SH)	5/22/2024 - 1/17/2026	\$250,000.00	\$250,000.00	\$25,282.11

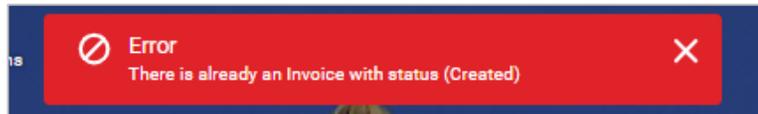
Grant Information

Grant Name	Grant Number
Test-BB2-1/26(SH)	test-grant-bb2
Funding Opportunity	Application
AB 628 Breaking Barriers to Employment Initiative 2.0	Test-BB2-1/26(SH)

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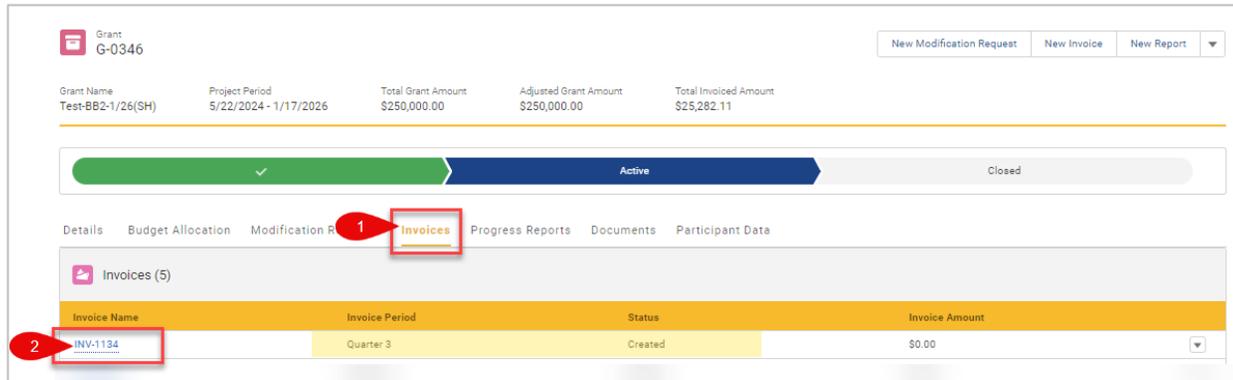
4. If a previous invoice was started or submitted and has not been approved yet, an error message will appear

If this is the first invoice, please skip to step 6

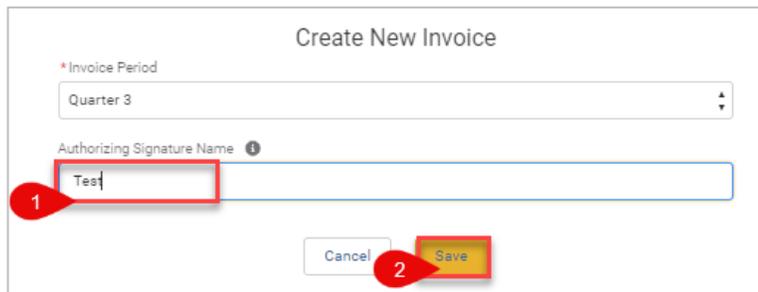


5. To locate the pending invoice, click on the **Invoices** tab

Then locate the invoice that was previously created and click on the **Invoice Name** to continue



6. Input your signature to authorize and click on the **Save** button



7. A successful message will appear at the top of the screen



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8. In order to proceed with the invoice, click on **I Agree** after reading the acknowledgment

GMS Invoice INV-1134

Submit for Approval Edit Delete

Grant	Invoice Number	Invoice Period	Invoice Amount
G-0346		Quarter 3	\$0.00

Created Submitted for Approval Approved Denied

Budget Summary Details Documents

▼ Acknowledgement

By signing and submitting an Invoice, you 'The Applicant' are agreeing to these terms and signing on behalf of the Lead Application Agency (Applying Organization).

I Disagree **I Agree**

9. Click on the **Proceed** button to move forward

Confirmation

You have decided to agree to the terms and conditions. Please click to Proceed.

**Proceed** Cancel

10. Under the **Documents** tab, click on the **New** button to upload any document

GMS Invoice INV-1134

Submit for Approval Edit Delete

Grant	Invoice Number	Invoice Period	Invoice Amount
G-0346		Quarter 3	\$0.00

Created Submitted for Approval Approved Denied

Budget Summary Details **Documents**

**New**

Name	Status	Versions	Action
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11. Enter a **Document Name**, select **Document Format**, and then click on the **Save** button

Document Details

\* Document Name  
TEST

Document Format  
--Select Value--

PDF  
Word  
ZIP  
All types

Save

12. Click on the **Submit for Approval** button to submit for review

*Note: Once the invoice has been submit, staff will need to approve or deny before another can be submitted in its place*

GMS Invoice  
INV-1134

Grant: G-0346 Invoice Number: Invoice Period: Quarter 3 Invoice Amount: \$0.00

Submit for Approval Edit Delete

Created Submitted for Approval Approved Denied

Budget Summary Details Documents

Save

Line Item	Budget Line Item	Allocated Grant Fund Amount	Grant Fund Expended to Date	Grant Fund Expenditure	Remaining Grant Fund Amount	Allocated Leveraged Fund Amount	Leveraged Fund Expended to Date	Leveraged Fund Expenditure	Remaining Leveraged Fund Amount
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13. A successful message appears and the invoice will move to **Submittal for Approval** status

The screenshot displays a user interface for invoice management. At the top, a green success banner with a checkmark icon and a close button (X) reads "Success Your Invoice is submitted for approval". Below this, the invoice details are shown: "GMS Invoice INV-1134" with a "Submit for Approval" button, and "Edit" and "Delete" buttons. A table lists the following information:

Grant	Invoice Number	Invoice Period	Invoice Amount
G-0346		Quarter 3	\$0.00

Below the table is a horizontal progress bar with four stages: a green bar with a checkmark, a blue bar labeled "Submitted for Approval" (highlighted with a red box), a grey bar labeled "Approved", and a grey bar labeled "Denied". At the bottom left, there are tabs for "Budget Summary", "Details", and "Documents". A "Save" button is located at the bottom right.