

How To Create Voucher Approval

Here are the steps on how to create voucher approval if you are logged in as a **Vendor Contact**:

1. Login as vendor contacts (see [How To Login as Vendor Contacts](#)).
2. Expand **Purchasing** and then click **Vouchers**.
3. Click **New** button from **Search Voucher**.
4. Voucher screen will open. By default, Vendor of the contact that is currently logged will be displayed in Vendor field and is read-only. Also, **Require Approval** for this voucher is checked automatically with the status **Ready for Submission**.

The screenshot shows the 'Voucher - CRACKED MUG' form. The 'Require Approval' checkbox is checked, and the status is 'Ready for submission'. The 'Approval Notes' field is empty. The form includes fields for Type, Vendor, Invoice No, Invoice Date, Check Comments, Post Date, Terms, Due Date, Reference, Ship From, Ship To, Location, Pay To, Voucher No, AP Account, Withheld Amount, Currency, and Ordered By. A table at the bottom shows the voucher details with columns for Item No, Description, Misc Description, UOM, Ordered, Billed, Cost Currency, Exchange Rate, Cost, Cost UOM, Gross/Net UOM, Net Weight, Discount, Tax, Total, Account ID, and Account Description.

5. Enter details (see [How To Create Vouchers](#)) and save.

The screenshot shows the 'Voucher - CRACKED MUG' form after saving. The 'Require Approval' checkbox is checked, and the status is 'Ready for submission'. The 'Approval Notes' field is empty. The form includes fields for Type, Vendor, Invoice No, Invoice Date, Check Comments, Post Date, Terms, Due Date, Reference, Ship From, Ship To, Location, Pay To, Voucher No, AP Account, Withheld Amount, Currency, and Ordered By. A table at the bottom shows the voucher details with columns for Item No, Description, Misc Description, UOM, Ordered, Billed, Cost Currency, Exchange Rate, Cost, Cost UOM, Gross/Net UOM, Net Weight, Discount, Tax, Total, Account ID, and Account Description.

6. Click **Submit** button. This will notify assigned approvers that they have vouchers for approval.

The screenshot shows an email notification from iRely Software. The email subject is 'i21 - For Approval'. The email body says 'You have the following Voucher to approve: BL-128 - CRACKED MUG'.

7. Status of the voucher will also change to **Awaiting Approval**.

The screenshot shows the 'Voucher - CRACKED MUG' form with the 'Require Approval' checkbox checked and the status 'Awaiting approval'. The 'Approval Notes' field is empty.

Here are the steps on how to create voucher approval if you are logged in as a **Vendor Contact**:

1. Login as vendor contacts (see [How To Login as Vendor Contacts](#)).
2. Expand **Purchasing** and then click **Vouchers**.
3. Click **New** button from **Search Voucher**.

4. Voucher screen will open. By default, Vendor of the contact that is currently logged will be displayed in Vendor field and is read-only. Also, **Require Approval** for this voucher is checked automatically with the status **Ready for Submit**.

Voucher - Cracked Mug

New Save Search Delete Undo Duplicate Post Pay Recap Add Receipt Approve Submit Reject Close

Details Prepaid and Debit memos Attachments (0) Comments (0) Audit Log (0)

Type: Voucher Post Date: 01/27/2016 Contact: Cracked Mug Voucher No:
Vendor: Cracked Mug Terms: Net 15 Ship From: Location 1 AP Account: 20000-0000-000
Invoice No: 123456789 Due Date: 02/11/2016 Ship To: Withheld Amount: 0.00
Invoice Date: 01/27/2016 Reference: Location: Currency: USD
Check Comments: Ship Via Ordered By: Recurring:
+ Insert Open Tax Details Remove Get previous details Layout Filter Records (F3)
Contract Item No. Description Misc Description Ordered Bill Cost Cost UOM Gross/Net UOM Net Weig... Discou... Tax Total Account ID Comment
test 1 1 100.00 0.00 0% 0.00 100.00
Ship From: 123 Test Drive Indianapolis, IN 46204 United States Approval Require Approval: ☒ Status: Ready for submit Subtotal: 0.00 Shipping: 0.00 Tax: 0.000000 Total: 0.00 Amount Paid: 0.00 Amount Due: 0.00
Ship To: 4242 Flagstaff Cove Fort Wayne, IN 46815 United States Approval Notes:
Edited Page 1 of 1

5. Enter details (see [How To Create Vouchers](#)) and save.

Voucher - Cracked Mug

New Save Search Delete Undo Duplicate Post Pay Recap Add Receipt Approve Submit Reject Close

Details Prepaid and Debit memos Attachments (0) Comments (0) Audit Log (1)

Type: Voucher Post Date: 01/27/2016 Contact: Cracked Mug Voucher No: BL-93
Vendor: Cracked Mug Terms: Net 15 Ship From: Location 1 AP Account: 20000-0000-000
Invoice No: 123456789 Due Date: 02/11/2016 Ship To: 0001 - Fort Wayne Withheld Amount: 0.00
Invoice Date: 01/27/2016 Reference: Location: Currency: USD
Check Comments: Ship Via Ordered By: Recurring:
+ Insert Open Tax Details Remove Get previous details Layout Filter Records (F3)
Contract Item No. Description Misc Description Ordered Bill Cost Cost UOM Gross/Net UOM Net Weig... Discou... Tax Total
test 1 1 100.00 0.00 0% 0.00 100.00
Ship From: 123 Test Drive Indianapolis, IN 46204 United States Approval Require Approval: ☒ Status: Ready for submit Subtotal: 100.00 Shipping: 0.00 Tax: 0.000000 Total: 100.00 Amount Paid: 0.00 Amount Due: 100.00
Ship To: 4242 Flagstaff Cove Fort Wayne, IN 46815 United States Approval Notes:
Saved Page 1 of 1

6. Click **Submit** button. This will notify assigned approvers that they have vouchers for approval.

Search Current Mailbox (Ctrl+E) Current Mailbox

All Unread By Date Newest

Today

No Reply For Approval. 16:48

You have the following Voucher to approve:

Reply Reply All Forward

Wed 1/27/2016 16:44

No Reply For Approval.

To Approver 1

You have the following Voucher to approve: [BL-93 - Cracked Mug](#)

7. Status of the voucher will also change to **Awaiting Approval**.

Approval

Require Approval: ☒ Status: Awaiting approval

Approval Notes:

Here are the steps on how to create bill approval:

1. Login as vendor contacts (see [How To Login as Vendor Contacts](#)). When you're logged in as vendor contact, you will only see **Favorites**, **Vendor** and **Bill** on your menu.



2. Click **Vendor > Bill** and click **New** button to open blank **Bill** screen. Notice that **Transaction Type** is defaulted to **Bill Approval**.

The screenshot shows the 'Bill' screen in the application. The 'Transaction Type' is set to 'Bill Approval'. The 'Vendor ID' is 'V-001'. The 'Date' is '06/17/2015'. The 'Invoice Date' is '06/17/2015'. The 'Currency' is 'USD'. The 'Invoice No.' is blank. The 'Bill No.' is blank. The 'Ship From' is 'L-001' and the 'Ship To' is blank. The 'Ordered By' is blank. The 'Contact' is 'C-001'. The 'Ship Via' is 'UPS Ground'. The 'Due Date' is '07/17/2015'. The 'Terms' are '5% 10 Net 30'. The 'AP Account' is '26003-0000'. The 'Location' is blank. The 'Withheld Amount' is '0.000000'. The 'Reference' is blank. The 'Approval Notes' are blank. Below the details, there is a table with columns: Item No., Description, Misc Description, Ordered, Received, Discoun..., Tax, Cost, Total, Account ID, and Comments. The table is currently empty. At the bottom right, there is a summary section with fields for Subtotal, Shipping, Tax, and Total, all showing '0.000000'. The status bar at the bottom indicates 'Edited' and 'Page 1 of 1'.

3. Create bill entry (see [How To Create Bill Entry](#)) and save transaction.

The screenshot shows the 'Bill' screen after saving the transaction. The 'Transaction Type' is still 'Bill Approval'. The 'Vendor ID' is 'V-001'. The 'Date' is '06/17/2015'. The 'Invoice Date' is '06/17/2015'. The 'Currency' is 'USD'. The 'Invoice No.' is blank. The 'Bill No.' is 'BL-45697'. The 'Ship From' is 'L-001' and the 'Ship To' is '1'. The 'Ordered By' is 'AGADMIN'. The 'Contact' is 'C-001'. The 'Ship Via' is 'UPS Ground'. The 'Due Date' is '07/17/2015'. The 'Terms' are '5% 10 Net 30'. The 'AP Account' is '26003-0000'. The 'Location' is '1'. The 'Withheld Amount' is '0.000000'. The 'Reference' is 'This is a test.'. The 'Approval Notes' are blank. Below the details, there is a table with columns: Item No., Description, Misc Description, Ordered, Received, Discoun..., Tax, Cost, Total, Account ID, and Comments. The table contains two rows: one for 'Service' and one for 'NON-INV'. The 'Service' row has 'Ordered' 1, 'Received' 1, 'Discoun...' 0%, 'Tax' None, 'Cost' 5.00, 'Total' 5.00, and 'Account ID' 93000-0000. The 'NON-INV' row has 'Ordered' 1, 'Received' 1, 'Discoun...' 0%, 'Tax' None, 'Cost' 5.00, 'Total' 5.00, and 'Account ID' 93000-0000. At the bottom right, there is a summary section with fields for Subtotal, Shipping, Tax, and Total. The 'Subtotal' is '10.000000', 'Shipping' is '0.000000', 'Tax' is '0.000000', and 'Total' is '10.000000'. The status bar at the bottom indicates 'Saved' and 'Page 1 of 1'.