

How To Approve Vouchers

Vouchers created where **Require Approval** button is checked needs to be approved first before it can be posted. Approving of vouchers can only be performed by the **Approvers** included in the **Approval List** set for the vendor (See [How to Create an Approval List](#)) and depending on the **Approver Level** setup (see [How to Create an Approval List](#)).

There are two ways on how to approve vouchers: via Vendor Expense Approval and directly via Vouchers screen:

via Vendor Expense Approval screen

- 1. Login into i21 using the credentials of one of the **Approver**.
- 2. Open **Vendor Expense Approval** screen.. (see [Vendor Expense Approval](#))
- 3. Select the vouchers and then check **Approve** checkbox.

Voucher Id	Approver Type	Vendor ID	Name	Vendor Invoice No.	Voucher Total	Due Date	Approved	Rejected	Reason
<input checked="" type="checkbox"/> BL-128	Primary	CRACKEDM...	CRACKED MUG	CM-6	300.00	07/29/20...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> BL-130	Primary	CRACKEDM...	CRACKED MUG	CM-7	75.00	07/29/20...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> BL-131	Primary	CRACKEDM...	CRACKED MUG	CM-8	100.00	06/29/20...	<input type="checkbox"/>	<input type="checkbox"/>	

- 4. Click **Save** button.
- 5. Approved bills will be removed from the list automatically. An email will be sent back to the Vendor Contact informing that bill has been approved.

i21 Approval Status - approved. Inbox x

autosupport@irely.com
to me ▾
Your Voucher has been approved. [BL-128 - CRACKED MUG](#)

autosupport@irely.com
to me ▾
...
Your Voucher has been approved. [BL-130 - CRACKED MUG](#)

via Voucher screen

- 1. Login into i21 using the credentials of one of the **Approver**.
- 2. Open the voucher created by the **Vendor Contact**.

3. Click **Approve** button and select Yes on message.

Voucher - CRACKED MUG

New Save Search Delete Undo Duplicate Post Pay Void Reverse Recap Add Payables **Approve** Submit Reject Recurring Close

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

Type: Voucher Post Date: 6/29/2016 Contact: CRACKEDMUG Voucher No: BL-135

Vendor: CRACKED MUG Terms: 5% 10 NET 30 Ship From: CRACKED MUG AP Account: 20000-0000-000

Invoice No: CM-12 Due Date: 7/29/2016 Ship To: 0001 - Fort Wayne Withheld Amount: 0.00

Invoice Date: 6/29/2016 Recur: Test Reference: 0001 - Fort Wayne Currency: USD

Check Comments: Ship Via: UPS Pay To: CRACKED MUG Ordered By:

Insert Open Tax Details Remove Get previous details Layout Filter Records (F3)

Contract	Item No.	Description	Misc Description	UOM	Ordered	Billed	Cost Currency	Exchange Ra	Cost	Cost UOM	Gross/Net UO
		MISC ITEM			1	1		0.00	15.00		

4. Voucher will be approved and saved automatically.
5. An email will be sent back to the Vendor Contact informing that bill has been approved.

i21 Approval Status - approved.

Inbox x



autosupport@irely.com

to me

Your Voucher has been approved. [BL-135 - CRACKED MUG](#)

Vouchers created where Require Approval button is checked needs to be approved first before it can be posted. Approving of vouchers can only be performed by the **Approvers** included in the **Approval List** set for the vendor (See [How to Create an Approval List](#)) and depending on the **Approver Level** setup (see [How to Create an Approval List](#)).

Entity - Cracked Mug

New Save Search Refresh Delete Undo Additional Close

Entity Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Custom Audit Log (14)

Detail Credit Card Reconciliation Taxing

Type: Company Approval List: iRely Admin

Vendor Account No: Tax No:

GL Account: 60000-0000-003 Tax State:

Currency: USD Tax Code:

Credit Limit: 0.00 Print 1099: Yes

Pay To: 1099 Name: 1099 Cracked

Payment Method: 1099 Form: 1099-INT

Terms: Net 15 1099 Type: Rents

Ship Via: Federal Tax ID:

Bill To: Location 1 W9 Signed:

Ship From: Location 1 Withholding:

Legacy Vendor ID: 0001005078 FLO Id:

Payment Control

☒ Active

☐ Always Discount

☐ EFT

☐ Hold

☒ One voucher per payment

Setup

☐ Transport Terminal

There are two ways on how to approve vouchers: via Vendor Expense Approval and directly via Vouchers screen:

via **Vendor Expense Approval** screen

1. Login into i21 using the credentials of one of the **Approver**.
2. Open **Vendor Expense Approval** screen. (see [Vendor Expense Approval](#))
3. Select the vouchers and then check **Approve** checkbox.

Vendor Expense Approval

Save Undo Reload Close

Details

Open Voucher Approve All Reject All Clear Layout Filter Records (F3)

Voucher Id	Vendor ID	Name	Vendor Invoice No.	Voucher Total	Due Date	Approved	Rejected	Reason
<input checked="" type="checkbox"/> BL-66	0001005078	Cracked Mug	aaaaa	10.00	02/11/20...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> BL-68	0001005078	Cracked Mug	adasda	100.00	02/11/20...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> BL-88	0001005078	Cracked Mug	asdsad	10.00	02/11/20...	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> BL-89	0001005078	Cracked Mug	asad	10.00	02/11/20...	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> BL-93	0001005078	Cracked Mug	123456789	100.00	02/11/20...	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> BL-94	0001005078	Cracked Mug	afda	10.00	02/11/20...	<input type="checkbox"/>	<input type="checkbox"/>	

4. Click **Save** button.

5. Approved bills will be removed from the list automatically. An email will be sent back to the Vendor Contact informing that bill has been approved.

Approval Status - approved.

Inbox x



autosupport@irely.com

to me

Your Voucher has been approved. [BL-66 - Cracked Mug](#)



autosupport@irely.com

to me

Your Voucher has been approved. [BL-68 - Cracked Mug](#)

via Voucher screen

1. Login into i21 using the credentials of one of the Approver.
2. Open the voucher created by the Vendor Contact.
3. Click **Approve** button and select Yes on message.

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 (2)

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 Q Open Q Tax Details X Remove Get previous details Layout Filter Records (F3)

Contract	Item No.	Description	Misc Description	Ordered	Billed	Cost	Cost UOM	Gross/Net UOM	Net Weig...	Discou...	Tax
		test		1	1	100.00			0.00	0%	0.00

4. Voucher will be approved and saved automatically.
5. An email will be sent back to the Vendor Contact informing that bill has been approved.



autosupport@irely.com

to me

Your Voucher has been approved. [BL-93 - Cracked Mug](#)

Bills created by **Vendor Contacts** needs to be approved first before it can be posted. Approving of bills can only be performed by the **Approvers** included in the **Approval List** set for the vendor. (See [How to Create an Approval List](#))

Entity - Juan Dela Cruz

New Save Search Refresh Undo Additional Close

Entity Vendor Locations Contacts Notes History Attachments Custom

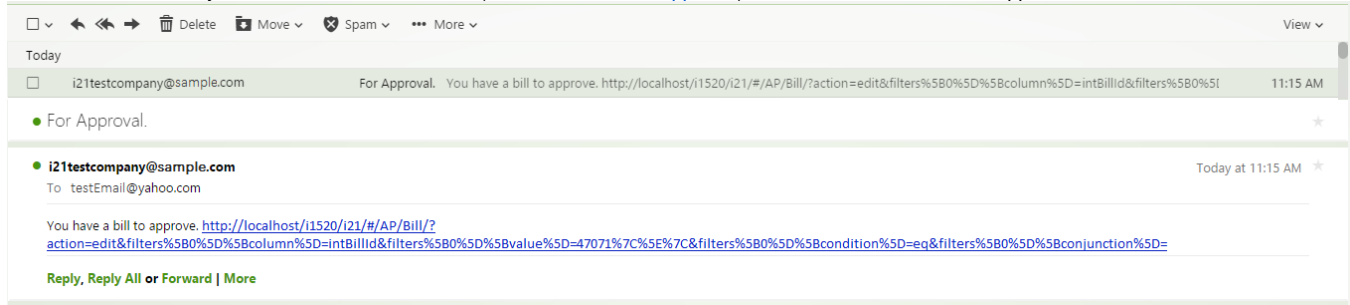
Detail Credit Card Reconciliation

Type: Company Approval List: **Admin List**

Vendor Account No: 1010101111 Tax No:

GL Account: 93000-0000 Tax State:

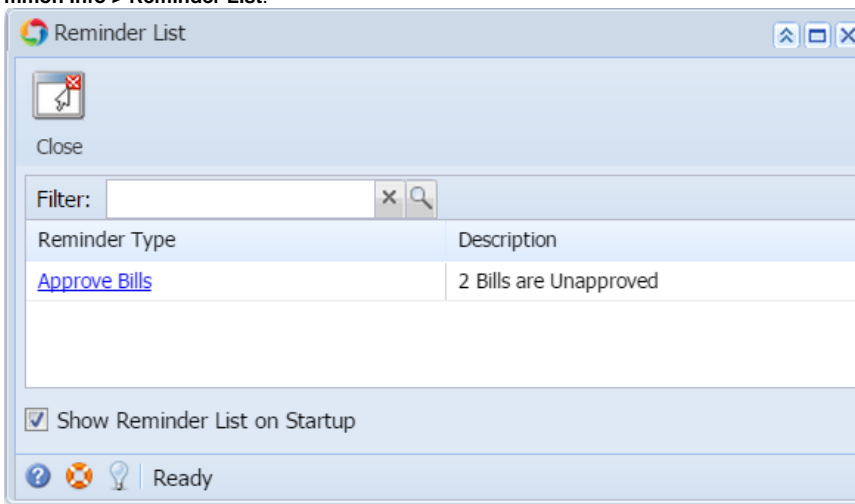
Once the bill created by the Vendor Contact is saved ([How To Create Bill Approval](#)), an email will be sent to the approvers.



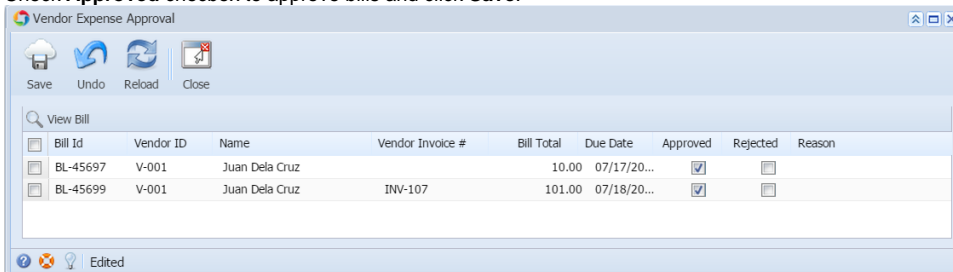
There are two ways on how to approve bills: via Reminder List and via Bill screen:

via Reminder List

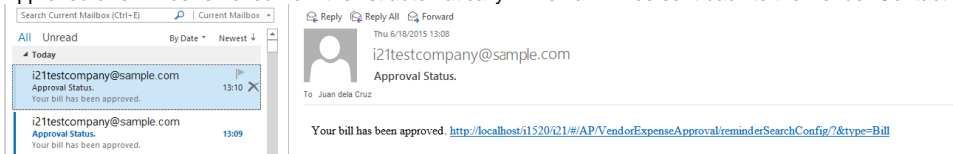
1. Login into i21 using the credentials of one of the **Approver**.
2. If **Show Reminder List on Startup** option is checked, **Reminder List** screen will be shown automatically after login. Else, open screen from **Common Info > Reminder List**.



3. Bills for approval will be listed on the grid. Click **Approve Bills** hyperlink and **Vendor Expense Approval** screen will open.
4. Check **Approved** checkbox to approve bills and click **Save**.



5. Approved bills will be removed from the list automatically. An email will be sent back to the Vendor Contact informing that bill has been approved.



via Bill screen

1. Login into i21 using the credentials of one of the **Approver**.
2. Open the bill created by the **Vendor Contact**.

3. Click **Approve** button.

The screenshot shows a web application window titled "Bill". The toolbar at the top includes buttons for New, Save, Search, Delete, Undo, Print, Recap, Add Receipt, Approve (highlighted with a red box), Reject, and Close. The main form contains fields for Transaction Type (Bill Approval), Vendor ID (V-001), Date (06/18/2015), Invoice Date (06/18/2015), Currency (USD), Invoice No (INV-206), and Bill No (BL-45700). It also includes shipping and contact information. Below the form is a table with columns: Item No., Description, Misc Description, Ordered, Received, Discoun..., Tax, Cost, Total, Account ID, Comments, Weigh..., Volume, and Storage. The table contains two rows of data. At the bottom right, there is a summary section with Subtotal, Shipping, Tax, and Total amounts.

Item No.	Description	Misc Description	Ordered	Received	Discoun...	Tax	Cost	Total	Account ID	Comments	Weigh...	Volume	Storage
Other Charge	car rentals		1	1	0%	None	12.50	12.50	93000-0000		0	0	
Software			1	1	0%	None	6.00	6.00	93000-0000		0	0	

Subtotal: 18.500000
Shipping: 0.000000
Tax: 0.000000
Total: 18.500000

4. Bill will be approved and saved automatically.

5. An email will be sent back to the Vendor Contact informing that bill has been approved.

