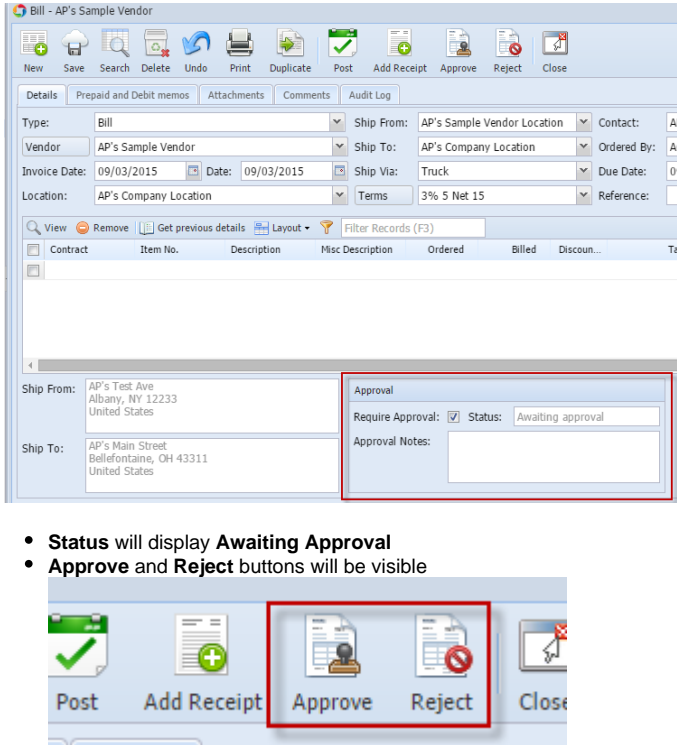


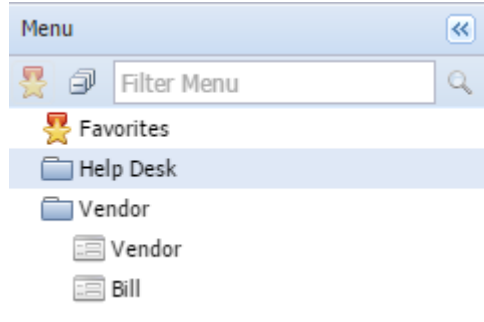
# Bill Approval Usability

Description	How To
1. Create Bill for Approval	<p>Go to <b>Purchasing &gt; Bills</b> &gt; click <b>New</b> button</p> <ul style="list-style-type: none"> <li>• <b>Type</b> will show <b>Bill</b> by default</li> </ul>
	<p>Select <b>Vendor</b></p> <ul style="list-style-type: none"> <li>• following fields will be filled in automatically <ul style="list-style-type: none"> <li>◦ Ship From</li> <li>◦ Ship Via</li> <li>◦ Terms</li> <li>◦ Contact</li> </ul> </li> </ul>
	<p>If vendor has existing <b>PO</b> or <b>IR</b>, <b>Add Inventory Receipt</b> screen will open</p> <ul style="list-style-type: none"> <li>• Close screen or select items to add on your bill</li> </ul>
	<p>Enter <b>Invoice No</b></p>
	<p>On <b>Approval</b> panel, check <b>Require Approval</b>.</p>  <ul style="list-style-type: none"> <li>• <b>Status</b> will display <b>Awaiting Approval</b></li> <li>• <b>Approve</b> and <b>Reject</b> buttons will be visible</li> </ul>
	<p><b>Save and close.</b></p>

B. User is a vendor contact

Log in as vendor contact

- Available menus for vendor contact



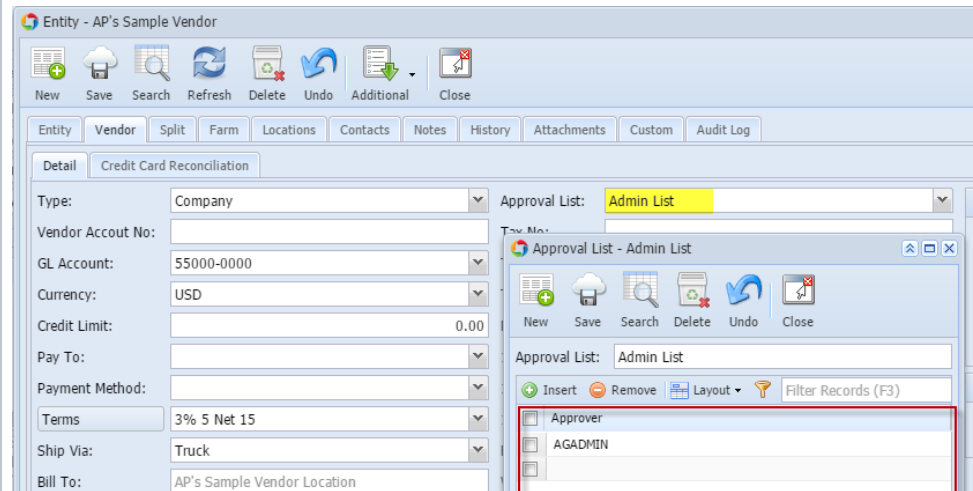
Go to **Vendor > Bill** > click **New** button

- **Type** will show **Bill** by default
- **Vendor** will default to the Vendor of the contact
- **Require Approval** is checked by default

Add details and save.

## 2. Approving bills

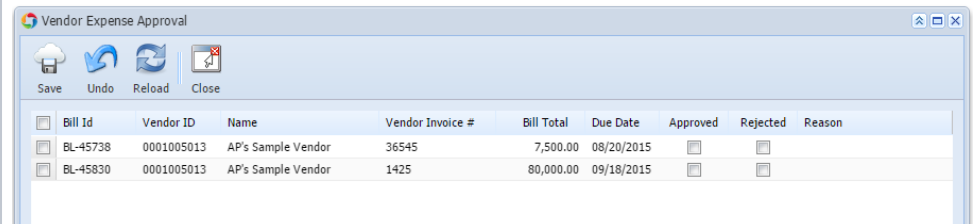
Log in using the credentials of one of the approver included in the Vendor's **Approval List**.



- Approval List can be opened from **Common Info > Approval List**

Go to **Purchasing > Vendor Expense Approval**

- All bills for approval of the logged in user will be listed here



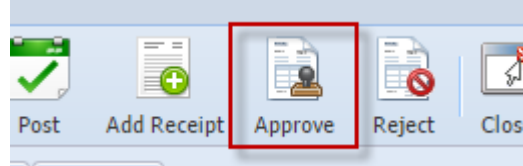
1. Approve bills

Ways to Approve bills:

1. From Vendor Expense Approval, check **Approved** and click **Save**

Due Date	Approved	Rejected	Reason
08/20/2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
09/18/2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

2. Open bill transaction and click button **Approve** then **Save**.



Once bill is approved, it will be removed from the Vendor Expense Approval list

Log in as user that is not a vendor contract. Bill will have the status **Approved**

**Approval**

Require Approval: ☐ Status: **Approved**

Approval Notes:

These are ready for posting.

2. Reject bills

Ways to Reject bills:

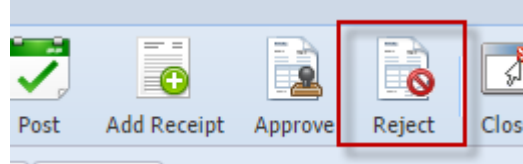
1. From Vendor Expense Approval, check **Rejected** and click **Save**

Vendor Expense Approval

Save Undo Reload Close

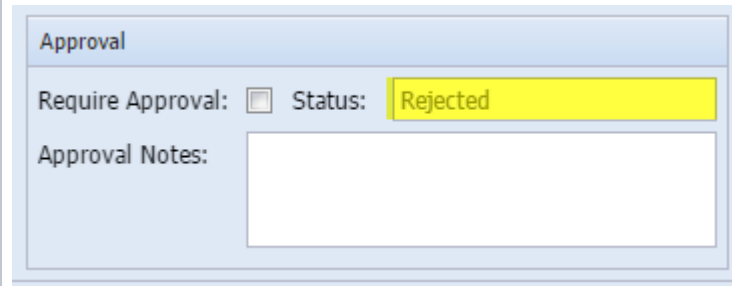
<input type="checkbox"/>	Bill Id	Vendor ID	Name	Vendor Invoice #	Bill Total	Due Date	Approved	Rejected	Reason
<input type="checkbox"/>	BL-45738	0001005013	AP's Sample Vendor	36545	7,500.00	08/20/2015	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	BL-45830	0001005013	AP's Sample Vendor	1425	80,000.00	09/18/2015	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

2. Open bill transaction and click button **Reject** then **Save**.



Once bill is rejected, it will be removed from the Vendor Expense Approval list

Log in as user that is not a vendor contract. Bill. will have the status **Rejected**



The screenshot shows a web form titled "Approval". It contains a "Require Approval:" checkbox which is unchecked. To its right, the "Status:" is set to "Rejected", which is highlighted in yellow. Below these fields is a large, empty text area labeled "Approval Notes:".

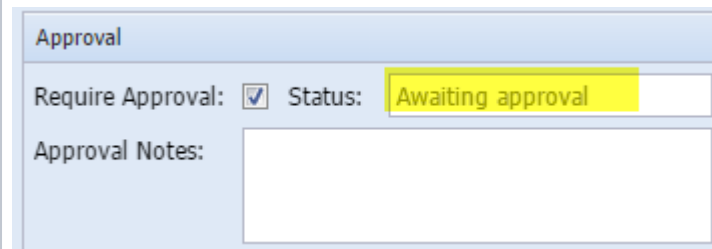
These bill is still not allowed to be posted.

To re-send for approval, check again Require Approval checkbox and select Yes on message:



The screenshot shows a dialog box titled "iRely i21". It contains a question mark icon and the text: "Editing this transaction requires to re-enable approval process. Do you want to continue?". At the bottom, there are two buttons: "Yes" and "No".

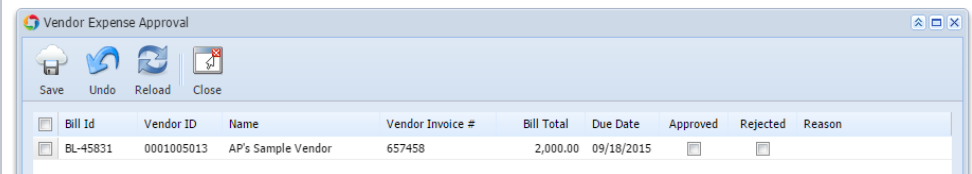
Status will not again change to **Awaiting Approval**



The screenshot shows the same "Approval" form as before. In this version, the "Require Approval:" checkbox is checked. The "Status:" is now "Awaiting approval", which is highlighted in yellow. The "Approval Notes:" text area remains empty.

Edit and save.

This will be available again on the Approver's Vendor Expense Approval list and is ready to be approved or rejected.



The screenshot shows a "Vendor Expense Approval" window. It has a toolbar with "Save", "Undo", "Reload", and "Close" buttons. Below the toolbar is a table with the following data:

Bill Id	Vendor ID	Name	Vendor Invoice #	Bill Total	Due Date	Approved	Rejected	Reason
BL-45831	0001005013	AP's Sample Vendor	657458	2,000.00	09/18/2015	<input type="checkbox"/>	<input type="checkbox"/>	