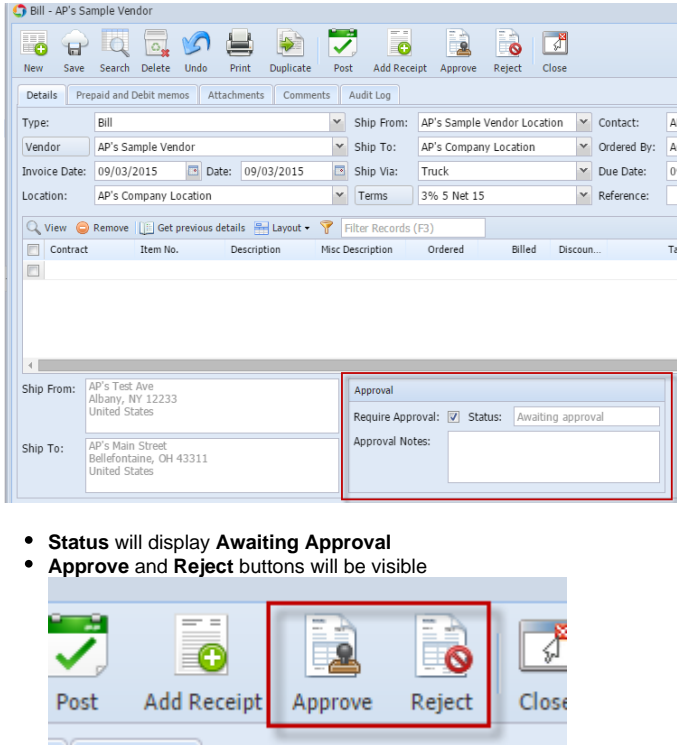


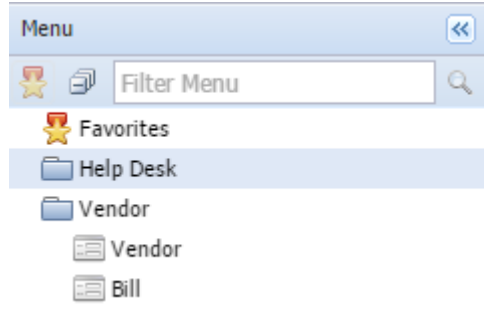
Bill Approval Usability

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

B. User is a vendor contact

Log in as vendor contact

- Available menus for vendor contact



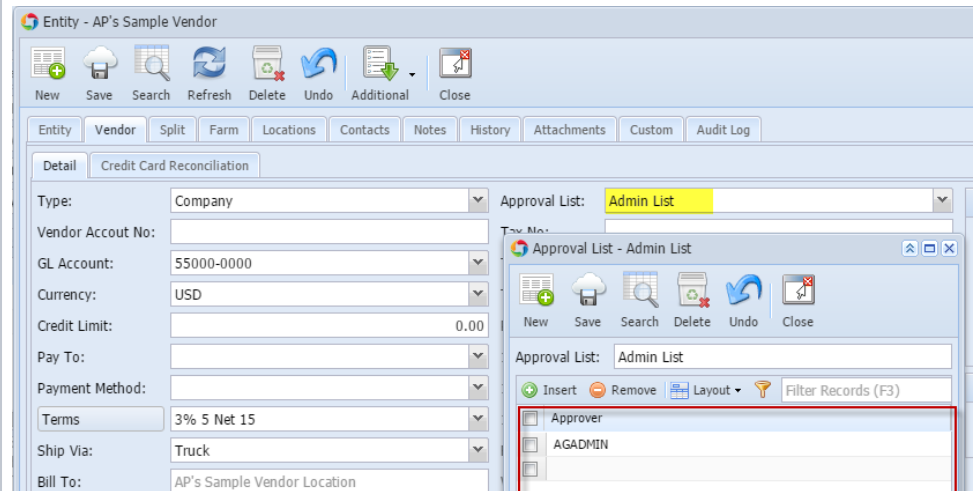
Go to **Vendor** > **Bill** > click **New** button

- **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

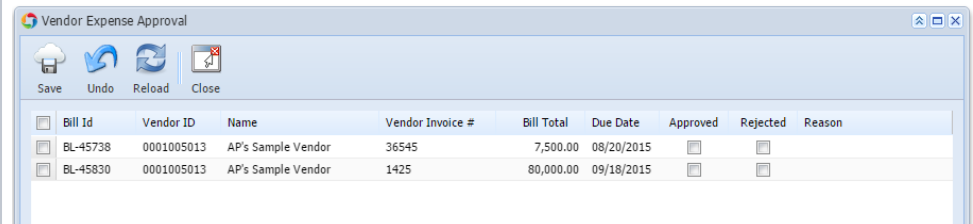
Log in using the credentials of one of the approver included in the Vendor's **Approval List**.



- 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



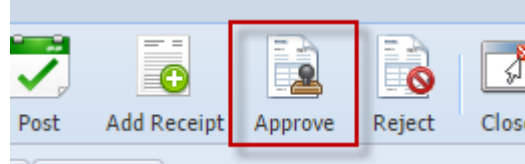
1. Approve bills

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.

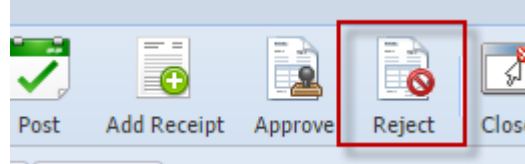
2. Reject bills

Ways to Reject bills:

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

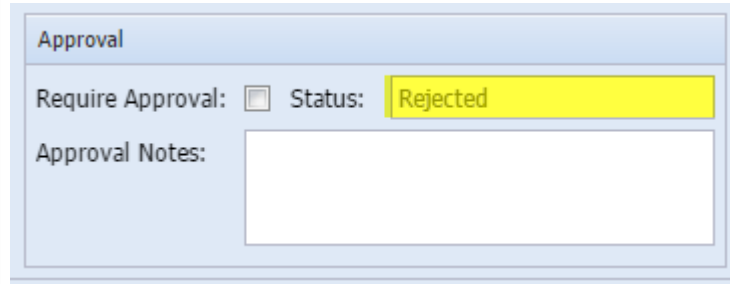
Bill Id	Vendor ID	Name	Vendor Invoice #	Bill Total	Due Date	Approved	Rejected	Reason
BL-45738	0001005013	AP's Sample Vendor	36545	7,500.00	08/20/2015	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
BL-45830	0001005013	AP's Sample Vendor	1425	80,000.00	09/18/2015	<input type="checkbox"/>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



Approval

Require Approval: ☐ Status: **Rejected**

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:

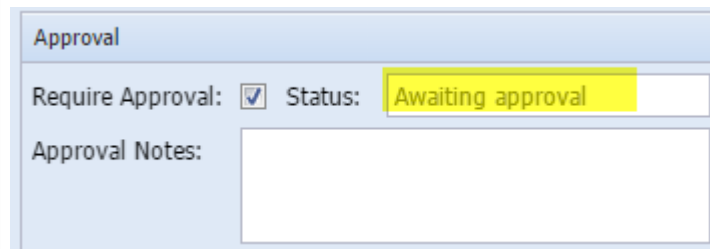


iRely i21

Editing this transaction requires to re-enable approval process. Do you want to continue?

Yes No

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



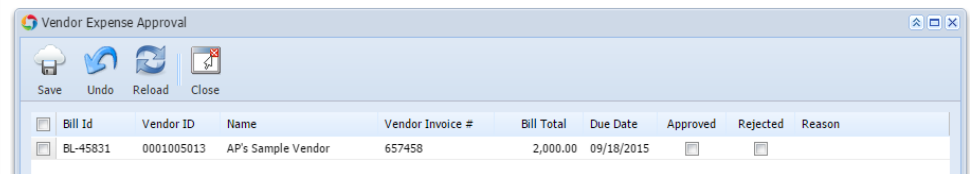
Approval

Require Approval: ☒ Status: **Awaiting approval**

Approval Notes:

Edit and save.

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



Vendor Expense Approval

Save Undo Reload Close

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"/>	