

How To Create Vouchers for Recurring

Here are the steps on how to create Recurring Vouchers:

1. From the **Main Menu**, click **Purchasing (A/P)** and then click **Vouchers** to open **Search Vouchers**.
2. Click **New** toolbar button to open blank Voucher screen.

The screenshot shows the 'Purchasing (A/P)' interface. On the left is a sidebar menu with 'Purchasing (A/P)' highlighted. The main area has a 'Vouchers' section with a toolbar containing 'New', 'Open', 'Refresh', 'Excel', 'PDF', 'Text', 'CSV', and 'Close'. The 'New' button is highlighted with a red box. Below the toolbar is a table of vouchers, and at the bottom is a 'Voucher - AP Sample Vendor' form.

3. Check **Recur** checkbox. Voucher will be set as a voucher for recurring. This is not allowed to be posted so **Post** button will be disabled.

The screenshot shows the 'Voucher - AP Sample Vendor' form. The 'Recur' checkbox is checked and highlighted with a red box. The form includes fields for Type, Vendor, Invoice No, Invoice Date, Check Comments, Post Date, Terms, Due Date, Reference, and Ship Via. Below the form is a table with columns: Load #, Contract, Contract Seq, PO #, and Iter.

4. Enter details just like a normal voucher and then click **Save**. This will now be available to be selected in **Recurring Transaction** screen.

Here are the steps on how to create Vouchers:

1. From the **Main Menu**, expand **Purchasing (Accounts Payable)** and then click **Vouchers** to open **Search Vouchers**.

a. Click **New** toolbar button to open blank Voucher screen.

The screenshot shows the iRely LLC Voucher screen. The 'New' button in the top toolbar is highlighted with a red arrow. The screen displays various fields for creating a voucher, including Type, Vendor, Invoice No, Invoice Date, and Recur checkbox. The Recur checkbox is currently unchecked.

2. Check **Recur** checkbox. Voucher will be set as a voucher for recurring. This is not allowed to be posted so **Post** button will be disabled.

The screenshot shows the iRely LLC Voucher screen with the 'Recur' checkbox checked. The 'Post' button in the top toolbar is highlighted with a red box. The screen displays various fields for creating a voucher, including Type, Vendor, Invoice No, Invoice Date, and Recur checkbox.

3. Enter details just like a normal voucher and then click **Save**. This will now be available to be selected in **Recurring Transaction** screen.

Here are the steps on how to create Vouchers:

1. From the **Main Menu**, expand **Purchasing** and then click **Vouchers** to open **Search Vouchers**.
2. Click **New** toolbar button to open blank Voucher screen.

The screenshot shows the iRely LLC Voucher screen. The 'New' button in the top toolbar is highlighted with a red arrow. The screen displays various fields for creating a voucher, including Type, Vendor, Invoice No, Invoice Date, and Recur checkbox.

3. Check **Recurring** checkbox. Voucher will be set as a voucher for recurring. This is not allowed to be posted so **Post** button will be disabled.

The screenshot shows the iRely LLC Voucher screen with the 'Recurring' checkbox checked. The 'Post' button in the top toolbar is highlighted with a red box. The screen displays various fields for creating a voucher, including Type, Vendor, Invoice No, Invoice Date, and Recurring checkbox.

4. Enter details just like a normal voucher and then click **Save**. This will now be available to be selected in **Recurring Transaction** screen.

Here are the steps on how to create Vouchers:

1. From the **Main Menu**, expand **Purchasing** and then click **Vouchers** to open **Search Vouchers**.

2. Click **New** toolbar button to open blank Voucher screen.

The screenshot shows the 'Voucher' screen in a software application. The user is 'Sample User' and the company is 'I21 Source Company'. The 'Voucher' toolbar at the top has a 'New' button highlighted with a red box. The left sidebar shows a navigation menu with 'Vouchers' highlighted. The main area displays a list of vouchers and a 'New Voucher' form. The form includes fields for Type (Voucher), Post Date (02/02/2016), Vendor, Invoice No., Invoice Date (02/02/2016), Check Comments, Ship Via, Contact, Ship From, Ship To, Location, Ordered By (PSalazar), Voucher No., AP Account (20000-0000-000), Withheld Amount (0.00), Currency (USD), and Recurring (unchecked). The bottom right shows a summary of Subtotal (0.00), Shipping (0.00), Tax (0.000000), Total (0.00), Amount Paid (0.00), and Amount Due (0.00).

3. Check **Recurring** checkbox. Voucher will be set as a voucher for recurring. This is not allowed to be posted so **Post** button will be disabled.

The screenshot shows the 'Voucher' screen with the 'Recurring' checkbox checked. The 'Post' button in the toolbar is now disabled. The 'New Voucher' form is the same as in the previous screenshot, but the 'Recurring' checkbox is now checked. The bottom right summary remains the same.

4. Enter details just like a normal voucher and then click **Save**. This will now be available to be selected in **Recurring Transaction** screen.