

AP Bill Drafts - SKY Vendor

Last Modified on 04/16/2024 1:17 pm CDT

The *Drafts* tab displays AP Bills entered but not yet posted. AP Bills here can be viewed by selecting the **Eye** icon.

The screenshot shows the 'Drafts' tab selected. At the top, there is a search bar and an 'Export' button. Below is a table with columns: Vendor Name, Vendor ID, Bill #, Bill Date, Due Date, Gross Amount, Balance Due, and Status. The first row shows Vendor Name 'A. L. Oil & Hauling', Vendor ID 'ALOil', Bill # '89467', Bill Date '05/15/2023', Due Date '06/15/2023', Gross Amount '\$50.00', Balance Due '\$50.00', and Status 'Draft'. Below this is a section 'SHOWING 1 OF 1' with a table for bill items. The first item has GL Account '5514000-00', Description 'Purchases - Bagged Fertilizer', Amount '\$50.00', Quantity '0.00', Vehicle '--', and Comment '--'.

Vendor Name	Vendor ID	Bill #	Bill Date	Due Date	Gross Amount	Balance Due	Status
A. L. Oil & Hauling	ALOil	89467	05/15/2023	06/15/2023	\$50.00	\$50.00	Draft

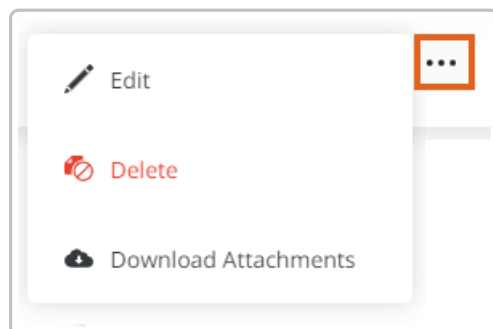
GL Account	Description	Amount	Quantity	Vehicle	Comment
5514000-00	Purchases - Bagged Fertilizer	\$50.00	0.00	--	--

When adding an AP Bill, there is an option at the bottom to *Set bill status to "Draft"*. Check this box prior to saving and the Bill will display on the *Drafts* tab.

The screenshot shows a form with a checkbox labeled 'Set bill status to "Draft"' which is checked. Below this are summary fields: Total: \$0.00, Discount: \$0.00, and Net: \$0.00. At the bottom, there are two buttons: 'Save & Start New' and 'Save Bill'.

Note: The *Vendor*, *Invoice #*, *Bill Date*, and *Due Date* must be populated before saving.

If the Bill is no longer needed, choose the **Ellipsis** and select *Delete*. If desired, select *Download Attachments* to download all attachments on that Bill. When ready to finish posting the Bill or to add additional information, select *Edit*.



The *Approver Info* section is available if the *Enable AP Approval process for my company* is enabled and *Approvers* are selected in SKY Admin under *Vendor*. Select the *Approver* from the drop-down and enter an optional *Note to Approver*.



Remove the Approver by selecting the **Delete** icon. Additional Approvers can be added by selecting **+ Add Another Approver**.


Reorder Approvers by selecting the grid of dots next to the *Approver* drop-down and dragging to the appropriate place. The order Approvers are listed is the order in which the AP Bill will be sent for approval.

Note: The Bill will not be sent through the Approval process until *Set bill status to "Draft"* is unchecked.

Approver Info

Approvers receive an email prompting them to approve the bill. Emails listing the bills for approval are sent every 4 hours.

 Approver Karli Bennett	Note to Approver	
0 / 40		

[+ Add Another Approver](#) 

Once everything is filled out, uncheck the *Set bill status to "Draft"* checkbox and **Post Bill** or **Post & Start New** to enter another Bill.

Note: If the options still say **Save Bill** and **Save & Start New**, the *Set bill status to "Draft"* option is still checked and the Bill will remain a draft.