

## SOP: Invoice Approval in Yardi Voyager

Department: Property Management / Accounting

System: Yardi Voyager

Process Name: Invoice Approval

Prepared By: Mariah Farrell, Property Manager

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This document is to provide a standardized process for reviewing and approving vendor invoices in Yardi Voyager to ensure timely and accurate payment.

This SOP applies to all users assigned with invoice review and approval responsibilities within Yardi Voyager.

### Responsibilities

- Invoice Approver (e.g., Property Manager, Regional Manager):\*\* Responsible for reviewing coding, verifying documentation, and approving or rejecting invoices.
- AP Team:\*\* Ensures approved invoices are processed for payment.
- Finance/Accounting Supervisor: Oversees workflow compliance and audits.

### Prerequisites

- Active Yardi Voyager user account with invoice approval permissions.
- Knowledge of GL coding, budgets, and vendor contracts.
- Access to supporting documentation (invoice copies, work orders, etc.).

### Procedure:

- Step 1: Log In
  1. Navigate to the Yardi Voyager login page.
  2. Enter your username and password, and click Login.
- Step 2: Access Pending Approvals
  1. Go to: Payables > Invoice Approval Queue or use: Dashboard > Workflow Notifications.
  2. Filter by: Property > Vendor > Date range (if necessary)
- Step 3: Review Invoice Details
  1. Click on the invoice number to open the invoice.
  2. Verify the following:
    - Vendor name is correct.
    - Invoice number and date match the scanned document.
    - Total amount is accurate.
    - GL coding is appropriate.
    - Property or job cost is allocated correctly.
  3. Review attached documents (invoice, PO, receipts, etc.).

- Step 4: Approve or Reject
  - To Approve: Click “Approve” or “Submit” (depending on workflow setup).
  - To Reject or Request Change: Click “Reject” or “Return” > Enter a comment explaining why the invoice is rejected (e.g., “Incorrect coding” or “Missing documentation”).
- Step 5: Monitor Status
  1. Use “Invoice Approval Queue” to monitor: Approved invoices and Rejected or returned invoices
  2. Follow up with AP or the invoice originator as needed.

#### Approval Levels (Example)

Approval Level	Threshold	Approver Title
Level 1	Up to \$5,00	Property Manager
Level 2	\$5,001 - \$10,000	Regional Manager
Level 3	Above \$10,000	Director/CEO/VP

*Note: Approval levels may vary based on your organization’s policy and setup in Yardi.*

#### Best Practices:

- Review invoices promptly to avoid payment delays.
- Ensure all required documents are attached before approval.
- Verify invoices against POs or contracts where applicable.
- Communicate with AP regarding unusual charges or vendor issues.

#### Troubleshooting

Issue	Resolution
Cannot find the invoice to approve	Check if it has already been approved or rejected
Error on the invoice	Reject and add a comment for the creator to correct
GL code is missing or invalid	Contact the creator or Accounts Payable Manager
Approval button is not showing	Ensure you are assigned as the approver

Related Documents:

- Yardi GL Code Reference Sheet
- Invoice Entry SOP
- Procurement & Contracting Policy
- Yardi Voyager User Manual (Approvals Section)