Copying Existing Vouchers

Purpose: Use this document as a reference for how to copy an existing voucher in ctcLink

Audience: AP staff

⚠ You must have at least one of these local college managed security roles:

- ZZ Voucher Entry

  You must also set these User Preference Definitions:

- User Preferences: Voucher Entry

  If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

⚠ Copied Vouchers are created with an **Incomplete** or **Recycled** status, and needs to be saved for further processing. Recycled Vouchers are vouchers that were created through an automated process that have missing information and put in 'recycled' status.

Copying an Existing Voucher

Navigation: Accounts Payable > Vouchers > Add/Update > Voucher Search

1. The **Voucher Search** page displays.
2. Enter the **Business Unit**.
3. Enter or use the look up icon to select the specific **Voucher ID** you would like to copy.
4. Select **Search.**

💡 Optional to use the other search criteria within the 'Voucher Information' or 'Supplier Detail' search fields to find your voucher you'd like to copy.

5. The Search Results displays below.
6. Select the **Copy Voucher icon**.

> ⚠ **Note**: When you create a Voucher Copy, the following information is _copied_ from the original voucher:

- Invoice lines, distributions, taxes, and miscellaneous charges.
- Payment terms, source documents, withholding, and bank details
- For a voucher with multiple schedules, only the first schedule is copied to the new voucher.

   Similarly, the following information is *not copied* from the original voucher:

- Attachments.
- Payment notes.
- Prepaid reference.
- Match, approval and budget statuses.

7. The **Copy Voucher** window opens.
8. Enter the **Invoice Number.**
9. Enter the **Invoice Date.** If left blank, the system defaults to current date.
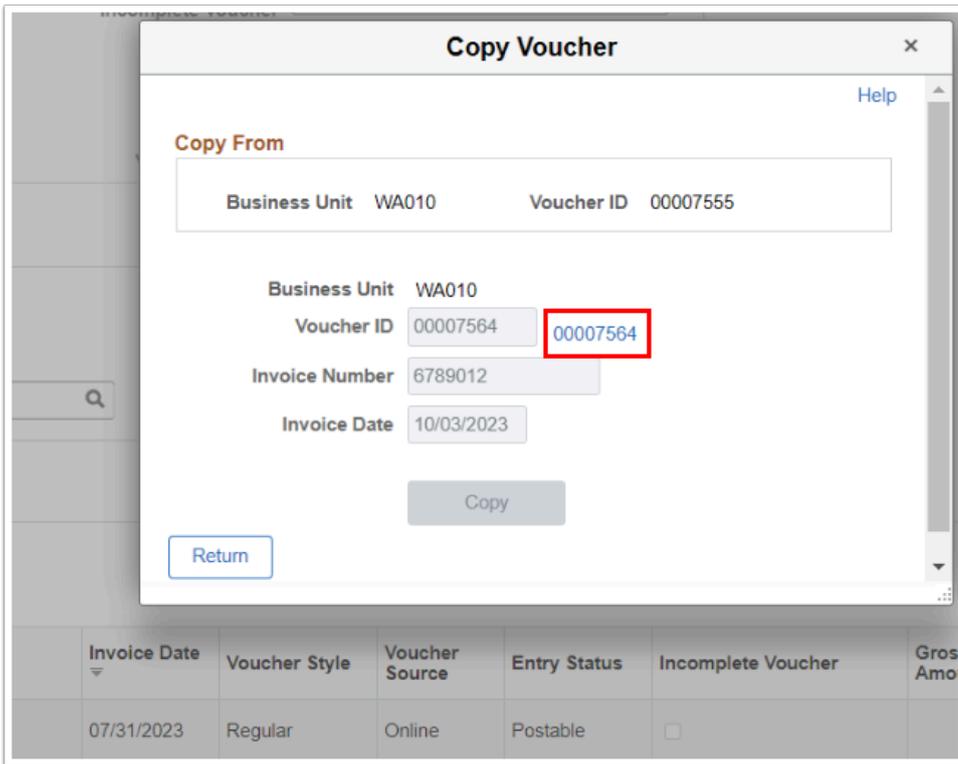10. Select **Copy.**

11. The next automated **Voucher ID** number displays withing the Copy Voucher window.
12. Select the new **Voucher ID** hyperlink to navigate to Regular Entry page.

13. The **Regular Entry** page displays the newly Copied Voucher.
14. Continue to edit/refine the new voucher as needed.
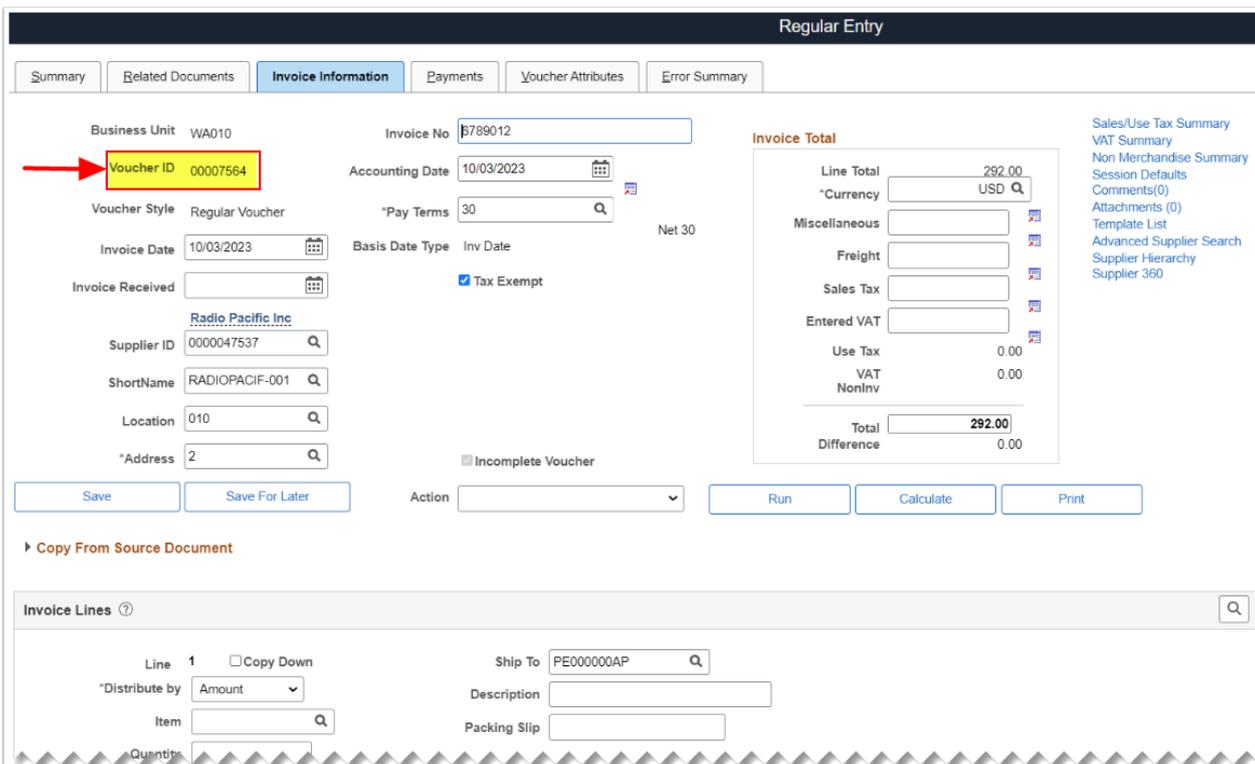
15. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to [Copying Existing Vouchers](#). This link will open in a new tab/window.