

Voucher

- [Overview Video](#)

Overview Video

<https://www.youtube.com/embed/EvTkIjZt4FI>

Step-by-Step Tutorial Guide

Step 1: Open the Voucher Module

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, click on **Voucher**.
3. The Voucher dashboard opens.

The dashboard displays all previously created vouchers along with their current status.

Step 2: Review Existing Vouchers

1. On the Voucher page, review the list of available voucher records.
2. The table may display:
 - Voucher Number
 - Employee Name

- Voucher Type
- Amount
- Created Date
- Approval Status

3. Use the search and filter options to locate a specific voucher.

This helps administrators and employees quickly access voucher information.

Step 3: Create a New Voucher

1. Click **Create Voucher** or **Add Voucher**.
2. The voucher creation form opens.

This form is used to submit a new reimbursement or expense request.

Step 4: Select the Voucher Type

1. Click the **Voucher Type** dropdown.
2. Select the appropriate category.

Examples may include:

- Travel Reimbursement
- Food Expense
- Fuel Expense
- Office Expense
- Miscellaneous Expense

Selecting the correct type ensures proper expense classification.

Step 5: Enter Voucher Details

Fill in the required information, including:

- Voucher Date
- Voucher Amount
- Description
- Expense Details
- Remarks (if applicable)

Ensure all information entered is accurate before proceeding.

Step 6: Upload Supporting Documents

1. Click **Upload Attachment**.
2. Attach the required supporting documents.

Examples include:

- Bills
- Invoices
- Payment Receipts
- Travel Tickets
- Supporting Documents

Supporting documents help validate the voucher during approval.

Step 7: Review the Voucher Information

Before submitting, verify:

- Voucher Type
- Expense Date
- Amount
- Description
- Attached Documents

Ensure all mandatory fields are completed.

Step 8: Submit the Voucher

1. Click **Submit**.
2. The system forwards the voucher to the configured approval workflow.
3. A confirmation message appears after successful submission.

The voucher is now available for approval.

Step 9: Track Voucher Status

1. Return to the Voucher dashboard.
2. Locate the submitted voucher.
3. Review its current status.

Common statuses include:

- Draft
- Pending Approval
- Approved
- Rejected
- Processed

This allows users to monitor the progress of their voucher requests.

Step 10: View Voucher Details

1. Click on any voucher from the list.
2. Review details such as:
 - Voucher Number
 - Expense Category
 - Amount
 - Supporting Documents
 - Approval Status
 - Approver Remarks

This provides complete visibility into the voucher lifecycle.

Step 11: Edit or Cancel a Voucher (If Permitted)

1. If the voucher is still pending approval, select the voucher.
2. Click **Edit** to update the details or **Cancel** to withdraw the request.
3. Save the changes or confirm the cancellation.

Editing is generally allowed only before the approval process is completed.

Step 12: Manage Voucher Records

From the Voucher dashboard, users can:

- View voucher history
- Search vouchers
- Filter by status or date
- Download voucher details (if available)
- Monitor reimbursement progress

Maintaining accurate voucher records helps simplify expense tracking and financial audits.

Key Benefits of the Voucher Module

- Centralized expense management
- Paperless voucher submission
- Easy document attachment
- Automated approval workflow
- Real-time voucher tracking
- Transparent reimbursement process
- Improved financial record management

End of Tutorial

You have successfully learned how to use the **Voucher Management** module in the TankhaPay Business Portal. This feature enables employees and administrators to efficiently submit, track, approve, and manage expense vouchers through a centralized and streamlined workflow.