Uploading Receipts/Invoices

Attaching electronic copies of receipts to documents within Infor meets the IRS guidelines for receipt retention, so paper copies of receipts will no longer need to be kept in paper files. However, **before discarding paper receipts**, **users must verify the receipts are legible** when attaching to a document in Infor.

Option 1 - Send to Receipt Store and attach later

- 1. Email receipt(s) to https://www.ukanowickawaii.saas.infor.com
- 2. Either access 'Receipt Store' from 'Receipts' menu
 - a. From an existing document, click the 'Manage Receipts' drop-down menu
 - b. 'Choose an image from the receipt store'

infor	Infor Expense Management						
	Inbox Expense Report Payment Request Travel Plan Timesheet						
	What do you want to do? Create a New Review Documents Search if	Documents Manage Receipts					
	3 My Documents \$2,020.27 0 Documents for Review 0 My	Credit Card 0					

- c. Select 'Search My Receipts' to view a receipt
 - i. Click the trash icon to delete a receipt
- 3. Or attach receipts when submitting the document
 - a. From your Inbox
 - i. Select the Expense Report you wish to add receipts to
 - ii. Select 'Insert Receipts'

View R	eceipt Inser	t Receipts View History Print	
		Title	Tracking Number
		fda	ER00036851
v		ER00036846	

- b. From the Expense Report
 - i. Click 'Submit' when the document is ready for submission
 - ii. Select 'Attach Receipts'
 - Choose either 'Receipt Store' or 'Browse'. If you choose the 'Receipt Store' option, select the receipt you wish to load.

iv. Select 'DONE'.

Option 2 – Directly from a document (Expense Report or Payment Request)

- 1. Save an electronic copy of receipts on computer
- 2. From an existing document, click the 'Receipts' drop-down menu
 - a. Select 'Attach Receipts'
 - b. Select 'Browse' and add receipt(s)
 - c. Click 'Attach' button
 - d. Click 'Done' after message that receipt(s) were uploaded successfully appears

infor Expense Management					
Attach Receipts					
Upload receipts to expense ER00036852 Select receipts to upload. Receipts Browse No files selected. The following file types are supported: pdf,tiff,tif,gif,jpeg.jpg. Attach Receipts Receipt Store					

Option 3 – <u>Scan a packet of receipts (Recommended/Best Practice)</u>

- 1. Create a packet of receipts in the same order as line items on a completed document
- 2. Scan packet to Liberty email from a University printer
- 3. Forward email to <u>liberty-xm-prd@xmmail.saas.infor.com</u> with document number in the subject line.

Clipboard		Basic lext	15
	То	☐ liberty-xm-prd@xmmail.saas.infor.com;	
Send	Cc		
	Subject:	ER00000704	
	Attached:	Acc04374920141006093821.pdf (157 KB)	

Viewing Receipts/Invoices

Option 1 – Directly from Document

- 1. Select the Expense Report and click 'View Receipt'.
- 2. View receipts individually by clicking the 'previous' and 'next' buttons
- 3. Select 'View All' to see all receipts attached to the document





ER00000704						
Done			Slide View			
	11 Indiae Section			President		
	photo 4-JPG.pdf	photo 5-JPG.pdf	photo 1-JPG.pdf	photo 2-JPG.pdf		
			PERIN			
	photo 3-JPG.pdf	photo-JPG.pdf	photo 2-JPG.pdf	photo 1-JPG.pdf		
	doc0437492014100 6093821.pdf					

Option 2 – Across all documents

1. Select 'Manage Receipts' option from Inbox

infor	pr Infor Expense Management						
	Inbox Expense Report Payment Request Travel Plan						
	What do you want to do?		do? Create	a New	Review Documents	Search Documents	Manage Receipts

- 2. Select 'View Receipts' icon to view photos of receipts
- 3. Select 'Number of Receipts' link to view list of receipts
- 4. Select 'Tracking Number' link to view history of receipt uploads