## 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 liberty-xm-prd@xmmail.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'
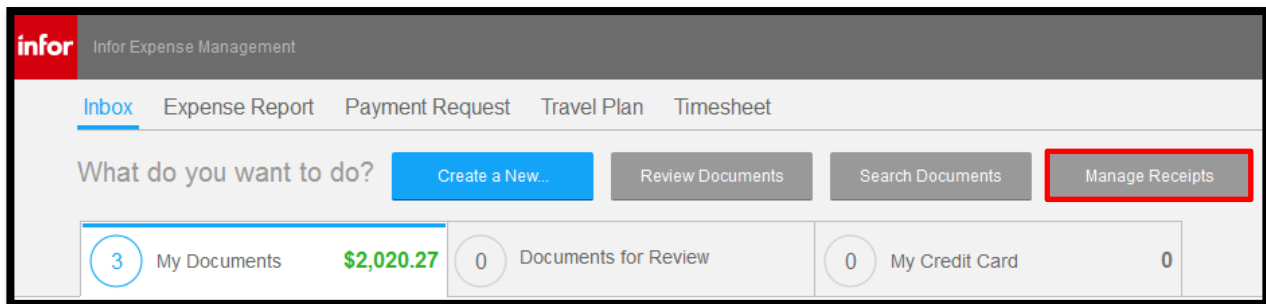
    c. Select 'Search My Receipts' to view a receipt
        i. Click the trash icon to delete a receipt
3. Or attach receipts when submitting the document
    a. From your Inbox
        i. Select the Expense Report you wish to add receipts to
   ii. Select 'Insert Receipts'
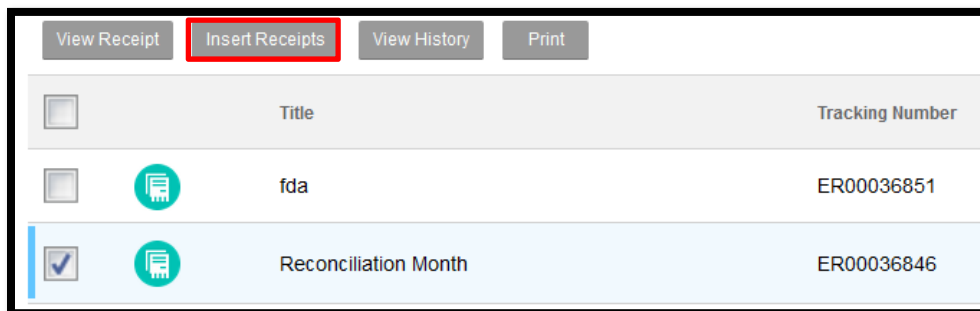
    b. From the Expense Report
        i. Click 'Submit' when the document is ready for submission
        ii. Select 'Attach Receipts'
        iii. Choose either 'Receipt Store' or 'Browse'. If you choose the 'Receipt Store' option, select the receipt you wish to load.

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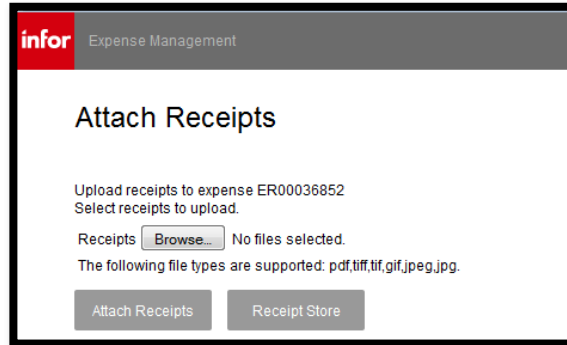
**Option 3 – <u>Scan a packet of receipts (Recommended/Best Practice)</u>**

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.
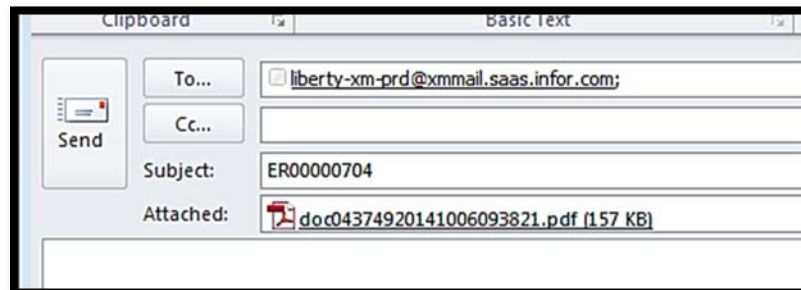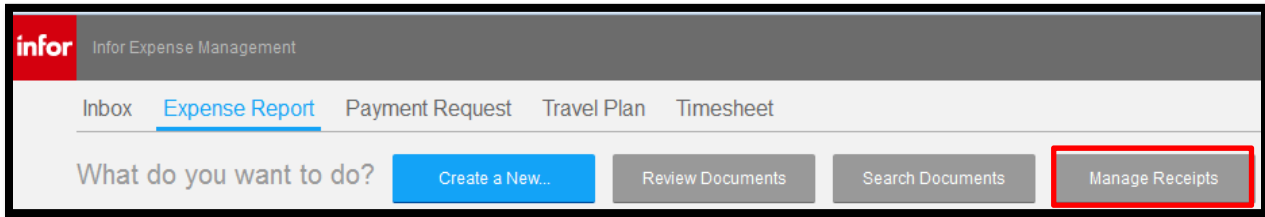
Viewing Receipts/Invoices

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
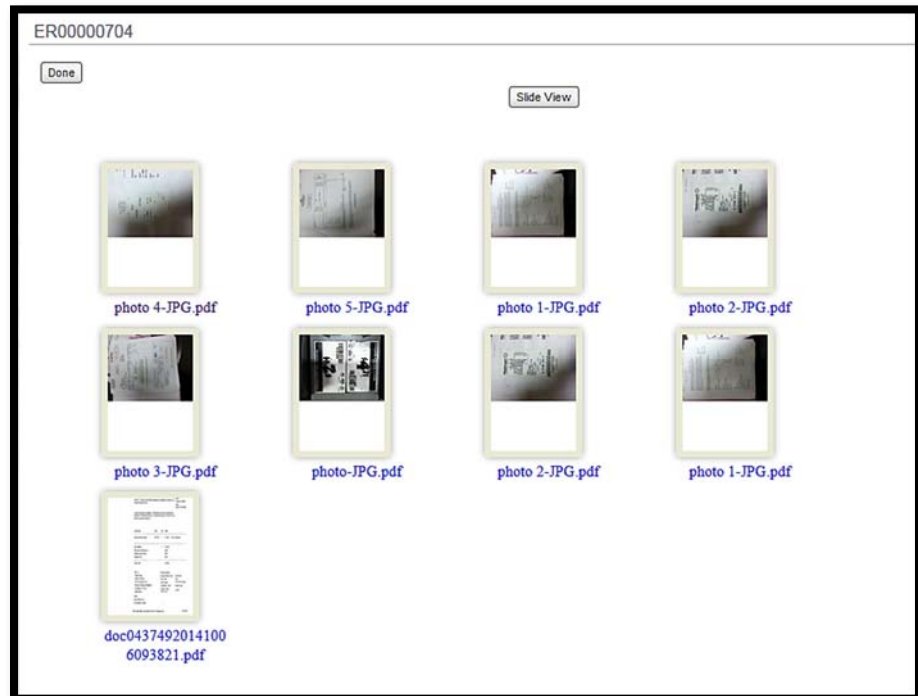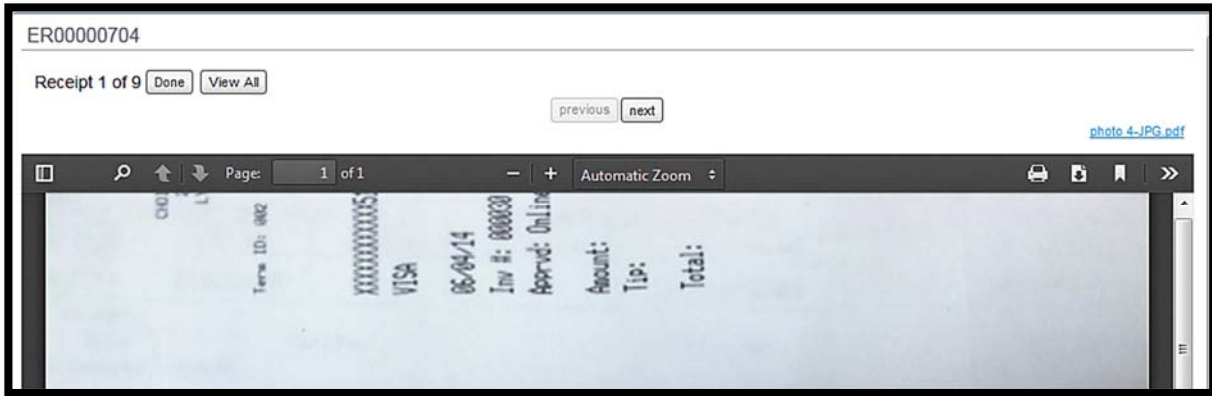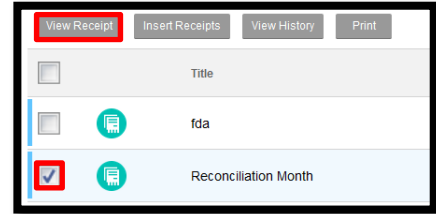
Option 2 – Across all documents

1. Select 'Manage Receipts' option from Inbox

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