Submit Invoices by Email to Accounts Payable

Submitting invoices by email improves your experience by reducing your manual data entry, allowing you to submit multiple invoices for the same vendor at the same time, and providing timely visibility of the invoice(s) processing status directly in Workday.* Please note, invoices can only be submitted with a **valid** (i.e., with sufficient funds and not closed) Workday Purchase Order (PO).

For more information about submitting invoices, visit the Accounts Payable website: controller.miami.edu/invoices.

Important: CO. 340 UM Hospital, 330 UMHC and 320 ABLEH invoices must continue to be emailed to uhealthap@miami.edu.

**To view invoices in Workday, you must have an appropriate security role, (e.g., Procurement Data Entry Specialist) for the Cost Center that is paying for the PO associated with this invoice.*

Quick Links: Invoice Submission Guidelines – Submit Invoices by Email – Look Up Submitted Invoices in Workday

Invoice Submission Guidelines

- Invoices must be submitted in the PDF file format (.pdf).
- Ensure that a **valid** (i.e., with sufficient funds and not closed) Purchase Order (PO) Number, e.g., PO-0000XXXXXX, is visible on the invoice.
  - **Tip:** On a PDF, you can insert a text box to add the correct PO number directly on the invoice document.
  - The PO must have sufficient funds and cannot be closed.
- Create one file per invoice. Edit the filename to include the **PO Number-Supplier Name-Invoice Number,** e.g., PO-0000123456-STAPLES-1001
  - **Important:**
    - Do **not** combine multiple invoices in the same PDF.
    - You **can** have multiple invoice attachments for the same vendor per one email submission.
    - Combine required backup such as the currency conversion printout and invoice into one PDF with the invoice as the first part of the PDF.
    - Do not add any backup as separate attachments.

Submit Invoices Via Email

1. Create a new email and enter APOCR@miami.edu in the address field.
2. In the Subject Header include the Supplier Name and PO number.
3. Verify that the files you are going to attach follow the Invoice Submission Guidelines above.

4. Attach invoice files for the same vendor.

5. Delete your email signature, including any logo images, and select **Send**.

Look Up Submitted Invoices in Workday

In order to look up invoices in Workday, you must have an appropriate security role, (e.g., Procurement Data Entry Specialist) for the Cost Center that is paying for the Purchase Order associated with this invoice.

1. In the Workday *Search* field, type ***supinv: [Supplier's Invoice Number]*** and press **Enter/Return**.

2. The corresponding invoice will appear on your screen with a Workday Supplier Invoice number, e.g., IV-XXXXXXXXX. Select the **Workday Supplier Invoice**.

    - **<u>Tip:</u>** If more than one result appears on your screen, use the **related actions icon** (/) to preview each invoice before making a selection.

3. Locate the *Status* field for the invoice in Workday.

    - If the *Status* is **Draft**, then your invoice was successfully submitted via email and is awaiting action by Accounts Payable.
        - **<u>Important</u>:** Take **<u>no</u>** action in Workday if the *Status* is **Draft**.

    - If the *Status* is **In Progress**, then locate the *Match* field. If the *Match* field says:

        - **Exception**, then this requires further action in Workday by your department, such as creating a Change Order, creating a receipt, or an override by a Cost Center Manager.

        - **Matched**, then locate the *Payment Status* field, which indicates if this invoice is *Paid* or *Unpaid.*

    - If the *Status* is **Canceled**, then this invoice may have been a duplicate entry.
        - **<u>Important</u>:** Please return to step 2 and review other corresponding search results in Workday **before** contacting Accounts Payable for more information.