Attaching Documentation to a Supplier Invoice Overview

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper**, or whoever is listed as the **Requester** if an Employee as Self assigned a cart to a Requisitioner, through the steps to attach documentation, such as a packing slip, to a supplier invoice in Workday.

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Procedure: Attaching Documentation to Supplier Invoices over $10,000

Adding documentation to a supplier invoice that is over $10,000 is easily done during the invoice approval process. The invoice approval process is shown below:
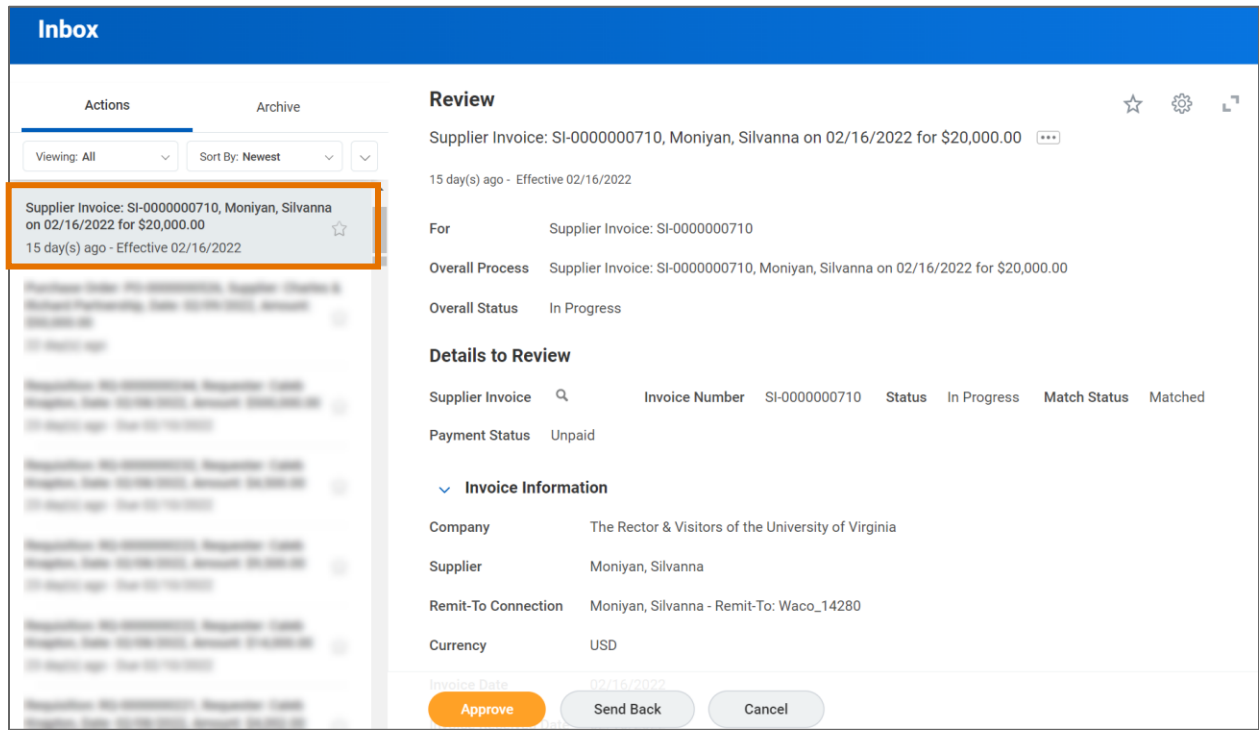
On the Workday Home screen:

1. Select the **Inbox** icon at the top-right corner.
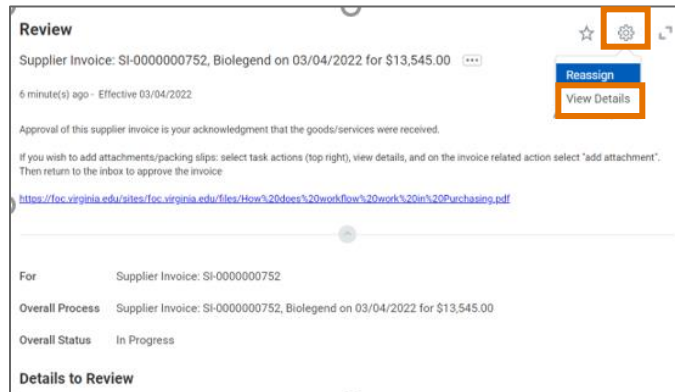

On the **Inbox** screen:

2. Select the relevant **Supplier Invoice** task under the Actions tab.

In the **Review** section:

3. Review the details of the supplier invoice on the screen.
4. If you wish to add attachments/packing slips, select the **Task Actions** icon at the top right and select **View Details**.

5. Select (**...**) related actions on the invoice and select **Add Attachment** under Supplier Invoice.

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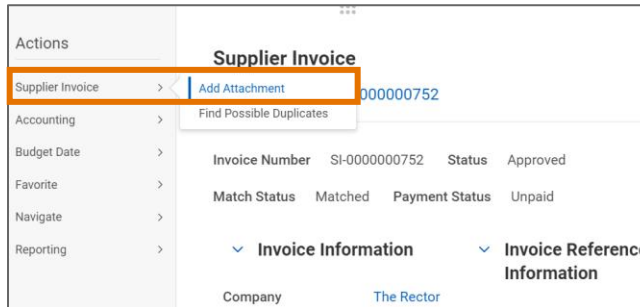
6. Add the attachment.
7. Return to the inbox to approve the invoice.
8. Select the **Approve** button to approve the request. Approving the invoice is your acknowledgment that you have received the goods/services in the quantity shown on the invoice.

You have successfully completed this task.

Procedure: Attaching Documentation to Supplier Invoices less than $10,000

For supplier invoices less than $10,000 you will not receive an approval notification. However, documentation, such as packing slips, can still be attached to the supplier invoice. This can be done for document record keeping, tracking, and audit purposes.

This procedure can also be followed for supplier invoices over $10,000 to which you wish to add documentation outside of the supplier invoice approval process.

You must first find the desired supplier invoice.

On the Workday **Home** screen:

1. Type "**Find Supplier Invoices**" into the Search bar to access the Find Supplier Invoices report.
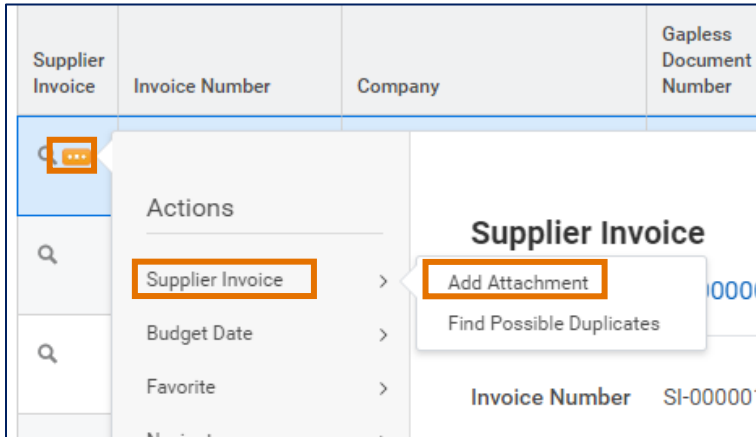
On the **Find Supplier Invoice** screen:

2. Narrow your search. This will most easily be done through entering the Purchase Order number.

On the second **Find Supplier Invoice** screen:

3. Hover on the magnifying glass next to the appropriate supplier invoice number and click on the three dot **Related Actions** button.

4. Under Actions, hover over **Supplier Invoices**, and click on **Add Attachment.**

On the second **Add Attachment for Supplier Invoice** screen:

5. Upload your documentation and click OK.

You have successfully completed this task.

Procedure: Attaching Documentation to Supplier Invoices from Account Certification

This procedure starts with an Account Certification already opened. If you are unsure how to get to the **Review Account Certification** screen where this procedure starts, The Prepare or Approve Account Certification Quick Reference Guide, steps 1-8, walk you through how to get to the Account Certification screen and how to filter to see activity.

> **NOTE** The Account Certification will only be available after month-end close for the month that the Supplier Invoice was created. If you want to attach the documentation to the Supplier Invoice before the Account Certification has been created, you will have to follow one of the procedures mentioned above.

On the **Review Account Certification** screen:

1. Click on the blue number in the **Ledger Account Balance** column.

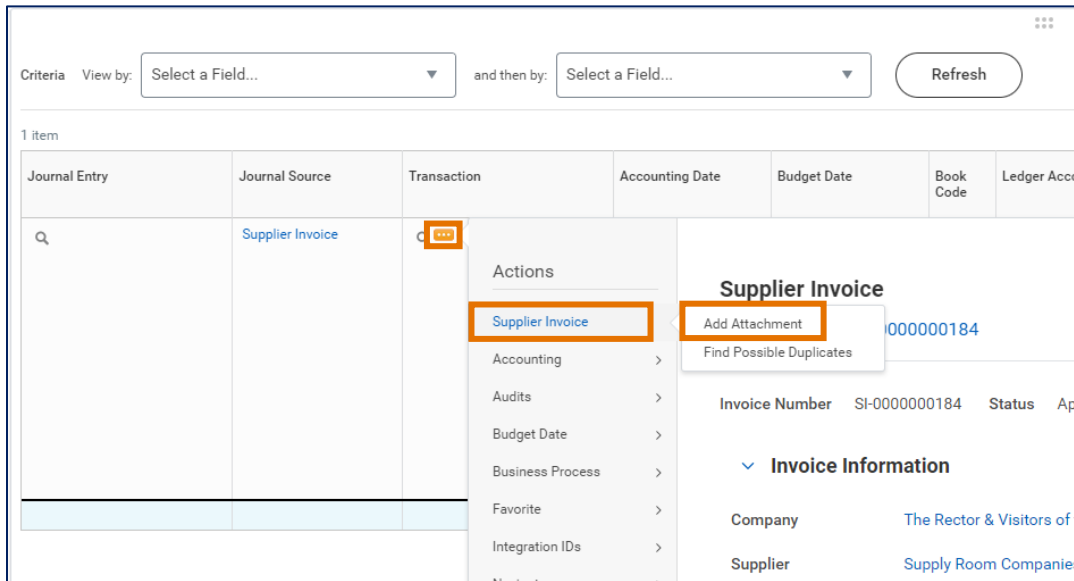On the transaction detail popup window:

2. Find the Supplier Invoice you want to add an attachment.
3. Select the **Related Action** button in the **Transactions** column by hoovering near the magnifying glass.

On the Related Actions menu of the selected supplier invoice:

4. Select **Supplier Invoice** > **Add Attachment.**

On the **Add Attachment for Supplier Invocie** screen:

5. Select the file that you want to attach.
6. Select **OK.**

You have successfully completed this task.