



Syssero® Solution Packet

Expenses - Email Receipts Setup



Solution Overview

This is an instructive guide on how to set-up Expense Receipt Email Ingestion in Workday.

1. Search 'Innovation Services Opt-In'

- You will want to check the 'Email Ingestion' Service on the "Cross Application Services' tab.

Innovation Services Opt-In

The screenshot shows the 'Innovation Services Opt-In' interface. On the left, a sidebar lists various service categories: Cross Application Services (checked), Financials, Global Address, HCM (checked), Learning, People Experience, Spend Management, and WCP. The main area displays a table of services under the heading 'Cross Application Services'.

Select	Service	Summary	Review Data Selection Task
<input type="checkbox"/>	Email Analytics	Email Analytics uses a third-party email subprocessor to send outbound emails that can be tracked for delivery and engagement metrics, including click and open rates. Various Workday applications support Email Analytics for specific notification categories.	N/A
<input checked="" type="checkbox"/>	Email Ingestion	Email ingestion uses third-party email processor to receive inbound emails to specific domain. Workday applications associated with the domains can then create tasks from the extracted data, such as creating supplier invoices, help desk cases, and expense receipts.	N/A
<input type="checkbox"/>	Enterprise Search	Enterprise Search improves search experiences across the Workday product by improving search relevance, retrieval, recommendations and insights.	Yes
<input type="checkbox"/>	Intelligent Core Generally Available Features	Intelligent Core leverages an ensemble of machine learning techniques to provide enhanced machine learning powered features and recommendations across Workday.	N/A
<input type="checkbox"/>	Notification Designer	Workday Notification Designer allows Customers to create and manage the layout, design and content of a notification template. Customers can then use these templates to send notifications to end users such as workers or job applicants.	N/A
<input type="checkbox"/>	SMS Multi-Factor Authentication	SMS Multi-Factor Authentication leverages Twilio as the delivery service for one-time passcode multifactor authentication.	N/A
<input type="checkbox"/>	Third-Party Map Service	Third-Party Map Service allows you to leverage services from providers like Google and Apple to display a map, calculate distance, and use additional map functionality.	N/A
<input type="checkbox"/>	Workday Messaging	Workday Messaging enables you to connect to your employees through text messaging. You can track and manage your employer's messaging preferences, such as their opt in and opt out activity, using a central platform.	N/A

- Once you have opted into the service, you will need to enable and assign View/Modify access to the 'Set up: Inbound Email' domain.

The screenshot shows the 'View Domain Security Policy' page for the 'Set Up: Inbound Email' domain. The policy status is 'Suspended - Policy not enabled'. The 'Allowed Security Group Types' are 'Segment - Notification Type' and 'Unconstrained Groups'. The 'Securable Actions' count is 14, and 'Securable Reporting Items' count is 3. Below this, a table for 'Report/Task Permissions' is shown, which is currently empty with the message 'No items available'.

Security Groups	View	Modify
No items available.		



3. Next, go to the task 'Create Email Ingestion Receiving Domain'

a. You will need to provide a subdomain and domain

- i. Please note that the subdomain must be unique to the tenant, so if you test in a lower level tenant first you will want to use a different subdomain than is what will be used in Production. For example Preview Subdomain might be 'expensestest' then Production would just be 'expenses.'
- ii. Example Subdomain/Domain combo (Subdomain: expenses; Domain: syssero.com)

Create Email Ingestion Receiving Domain ✕

Subdomain *

Domain *

Cancel OK

4. The next screen will show the DNS Record for the Receiving Domain. Take a screenshot of this and provide the information to the clients IT department. They will need to add the information into the company's DNS provider configuration. Once they add this information, there will be a 48 hour waiting period before the next step.

View Email Ingestion Receiving Domain expenses.syssero.com

Subdomain: expenses
Domain: syssero.com

Instructions

Work with your IT Administrator to add the 3 CNAMEs and MX record values into your DNS provider configuration.
Note: Most DNS updates take effect within 48 hours.
Once the updates are complete, run the Verify Email Ingestion Receiving Domain task.

DNS Records 3 items

Type	Host	Value	Verified
CNAME	et.expenses.syssero.com	[REDACTED]	No
CNAME	expenses_domainkey.expenses.syssero.com	[REDACTED]	No
CNAME	expenses2_domainkey.expenses.syssero.com	[REDACTED]	No

MX Record 1 item

Type	Host	Priority	Data
MX	expenses.syssero.com	10	[REDACTED]



5. After the Domain information has been added to the company's DNS provider configuration, and the 48 hour waiting period has passed, run the task 'Verify Email Ingestion Receiving Domain.'
 - a. You will select the domain you created previously and click OK.
 - b. A refresh screen will appear. Give it a minute or 2 and click refresh. Once it is done it will say if the Domain is verified or not. If it fails verification, give it another day and try again. If it fails verification twice, reach back out to the IT group and confirm that everything was set up\ correctly with the DNS provider configuration.

Verify Email Ingestion Receiving Domain [X]

Receiving Domain * [X] expenses.syssero.com [Menu]

[Cancel] [OK]

6. Once the Receiving Domain is verified, run the task 'Configure Email Ingestion Settings.'
 - a. For 'Type' select 'Expense Receipt'
 - b. Under 'Receiving Domain' you will select 'Use Customer-Provided Receiving Domain'
 - i. Select your newly created Receiving Domain.
 - c. Under Allowed Senders, leave it blank
 - i. This functionality currently is only available for Supplier Invoice
 - d. Check the 'Acknowledge' box and click OK

Configure Email Ingestion Settings

Notification Type
Select a notification type to view additional configuration options.

Type * [X] Expense Receipt [Menu]

Receiving Domain

Receiving Domain Type A Workday-provided receiving domain for email ingestion is generated by default. If you want to use your company's verified receiving domain, select Use Customer Provided Receiving Domain, and select your receiving domain from the list.

Use Workday-Provided Receiving Domain
 Use Customer-Provided Receiving Domain



Allowed Senders

Workday accepts email receipts from all workers in Workday. Any new email addresses you include must first be associated with a worker before Workday can process the emailed receipt.

Add a row for each email address from which you want to accept emails. 0 items

Email Address
No Data

Acknowledgement

Select the check box to acknowledge that setting up Email Ingestion includes the risk of sending personally identifiable information through emails and email domains to Twilio SendGrid.

7. Once that step is completed, it is ready for use!

a. Users can email receipts to any email address at that domain/subdomain combo and it should work. Best practice is going to be to use an email like the following

["receipts@expenses.syssero.com"](mailto:receipts@expenses.syssero.com)


b. When a user emails the receipts they will show under quick expenses when they go to create a new expense report.

8. If you need to run a record of what email receipts have been processed in the system, the report 'Expense Receipts Email Ingestion By Date Range' can be ran.

Expense Receipts Email Ingestion By Date Range ✕

From Second * MM/DD/YYYY --:--:-- AM

To Second * MM/DD/YYYY --:--:-- AM



Cancel OK