

Working with In tray documents

The In tray is designed to store a digital copy of your documents for you. Upload your invoices and receipts to make it easier to create bills, pay bills and track payments. Plus, you'll always have your proof of purchase documents on hand when you need them.

How does it work?

Check out this short video for an overview of uploading and working with your supplier documents and bills in MYOB Essentials.



Learn how to record bills with our free interactive online training

Adding documents to your In tray

You can add documents up to **10MB** in size, in these formats: **PDF, JPG, JPEG, TIFF, TIF, and PNG.**

You can add documents in a few ways:

- Drag documents saved on your computer straight into the In tray
- Click **Upload document** and choose documents stored on your computer
- Take a picture of a receipt using your phone and upload it to your In tray using the [MYOB Capture app](#)
- Have documents sent directly to your In tray from one of our [partner suppliers](#)
- Email documents to the address that appears in your In tray. You can share this address with your suppliers so they can email documents straight to your In tray. [Tell me more about emailing documents to my In tray.](#)

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In tray New! Get the MYOB Capture app and send files to the In tray.

1 Select a document Sort by Recently Added

Enlarge Download Delete

You currently have no documents in your In tray.
Email, upload or drag and drop some documents here.

Upload documents Create new Spend money Create new bill Link to existing bill

Or email documents to: Copy

Receiving documents in your In Tray that shouldn't be there? [Reset email](#).

2 Create transaction

If an uploaded document has an orange warning icon () it means MYOB Essentials has been unable to read any information from the document. But you can still work with the document as described below.

Working with In tray documents

Once a document is in your In tray, you can link it to a bill you've already entered into MYOB Essentials, or use the document to create a new bill or Spend Money transaction.

You can also download or delete In tray documents.

To link documents

To create a new bill

To create a new Spend Money transaction

To download documents from the In tray

To delete documents from the In tray

FAQs

How do I change which document is linked to a bill?

Can I link more than one supplier invoice to a bill

Can I link attachments from my In tray against bank transactions?

What's MYOB to MYOB?

Related topics

[Attaching documents to bank transactions](#)

[Attaching documents to Spend money transactions](#)

[Attaching documents to bills](#)

[Emailing documents to your In tray](#)

[Using the MYOB Capture app](#)

From the community

Re: Link attachments to your Spend money transactions

Re: You can now create Spend money transactions from the In tray

Spend Money Bug - just creates spinning wheels.

Exporting Documents saved in In Tray from MYOB Essentials

Creating new invoice from Tray-incorrect company name appearing.

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