Add a Receipt

Last Modified on 16/10/2023 2:50 pm BST

Permissions

You will require the following permissions:

- A basic claimant Access Role
- The "Receipts can be uploaded to Expense Items" General Option must be activated.

After you have scanned or uploaded a receipt and saved it to your computer or network, you can attach it to an expense.

1. Locate the claim which contains the expense. Navigate to the**Claim Details** page for this claim, as shown below.

2. Click the **Upload Receipt** icon against the expense that you want to attach a receipt to. This will direct you to the Receipt Management page.

Receipt Management

Manage Receipts

Your claim and its receipt images are below. Show help.

📁 **Claim1**   **3 items**   **£180.00**
      [Not submitted]

Claim Header				
📄 Food		1154-000002	05/10/2023	£85.00
📄 **Stationery Items**		**1154-000006**	**15/10/2023**	**£65.00**
📄 Taxi		1154-000007	15/10/2023	£30.00

[save] [cancel]

3. Click the **Expense Item Header** for the expense that you want to upload a receipt to. Hovering over the **Receipt Area** (grey box located under the Expense Item Header) will display the **Attach Receipt** icon.

Receipt Management

Manage Receipts

Your claim and its receipt images are below. Show help.

📁 **Claim1** **[Not submitted]**	**3 items**		**£180.00**

Claim Header

📄 Food	1154-000002	05/10/2023	£85.00
📄 **Stationery Items**	**1154-000006**	**15/10/2023**	**£65.00**
	Click to upload a receipt			
📄 Taxi	1154-000007	15/10/2023	£30.00

save   cancel

4. Click 🖼 which will open a window where you can select the receipt image from your local network/computer.

Note: The max file size for a receipt image is 28.6 mb.
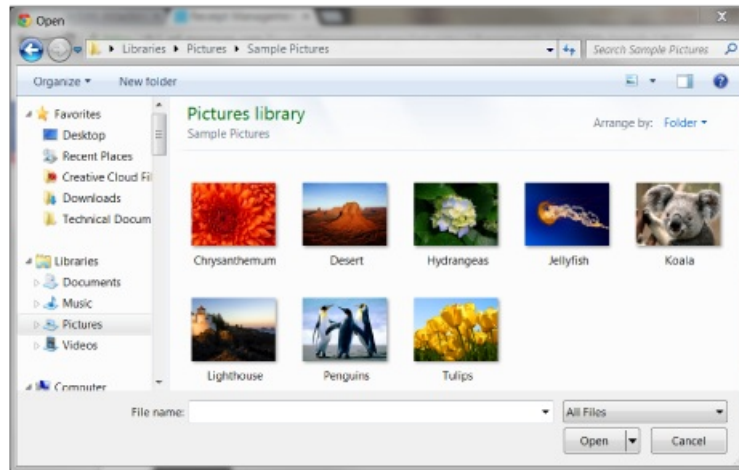
5. Double click the receipt image that you want to attach. The image will appear in the **Receipt Area** below the **Expense Item Header**.

> **Note:** The file types that you are permitted to upload are determined by your administrator. The standard file types for receipt images are usually .jpg and .png. Submitting a PDF will convert the pages into .jpg files. Contact your local administrator to find out which files types are allowed.

Receipt Management

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📁	**Claim1** **[Not submitted]**	**3 items**		**£180.00**

Claim Header

📄	Food	1154-000002	05/10/2023	£85.00
📄	**Stationery Items**	**1154-000006**	**15/10/2023**	**£65.00**
📄	Taxi	1154-000007	15/10/2023	£30.00

save   cancel

Note: Clicking 🔍 will show you a preview of your receipt image(s).

6. Click **Save** to store the changes and exit or follow the same process to upload more receipts. Alternatively, click **Cancel** to exit the receipt management page without uploading or attaching any receipts.

For information on how to move, copy and preview receipt images, viewManage Receipts.

Note: Once a claim has been submitted you will no longer have the ability to delete a receipt from that claim. Approvers of the claim will still have the ability to delete and attach additional receipts and you will be able to attach and delete receipts for a returned Expense Item.