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.

Claim Details														
Gen	eral	Inforn	nation											
Claim Name			Claim1		aim1	Claim Total		£180.00						
Claim Description														
Num	iber	of Item	IS		3		An	nount Payable	£180.00					
Expense Items														
7	×		ب	_	<u>.</u>	Number of Miles 🔺	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payabl
							05/10/2023	Food	Site Visit - Mobile		£85.00	£0.00	£85.00	£85.00
2	×	_									005.00	00.00	£65.00	£65.0
				4			15/10/2023	Stationery Items	Conference / Exhibition		£05.00	£0.00	£03.00	200.0
	×						15/10/2023 15/10/2023	Stationery Items Taxi	Conference / Exhibition				£30.00	£30.00

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

	pt Management Receipts									
Your cl	claim and its receipt images are below. <u>Show help</u> .									
	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									

 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	<u>help</u> .		
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 receip	t		
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.

Favorites Pictures Desktop Sample Picture Sample Picture Downloads Technical Docum			Arran	ge by: Folder •
Creative Cloud Fi Downloads Technical Docum		100	60463gg	9.8
A Call Ubraries Chrysanthem S. Documents	hum Desert	Hydrangeas	Jellyfish	Koala
b	e Penguins	Tulips		

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 Manage Receipts			
Your claim and its receipt images are below. Show	<u>w help</u> .		
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 \wp will show you a preview of your receipt image(s).

 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.