

## Access Expense – My Receipts

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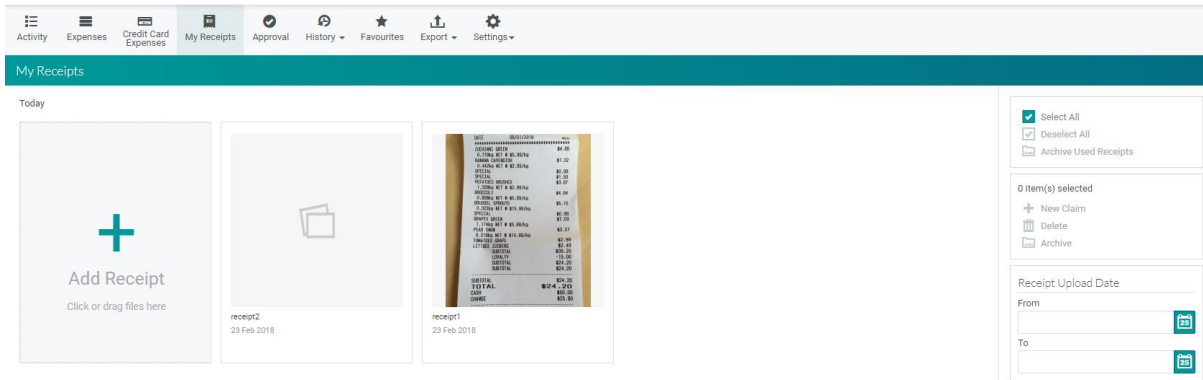
## Overview of My Receipts

My Receipts allows users to take pictures of their receipts on a mobile device or upload via desktop during the month and easily attach these to their out of cash or credit card expenses.

You can create new claims and add from the 'My Receipt' option or go directly into 'My Receipts' and create a claim directly from the receipt (see section: New Claim from My Receipts). Going directly into 'My Receipts' will allow you to easily search for receipt that you need to claim against; Additionally, you can archive receipts when they are no longer needed from this section.

## Desktop

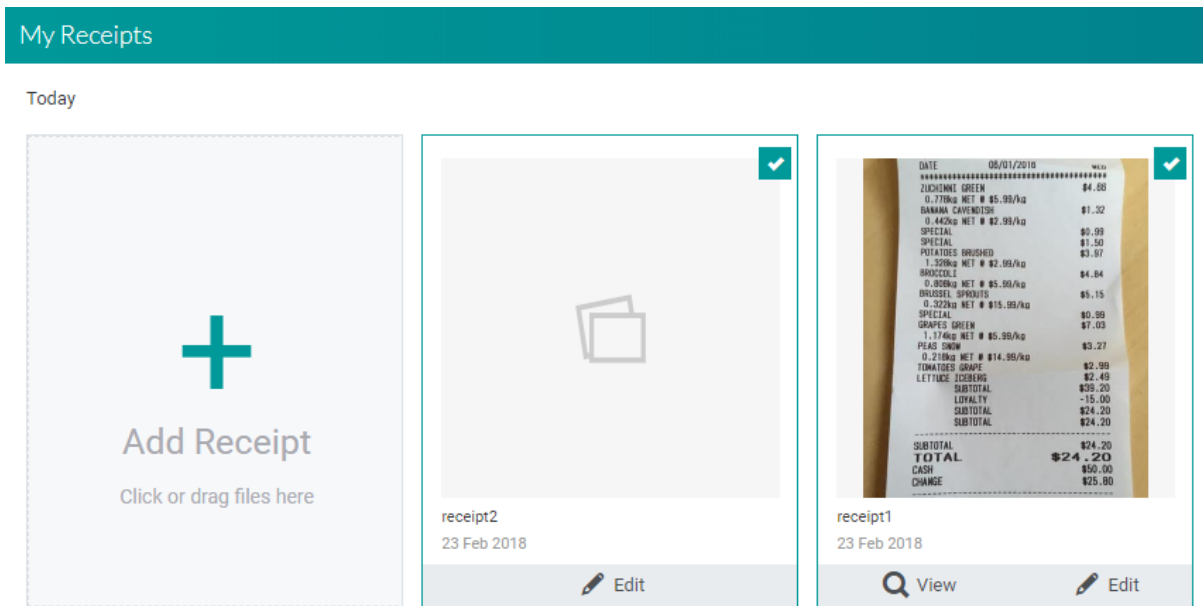
My Receipts can be accessed via a tab on the menu bar and will show a preview of uploaded receipts.



## Add Receipt

Receipts can be uploaded by dragging the receipt onto the page or by clicking on the Add Receipts button or taken via a mobile device.

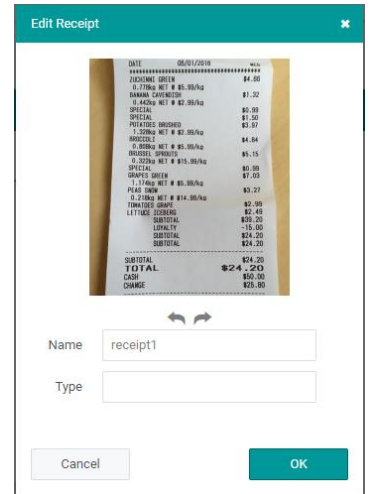
Once a receipt is added, you can tag the receipt with a type; this can be used to identify the receipt later using the filter on receipt tag to narrow your receipt down. Each Receipt shows the date uploaded, name and type and are ordered by the date uploaded.



Clicking on Edit allows changing the of the name, type or change the orientation if the document is an image.

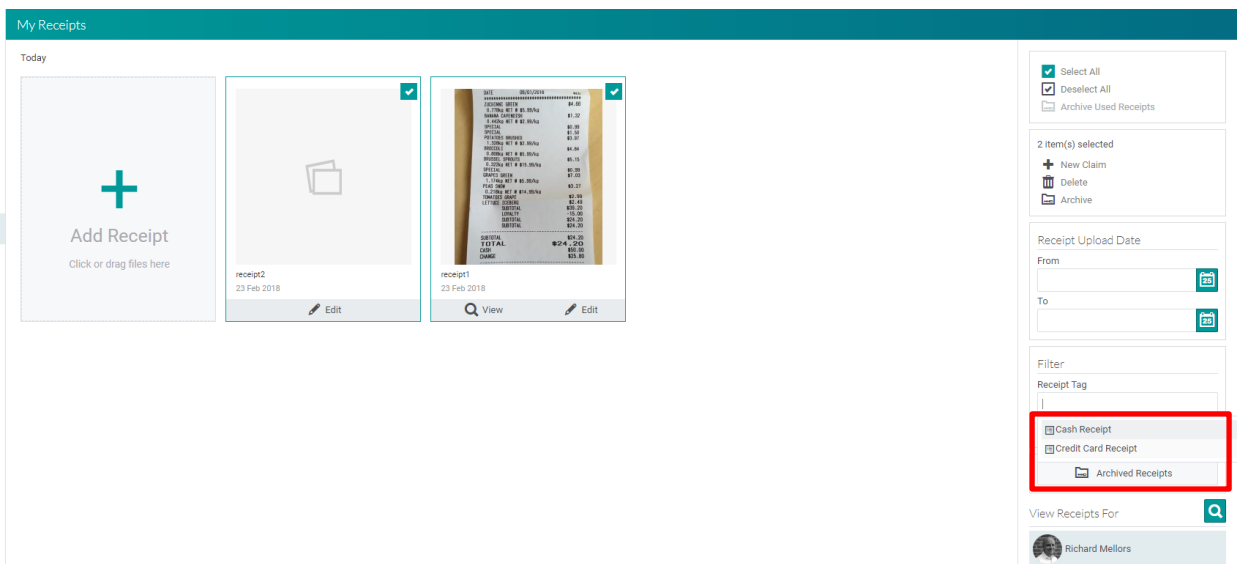
Clicking View opens the receipt and will give you the ability to zoom in and view the receipt in more detail.

Clicking View opens the receipt and will show a Zoom button.



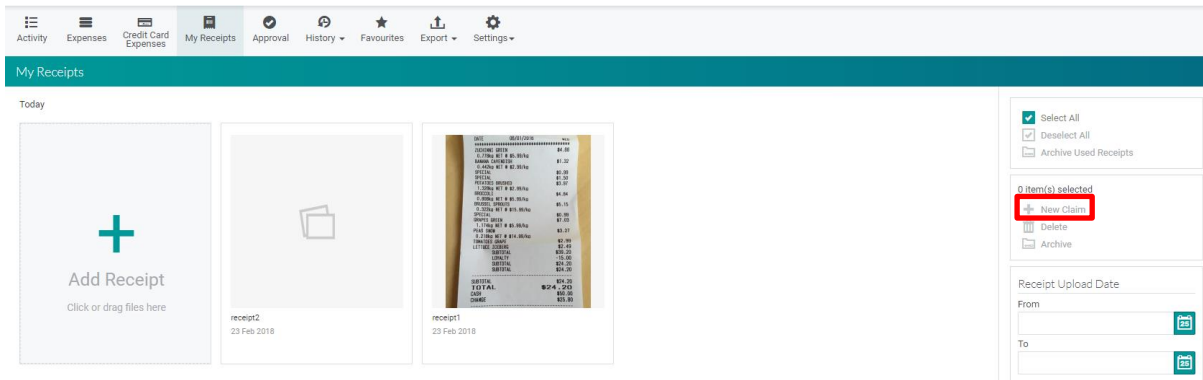
## Receipt Type

A receipt type can be assigned to a receipt when it is added or by editing the receipt. Receipt types are tags on the receipt which can be used to easily find receipts using the search options to find receipts.

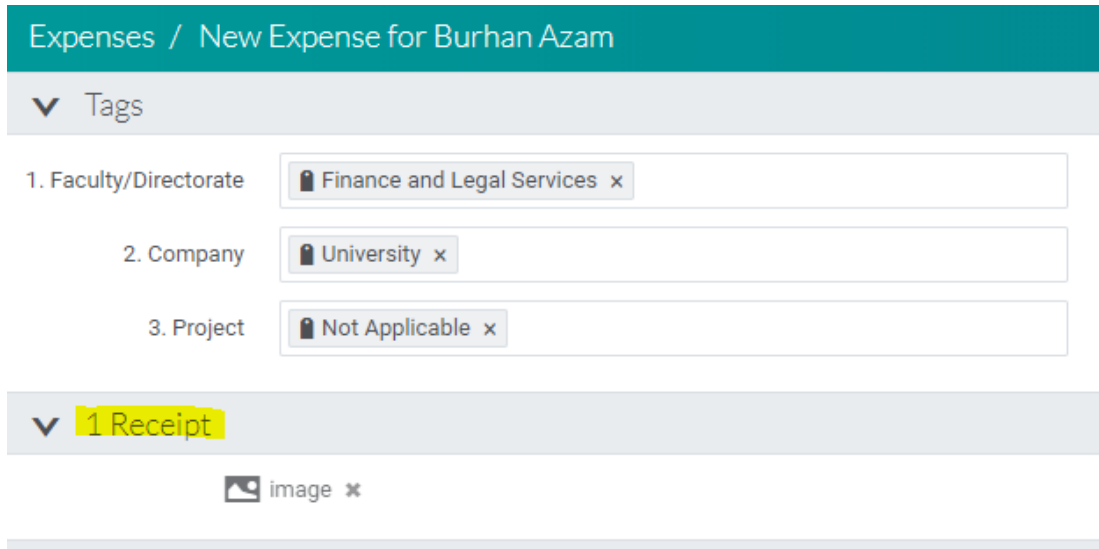


## New Claim from My Receipts

You can attach receipts to a new claim by selecting the receipt(s) and use selecting “New Claim”



This will open a new claim window and with the selected receipt(s) attached



Add Receipts to existing claim

You can add a receipt to existing claims from the claim form. Click 'My Receipts' from the Attach Receipt action pane when editing an existing Claim.

Expenses

Capture what you spend and reclaim it!

Save  
Save and New  
Close

---

Attach Receipt

Upload  
My Receipts

This will open My Receipts where receipts can be selected to add to your claim.

My Receipts

receipt2  
23 Feb 2018

receipt1  
23 Feb 2018

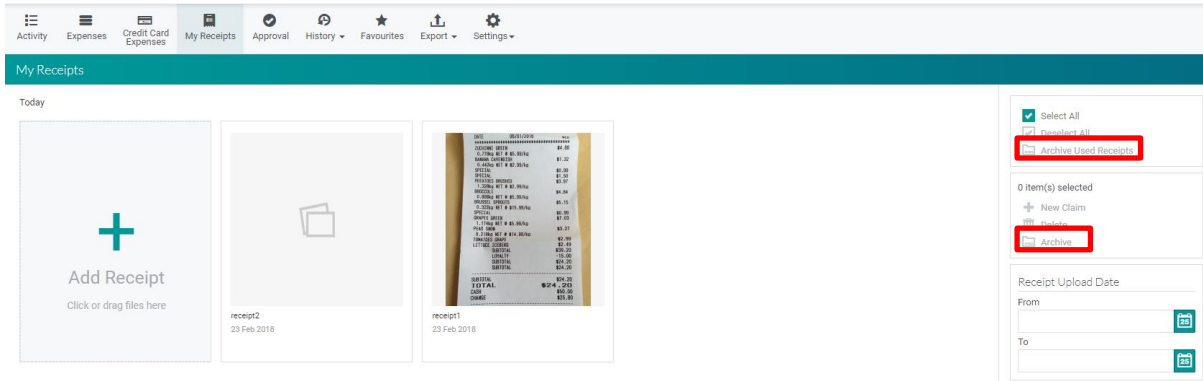
Cancel
0 receipt(s) selected
Attach

## Archiving Receipts

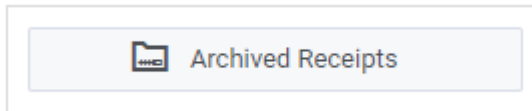
You can archive receipts from My receipts which are no longer required.

This can be done by selecting the receipts and clicking Archive.

Or using the option to Archive Used Receipts, which will archive all used receipts.



To view receipts that have been archived select **Archived Receipts**



This will take you into the archive view where it will be possible to **Delete** receipts or **Move to My Receipts** so receipts can be moved back to the receipt store to be used.

Archiving receipts or deleting them will not remove them from claims where the receipt has already been attached.

## Mobile

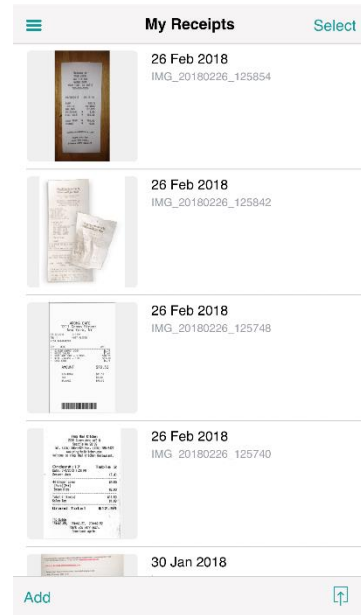
My Receipts can also be accessed via the Mobile application. Clicking the Receipts menu item will show the My Receipts, displaying all unarchived receipts

Receipts will show the key information, Date, Name, and Type and whether the receipt has been used.

Clicking on the receipt image opens the receipt image and will allow swiping through the images, you can select to add from the receipt image to Add to a New Claim, Delete or Archive the receipt.

## Add Receipt

A new receipt is added using the Add button you can add using the Camera or from the Photo Library

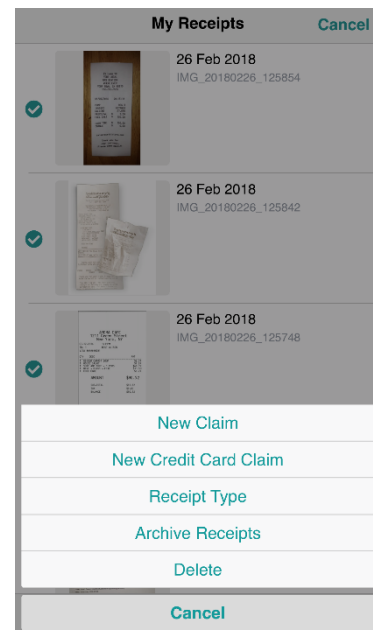


## Add Receipt to Claim

Use the Select button in the top right of the screen and then select receipt(s) to be added to a new claim use the Actions menu at the bottom right of the screen and select New Claim.

It will be possible from the Action menu to add a Receipt type, Archive or Delete the selected Receipts as well as create a claim.

The new claim window will be shown with the selected receipt(s) attached ready for input with the information about the claim.





## Add receipt to existing Claim

Receipts stored in My Receipts can also be added via the New Claim window or to existing claims.

Clicking Add Receipts will prompt to either Add from Phone (camera or photo library) or Add from My Receipts

Clicking Add from My Receipts displays a list of receipt images.

Receipts can be added via the Select button or it will be possible to view the image in full screen and use the Attach button.

It is also possible to swipe through the receipt images in this view

It is possible to carry out the same functionality as the Desktop on mobile, such as Deleting or Archiving receipts or even setting the types on receipts after they have been uploaded.

Receipts can be added to Cash expense claims or Credit Card claims on both the desktop and mobile.

