

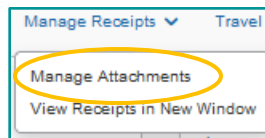


Attach Receipts

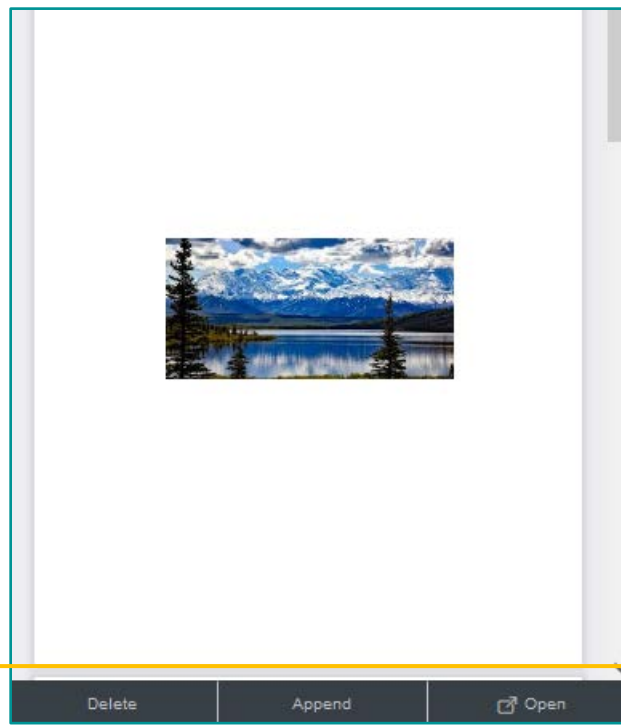
Receipts are attachable to individual expenses or the Report as a whole. Any receipts attached at the expense level are viewable at the Report level. Users can attach receipts to the Report at any approval stage.

From Manage Receipts

1. Select “Manage Attachments” from the Manage Receipts drop-down menu



2. A window to view all files attached to the Report pops up



- a. Delete – Delete the file currently viewed
- b. Append – Attach additional files to the Report
- c. Open – Open the attachments in the browser’s viewer (a resizable window)

Note: Attaching a receipt at the Report level does not fulfill the receipt requirements for a select Expense. If a receipt is required for a specific Expense (e.g. airfare, lodging, car rental, and expenses over \$75), the user must attach the receipt to the individual Expense.



From Expense

1. Open the Expense by either clicking within the field row or selecting the Expense and clicking "Edit"

Add Expense Edit Delete Copy Allocate Combine Expenses Move to									
Alerts	Comments	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested	
<input checked="" type="checkbox"/>			zNotUsed-IBCP	Airfare Reservation	Alaska Airlines Fairbanks, Alaska	07/10/2020	\$308.20	\$250.00 Allocated Itemized	

2. Click in the "Upload Receipt Image" field in the Details or Itemizations tab

Details | Itemizations | Hide Receipt

Allocate * Required field

Expense Type *
Airfare

Transaction Date: 07/10/2020 | Payment Type: zNotUsed-IBCP

Vendor: Alaska Airlines | Enter Vendor Name: Alaska Airlines

Destination City * ? : Fairbanks, Alaska | Trip Purpose * : Professional Development/Training

Trip Type * : Alaska | Traveler Type * : Staff

Upload Receipt Image

3. Upload and attach from the active device or select and attach from the user's Available Receipts or receipts attached to another Expense on the Report

Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts | Receipts in Report

Upload Receipt Image
5MB limit per file

SEA Cost Comparison...
Uploaded: 08/27/2022 11:...

Attach | View

Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts | **Receipts in Report**

Jesk.jpg
Uploaded: 07/17/2020 11:...

Attach | View



4. Once attached, a thumbnail appears on the Expense under the “Receipts” column

<input type="checkbox"/>	Comments ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓
<input type="checkbox"/>			zNotUsed-IBCP	Airfare Reservation

5. View the receipt by clicking the thumbnail or opening the Expense edit screen

The screenshot shows the 'Details' tab of an expense form. On the right, a receipt preview window is open, displaying a 'TRIP OVERVIEW' from 'ctm' (Central Travel Management) for a flight from Anchorage, AK to Phoenix, AZ. The receipt is circled in yellow. The form fields include:

- Expense Type: Airfare
- Transaction Date: 07/10/2020
- Payment Type: zNotUsed-IBCP
- Vendor: Alaska Airlines
- Enter Vendor Name: Alaska Airlines
- Destination City: Fairbanks, Alaska
- Trip Purpose: Professional Developme...
- Trip Type: Alaska
- Traveler Type: Staff

6. Detach the receipt by clicking Detach at the bottom of the receipt image
 - a. Detaching moves the image to the user’s Available Receipts
 - b. This action is only available before submitting the Report

This close-up shows the bottom of the receipt preview window. The receipt details include:

- RESERVATIONS
- Sunday, June 05, 2022
- Flight: Anchorage, AK (ANC) to Phoenix, AZ (PHX)
- Stakeholder: CTC
- Operator: Alaska Airlines
- Departure: 11:05 PM
- Confirmation: YES/REV
- Class: Y (Yield)
- Class: Confirmed
- Location: The Gates, 1st Level (210)
- Origin: Anchorage
- Terminal: 2207N - 221871C
- Origin: Alaska Airlines
- Number: 123456789

At the bottom of the preview, there are two buttons: 'Detach' (circled in yellow) and 'Append'.