Attaching Receipts

Users in the *Bank of America Works* system can upload and store receipt images for later processing.

> ➢ The following file formats are supported for the upload process: .pdf, .png, .jpg, .gif and .jpeg.
> ➢ Receipts must be scanned and uploaded one at a time.
> ➢ Each PDF image must be less than 1 MB to upload.
> ➢ For Non-PDF images, the size limit can be up to 10 MB.

Attaching a Receipt to a Transaction

1. From the Home page, click **Expenses > Transactions > Accountholder**.
2. Click on the TXN number of the transaction, and choose **Manage Receipts**.
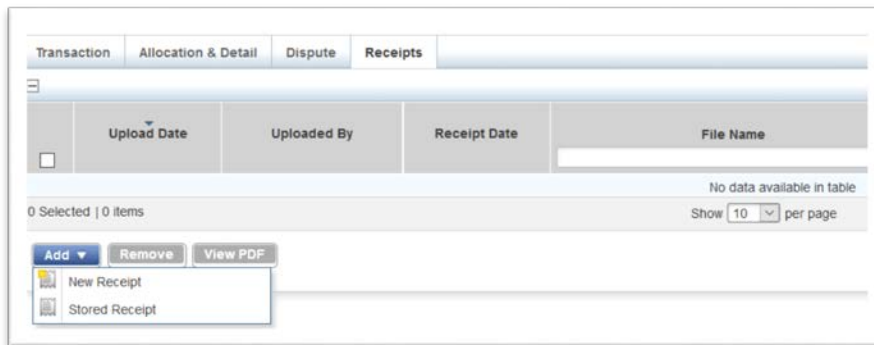3. Click **Add**. Do one of the following:
4. Attach a **New Receipt**:

    a. Select New Receipt.
    b. Browse to the desired image.
    c. **Receipt Date** and **Description** are optional. If you do not use these, please name your file with identifying information.
    d. Click **OK**. A confirmation message displays.
    e. Click **Close**.

5. Attach a **Stored Receipt** (see *Store a Receipt* below):

    a. Click **Stored Receipt**.

    b. Select a receipt from the list.

    c. Click **Attach**. A confirmation message displays.

    d. Click **Close**.

Attaching a Receipt to a Transaction (from within the transaction)

1. From the Home page, click **Expenses > Transactions > Accountholder**.

2. Click on the TXN number of the transaction, and choose **View Full Details**.

3. Click on the tab **Receipts**.

4. Click **Add**. Do one of the following:

5. Attach a **New Receipt**:

    e. Select New Receipt.

    f. Browse to the desired image.

    g. **Receipt Date** and **Description** are optional. If you do not use these, please name your file with identifying information.

    h. Click **OK**. A confirmation message displays.

    i. Click **Close**.

6. Attach a **Stored Receipt** (see *Store a Receipt* below):

    j. Click **Stored Receipt**.

    k. Select a receipt from the list.

    l. Click **Attach**. A confirmation message displays.

    m. Click **Close**.

To Store Receipts (for later attachment)

1. From the Home page, click **Expenses > Receipts**.

2. Click **Add**.

3. Click **Browse** to find the desired image to upload.

4. **Receipt Date** and **Description** are optional. If you do not use these, please name your file with identifying information.

5.

Expenses > Receipts

Receipts

Receipts

Show unattached receipts only ☑

Upload Date	File Name
☐	

No data available in table

0 Selected | 0 items |◁ ◁ Page: [1] of 0 ▷ ▷|

[Add] [Remove] [View PDF]

Receipt Details

* File Name: [   ]

Receipt Date: [   ] mm/dd/yyyy

Description: [   ]

Attached To:

Add Receipt   ☒

Works supports files in the .pdf, .png, .jpg, .gif and .jpeg format. Uploaded files will be compressed* and compressed file must be less than1MB.

*Note: PDF files are not compressed and must be less than 1MB natively.

* File to Add: [Browse...] No file selected.

Receipt Date: [   ] 🗓 mm/dd/yyyy

Description: [   ]

[OK] [Cancel]

6. Click **OK**.