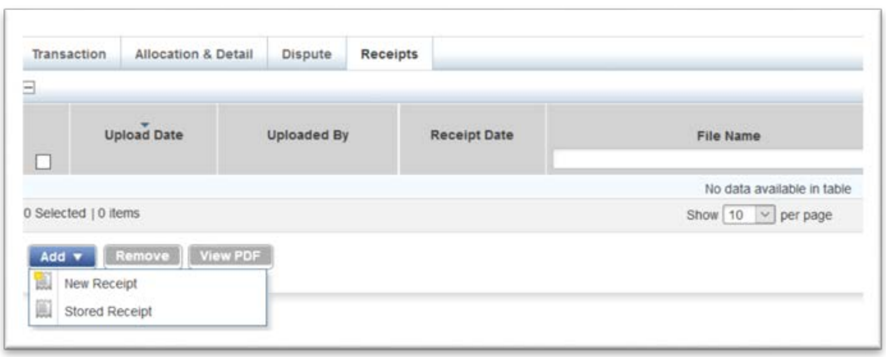
Attaching Receipts

Users in the *Bank of America Works* system can upload and attach receipt images to their transactions, or store receipt images for later processing.

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:

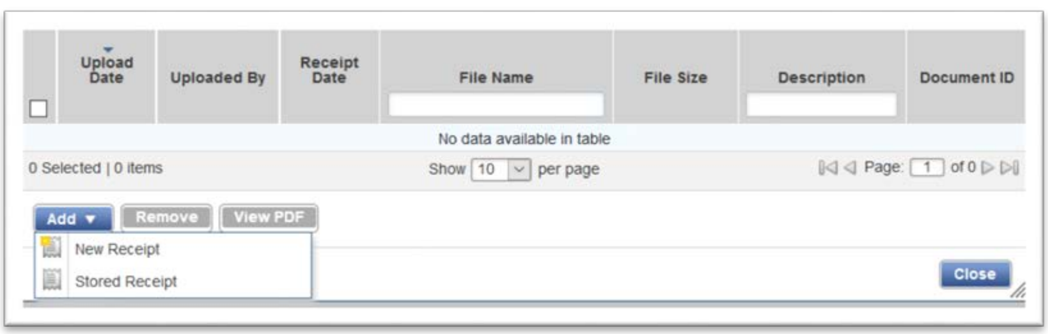


5. Attach a **New Receipt**:
   a. Select New Receipt.
   b. Browse to the desired image.
   c. **Receipt Date** and **Description** are optional. If you do not use these, please name your file with identifying information.
   d. Click **OK**. A confirmation message displays.
   e. Click **Close**.
6. Attach a **Stored Receipt** (see *Store a Receipt* below):
   f. Click **Stored Receipt**.
   g. Select a receipt from the list.
   h. Click **Attach**. A confirmation message displays.
   i. Click **Close**.

- 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 (not in the transaction)

2. From the Home page, click **Expenses > Transactions > Accountholder**.
3. Click on the TXN number of the transaction, and choose **Manage Receipts**.
4. Click **Add**. Do one of the following:
5. 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**.



6. 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**.

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. Click **OK**.