Transaction management legacy view

Attach a receipt

Your organization may allow you to attach a receipt to a transaction. You can attach a PNG, JPG, or PDF file copy of your receipt (e.g., scanned on a copy machine into PDF format) to a transaction. The system converts all file types to a PDF after upload. You and your Program Administrator can view the attachments on the transaction list and on transaction reports.

Your organization can choose a system setting to lock transactions after a certain number of days after your cycle date so that attachments can no longer be added to the transaction. Know what your organization has set for the limit.

To attach a receipt from the transaction list, click the **Paperclip** icon in the Attachment column for the transaction you want to attach a receipt to.

You can attach multiple receipts to a single transaction.

Click the **Add Attachment** link. A *Choose File to Upload* window opens.

Transaction Management

Trans Date	Posting Date	Merchant	City, State/Province	Amount
01/01	01/04	Chianti Grill	Falcon Height, MN	$87.94

Manage Attachments

Please add or delete attachments. Only PNG, JPG or PDF files are allowed.
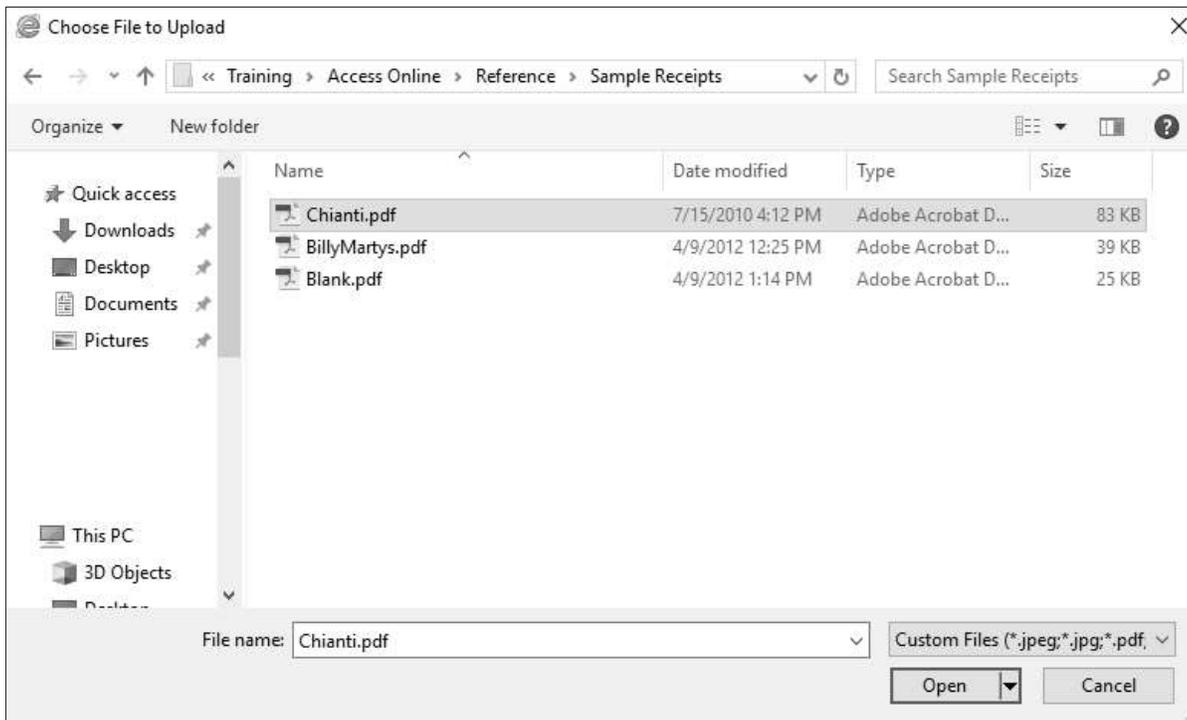

Add Attachment

Back

Save

Search and select one or more files to upload.

Click the **Open** button.

Click the **Trash can** icon to delete a receipt, if needed.

1. Use the arrows to page through each receipt if you uploaded more than one.
2. Click the **Save** button. The system attaches the receipts to the transaction.

Transaction Management

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01/01	01/04	Chianti Grill	Falcon Height, MN	$87.94

Manage Attachments

Please add or delete attachments. Only PNG, JPG or PDF files are allowed.

0.12MB 🗑

Images 1-2 of 2

Add Another Attachment

Back   Save

Your receipt displays as a pdf icon.

Click the **Paperclip** icon to attach additional receipts.

You can view an attachment by:

- Clicking the PDF icon on the transaction list

- Running a *Transaction Summary* report in PDF output and clicking the link to the attachment
- Completing a multiple attachments request if you are Program Administrator

Select	Status	Approval Status	Trans Date	Posting Date	Merchant	City/State	Amount		Detail	Trans Unique ID	Purchase ID	Attachment ⓘ	Comments	Accounting Code ⓘ
☐		Pending	01/16	01/24	112 EATERY	DALLAS, TX	$354.22			08203106188653202019-01-2400006		🖇		Add Allocation
☐		Pending	01/16	01/24	IDEAL DINER	ANAHEIM, CA	$325.23			08203106188653202019-01-2400005		🖇 📄		Add Allocation
☐		Pending	01/16	01/24	OFFICE DEPOT BLAT	FARGO, ND	$87.59			08203106188653202019-01-2400004		🖇		Add Allocation
☐		Pending	01/16	01/24	112 EATERY	DALLAS, TX	$354.22	CR		08203106188653202019-01-2400003		🖇		Add Allocation
☐		Pending	01/16	01/24	IDEAL DINER	ANAHEIM, CA	$325.23	CR		08203106188653202019-01-2400002		🖇		Add Allocation
☐		Pending	01/16	01/24	OFFICE DEPOT BLAT	FARGO, ND	$87.59	CR		08203106188653202019-01-2400001		🖇		Add Allocation

Transaction List — Return to top

Records 1 - 6 of 6

Check All Shown | Uncheck All Shown

ⓡ Reviewed ⓓ Disputed ⓡ Reallocated ⓓ, ⓡ Trans Detail Level 🖇 Upload Attachments 📄 Attachment

Check All Shown | Uncheck All Shown

Records 1 - 6 of 6

[Reallocate] [Mass Reallocate] [Change Review Status] [Approve] [Pull Back]