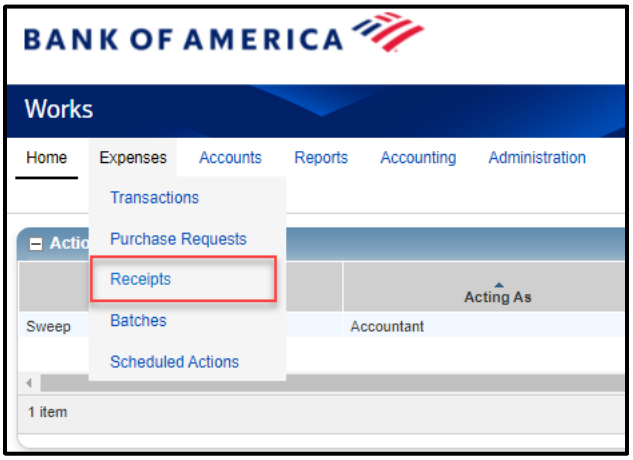
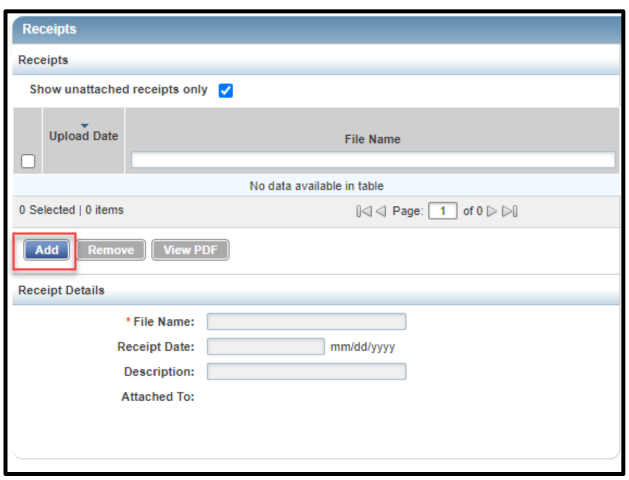
Uploading Receipts to Transactions in WORKS

Please note that you can only attach receipts BEFORE you sign off on transactions. Please ensure receipts are submitted and attached before signing off on expenses to ensure they are completed accurately.

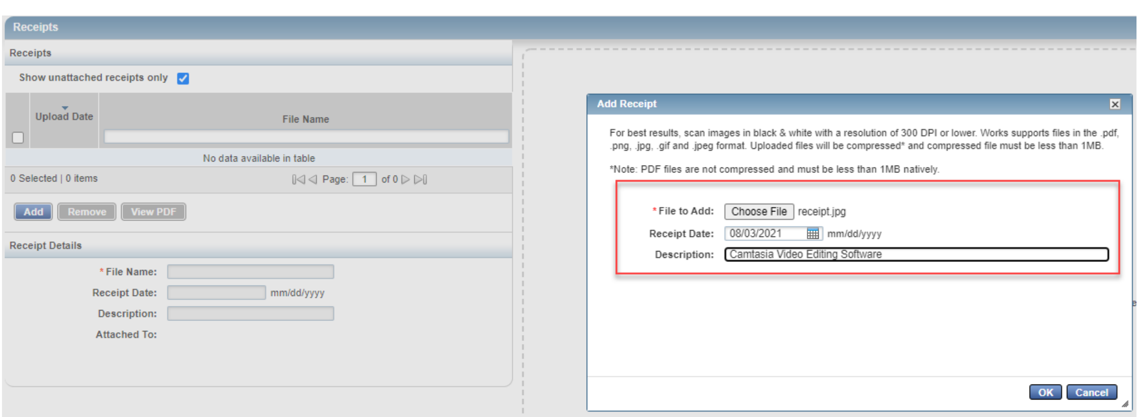
1) From the WORKS homepage, select "**Expenses**" and then "**Receipts**"



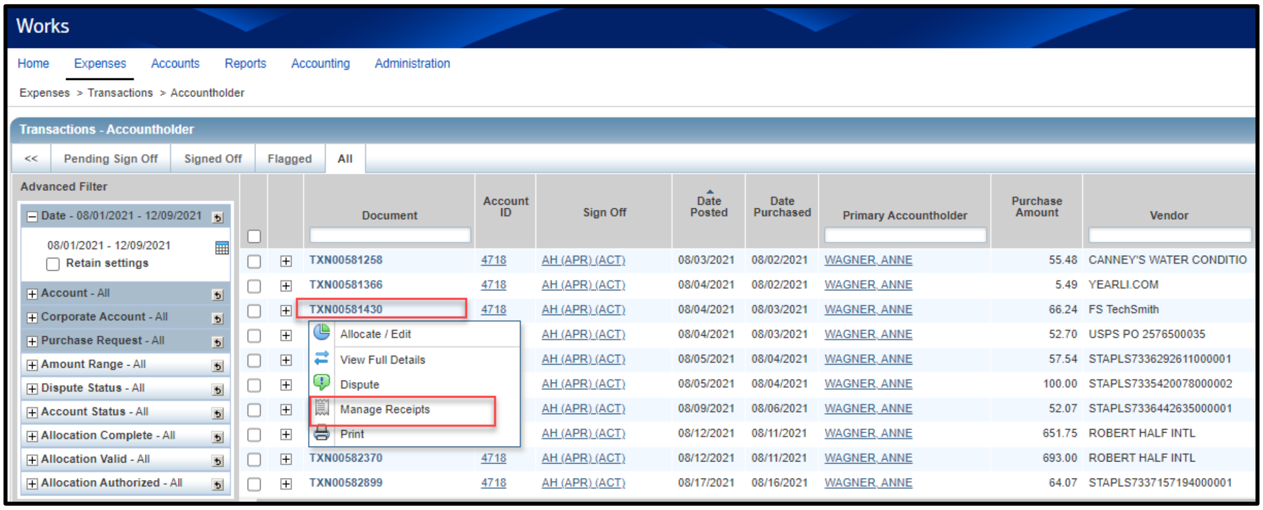
2) Your receipts that you have uploaded will be displayed on this screen. To add a new receipt, click the "**Add**" button.



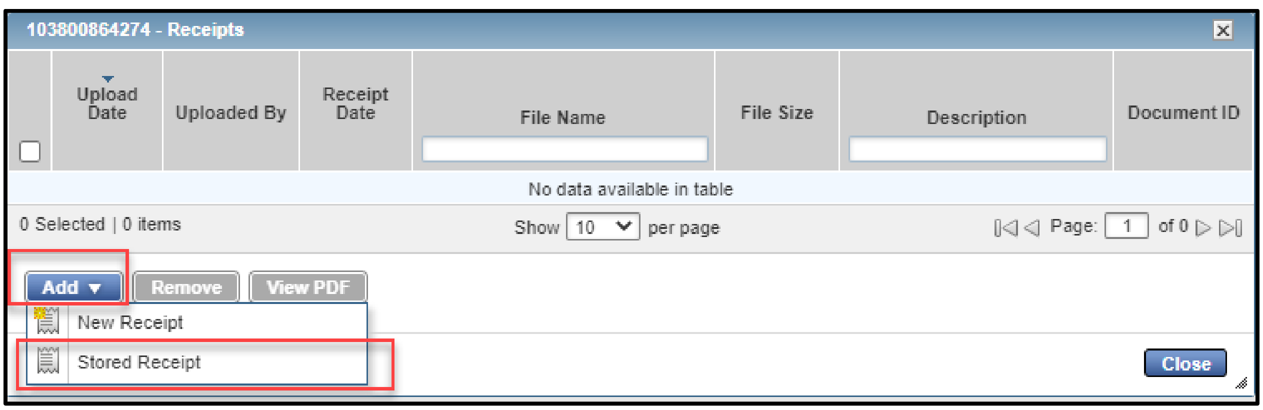
3) On the ensuing screen, click the "**Browse**" button and select the receipt from your files. Put the date that is on the receipt in the "**Receipt Date**" space, and then any additional notes about the file in the "**Description**" field. Once you are done click "**OK**". Repeat for each additional receipt.



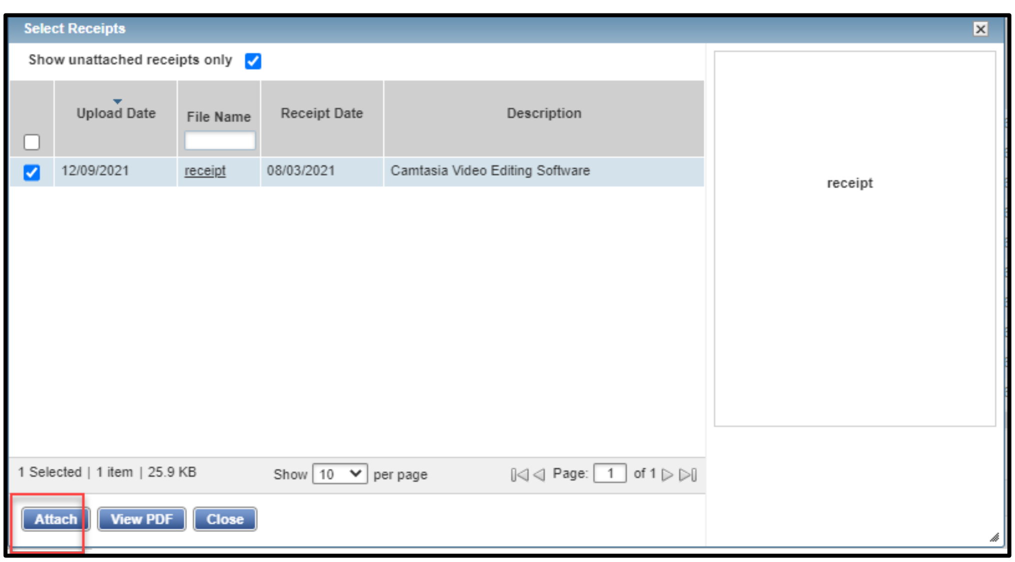
4) When the receipts are uploaded, go to “**Expenses**” → “**Transactions**” and find the transaction you want to attach the receipt to. Click on the drop down under the “**Document**” column and select “**Manage Receipts**”



5) Select “**Add**” and then “**Stored Receipt**”



6) Select the receipt by checking the box and then selecting “**Attach**”. If you aren’t certain which receipt is which, you can select “**View PDF**” to pull up a copy to view. Hit “**Close**” when done.



7) If you want to change your screen to show whether your transactions have receipts attached to them or not, select the "**Columns**" option at the top right and then check the box next to "**Uploaded Receipts**" and "**Save**". After this, you will see a new column at the end that displays "Yes" or "No" depending on if a receipt is attached or not. You can also select "**View Full Details**" and then the "**Receipts**" tab to pull up the PDF of the receipt if needed.