

Chrome River Receipt Gallery

How to Maximize the Receipt Gallery

Chrome River Travel and Expense is a comprehensive, automated travel and expense system. This system automates the approval process for travel pre-approvals (authorizations), travel expense and direct pay payments.

Information in this document:

How to upload receipts to the receipt gallery

How to attach receipts from the receipt gallery

How to create expense line items from the receipt gallery

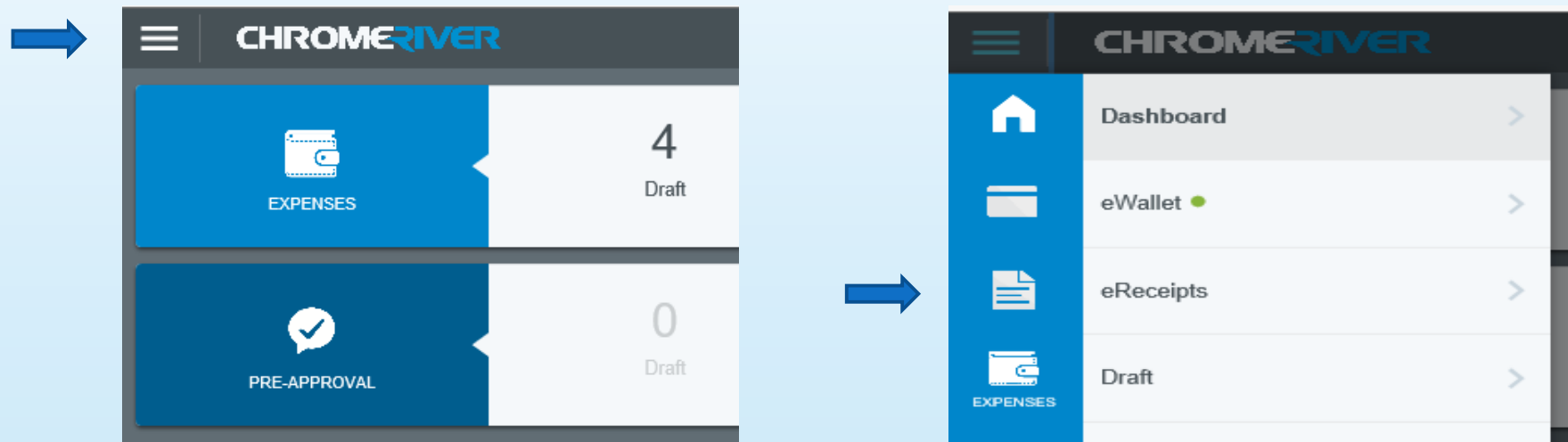


Adding Receipts

- ▶ Receipts can be uploaded to the Receipt Gallery at any time.
- ▶ Ways to upload receipts:
 - ▶ Upload from a users computer
 - ▶ Email receipt to the Receipt Gallery
 - ▶ Email receipt to an Expense Report
 - ▶ Use CR SNAP
- ▶ Attachments require PNG, JPEG, and PDF formats.

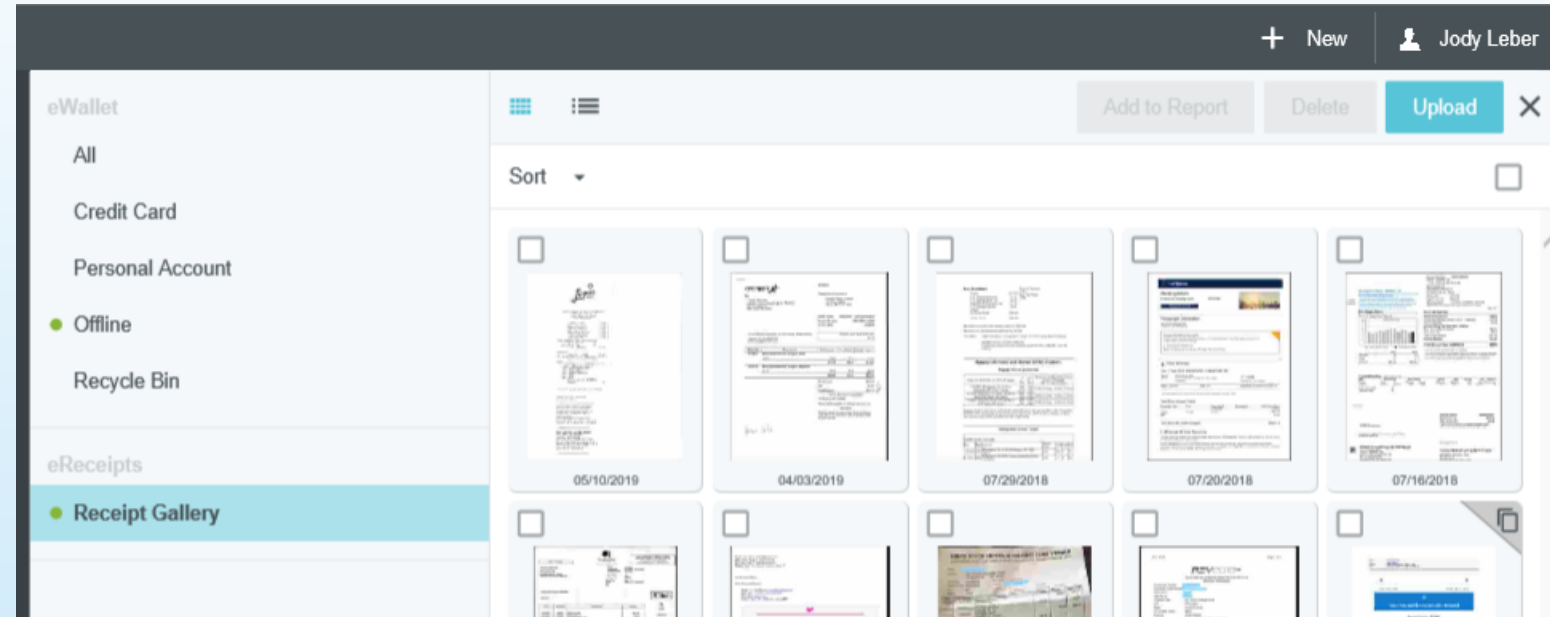
Adding Receipts

- ▶ Receipts may be uploaded into the user/travelers Receipt Gallery from saved documents on a computer.
 - ▶ Click on the Menu bar on the top left of the Chrome River dashboard.
 - ▶ Select eReceipts from the drop down list.



Adding Receipts

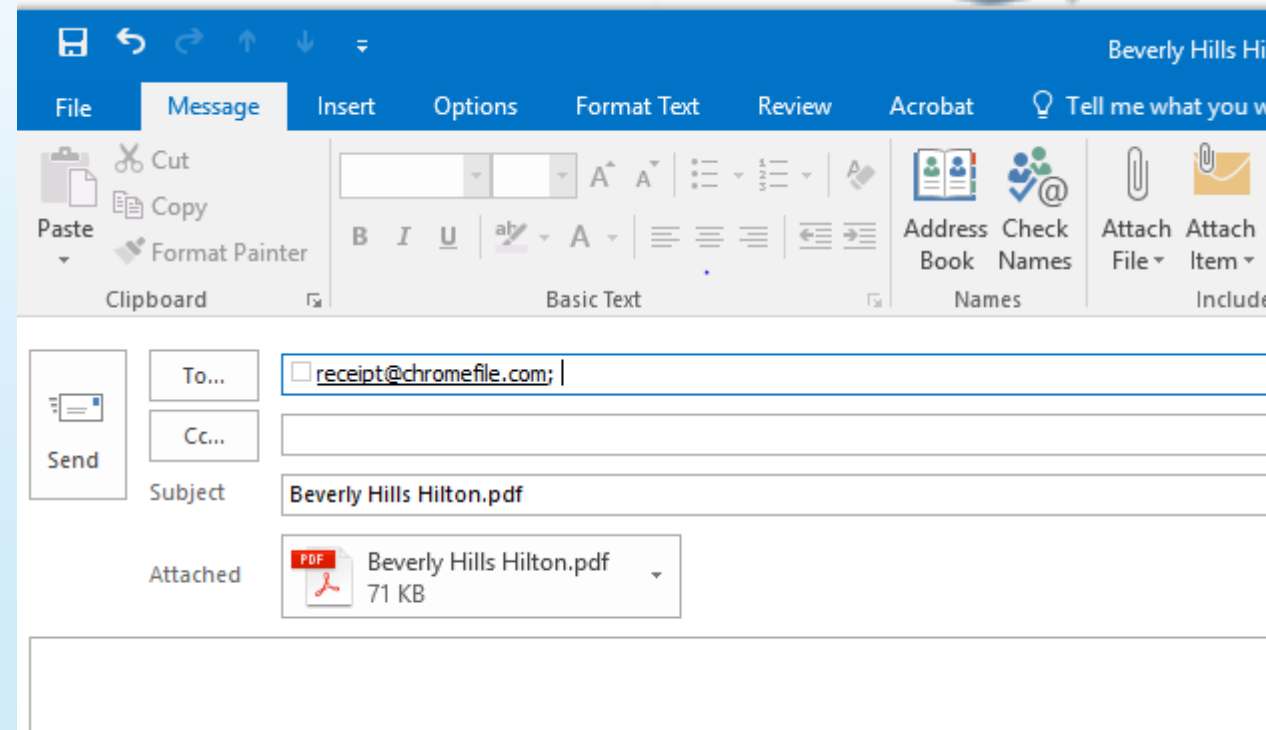
- Select Upload from top right. From your saved files double click on the document you would like to upload. You may also select a file then click Open to upload.



- A user can upload receipts while creating an expense report by clicking Receipt Gallery under Add Expenses and upload.

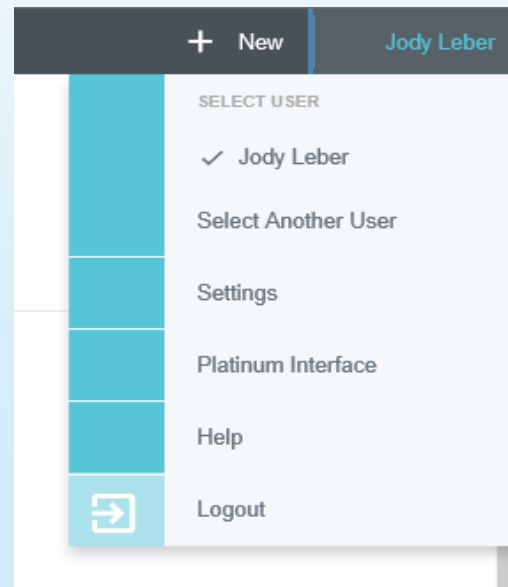
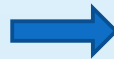
Adding Receipts

- Email receipt directly to your Receipt Gallery from your UNCW email account.
- Send receipt to receipt@chromefile.com



Adding Receipts

- ▶ A user may also email receipts to their Receipt Gallery from a personal email address when added to their Chrome River Profile.
- ▶ To add a personal address, click on your name then Settings from the drop down box.



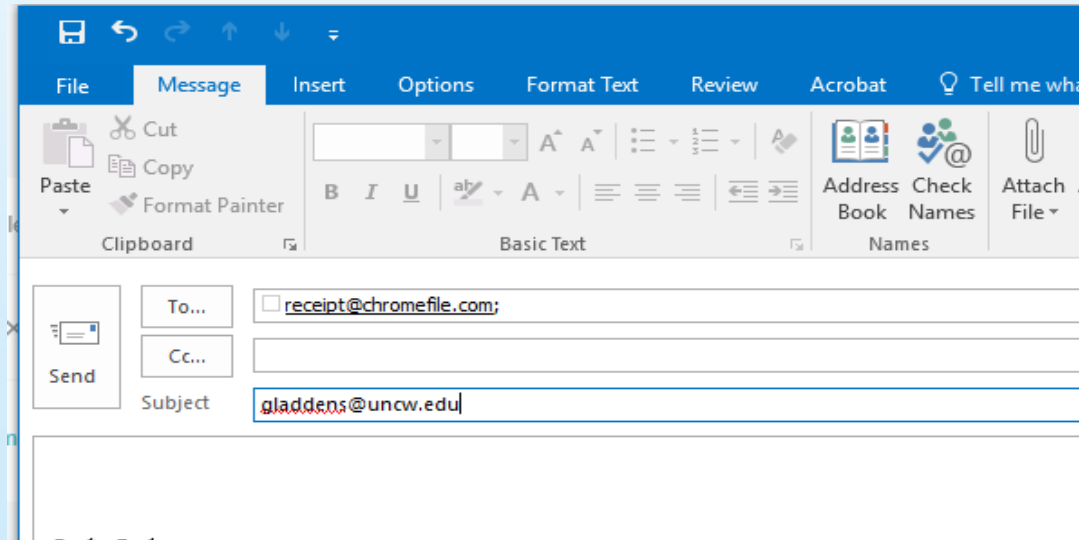
Adding Receipts

- ▶ Select +Add Alternative Emails and add your personal email.

<p>Jody Leber <i>uShop and Chrome River Analyst</i></p>	Account Information
Personal Settings	Email Addresses
Preferences Settings	Primary Email leberj@uncw.edu
Delegate Settings	Alternative Email 1 × j.leber4@gmail.com
Notification Settings	+ Add Alternative Emails ←
Privacy Policy	
About Chrome River	

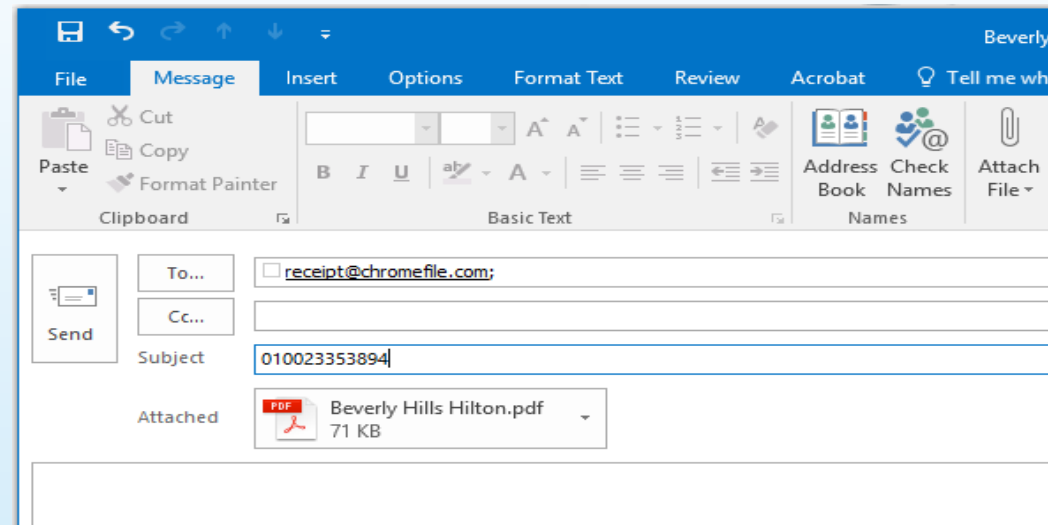
Adding Receipts

- ▶ A receipt can be emailed to the Receipt Gallery by the Delegate of the expense owner from the Delegates UNCW email account.
- ▶ Send email to receipt@chromefile.com and in the subject line include the UNCW email address of the expense owner.



Adding Receipts

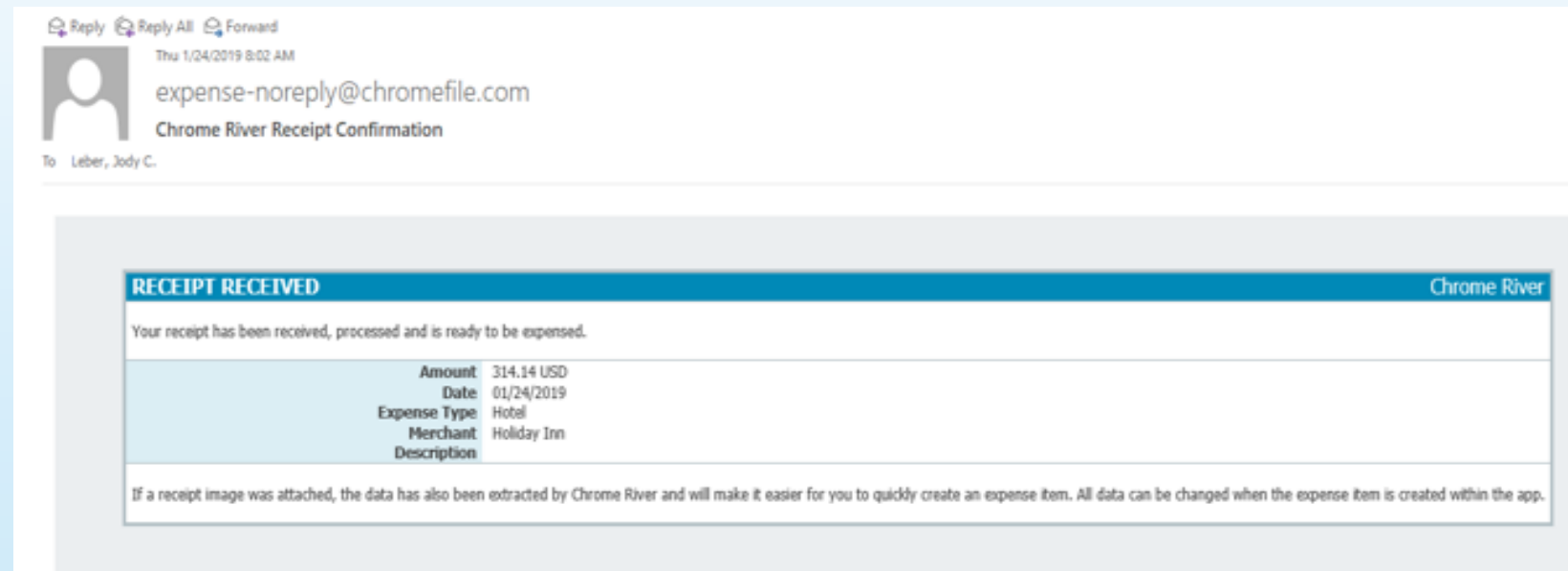
- ▶ A user or delegate may email receipts straight to the Expense Report if a report has been created.
- ▶ Email receipt to receipt@chromefile.com and in the subject line include the report ID number (example 010032375257).



- ▶ The receipt will be found in the attachments on the Header page of the Expense report.
- ▶ Once the Expense report is open, you may drag and drop the receipt to attach to the correct expense line item.

Adding Receipts

- Once receipts have been added to the Receipt Gallery a detailed email confirmation will be received.
 - Chrome River Receipt Confirmation email.



The screenshot shows an email interface with the following details:

- Buttons: Reply, Reply All, Forward
- Date: Thu 1/24/2019 8:02 AM
- From: expense-noreply@chromefile.com
- Subject: Chrome River Receipt Confirmation
- To: Leber, Jody C.

The email body contains a receipt confirmation with the following table:

RECEIPT RECEIVED		Chrome River
Your receipt has been received, processed and is ready to be expensed.		
Amount	314.14 USD	
Date	01/24/2019	
Expense Type	Hotel	
Merchant	Holiday Inn	
Description		

If a receipt image was attached, the data has also been extracted by Chrome River and will make it easier for you to quickly create an expense item. All data can be changed when the expense item is created within the app.

Adding Receipts

- Email receipt confirmation when sent by a delegate.

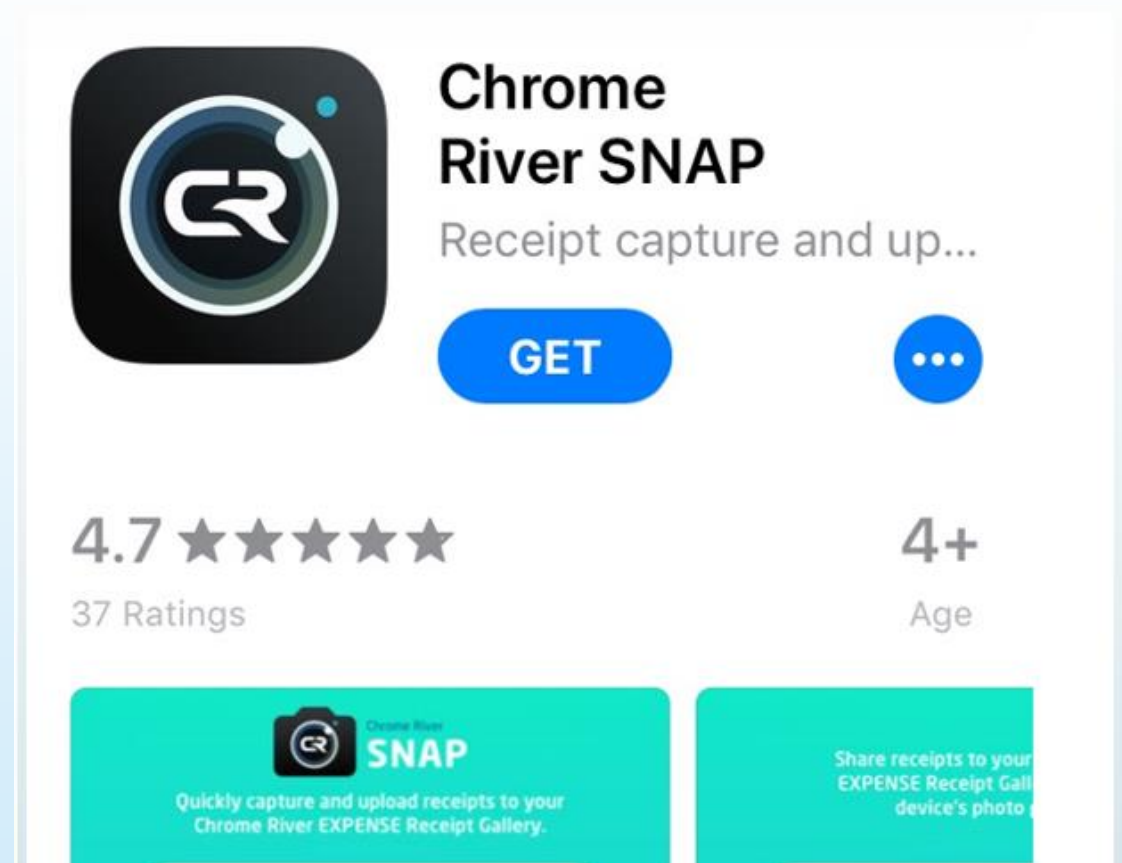
RECEIPT RECEIVED	
Your receipt has been received, processed and is ready to be expensed.	
Expense Owner	Sandra Gladden gladdens@uncw.edu
Amount	346.15 USD
Date	06/12/2019
Expense Type	Hotel
Merchant	Beverly Hilton
Description	
If a receipt image was attached, the data has also been extracted by Chrome River and will make it easier for	

- Email receipt confirmation when sent to an Expense Report.

RECEIPT RECEIVED	Chrome River
Receipt images were successfully received and attached to the following report.	
Expense Report for	Jody Leber
Report ID	0100-2335-3894
Report Name	Rev2018

Adding receipts

- ▶ Chrome River SNAP
 - ▶ APP is available for iPhone and Android users.
 - ▶ Search the APP Store for Chrome River SNAP and download.



The screenshot shows the App Store listing for the Chrome River SNAP app. The app icon is a black square with rounded corners, featuring a white 'CR' logo inside a circular graphic. The app title is 'Chrome River SNAP' in bold black text, with the subtitle 'Receipt capture and up...' below it. A blue 'GET' button is visible, along with a three-dot menu icon. The app has a 4.7 star rating from 37 ratings and is rated for ages 4+. Two promotional banners are shown at the bottom: one with the app icon and text 'Quickly capture and upload receipts to your Chrome River EXPENSE Receipt Gallery.', and another with text 'Share receipts to your EXPENSE Receipt Gallery device's photo gallery'.

Chrome River SNAP
Receipt capture and up...

GET

4.7 ★★★★★
37 Ratings

4+
Age

Quickly capture and upload receipts to your Chrome River EXPENSE Receipt Gallery.

Share receipts to your EXPENSE Receipt Gallery device's photo gallery.

Adding Receipts

- Once downloaded open APP.
- Need to verify the primary email.
- Enter UNCW address
- Click Next



Before we begin, we need to verify the primary email used for your Chrome River account.

Before we begin, we need to verify the primary email used for your Chrome River account.

gladdens@uncw.edu

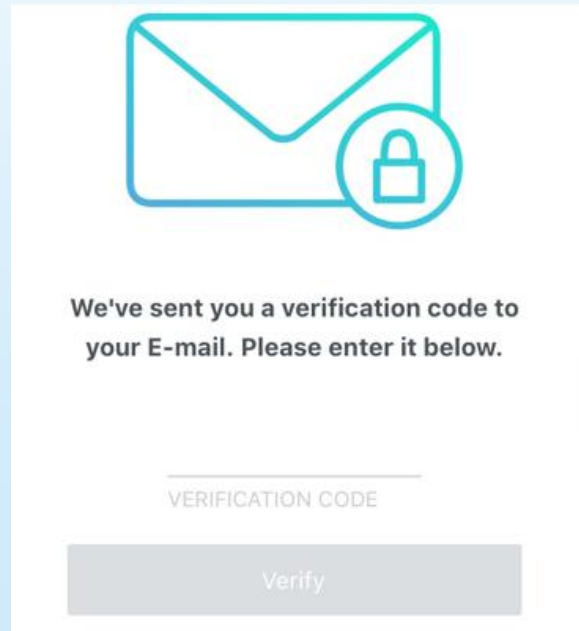
EMAIL ADDRESS

Next

By using our app, you agree to our [Terms & Conditions](#)

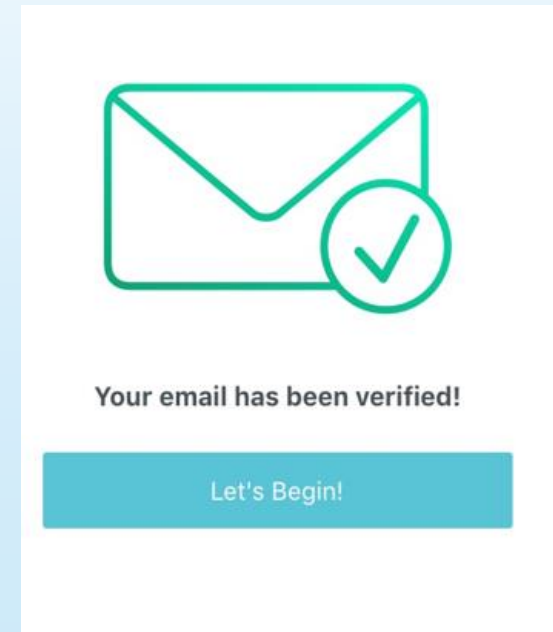
Adding receipts

- ▶ Retrieve verification code from the email sent to your UNCW address.
- ▶ Add verification code into APP
- ▶ Click Verify



The image shows a mobile app screen for verification. At the top, there is a teal icon of an envelope with a padlock. Below the icon, the text reads: "We've sent you a verification code to your E-mail. Please enter it below." Underneath this text is a horizontal line, followed by the label "VERIFICATION CODE" in all caps. At the bottom of the screen is a grey button with the text "Verify".

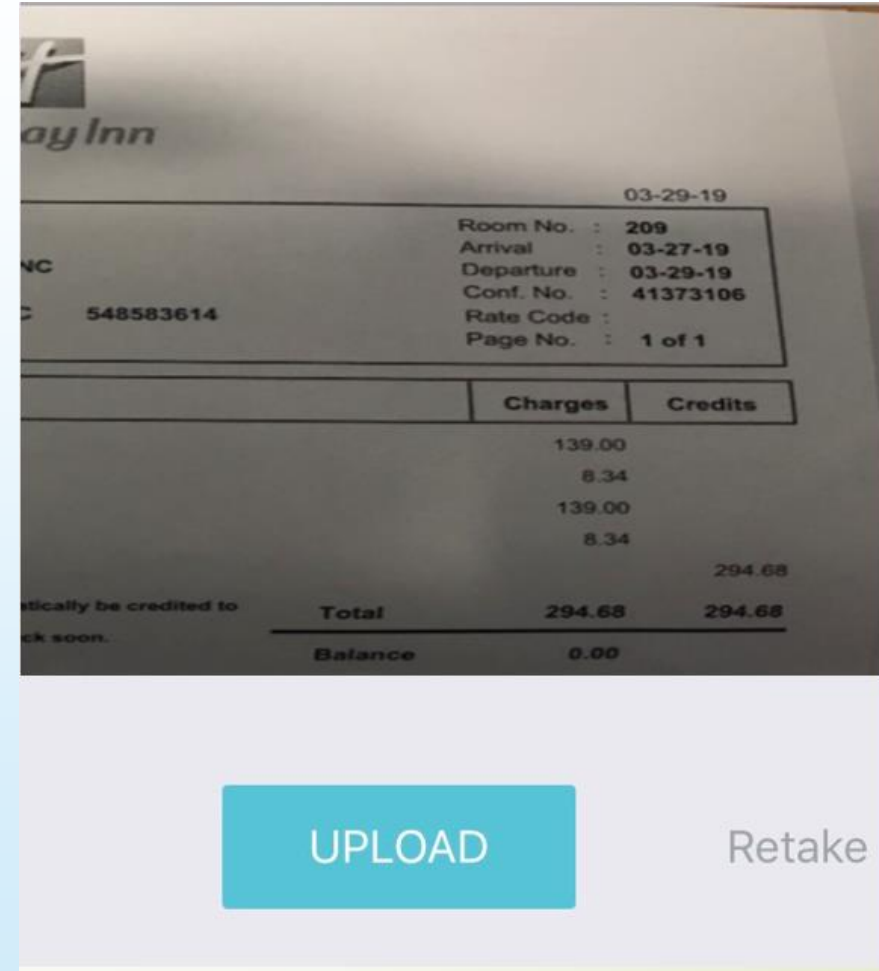
- ▶ Receive confirmed verification
- ▶ Click Let's Begin



The image shows a mobile app screen for verification confirmation. At the top, there is a teal icon of an envelope with a checkmark. Below the icon, the text reads: "Your email has been verified!". At the bottom of the screen is a teal button with the text "Let's Begin!".

Adding receipts

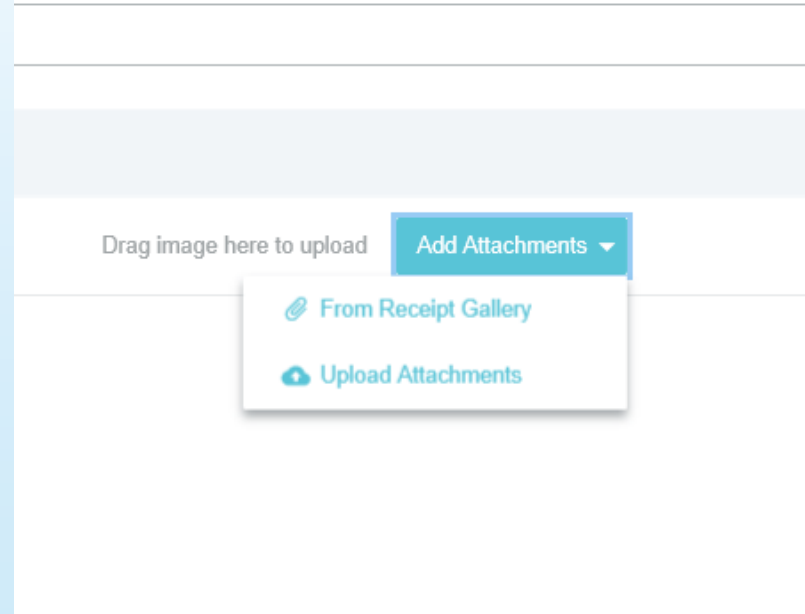
- ▶ Agree for APP to use your camera
- ▶ APP will open to the camera when opened
- ▶ Take a picture of the receipt
- ▶ Click "UPLOAD" at bottom of phone screen.
- ▶ Click "Retake" if new picture is needed



Attaching Receipts

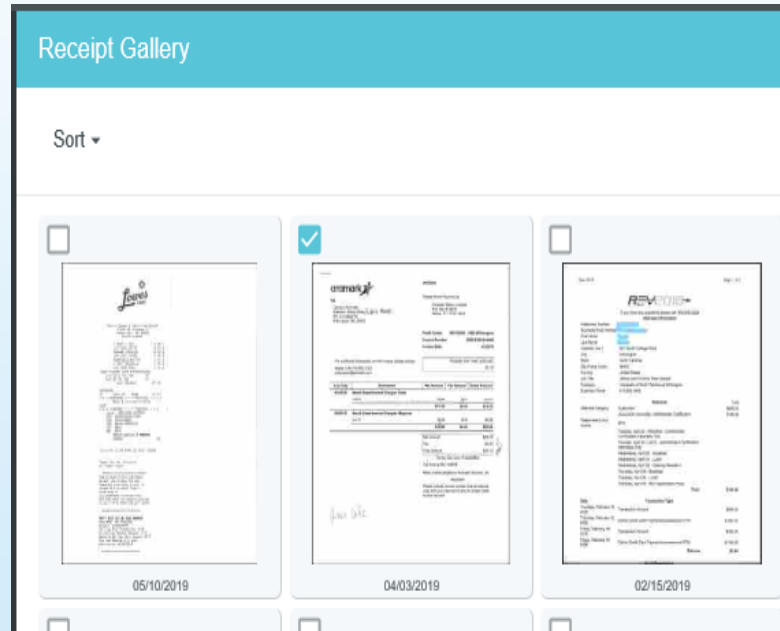
Able to apply a receipt from the Receipt Gallery to a line item expense

- ▶ Using the Expense Report Add Attachment tab
 - ▶ When creating an expense line item select Add Attachments and From Receipt Gallery at the bottom of the page

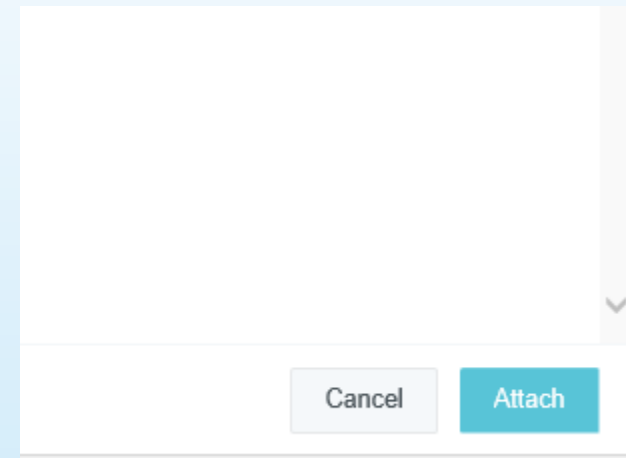


Attaching Receipts

- Select the correct receipt needed



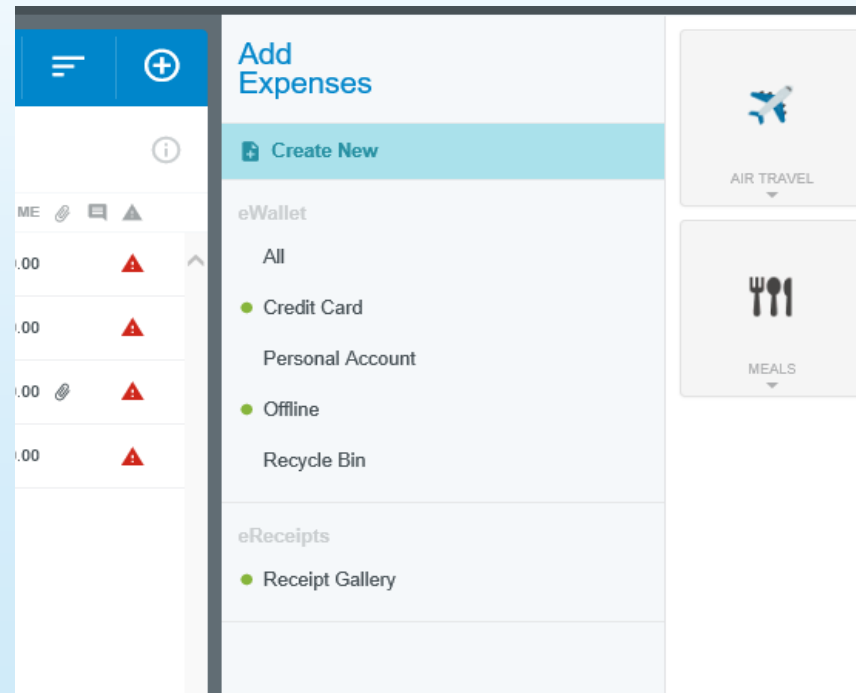
- Click on Attach at the bottom of the Gallery



Attaching Receipts

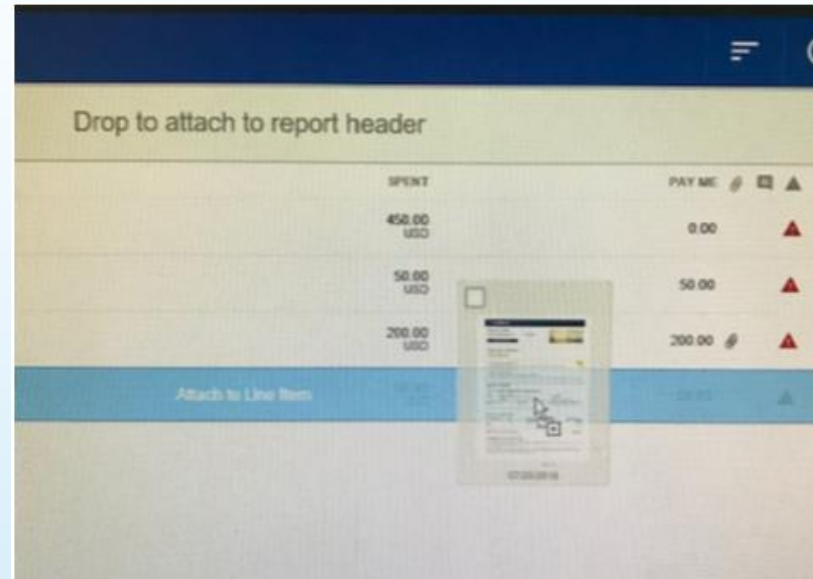
Able to apply a receipt from the Receipt Gallery to a line item expense

- ▶ Drag and drop a receipt from the Receipt Gallery
- ▶ Under the Add Expenses, click on Receipt Gallery




Attaching Receipts

- ▶ Click on the correct receipt. Drag over to the expense line item you would like to attach it to and drop.







- ▶ Line item will then show the attachment icon

50.00 USD	50.00
200.00 USD	200.00 
50.00 USD	50.00

Attaching Receipts

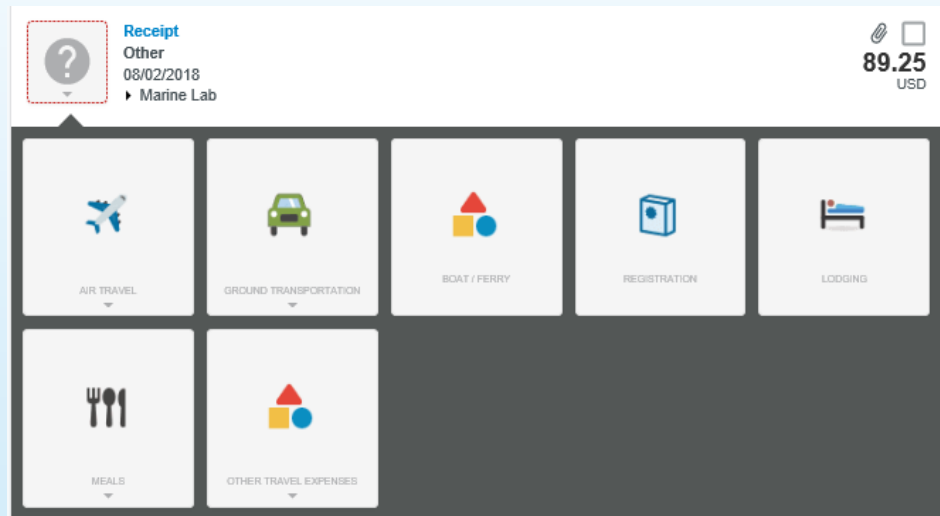
Bank Card Transactions

- ▶ Merge receipt with bank card transaction for reconciliation (OCR will do this automatically if acceptable)
 - ▶ Once Expense Report is created, under Add Expenses select All
 - ▶ This gives you a list of all bank card charges and all receipts found in the eWallet

	Receipt Taxi 04/27/2018 ▶ Lyft	 <input type="checkbox"/> 10.20 USD
	Bank of America Visa Transaction Airfare 06/21/2018 ▶ LUFTHANSA AG2201400242126	<input type="checkbox"/> 298.86 USD  256.87 EUR

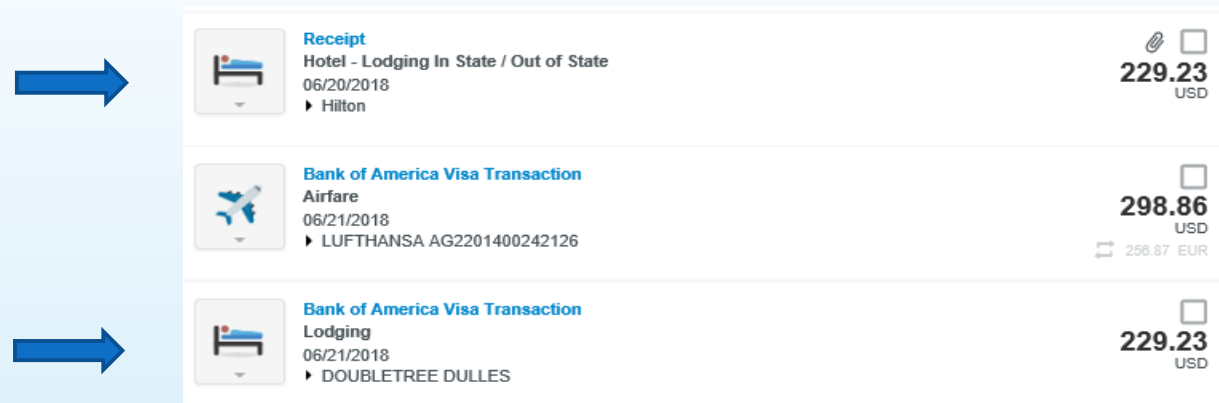
Attaching Receipts

- Assign all ? Bank card transactions and receipts to the correct expense type by clicking on the icon arrow.







Attaching Receipts

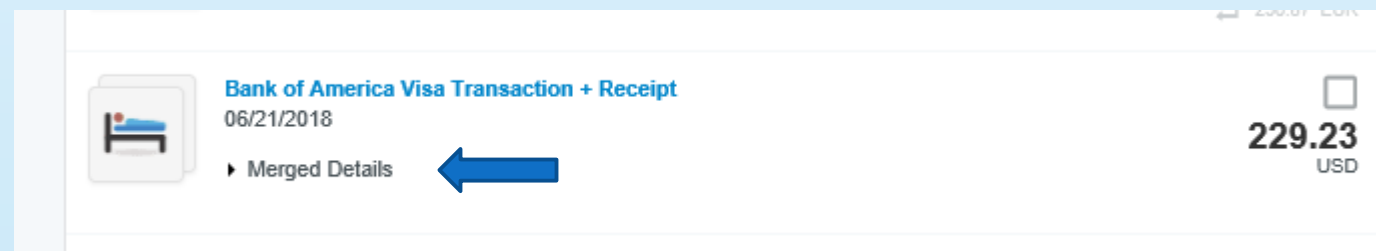
- ▶ The user is able to drag the receipt icon and drop on the correct bank card transaction icon.




▶

	Receipt Hotel - Lodging In State / Out of State 06/20/2018 ▶ Hilton	 <input type="checkbox"/> 229.23 USD
	Bank of America Visa Transaction Airfare 06/21/2018 ▶ LUFTHANSA AG2201400242126	<input type="checkbox"/> 298.86 USD 256.87 EUR
	Bank of America Visa Transaction Lodging 06/21/2018 ▶ DOUBLETREE DULLES	<input type="checkbox"/> 229.23 USD

- ▶ The icon will now show that the bank card transaction and receipt have been merged.

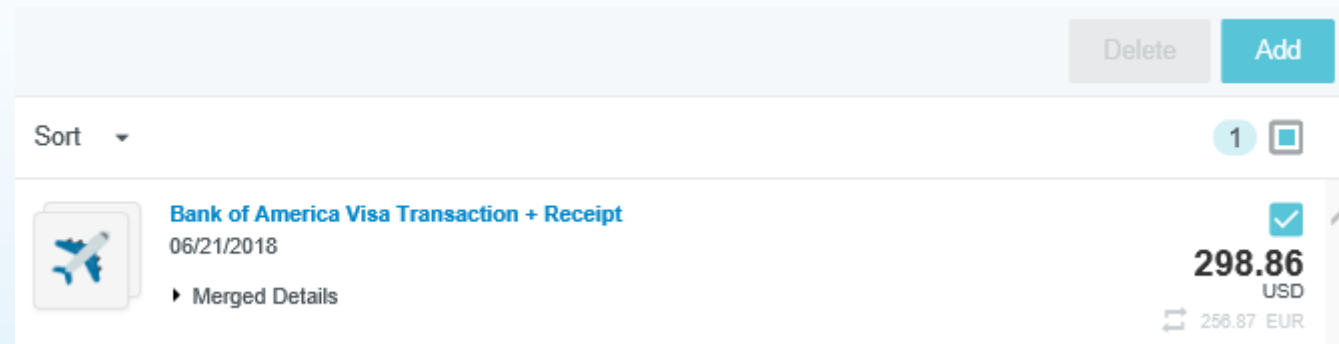


▶

	Bank of America Visa Transaction + Receipt 06/21/2018 ▶ Merged Details	<input type="checkbox"/> 229.23 USD
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Attaching Receipts

- ▶ Reconcile by selecting the bank card transaction and clicking Add.



The screenshot shows a list of transactions. At the top right, there are 'Delete' and 'Add' buttons. Below them is a 'Sort' dropdown and a '1' icon with a square. The main transaction is 'Bank of America Visa Transaction + Receipt' dated '06/21/2018'. It has a checkmark icon and a value of '298.86 USD'. Below the USD value is '256.87 EUR'. A 'Merged Details' link is visible below the transaction title.

- ▶ The expense line item will be created on the expense report with the attached receipt as required documentation.

DATE	EXPENSE	SPENT	PAY ME
Thu 06/21/2018	 Lodging	229.23 USD	0.00  

Attaching Receipts

Bank Card Transactions

- ▶ If an expense line item has been created but a bank card was used for that expense and has posted to the eWallet.
- ▶ A user can click on the back card transaction icon, drag and drop the it to the correct line item.

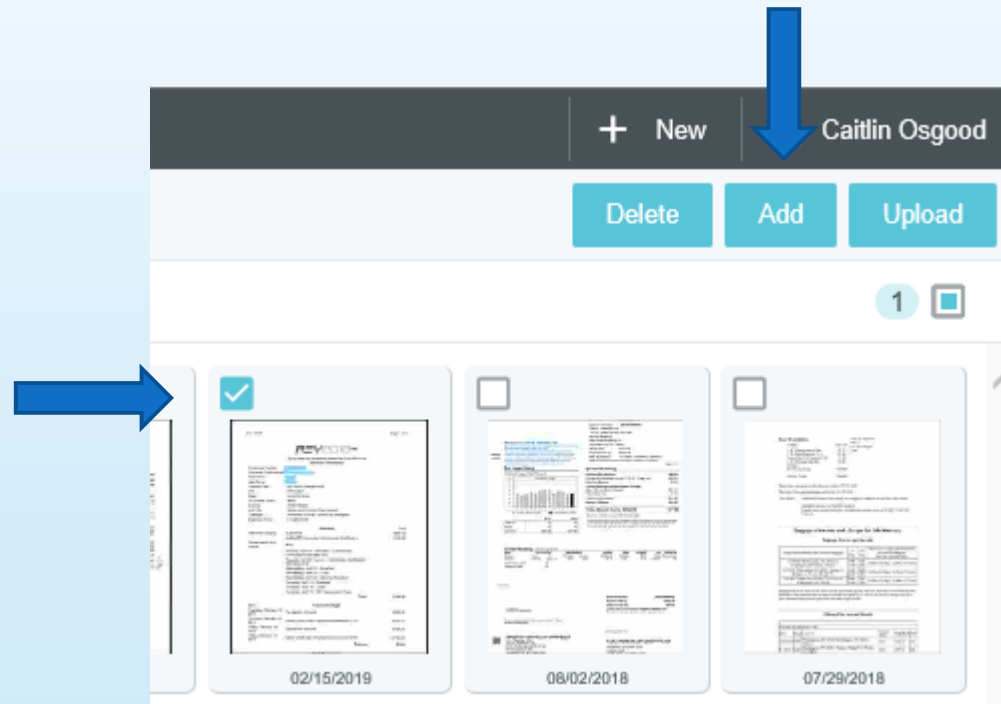


- ▶ The system will update the line item expense information including the total amount based on the bank card transaction.

Creating expense line items

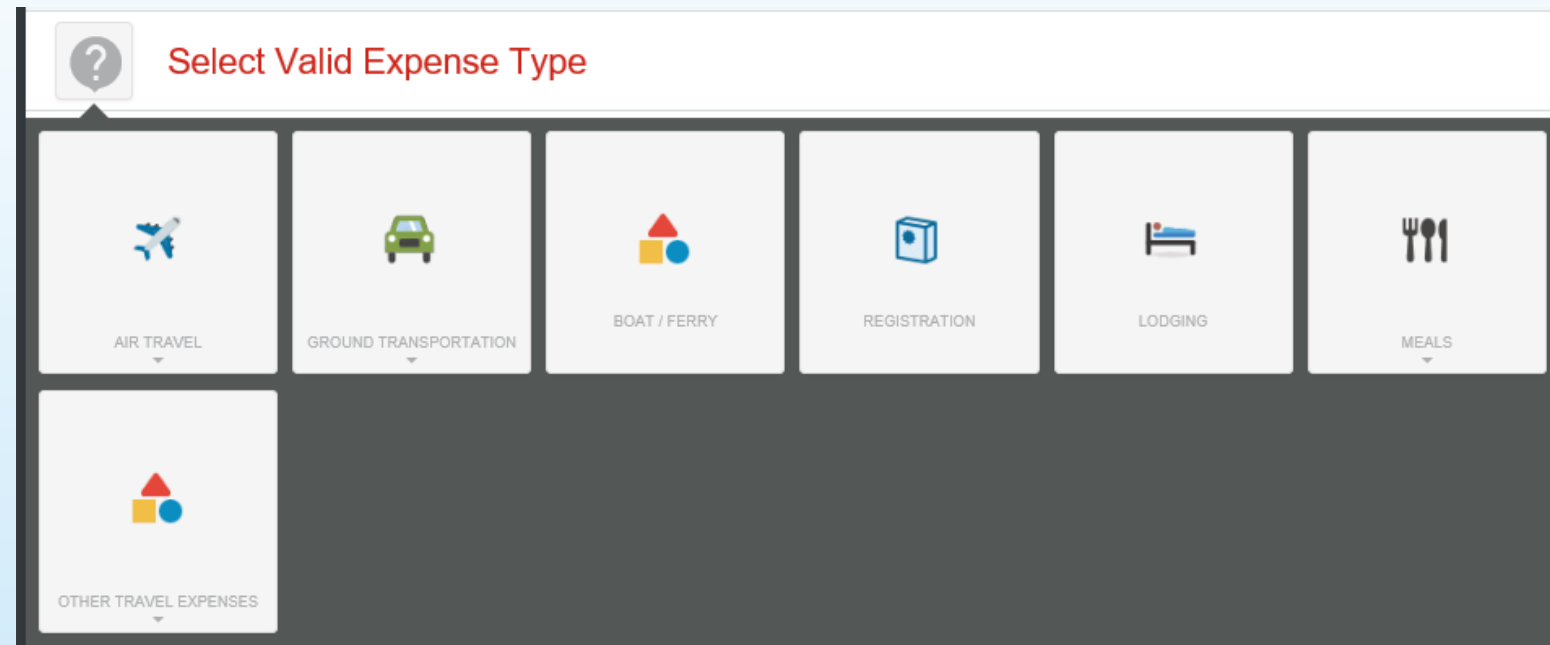
Able to create an expense line item with a receipt

- ▶ Using the Receipt Gallery
 - ▶ Select a receipt from the Receipt Gallery, click Add to create the line item expense



How does this benefit a user?

► If needed Select Valid Expense Type




The screenshot shows a user interface for selecting an expense type. At the top, there is a header with a question mark icon and the text "Select Valid Expense Type". Below the header, there are seven buttons arranged in two rows. The first row contains six buttons: "AIR TRAVEL" (with an airplane icon), "GROUND TRANSPORTATION" (with a car icon), "BOAT / FERRY" (with a boat icon), "REGISTRATION" (with a registration box icon), "LODGING" (with a bed icon), and "MEALS" (with a fork and knife icon). The second row contains one button: "OTHER TRAVEL EXPENSES" (with a boat icon). Each button has a small downward arrow at the bottom, indicating it is a dropdown menu.

► If the OCR system can read the expense type it will create the expense without this step.

How does this benefit a user?

- Expense is created on right side and receipt chosen is visible on the left side of the page.
- Verify and edit if needed all fields of the expense item.
- Click Save
- Expense line item has been created with receipt attached for documentation.

DATE	EXPENSE	SPENT	PAY ME
Fri 04/27/2018	 Taxi	10.20 USD	10.20 