Upload and Attach Receipts and Images

There are multiple ways to attach receipts and images in Chrome River. Receipts can be emailed, scanned or faxed and uploaded directly to the report header, to an expense, or to the **Receipt Gallery**. From the **Receipt Gallery**, images can be dragged and attached to line items within the report. Only JPG, PDF, PNG, and TIFF files can be accepted when an image is attached via the Chrome River SNAP app, and no file may be greater than 10 MB. Images attached via email, scanning, or faxing may not exceed a combined total of 100 MB. See the Chrome River Help Center, EXPENSE > Add Images for complete details. (Login to Chrome River and click the link below) https://pt.ca1.chromeriver.com/help/hg_admin_en/Content/B_Create_Expense_Report/Add_Images.htm

Attach Via Email

Before emailing a receipt or image, you will want to make sure that the email address you are using is associated to your Chrome River account.

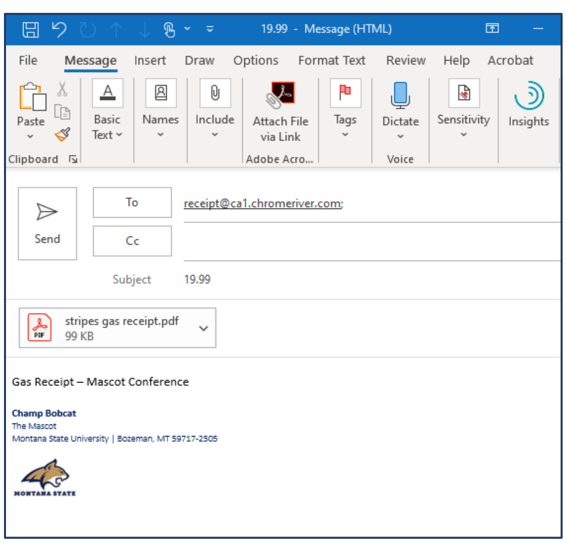
You can check your email information by going to your name located in the upper right corner of the Navigation Bar, selecting **Settings** and then **Personal Settings**.

You will see your montana.edu email address listed. If you would like to add a personal email so you can upload images from other accounts or from your mobile devices, you will need to click **+ Add Alternative Emails**.

Please note that an email address can only be associated with one account.

Email to Receipt Gallery

To email a receipt to your **Receipt Gallery**, simply
1) attach the images to an email message,
2) include the amount of the expense in the subject line (e.g. 19.99)
3) email from an email address associated with your Chrome River account device to receipt@ca1.chromeriver.com.



You can also take a photo with your mobile device and email directly from your phone as long as you've set up the appropriate email address in your **Personal Settings** in Chrome River.

The images will appear in the **Receipt Gallery** and/or the **Offline** section of the **eWallet**. Each image will appear as its own item, complete with the corresponding information about the expense.

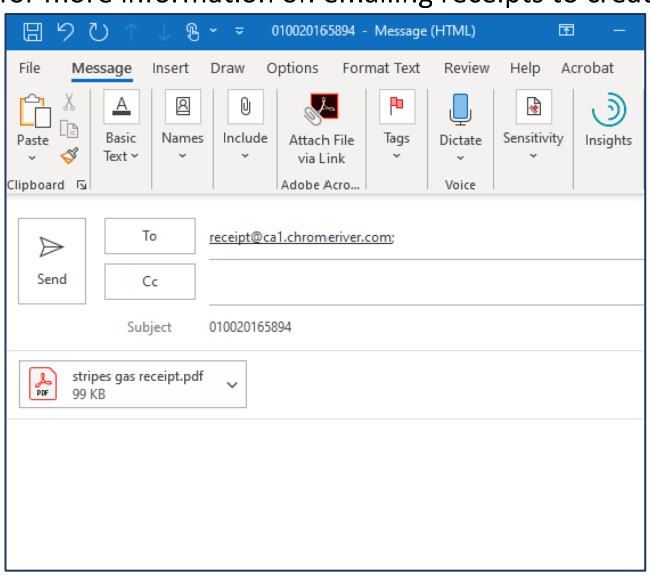
If you attach a multipage PDF containing only images, each image will be created as a separate expense item. If the multipage PDF contains text, a single item will be created.

Email to Expense Report

If you know the ID of the expense report to which you'd like to attach an image,
1) enter the Report ID into the subject line of an email you've composed (instead of the amount, as described in the **Email to Receipt Gallery** example, above).
2) Remove everything from the body of the email, including any email signatures.
3) Send the email to receipt@ca1.chromeriver.com.

This method works even if you have multiple images attached to the email you're sending, **if** they all apply to the same expense report. The total combined size of all images may not exceed 100 MB.

Images will be attached to the report header. See the **Receipt Transactions and Optical Character Recognition** section below for more information on emailing receipts to create transactions.



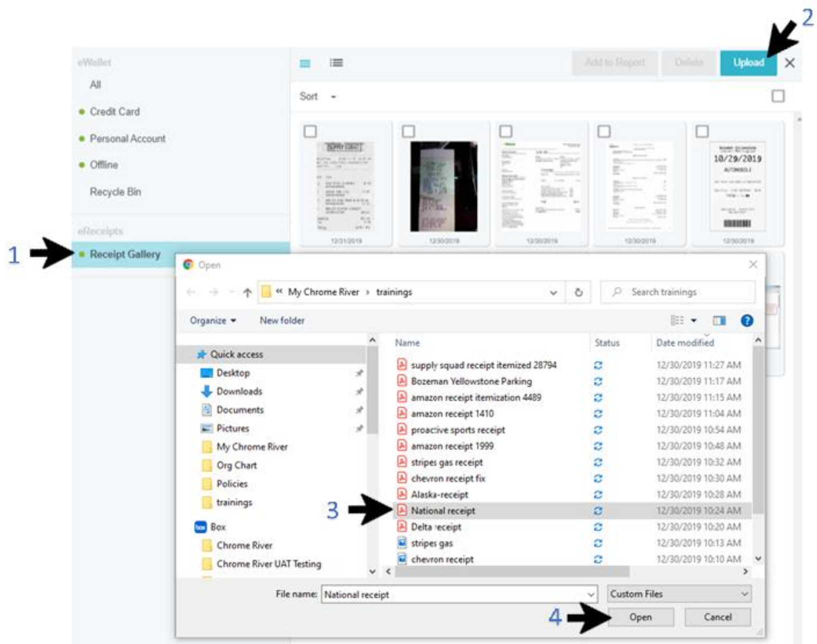
Attach Via Scanning/Upload

Scan and Attach to Receipt Gallery

You may wish to scan receipts or images directly to your computer. Once you have scanned, you can upload to the **Receipt Gallery** by going into your Chrome River **eReceipts** from the 3-bar menu,
1) select **Receipt Gallery**
2) click the **Upload** button
3) select the desired receipt(s) from your files
4) click **Open**

The receipt image(s) will appear in your **Receipt Gallery** with the date you uploaded the expense.

See more detail below in the **Upload to the Receipt Gallery** section.

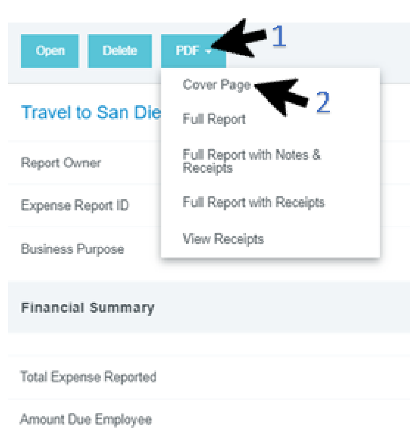


Attach Via Fax

This method is only available for attaching receipts or documentation to a specific report. You will need to print the PDF cover page of the expense report in order to get its unique barcode.

1) click the **PDF** button in the preview of the desired expense report (1)
2) select **Cover Page** (2), and the page will open in a new window so that you can print or save it
3) Fax the cover page with the images you wish to attach to **(888) 323-1591** - the unique barcode will direct it to the correct report.

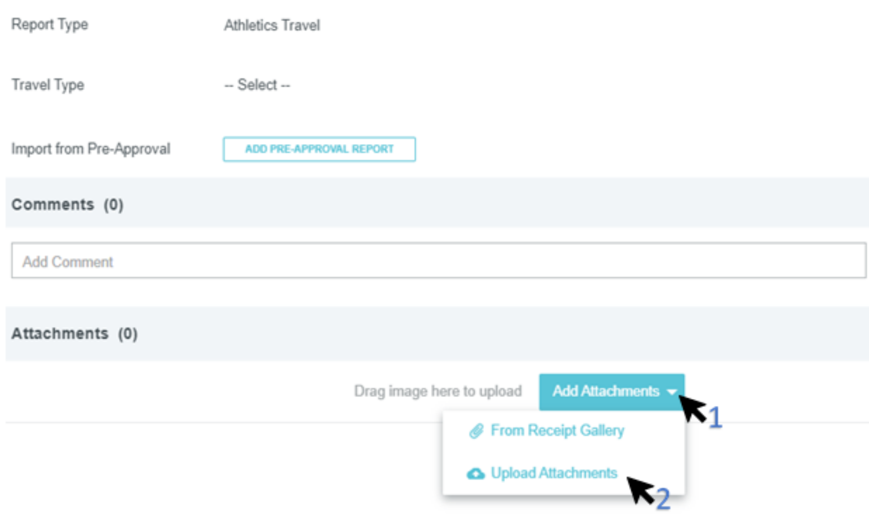
NOTE: Any images already attached to the report will be overwritten by the images you send in.



Uploading Images

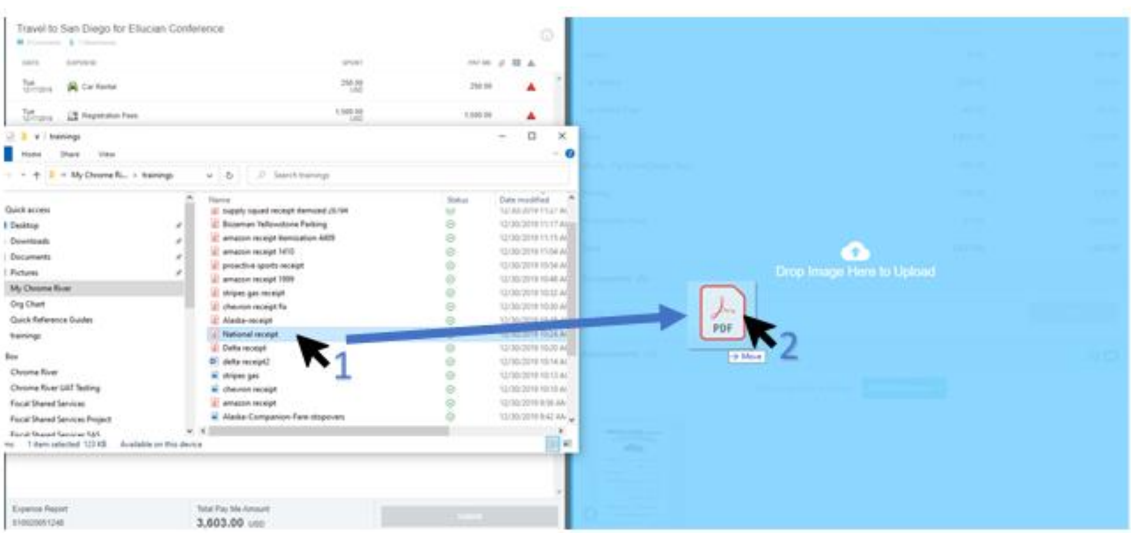
Upload to the Report Header

Once you have entered the header information for a new Expense Report or Pre-Approval, click the **Add Attachments** button (1) in the lower right to browse for an image on your device (2). This will attach a receipt to the report but does not tie it to a specific expense line. You will have the opportunity to assign this to a line item later.



You may also choose a receipt in a file first and drag it to the **Drag image here to upload** section.

From Windows folder (1), drag and drop the receipt file anywhere on the right side of the Chrome River window (2).

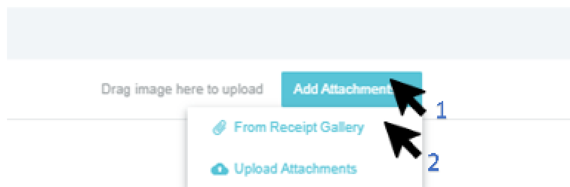


Upload Directly to an Expense Line Item

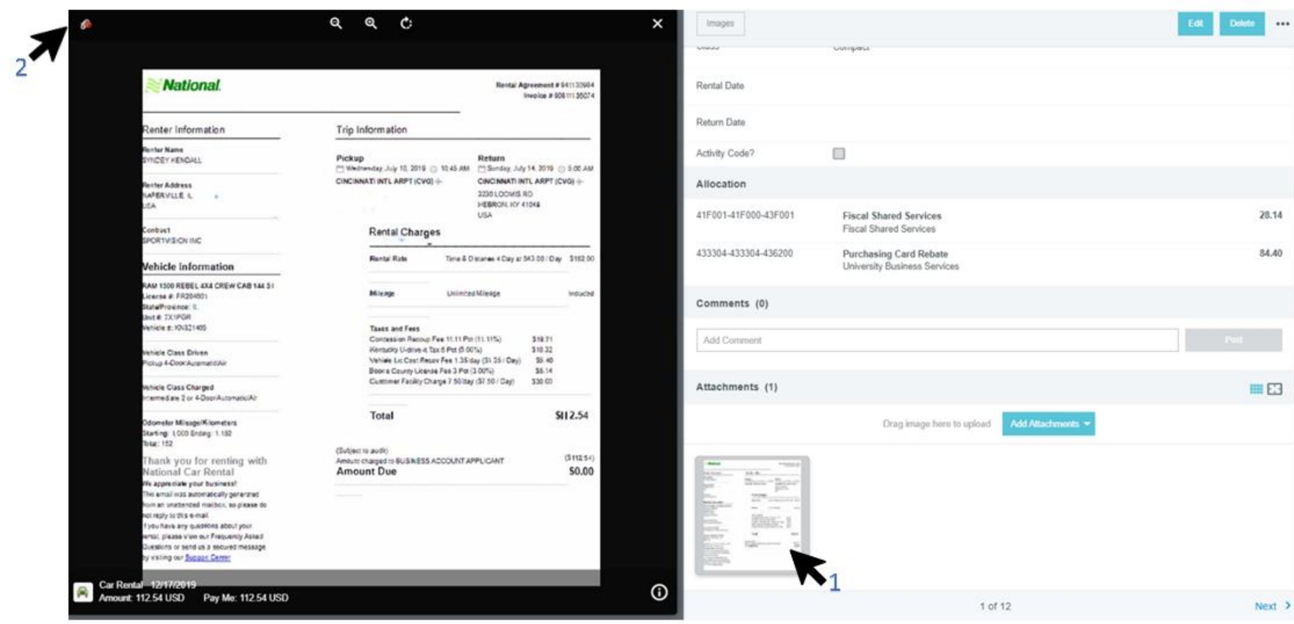
Receipts can be uploaded directly to a line item if you have the image already available on your computer or device. After you have created an expense, you will
1) click on the **Add Attachments** button in the lower right corner of the expense detail.
2) click on Upload Attachments in the dropdown

This can be done before the expense is saved or after.

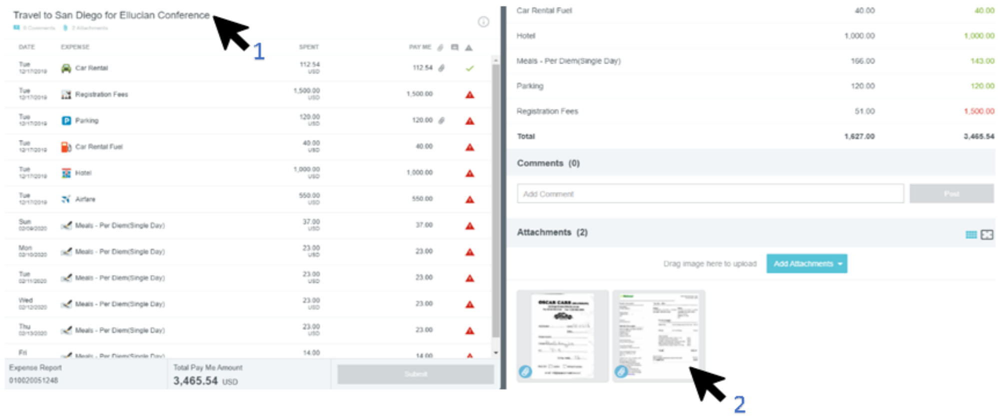
Once the image is attached, it will appear on the bottom of the expense detail when the line is selected. You can also use the Drag and Drop method shown in the **Upload to the Report Header** section above.



You will be able to view a larger image of the receipt by clicking the thumbnail image (1). The receipt will be visible on the left side of the screen.
Note: if you would like to detach the receipt from this expense, you can click on the paperclip in the upper left corner (2). The receipt will go to the **Receipt Gallery** in your **eWallet**.



Note: You will see the expense report name and the number of images attached on the left side of the screen (1). Beneath will be the list of expenses on the report. By clicking the report name (1), you will see the receipts associated with the report at the bottom of the screen (2).



The receipts that are attached to the report header AND to specific line items will be visible on this page. A paperclip on the receipts attached to line items will help identify where on the report they are attached.

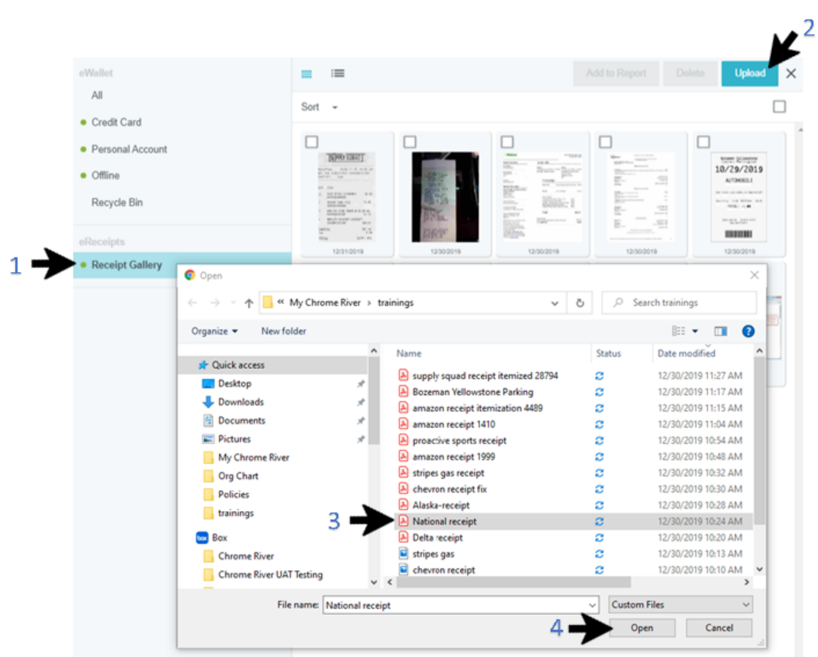
Upload to the Receipt Gallery

The **Receipt Gallery** is part of your Chrome River **eWallet**. It can be accessed by clicking the **three-bar menu** icon on the navigation bar and selecting **eReceipts**.

The **Receipt Gallery** can also be accessed from within a report by clicking on the **+** icon and selecting **Receipt Gallery** from the **eWallet**.

Once in the **Receipt Gallery**, you can click **Upload** to upload new images that are saved on your computer or device.

You can also use the Drag and Drop method shown in the **Upload to the Report Header** section above. Just drag and drop from the desired system folder to the Receipt Gallery.



A green dot next to the Receipt Gallery indicates that there are receipts that are unused and available to attach to a report or line item.

Upload to the Receipt Gallery

You can attach an image from the Receipt Gallery directly to the report header or line item by dragging and dropping from the Receipt Gallery.

After creating the report, access the Receipt Gallery by clicking on the **+** icon to bring up the **E-Wallet** and select **Receipt Gallery**.

Choose the receipt from the gallery you want to add. Click on the image but do not release until you've dragged the image to the report header. When you've dragged it to the correct spot, Chrome River will prompt to **Drop to attach to report header**.

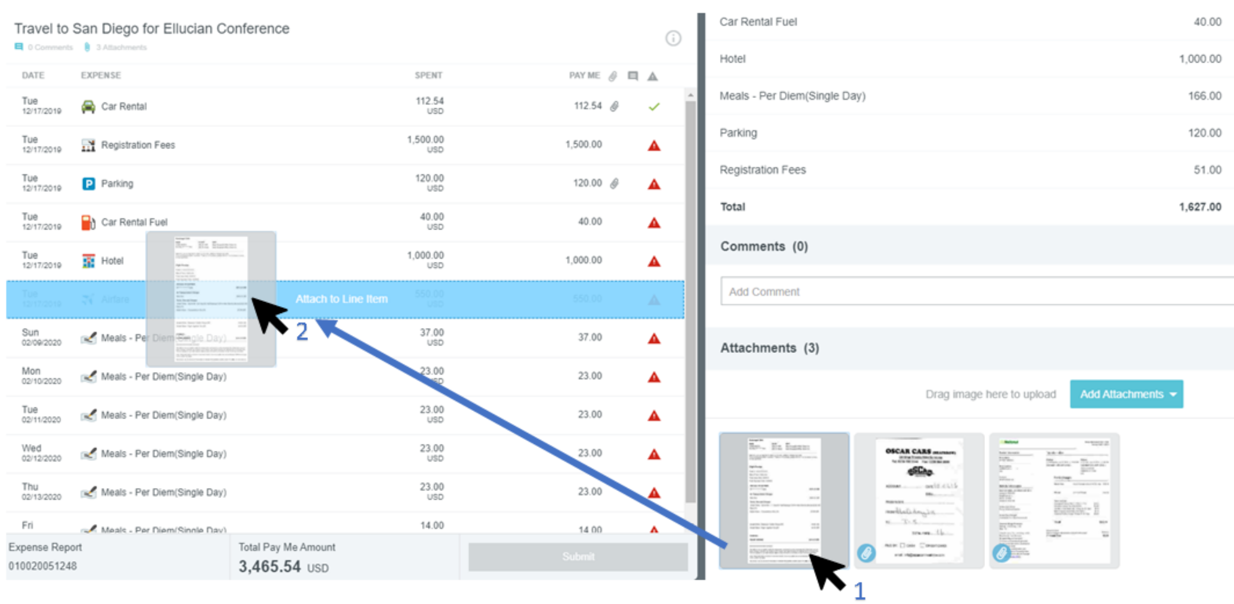
The same method can be applied to line items. If there is a line item created, Chrome River will prompt you to drop the image on the line. When there are multiple line items created, drag the image to the left of the expense screen. Chrome River will highlight the expense line the image will be attached to. Move the image up or down until the correct line item is highlighted and release the image.

Note: Multiple receipts and images can be attached to a single expense.

Moving Receipts and Images from the Report Header to a Line Item

If you decide you want to move a receipt from the header to the line item, you can drag the receipt from the header view to the line item.

Click the report header to view the receipts attached. As mentioned in the **Uploading Directly to a Line Item** section above, you will be able to identify the receipts that are attached only to the report header by the absence of a blue paperclip icon. You can select one of these images (1), click, drag, and drop to the line item of your choice (2).

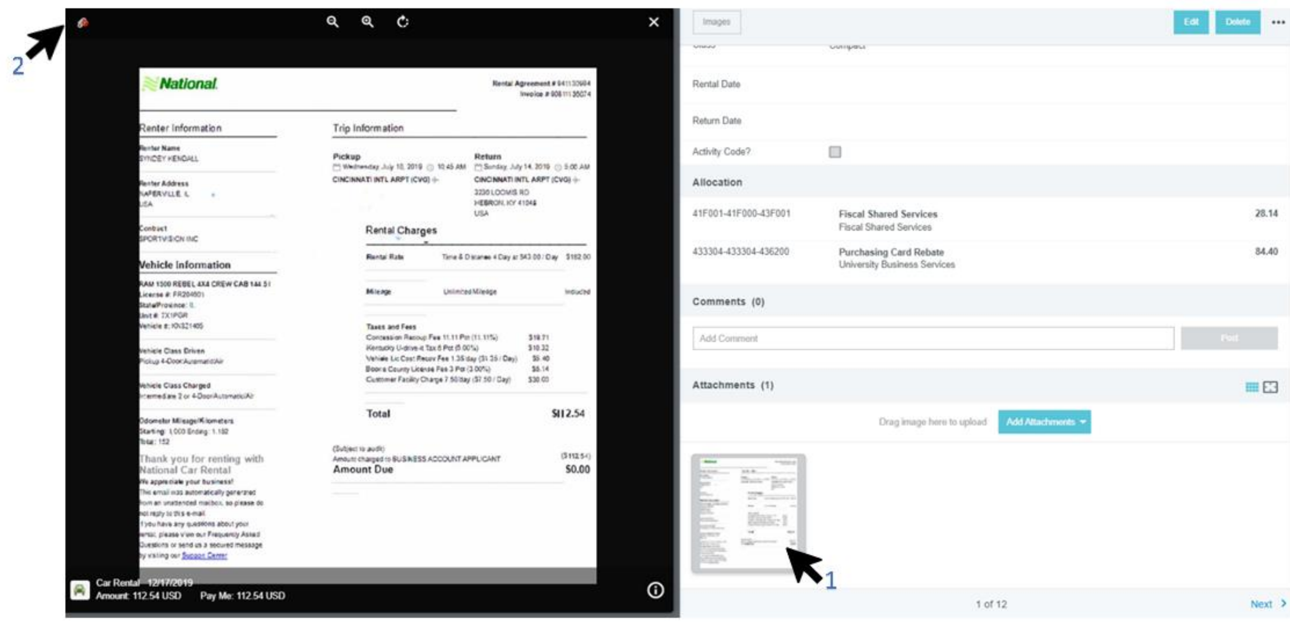


In many cases, travelers will complete a travel expense report (or reports) prior to the trip, and one immediately upon completing the trip. Chrome River makes this easy!

1. After clicking Save on previous step, the Add Expenses page appears on the right side of the screen. Click Credit Card under eWallet (1).

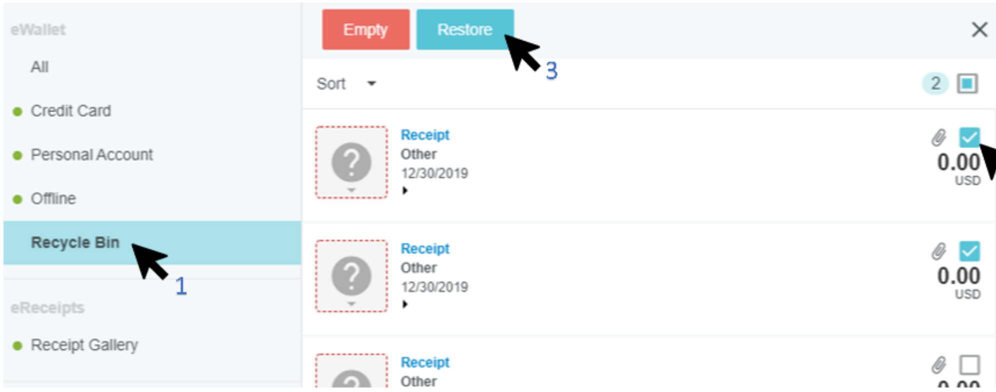
Detach and Delete Receipts

If the receipt has already been attached to a report header or line item, you can detach it by clicking on the receipt thumbnail at the bottom of the right-hand screen (1) to bring up the larger receipt image on the left. Click on the paperclip in the upper left corner (2). This will remove the receipt from the report. The receipt will go into the **Receipt Gallery**.



To delete a receipt from the **Receipt Gallery**, check the receipt(s) you wish to delete and then click the **Delete** button. A confirmation message will appear and the receipt will go into the **Recycle Bin**. The receipt will no longer appear in the Receipt Gallery.

Receipts that have been sent to the **Recycle Bin** (1) can be restored to the **Receipt Gallery** if you wish. Choose the receipt you wish to send back to the Receipt Gallery (2) and click **Restore** (3).



If you click on the **Empty** button, you will permanently remove all the receipts in the **Recycle Bin**, whether it is checked or not. Do not click this unless you would like to delete **all** the receipts from your e-Wallet Recycle Bin.

Receipt Transactions and Optical Character Recognition (OCR)

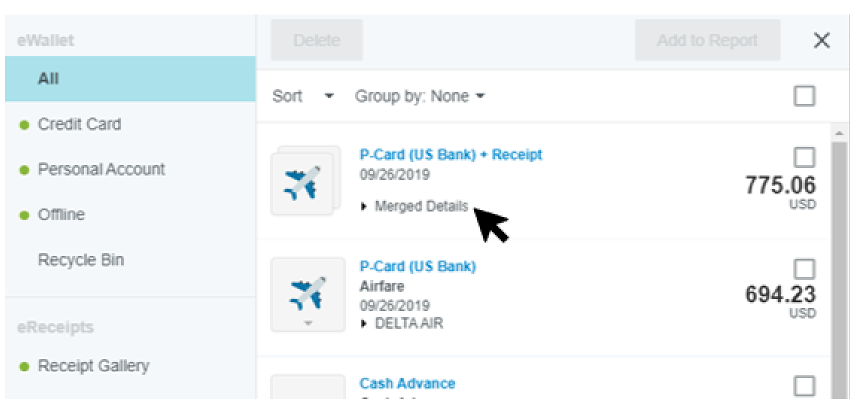
When a receipt or group of receipts is emailed, scanned, or uploaded to the Receipt Gallery, Optical Character Recognition (OCR) will attempt to create a transaction based on the information it can pull from the receipt(s), which may include the amount, vendor and expense type. Any information pulled by OCR from the receipt can be manually adjusted, if required, once applied to a report.

Note: OCR only works when a receipt is emailed, scanned, or uploaded into the Receipt Gallery. Receipts that are attached directly to reports will not be read by OCR; however, if there is more than one receipt on the page, the system will attempt to crop the receipts to form separate receipt images, regardless of the manner it is sent, unless uploaded directly to a line item.

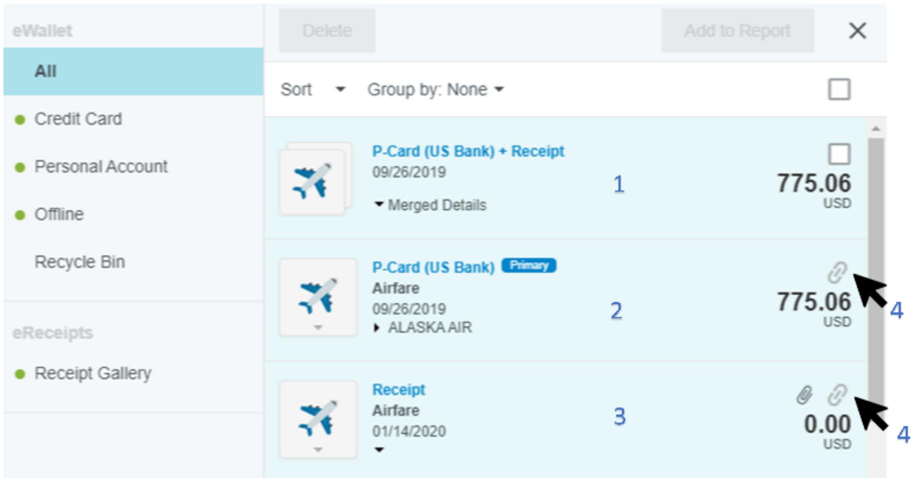
Merging Credit Card Transactions and Receipts

If OCR recognizes that the receipt corresponds with an unapplied P-Card Expense transaction, it will attempt to merge the transaction and receipt together to form one transaction.

You can identify when these transactions merge, as the P-Card Expense transaction will show **Merged Details** and have a dropdown arrow which you can click on to expand the details of the transaction.



Three lines will appear for the expense:
1. the newly created merged transaction
2. the P-Card Expense transaction (identified as **Primary**)
3. the receipt

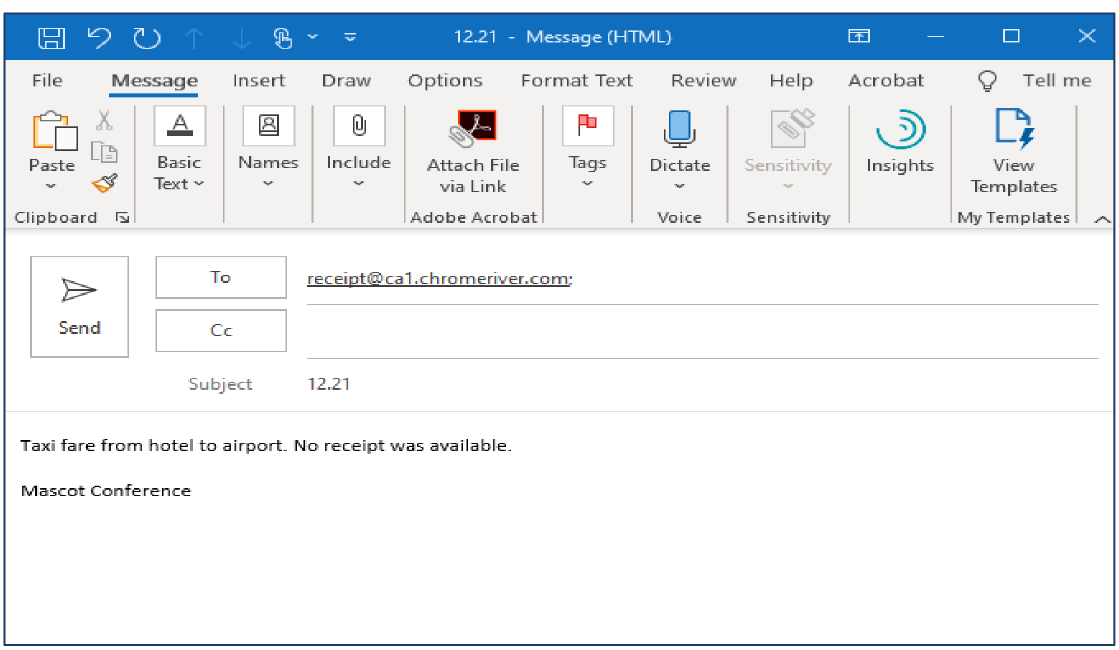


Note: If OCR identifies a receipt as belonging to a P-Card Expense transaction in error, you can unmerge by clicking on the paperclip outline (4) on either the primary or receipt transaction. The receipt will go back to the **Receipt Gallery**.

Email Memo

If you have an expense, such as a tip, that did not have a corresponding receipt, you can email a memo as a reminder to your eWallet as an offline receipt. This will create a transaction in your **Offline** expenses of your **eWallet** and no image will be sent to the Receipt Gallery.

To email, enter the amount of the expense in the email subject and send the email to receipt@ca1.chromeriver.com just as with a regular receipt. However, instead of the receipt attached in the body of the email, you will enter a description of the expense.



To access this expense, go to your **eWallet** and select **Offline**. The amount will show in your Offline transactions and can be applied to a report in the same way as other offline transactions.