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UPLOAD AND ATTACH RECEIPTS

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 **CR0002 Introduction to Receipts** document, **Receipt Image Specs** section for complete details.

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 wichita.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 to one account.



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	(ER		+ New	💄 Wu Shock
Wu Shock	Account Information	n		,
Personal Settings	Password	Change Password		
Preferences Settings Delegate Settings	Email Addresses			
Notification Settings	Primary Email	wushock@wichita.edu 🥌		
Privacy Policy	+ Add Alternative	Emails		
About Chrome River				

EMAIL TO RECEIPT GALLERY:

To email a receipt to your **Receipt Gallery**, simply attach the images to an email message, include the amount of the expense in the subject line, and 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.



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File	Message	Insert	Options	Format Text	Review	Acrobat	♀ Tell me
⁼ = ∎ Send	To Cc Subject Attached	21.62	<u>Oca 1. chromer</u> s Receipt Ex KB				
Wu Sh	cceipt - Mas lock ca State Uni		ence				

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, enter the Report ID into the subject line of an email you've composed (instead of the currency, as shown in the **Email to Receipt Gallery** example, above). Remove everything from the body of the email, including any email signatures. Send the email to <u>receipt@ca1.chromeriver.com</u>.



8	চ তে 🕥	∳ ab∈ ,	0100192191	T	—		×
File	Message	Insert Option	s Format Text	Review	Acrobat	Ō.	Tell me
Ŧ	To	<u>receipt@ca1.</u>	chromeriver.com;	Exp	ome Rive ense Re		
Send	Subject	010019219164		Nur	iber		厂
	Attached	Gas Rec 31 KB	eipt Example.jpg	•			
I							

This method works even if you have multiple images attached to the email you're sending, as long as 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

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**, choosing **Receipt Gallery**, and clicking the **Upload** button. The receipt image 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.

Add	Delete Add	Upload
Expenses	Sort •	
Create New		^
eWallet	There are no items available.	
All	File Upload	×
Credit Card	← → ∨ ↑ 🔤 « Train → Sample Receipts → 🗸 🖏 Search Sample Receipts	٥
Offline	Organize Vew folder	0
Recycle Bin	Music ^ Name	Туре
eReceipts	Pictures Uploaded	File f
Receipt Gallery	Gas Receipt Example	JPG F
	Greenphire_Share (B: ▶ WU Airfare Windows (C:) Wu Hotel Windows (C:) Normalized for the statement of	Adob Adob
	AP (\\ad.wichita.edu	Adob
	Warrants (\\ad.wichit 🗡 <	>
	File name: V All Files	~
	Cancel	
		.:



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Add		Add	Upload
Expenses	Sort 👻		
Create New			^
eWallet			
All			
Credit Card	2 (**)		
 Offline 	06/22/2019		
Recycle Bin			
eReceipts			
Receipt Gallery			

TO EXPENSE REPORT:

To scan to a specific report, click the PDF button in the preview of the expense report you want to attach images to. When you select **Cover Page**, the page will open in a new window so that you can print it or save it. Scan the cover page with the images you wish to attach to expense@ca1.chromeriver.com - the unique barcode will direct it to the correct report.

←	Expenses For Wu Shock		= ⊕	PDF - Images		Delete Edit
	Report Demonst	ration	(j)	Expenses	For Wu Shock	
DATE	EXPENSE	SPENT	PAY ME 🥜 🗮 🔺	Report Name	Expense Report Demonstration	
Mon 04/01/2019	Airfare	555.00 USD	555.00 @	Business Purpose	Expense Report Demonstration	
				Import from Pre-App. C		
Expense Rep 0100192340		Total Pay Me Amount 555.00 USD	Submit	Comments (0)		



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PDF - Images		
Cover Page		
Full Report		
Full Report with Notes & ceipts	Re-	
Full Report with Receipts	3	
View Receipts		
Expense Report		Report ID: 0100-1923-4056
Report Name	Expense Report Demo	nstration
Expense Owner Expense Owner ID	Wu Shock Wushock	
Created By	Wu Shock	
Date	Jun 22, 2019	
To Be Paid In	USD	
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Please place th Email:	is cover sheet in front of ha expense@cal.chromerive	rcom Fax: (888) 323-1591
Please place th Email: Financial Summar	expense@cal.chromerive	r.com Fax: (888) 323-1591
Email:	expense@cal.chromerive	r.com Fax: (888) 323-1591 Amount (USD)
Email:	expense@cal.chromerive	r.com Fax: (888) 323-1591
Email: Financial Summar	expense@cal.chromerive ry rted	r.com Fax: (888) 323-1591 Amount (USD)
Email: Financial Summar Total Expenses Repo Amount Due Expense	expense@cal.chromerive ry rted e Owner	r.com Fax: (888) 323-1591 Amount (USD) 555.00
Email: Financial Summar Total Expenses Repo	expense@cal.chromerive ry rted e Owner	r.com Fax: (888) 323-1591 Amount (USD) 555.00
Email: Financial Summar Total Expenses Repor Amount Due Expense Expense Summar	expense@cal.chromerive ry rted e Owner	r.com Fax: (888) 323-1591 Amount (USD) 555.00 555.00
Email: Financial Summar Total Expenses Repor Amount Due Expense Expense Summar Expense Type	expense@cal.chromerive ry rted e Owner	r.com Fax: (888) 323-1591 Amount (USD) 555.00 555.00 Amount (USD)
Email: Financial Summar Total Expenses Repor Amount Due Expense Expense Summar Expense Type Airfare	expense@cal.chromerive ry rted e Owner y	r.com Fax: (888) 323-1591 Amount (USD) 555.00 555.00 Amount (USD) 555.00
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Attach Via Faxing – only available for report header attachment

FAX TO EXPENSE REPORT:

Similar to the method for attaching a scanned image directly to a specific report, you will need to print the PDF cover page of the report in order to get the unique barcode for the report (see instructions above). The cover page and images will then need to be faxed to (888) 323-1591. Faxed receipts can only be attached to a specific report.

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

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Uploading Images

UPLOAD TO THE REPORT HEADER:

Once you have entered the header information for a new expense, click the **Add Attachments** button in the lower right corner to browse for an image on your device. 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.

÷	Expenses For Wu Shock		F	Ð	Delete Edit •••
	ot Demonstratio	on		(j)	Expenses For Wu Shock
DATE	EXPENSE	SPENT	Pay me 🔗 🖪		Report Name Receipt Demonstration
_		Click "+" to add your first item.		^	Business Purpose Receipt Demonstration
					.adtillion.
					Drag image here to upload Add Attachments 👻
				~	From Receipt Gallery
Expense I 01001923		Total Pay Me Amount 0.00 USD	Subm	it	Upload Attachments

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



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÷	Expenses For Wu Shock		=	Ð	Delete Ec
	pt Demonstration			(j)	Expenses For Wu Shock
DATE	EXPENSE Click "+" to	SPENT	PAY ME 🔗 🖪	A 1	Report Name Receipt Demonstration Business Purpose Receipt Demonstration
	• File Upload $\leftarrow \rightarrow \lor \uparrow \square \ll Train$. > Sample Receipts >	√ Č Se	arch Sample Rec	x ecceipts p
xpense 100192	 ← → ✓ ↑	 > Sample Receipts > Name Uploaded Gas Receipt E WUA Hotel WU Hotel WU Registrat 	£xample		

UPLOADING DIRECTLY TO A 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 a line item, you will click on the **Add Attachments** button in the lower right corner of the expense detail. This can be done before the expense is saved or after.



	Cancel	Save
🛪 Airfare		
Date	03/12/2019	
Spent	555.00 🖬 USD	
Business Purpose	Receipt Demonstration	
Attachments (0)		
	Drag image here to upload Add Attachments	
	From Receipt Gallery	
	Upload Attachments	

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.



		Cancel	Save
🛪 Airfare			
Date	03/12/2019		
Spent	555.00 🖬 USD		
Business Purpose	Receipt Demonstration		
Attachments (3)			
	Drag image here to upload Add Attachments -		
Varia de Constante			

You will also be able to view a larger image of the receipt by clicking the thumbnail image. 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. The receipt will go to the **Receipt Gallery** in your **eWallet**.



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ø 🔶	Q Q (*)	×	Images		Edit Delete 🚥
			Location?	_	
	UNITED 🔊 Taesday, Jane 54, 2019		Funding		
	Contract Description Contract Descrip		D10252-101510-01620	D10252: RU Controller's Office 101510: Financial Operations 2572-Employee Out-of-State Transportation	
	Customer Contact Center Confirmation number:		Comments (0)		
	M2FSH2 Works, KD, UB (CFT) to Denner, CD, UB (CFT)		Add Comment		Post
	This Basic Economy totet is normfundable and caril be changed. Learn more about our <u>28/hour</u> Bettels Booking policy.		Attachments (3)		···· 🔂
	Purchase summary 1 solis (164) 1 solis (164) \$ 5133.00 1 to DN \$ 519.70 1 CTu DN Wu Shock 1 Tele \$ 513.20			Drag image here to upload Add Attachments 🕶	
Airfare 03/12/2019	Contrargent \$333(1):="10	0	International State		
Amount: 555.00 USD	Pay Me: 555.00 USD		Para and a second se	Man + Man and Annual Annua	
				1 of 1	

NOTE: You will see the expense report name and the number of images attached on the left side of the screen. Beneath will be the list of expenses on the report. By clicking the report title, you will see the receipts associated with the report.

÷	Expenses For Wu Shock	3 Attachments	= ⊕	PDF - Images		Delete	Edit
	ot Demonstration	,	(j	Expenses	For Wu Shock		
DATE	EXPENSE	SPENT	PAY ME 🖉 🖪 🛦	Report Name	Receipt Demonstration		
Tue 03/12/2019	Airfare	555.00 USD	555.00 Ø 🗸	Business Purpose	Receipt Demonstration		
		List of expenses that have been added to the report.		Attachments (3)	All receipts associated with the report will display here.		
Expense F 01001923		Total Pay Me Amount 555.00 USD	∨ Submit	Anna Barras Tanana ang ang ang ang ang ang ang ang an	Drag image re to upload Add Attachments -		

The receipts that are attached to the report header AND to specific line items will be visible on this page. A paperclip on the expenses attached to lines will help you 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 line icon on the navigation bar and selecting **eWallet**.

	CHROMERIVER	
A	Dashboard	
APPROVALS	Expense Report 4	>
	Pre-Approval 2	>
	eWallet •	>
	eReceipts •	>



The **Receipt Gallery** can also be accessed from within a report by clicking on the 1 icon and selecting **Receipt Gallery** from the **eWallet**.

Expenses For Wu Shock		= ⊕	Add Expenses		Delete Add Upload
Receipt Demonstration		ī	Create New	Sort 👻	
DATE EXPENSE Tue 03/12/2019 🛪 Airfare	SPENT 555.00 USD	PAY ME 🔗 📮 🔺	eWallet All		
			Credit Card Offline	06/01/2019	
			Recycle Bin		
			Receipt Gallery	_	

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

Add		Add	Upload
Expenses	Sort 👻		
Create New			1
eWallet			
All			
Credit Card			
• Offline	06/01/2019		
Recycle Bin			
eReceipts			
Receipt Gallery			



Attaching Images from 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.



ATTACH IMAGE TO REPORT HEADER OR LINE ITEM:

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**.

Access the **Receipt Gallery** from within a report by clicking on the \bigcirc 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**.



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Expenses For Wu Shock	= ⊕	Add		Delete Add Upload
Receipt Demonstration		Add Expenses	Sort 👻	1 🗹
Receipt Demonstration to attach to report header		Create New		
DATE EXPENSE SPENT	PAY ME 🖉 📮 🛦	eWallet		
Tue 555.00 03/12/2019 3 Airfare USD	555.00 🧷 🗸 ^^	All		
		Credit Card		
		Offline	05/01/2019	
		Recycle Bin		
		eReceipts		
		Receipt Gallery		

The same method can be applied to line items. If there is a line item created available, 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.

	← Expenses For Wu Shock =	Ð	Add Expenses		Delete	Add Upload
	Receipt Demonstration			Sort 👻		1
	Receipt Demonstration	υ.	Create New			1
And and a second	DATE EXPENSE SPENT PAY ME 🖉 📮 🛦		eWallet			
	Tue 555.00 03/12/2019 🛪 Airfare USD 555.00 🖉 🗸	· ^	All			
06/01/2019	Tue 05/12/2019 🗟 Gasoline Attach to Line Iten 27 12.27 🗸		Credit Card	06/01/2019		
T			Offline			
			Recycle Bin			
			eReceipts			
			Receipt Gallery			

MOVING RECEIPTS AND IMAGES FROM REPORT HEADER TO 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, click, drag, and drop to the line item of your choice.



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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 to bring up the larger receipt image on the left. Click on the paperclip in the upper left corner. 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**.



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Add		=	Delete	Add	Up	load	
Expenses	Sort -	,			1	~	
Create New							
eWallet							
All	All Parameters Distances All Parameters Distances All Parameters All Para						
Credit Card							
• Offline	06/01	/2019					
Recycle Bin							
eReceipts							
Receipt Gallery	Sin You Bin	ir receipt has been mo	oved to the Recy	vcle (Jndo	x	
		-					Γ



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

Add			Empty	Restore
Expenses	Sort 👻		/	1
Create New		Receipt		0
eWallet		Miscellaneous / Other 04/29/2019		57.88
All		 Amazon 		
Credit Card		Receipt Gasoline		
• Offline	Ū	05/06/2019 • Thank You For Shopping At		21.62 USD
Recycle Bin		Provide State		
eReceipts	ຼີນ	Receipt Gasoline 05/06/2019 Thank You For Shopping At		21.62
 Receipt Gallery 				

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



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Receipt Transactions and Optical Character Recognition

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 **UMB Pcard Expense** transaction, it will attempt to merge the **UMB Pcard Expense** transaction and receipt together to form one transaction.



You can identify when these transactions merge, as the **UMB Pcard Expense** transaction will show **Merged Details** and have a drop down 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 will appear first,
- 2. the UMB Pcard Expense transaction second (identified as Primary)
- 3. the receipt, third



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



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For information on applying **UMB Pcard Expense** transactions, please see the **CR0014 Creating a Pcard Reconciliation Report** help document.

OFFLINE TRANSACTIONS:

If OCR does not recognize that the receipt emailed, scanned or uploaded to the **Receipt Gallery** is related to a **UMB Pcard Expense** transaction, the system will create an offline transaction that you can later apply to an expense report as an out of pocket expense.

You can apply the expense to a report by checking the box next to the expense and clicking Add.



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÷	← Expenses For Wu Shock		<i>=</i> ⊕ Add Expenses		Delete Add		
	t Demonstration		<i>.</i>	Create New	Sort -	1	
DATE Tue 03/12/201	EXPENSE	SPENT 555.00 USD	PAY ME Ø 🖬 🔺	eWallet All	Hotel 06/01/2019 Holiday Inn	307.08 USD	
Tue 03/12/201		12.27 USD	12.27 🗸	Credit Card Offline			
_				Recycle Bin			
Expense F 01001923		Total Pay Me Amount 567.27 USD	Submit				

You can also drag and drop the expense directly into the expense report.

	Expenses For Wu Shock		= ⊕	Add Expenses			Delete Add
Receipt	Demonstration				Sort 👻		
		Create New Line Item	<	Create New	H	Receipt Hotel	0
DATE	EXPENSE	SPENT	PAY ME 🦉 📮 🔺 👘	eWallet		06/01/2019 Holiday Inn	307.08
			555.00 Ø 🗸	All			
			12.27 🗸	Credit Card			
				• Offline			
				Recycle Bin			
		Attach to Line Item		eReceipts Receipt Gallery 			

For more information on expensing an out of pocket expense, please view the **CR0006 Create a Pre-Approval Report - Employee**, or **CR0011 Creating a Travel Expense Report - Employee** help document.

NOTE: If the receipt connected to the offline transaction is applied to an expense, the offline transaction will no longer be available.

EMAIL MEMO:

If you have an expense, such as a tip, that does not require a 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**.



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To email, enter the amount of the expense in the email subject and send the email to <u>receipt@ca1.chromeriver.com</u> 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.

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File	Message	Insert	Options	Format Text	Review	Acrobat	Ō.	Tell me
ت Send	To Cc Subject	□ <u>recei</u>	ot@ca1.ch	romeriver.com;				
	are from hot		port. No	receipt was a	wailable.			

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 described above for other offline transactions.

