How to capture receipts to upload into Works

All credit card transactions and reimbursement requests will require some sort of receipt to be uploaded into Works. Since Works only accepts PDF or JPG image file types, There are a number of ways you can get that paper receipt or emailed receipt into the proper format to achieve this.

1. **If a paper receipt** – Scan the receipt in on your scanner attached to your computer. It can be saved as either a PDF or JPG.

   Or, use the camera on your phone to take a normal, but close up photo of the receipt. Then email the photo to yourself so you can get it from your computer.

   Or, If you are familiar with install apps on your phone, try one call CamScanner. It is great for taking photos of small receipts. It will square up the edges for you and then you can choose to directly upload the scan to other sources such as DropBox, Google Drive, OneDrive, or Email.

2. **If an emailed receipt** – If the vendor/merchant has emailed you a receipt, it is probably as an attachment which is most likely already a PDF file. Save that file to your computer and upload that as is.

   If the receipt is imbedded directly into the email, no worries, just open the email and Save-AS and then find save as PDF. If your email program doesn't have that option, try opening the email and then choose to Print the email. In the list of printers, choose print to a PDF. Save to your computer so you can find it to upload into Works.

   If you don't have the option to Save As or Print to a PDF, then you can always do a screen capture using your favorite screen capture program (Snipping Tool comes pre-installed on Windows 10 and is super easy). Use it to capture the complete email and then save it as a JPG.

   I use screen grabs to capture the mileage map as well since we only need the To and From parts of the map and not every turn by turn direction it gives you.

   I hope this was helpful, please drop us line if you need help with any of these options!