

7 Quick Steps to Receipt Attachment in Access Online

Please follow these instructions to attach receipts to your procurement card transactions in Access Online. Only PNG, JPG or PDF files are allowed. Scan and save receipts to a folder on your computer. Next, login to Access Online, go to Transaction Management and find the transaction requiring a receipt.

Select	Status	Approval Status	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID	Attachment	Accounting Code
<input type="checkbox"/>		Pending	04/08	04/10	THE HOME DEPOT #2831	FERGUS FALLS, MN	\$22.09	III	324221		326521

1. Click "Select" and reallocate your transaction.

Remove Trans	Trans Date	Merchant	Amount	Alloc %	Accounting Code - Segment Name (Length)					
					CC (6)	DASH (1)	OBJ (4)	DASH2 (1)	DESCRIPTION (50)	
<input type="checkbox"/>	04/08/2018	THE HOME DEPOT #2831	\$22.09	Add Alloc	326521 *		3000 * 🔍		Supplies *	

🔍 Search

Remove Trans

Save Allocations

2. Click "Save Allocations".

Select	Status	Approval Status	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID	Attachment	Accounting Code
<input type="checkbox"/>		Pending	04/08	04/10	THE HOME DEPOT #2831	FERGUS FALLS, MN	\$22.09	III	324221		326521

3. Click the Paper Clip

Trans Date	Posting Date	Merchant	City, State/Province	Amount
04/08	04/10	The Home Depot #2831	Fergus Falls, MN	\$22.09

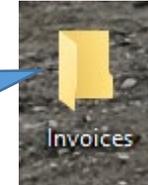
Manage Attachments

Please add or delete attachments. Only PNG, JPG or PDF files are allowed.

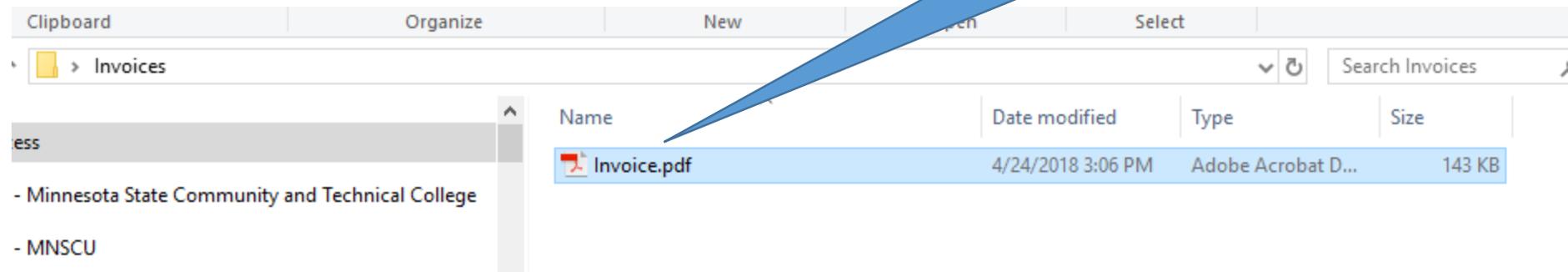
4. Click "Add Attachment".

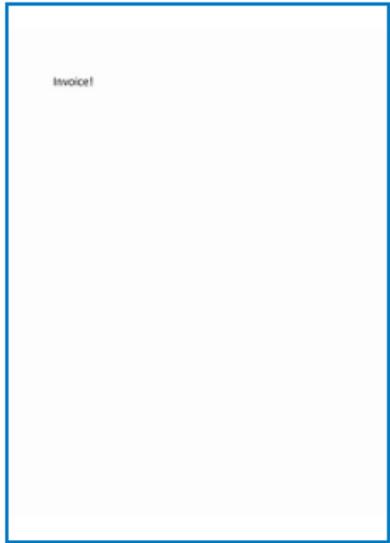


5. Open the folder where you have your receipts.



6. Double click the file that you wish to attach.





0.09MB



Image 1 of 1



[Add Another Attachment](#)

7. You can add more attachments if required....

...and when complete choose "Save".

It's attached and you are done!

Save

Select	Status	Approval Status	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID	Attachment	Account
<input type="checkbox"/>	® ® Pending		04/08	04/10	THE HOME DEPOT #2831	FERGUS FALLS, MN	\$22.09		324221		326521

You should now click the "Select Box" and "Approve" to send this on to your supervisor/approver who will be able to review the actual receipt. While you may only view the receipt online for 12 months, Business Services saves them in a shared folder retaining them for 7 years. We suggest that you file your original receipts and keep them for a minimum of 12 months before disposing of them. If you need further assistance, please contact Alison Fraase at 218-477-2240.