

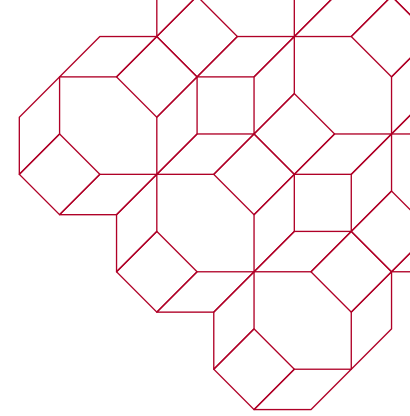
Expense Management

Receipt Pool – Overview



Spend Control

Expense Management Receipt Pool



What is the Receipt Pool?

The Receipt Pool allows users to store receipts within Expense Management. These can then be attached to transactions at a later time.

Where is the Receipt Pool enabled?

Receipt Pool does not require enablement. Once released, it will automatically be available to all cardholders.

Where will the Receipt Pool be accessible, Mobile, UI?

The Receipt Pool will be available from the website UI and the Mobile App.

When will the Receipt Pool be available?

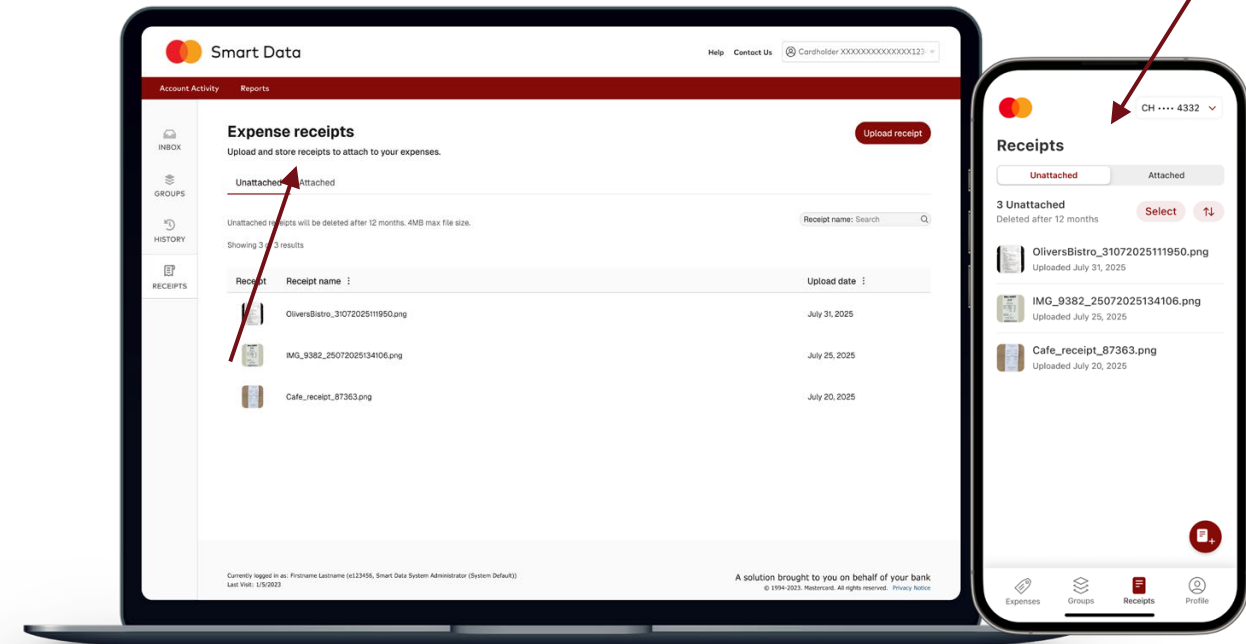
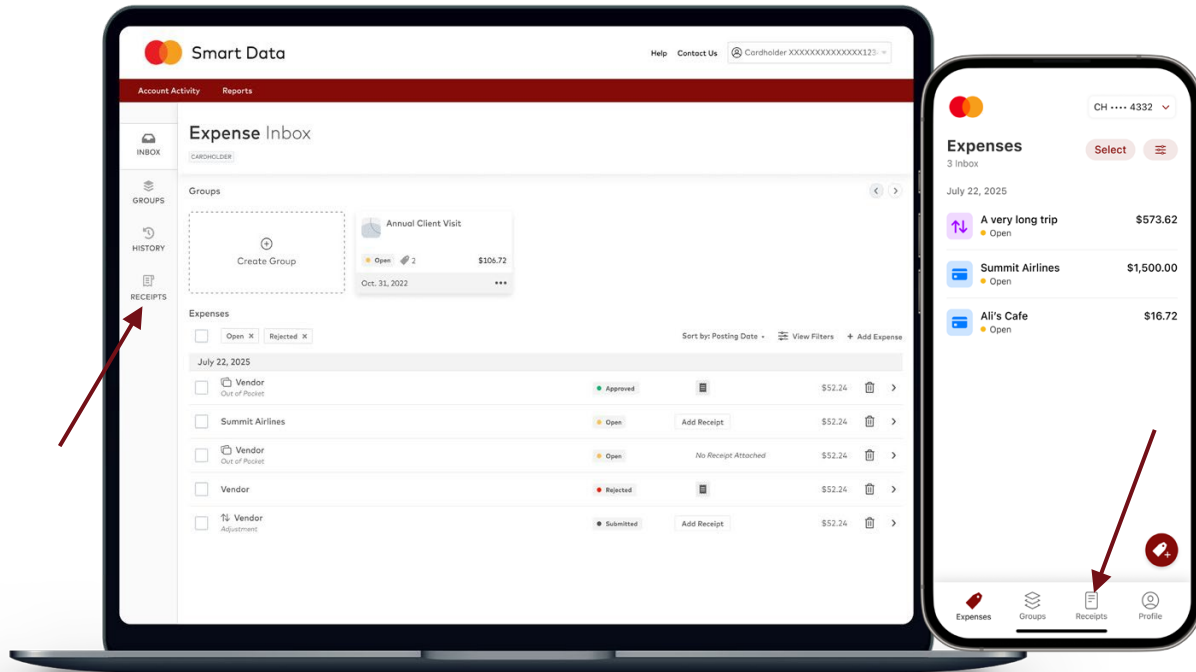
Receipt Pool will be available March 13, 2026.

Accessing the Receipt Pool

A new icon (Receipts) will show on the cardholder inbox screen and the mobile app.

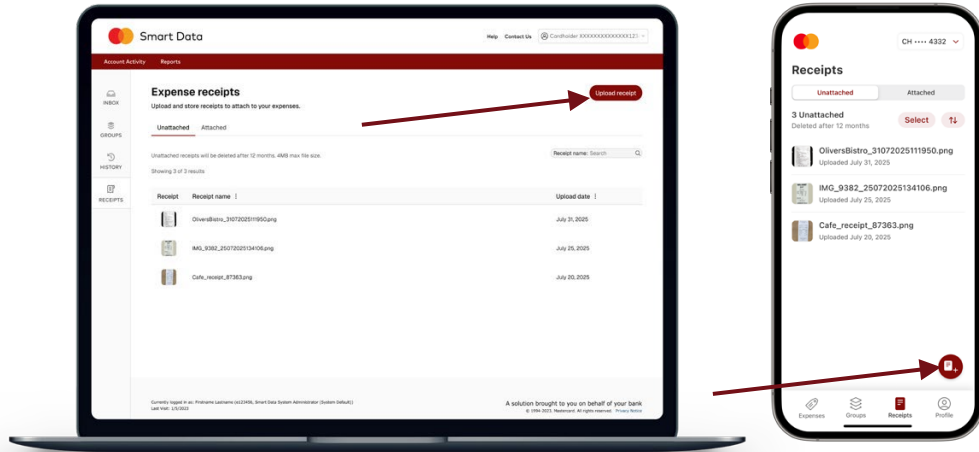
The Receipt Pool has two tabs

- Unattached – contains the receipts that have yet to be attached to a transaction
- Attached – contains the receipts that have already been attached to a transaction



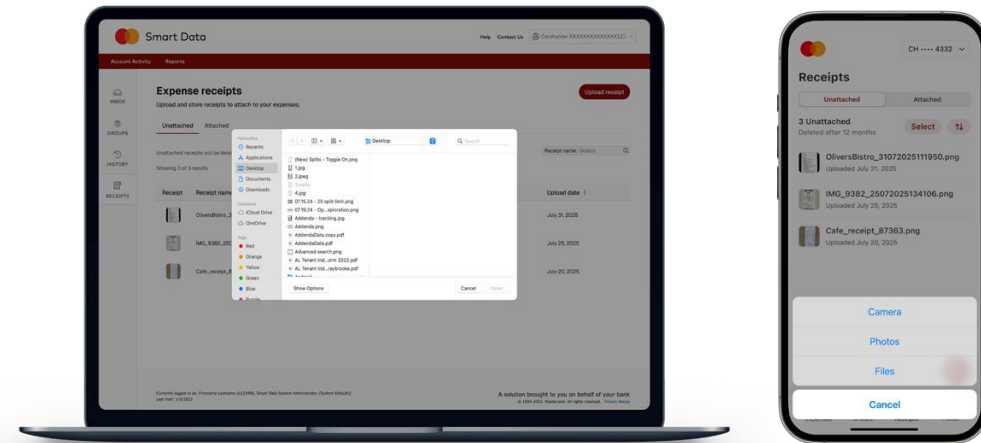
Uploading a receipt

1. Click on the Upload Receipt button or icon

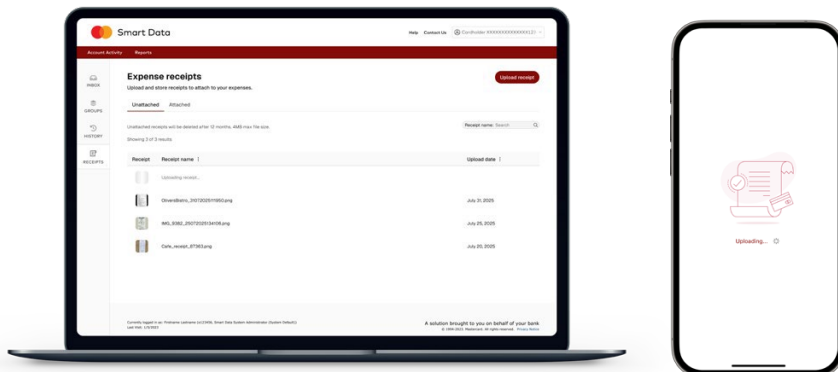


2. Select the file to be uploaded

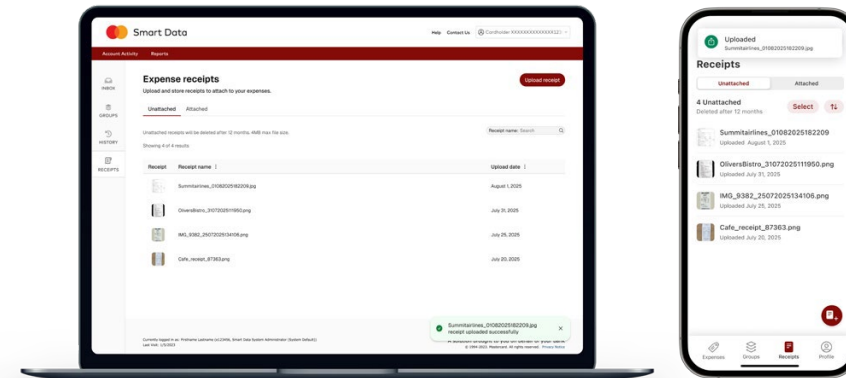
- In the UI, browse for and select the file
- In the mobile app, use the camera, select from the photo library or file storage



3. A progress state will display while the file uploads

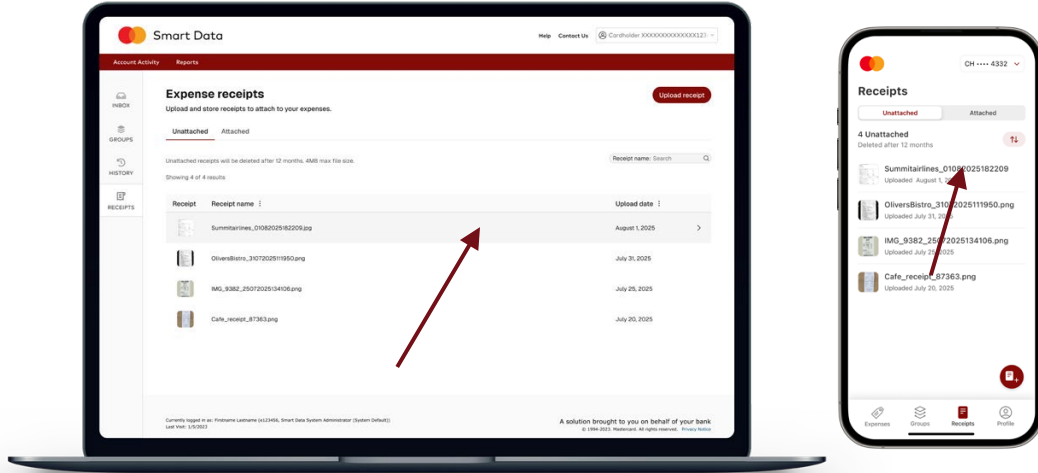


4. A confirmation message displays with new receipt in the 'Unattached' tab

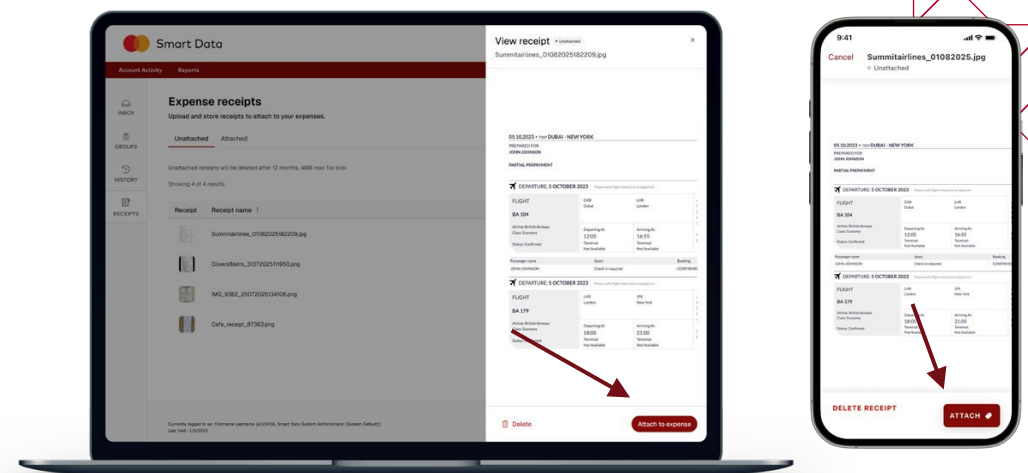


Attaching a receipt to a transaction (from the Receipt Pool)

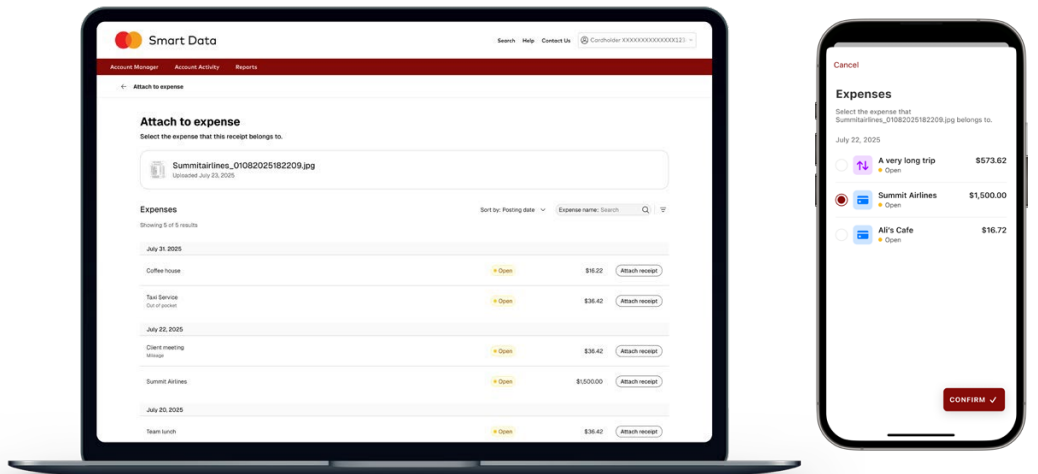
1. Click on the receipt to view the details



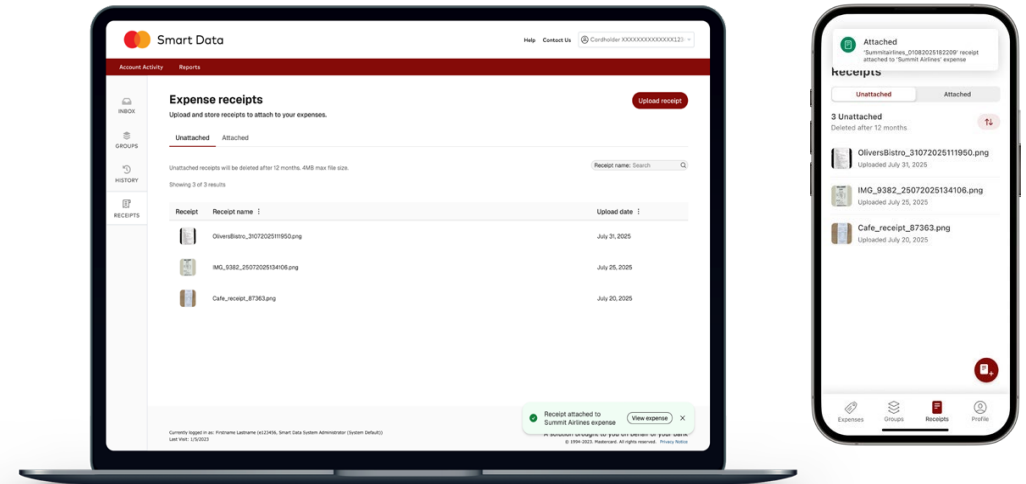
2. Click on the Attach to Expense button



3. Select the transaction by clicking it

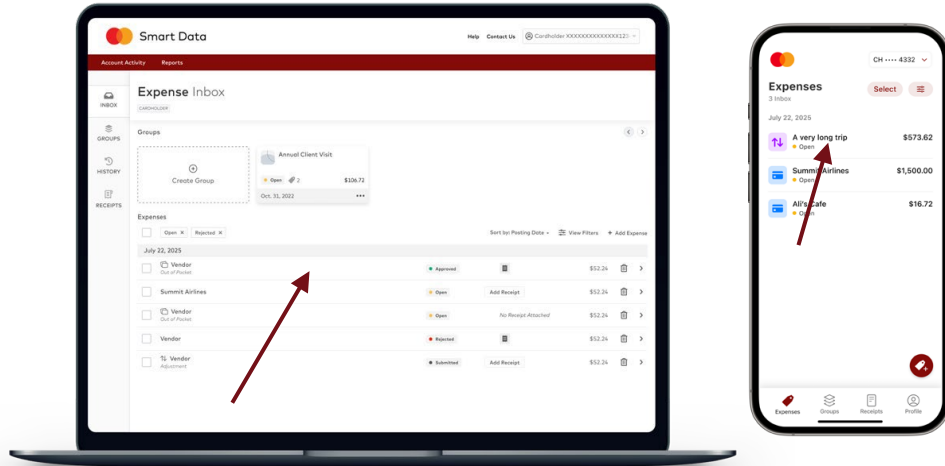


4. A message confirms the attachment

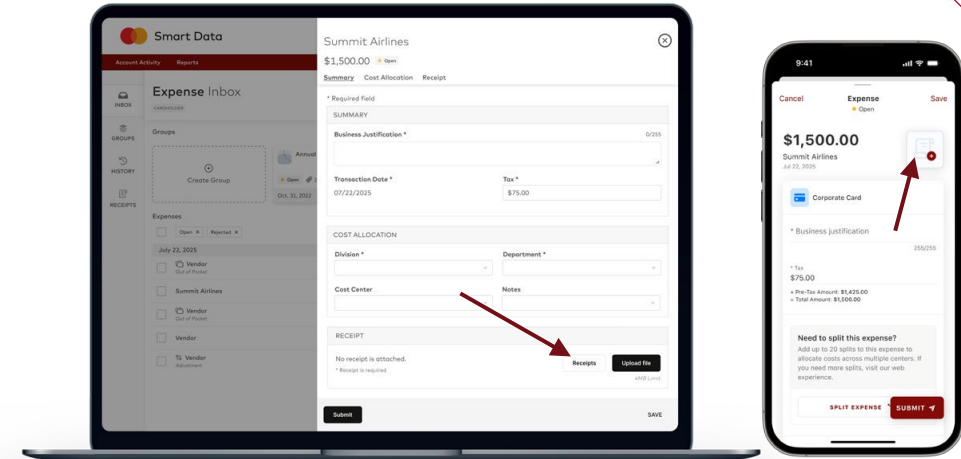


Attaching a receipt to a transaction (from the Inbox)

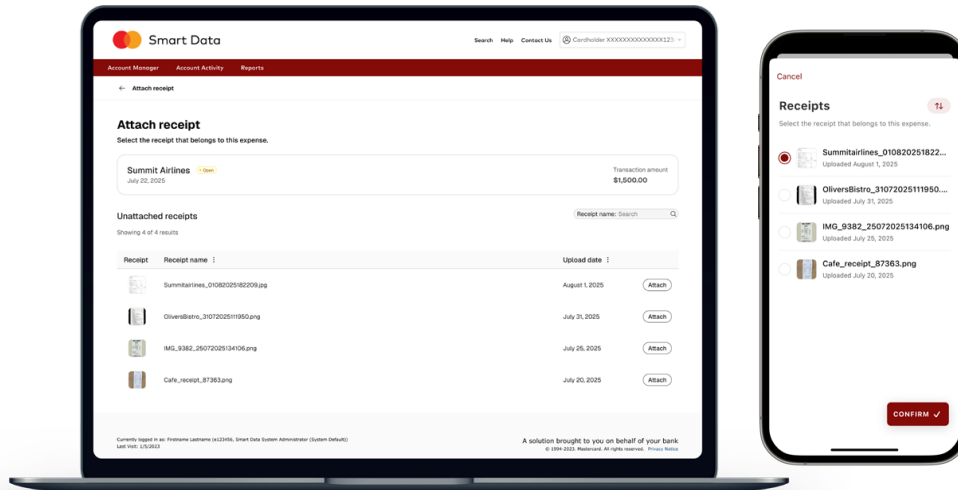
1. Click on the expense to view the details.



2. Click on the Receipts button or Attach Receipt icon in the mobile app



3. Click on the receipt to attach.



4. A message confirms the attachment

