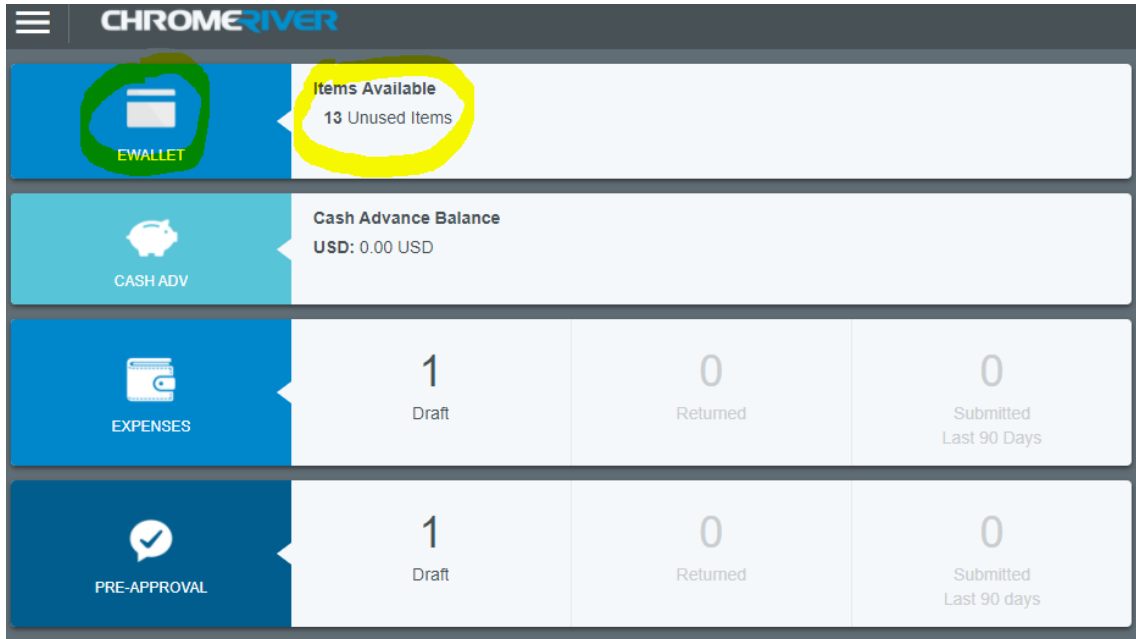


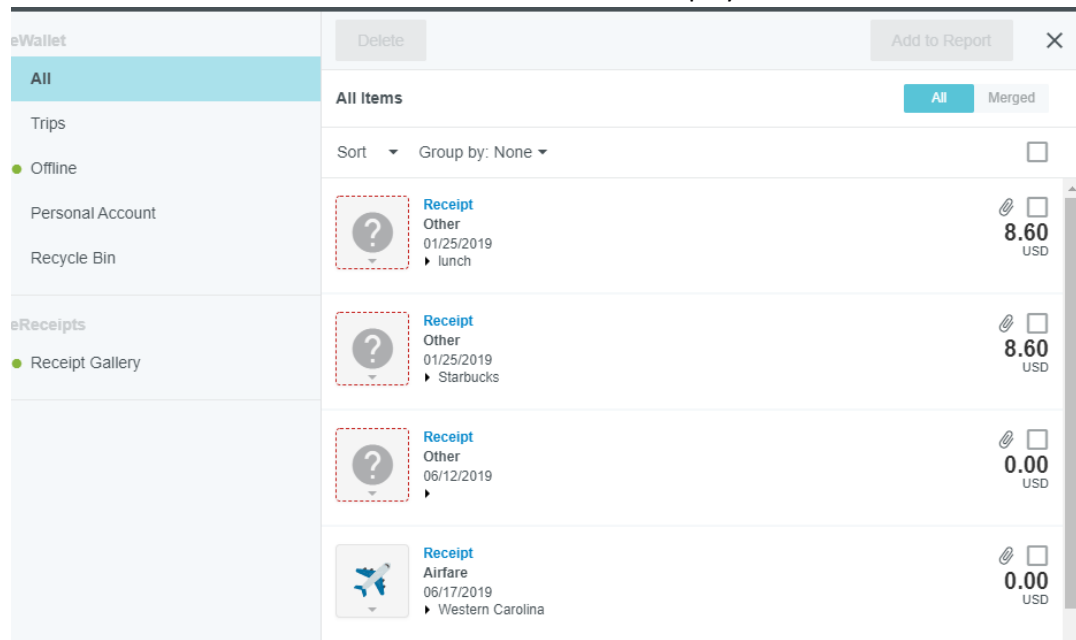
New Feature “EWALLET - Items Available” on Chrome River Dashboard

When a receipt is sent to Chrome River (either by CR Snap app or forwarded to receipt@chromefile.com) it now creates an EWALLET banner on the dashboard to let you know there are items available.



Note: If you have never had a Travel Advance from WCU then your screen will not show the banner for Cash Advance Balance.

User can click on the Items Available Unused Items to display them.



When user is ready to create their expense report for travel reimbursement, select all the items for said trip to be reimbursed by putting a check mark in the box above the dollar amount.

The screenshot shows an expense report interface. On the left is a sidebar with categories: eWallet (All, Trips, Offline, Personal Account, Recycle Bin) and eReceipts (Receipt Gallery). The main area is titled 'All Items' and contains a list of receipts. Each receipt entry includes an icon, a title, a date, a description, and a monetary value with a currency symbol. A checkbox is located to the right of each entry, and a yellow circle highlights this checkbox for each of the following items:

- Receipt: Other, 01/25/2019, lunch, 8.60 USD
- Receipt: Other, 01/25/2019, Starbucks, 8.60 USD
- Receipt: Other, 06/12/2019, 0.00 USD
- Receipt: Airfare, 06/17/2019, Western Carolina, 0.00 USD
- Receipt: Airfare, 07/09/2019, Get Outlook for Android, 0.00 USD
- Receipt: Car Rental, 07/25/2019, Budget, 0.00 EUR

Once all items have been selected, click Add to Report:

This image is a close-up of the bottom toolbar of the expense report interface. It features three buttons: 'Delete', 'Merge', and 'Add to Report'. The 'Add to Report' button is highlighted with a yellow circle, indicating it is the next step in the process.

Now you can add selected items to a new expense.

Add to Expense Report ✕

Select an existing draft expense report or create a new expense report.

[+ Create a New Expense Report](#)

test 010044498723	02/09/2021	0.00	✓
DRAFT			

Or you can add selected items to an existing expense report in the draft folder.

Add to Expense Report ✕

Select an existing draft expense report or create a new expense report.

[+ Create a New Expense Report](#)

test 010044498723	02/09/2021	0.00	✓
DRAFT			

Click on Create a New Expense Report and key in the information requested for the Header Page and click Save. Note: Please ignore my dates on the items in the receipt gallery since this is just used for testing. If this were a live reimbursement the dates would match.

Cancel Save

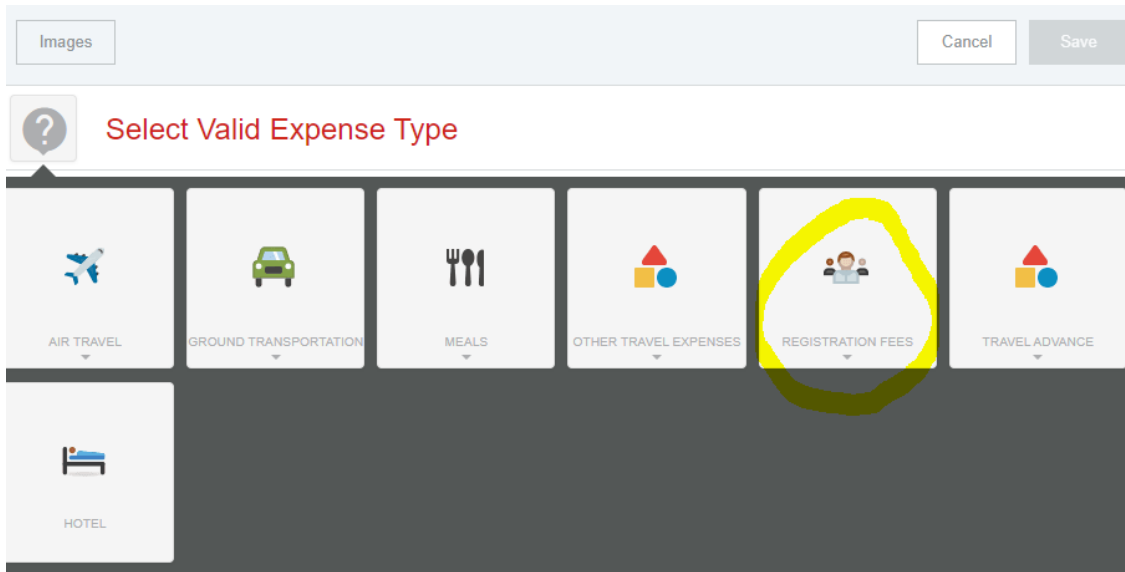
Expenses For Anita Hall

Report Name	<input type="text" value="Test for showing EWALLET Items Available"/>
Pay Me In	<input type="text" value="USD - US Dollars"/>
Report Type	<input type="text" value="Employee"/>
Trip Type	<input type="text" value="Out of State"/>
92 Number <small>Optional</small>	<input type="text"/>
Country	<input type="text" value="USA"/>
State	<input type="text" value="New York"/>
City	<input type="text" value="Albany"/>
Departure Date	<input type="text" value="01/25/2021"/>
Return Date	<input type="text" value="01/27/2021"/>
Attendant of Handicapped Employee	<input type="checkbox"/>

On the left-hand side of the screen, the first receipt selected is displayed.

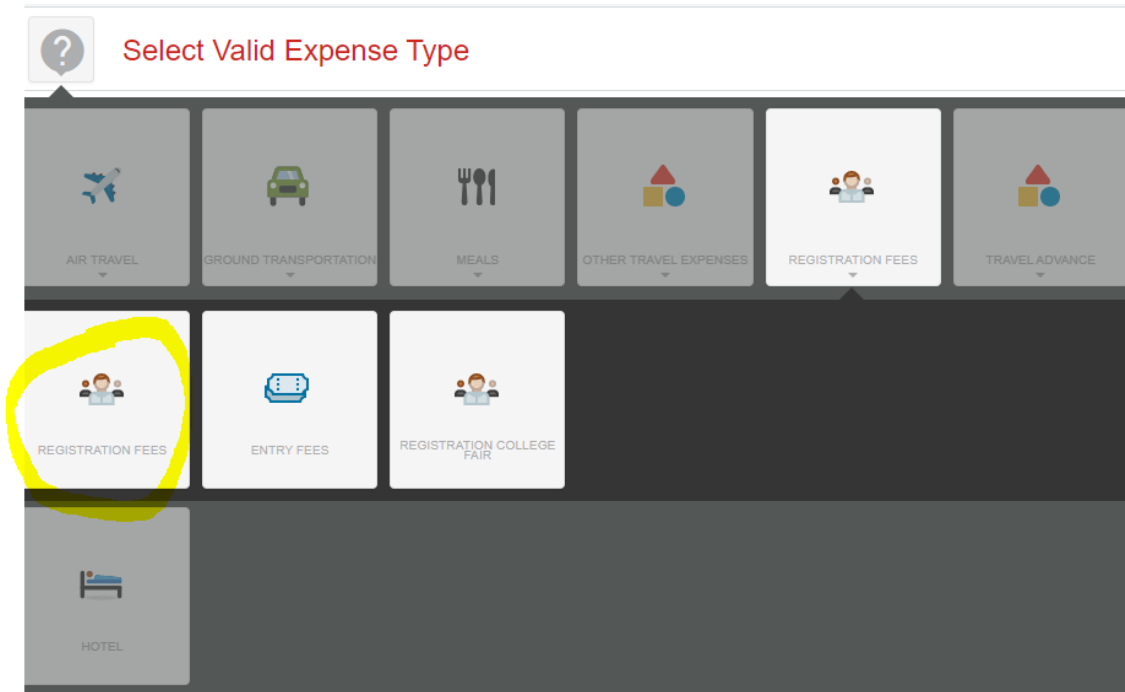


On the right-hand side of the screen the tiles are displayed and waiting for traveler to select where to categorize this receipt. In this case it is a meal receipt but let's pretend it is a registration fee. Click registration fee.



There's a missing piece to the puzzle. Please select an Expense Type.

Then select Registration Fees again.



Notice some of the fields are already entered based on what was on my receipt (done by OCR Technology within Chrome River). Make any necessary changes to fields to match receipt and click Save

Note: this is just a test and we are pretending this is a registration fee not an actual receipt.

Images Cancel **Save**

Date

Spent

Business Purpose

University Paid



Personal Charge

Allocation


[+ Add Allocation](#)

Downloaded Details

Receipt >

Attachments (1)  

Drag image here to upload [Add Attachments](#)



Notice the receipt is already attached. Allocation in this example is used for training purposes only. Please check with your department if you do not know your Allocation (Fund) number.

Once you click Save, the next receipt will appear on the left-hand side of the screen and the tiles will be visible on the right-hand side of the screen. The process repeats until all receipts have been completed by selecting the appropriate tile. Once you click Save on the last receipt your expense report has been updated with the selected receipts.

Note: Changes can be made by clicking each line item if needed.

DATE	EXPENSE	SPENT	PAY ME
Mon 01/25/2021	Registration Fees	8.60 USD	8.60
Mon 01/25/2021	Airfare	2.00 USD	2.00
Wed 01/27/2021	Airfare	5.00 USD	5.00
Mon 01/25/2021	Car Rental	5.25 EUR	6.39

If additional items need to be added, user can click the circle with the plus sign in it to see the tiles to be selected.

Expenses For Anita Hall

Test for showing EWALLET Items Available

Expenses For Anita Hall

Report Name: Test for showing EWALLET Items Available

Play Me In: USD - US Dollars

Report Type: Employee

Trip Type: Out of State

- AIR TRAVEL
- GROUND TRANSPORTATION
- MEALS
- OTHER TRAVEL EXPENSES
- REGISTRATION FEES
- TRAVEL ADVANCE
- HOTEL

Once expense report is correct then select Submit.

Expense Report 010044523431	Total Pay Me Amount 21.99 USD	Submit
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Make sure to attach the Pre-Approval or the Blanket Travel form to every expense report and reviewing information prior to selecting submit. Click Pre-Approval.

Submit Confirmation

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.


Test for showing EWALLET Items Available

Report Owner	Anita Hall
Expense Report ID	010044523431
Business Purpose	Registration Fees for Conference. Test only do not approve Airfare to Conference. Test only do not approve Airfare from Conference. Test only do not approve Care rental while at Conference. Test only do not approve

Financial Summary

Click in the box or click the down arrow to select appropriate Pre-Approval.

Apply Pre-Approval ×

Select a pre-approval report 

If you have any questions regarding the process of using the EWALLET Items Available feature, please email me at sahall@wcu.edu or call me at 828-227-3031.

Anita Hall