1) To attach a receipt after a transaction has been approved

Expenses > Transactions > Accountholder

- Click on the Signed Off tab
- Find one of the transactions you want to upload receipt and then scroll over to the right to find the Upload Receipt tab.
- Next to the transaction, click on the “No” tab. Another window/box should pop up - this is where you will click on Add to add a receipt.

2) How to sign off/approve a previous month's transaction

These transactions have been closed by Accounts Payable. To approve the transaction after they have been closed:

- Expenses > Transactions > Accountholder ---Signed off
- Log in to Works.
- From the Home page, hover over "Expenses" and then "Transactions." Then, click on "All."
- Transactions will appear here.
- Click on the TXN # which is hyperlinked - from there you will see "sign off."
- Sign off