

At Williams Giles we are always looking for ways to make our clients' lives easier, made even more relevant by the ongoing precautions around the Covid-19 outbreak. We are aware that for many of you, getting your records to us is usually a manual process, which may well be affected by social distancing.

A proactive option at this juncture is Receipt Bank, the award-winning cloud software add-on that automatically converts all your invoices and receipts into data, making it easy for you send your financial information straight to us.

With Receipt Bank's easy submission methods you'll never lose another receipt or invoice. You will save time as you no longer have to make trips to drop off your paperwork. There's a whole of range of ways to submit and you can choose whichever methods that suit your businesses workflow:

- Receipt Bank App (iPhone & Android)
- Email
- Dropbox

...and many more

Using Receipt Bank's easy submission methods means that:

- You save time on sending in your paperwork, time that you can spend on your core business services.
- You save space as there's no need to retain your physical documents, with it all documents easily searchable and securely stored on the cloud.
- You now have real time information flowing into your accounting package, providing you with insights to improve your business decisions.

If you'd like to get started submitting with Receipt Bank, please get in touch with David at david.bruce@williamsgiles.co.uk and we can get you setup with your Receipt Bank account.

There will be a small cost implication depending on the level of receipts you have, but this is easily covered by the time-savings we have already seen many of our clients achieve.

How does Receipt Bank work?

Receipt Bank is a platform used to manage the receipts, invoices, and other documents that businesses depends on to keep accurate, secure financial records.

You can capture and upload your bills and receipts using:

- The camera on your mobile phone
- Email
- Scans on your computer
- Automatically fetching them from online platforms

After you've sent in a document, Receipt Bank's automated extraction engine will read all of the key information and display it in an easily-manageable format, perfect for downloading or processing with a connected accounting software.

An image of the document and its associated data will be kept on file for a minimum of 10 years. Feel free to throw away that receipt; Receipt Bank will always have you covered for compliance and keep your financial documents securely stored online, where they can be shared with your colleagues, accountant or bookkeeper.

How to Submit Items by Email

Email-in is the easiest way to submit digital documents to Receipt Bank. Whenever you send or forward a receipt or invoice to your dedicated Email-in address, it will automatically be extracted and added to the Costs Inbox. Receipts, Invoices or other documents can be either:

- contained in the body of the email, or
- attached to the email

In either of these cases, Receipt Bank will detect the document, extract it and present it in the costs Inbox.

You can submit invoices or receipts of the following file types: JPG, PNG, GIF, BMP, TIFF, PDF and zip files with images, DOC, DOCX, ODT, and RTF.

How to use the mobile app to upload paperwork

The Receipt Bank Mobile app is the quickest and easiest way to submit physical, paper receipts, invoices and other documentation to Receipt Bank. It is what it is built for and that is why it doesn't possess all the features of a web account.

There is an iOS version and an Android version of the Receipt Bank Mobile App.

Submitting items through the mobile app is simple:

1. Open the mobile app
2. Take a picture of your receipt
3. Press 'Submit'

There are multiple camera modes on the Mobile App that allow any type of paper document to be captured easily.

After capturing the image of your receipt, you can add some contextual information to be included with your item before submission. Some fields cannot be edited before the upload has finished processing as they are automatically extracted.

