



RECEIPT BANK SUBMISSION METHODS: EFFORTLESS!

ALL YOU NEED TO KNOW TO NEVER LOSE ANOTHER EXPENSE DOCUMENT AND EASILY DELIVER THEM TO YOUR ACCOUNTANT/BOOKKEEPER IN REAL-TIME

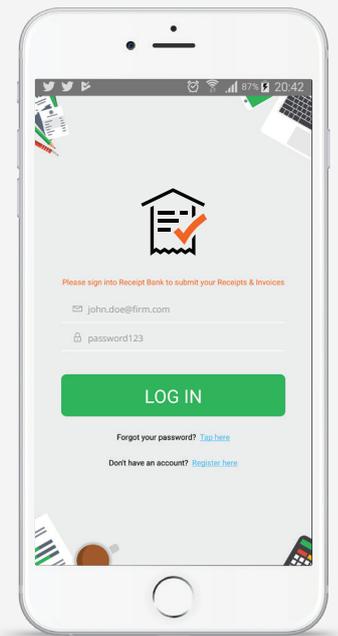


Receipt Bank revolutionizes the collection of expense documents providing you with the technology to send any receipt or invoice to your accountant or bookkeeper as soon as you receive them - with just a few clicks, without delay or effort.

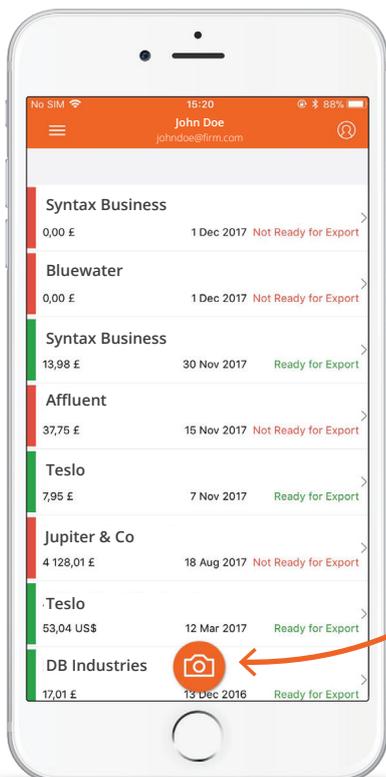
THE RECEIPT BANK MOBILE APP

If your accountant or bookkeeper sent you an email with your credentials, Receipt Bank is available for free download in Google Play and App Store:

- 01 Search "Receipt Bank"
- 02 Install the mobile app and open it
- 03 Use the credentials you received in the "Welcome to Receipt Bank" email from your accountant or bookkeeper.
- 04 You can now start taking pictures of receipts and invoices and submit them for your accountant or bookkeeper review.



If your accountant or bookkeeper sent you an SMS invite for downloading Receipt Bank, follow the link to install the app - your credentials will be auto-populated and you'll just need to type in a new password.



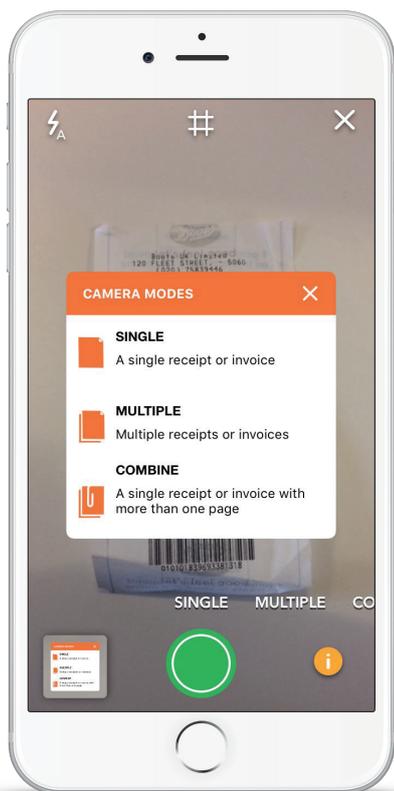
Receipt Bank's free mobile app is the quickest way to regularly submit your receipts, invoices, and expenses on the go without the burden of collecting them and following through. Once you receive an expense document, simply fire up the app, take a photo, hit "Submit" - and it's on its way to your accountant/bookkeeper, no further effort is needed on your part!

Start collecting your first invoices or receipts by simply touching the camera button in the middle of the screen.

All items you've submitted are visible in your mobile app's Inbox until your accountant/bookkeeper has processed them.



The different “Camera Modes” have your back with any size or number of receipts/invoices



1. SINGLE MODE:

Just snap a picture, hit the “Submit” button and let your accountant/bookkeeper do the rest!

- Make sure to take each receipt/invoice individually.

2. MULTIPLE MODE:

Quickly submit up to 50 single-page receipts and/or invoices.

- Make sure to take each receipt/invoice individually.

3. COMBINE MODE:

For invoices on 2 or more pages (or really long receipts), that you need to snap on both sides in order to process correctly.

- Make sure the image captures the whole receipt/invoice
- Allow enough light to fully capture the receipt/invoice

PERSONAL RECEIPT BANK EMAIL-IN ADDRESS

Your personal email-in address is different from your log-in email address for Receipt Bank as it's another submission method you have at your disposal - it's easy to identify it as it always ends with @receiptbank.me. It's convenient as invoices enclosed in emails (as HTML, PDF, etc.) that are sent to this address, regardless of who sent it, will be submitted to your Receipt Bank Inbox and from there, directly visible for your accountant or bookkeeper to process them.

Email-in ▾

You can customize your unique Receipt Bank email address below

Emailing your items to this email address from any other email address will deliver your items to this account under your name. You can give your unique email address to your suppliers and they can submit their invoices directly to your Receipt Bank account.

Email-in address

clientname.company

@receiptbank.me



Best practices on saving yourself some valuable time

» WHEN TO USE THE EMAIL-IN ADDRESS:

- for supplier invoices received over email
- for any digital invoices that the suppliers are accessible via Fetch Invoice

» WHERE TO FIND YOUR UNIQUE EMAIL-IN ADDRESS:

- **On mobile in the Receipt Bank mobile app:**

On iOS - select the menu in the upper left >> then the "Email In" option

On Android - "Settings" in the lower right >> then "Services" from the taps on top

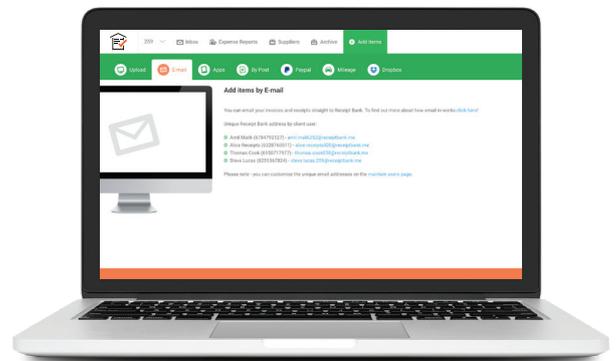
» HOW TO USE:

- **Single item in text** - forward to personalized address
- **Single item attached** - forward to personalized address
- **Regular invoices from the same supplier**

Give the supplier your @receiptbank.me address to cc when sending the invoice

Set up auto-forwarding rules to your @receiptbank.me address

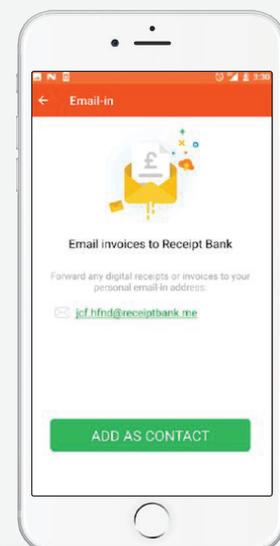
- **Multiple items attached to one email** - send from your login email account to multiple@receiptbank.me



GOOD TO KNOW

SAVE YOUR RB EMAIL-IN ADDRESS AS A CONTACT ON YOUR DEVICE!

- 01 Open your Receipt Bank mobile app.
- 02 Tap into the app settings and select 'Email in'.
- 03 You'll be prompted to allow Receipt Bank access to your contacts.
- 04 Tap 'Allow'.
- 05 'Add as contact' - your email-in address.
- 06 The address will be added to your device contacts.



INVOICE FETCH

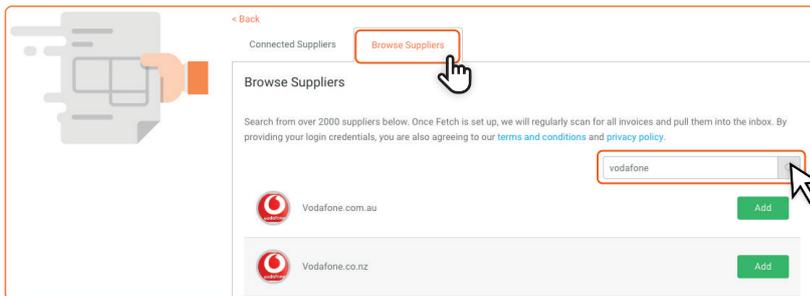
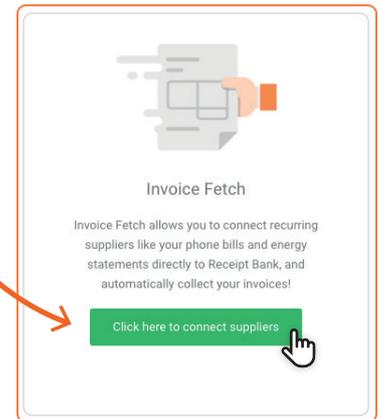


The Invoice Fetch submission method allows Receipt Bank to automatically download your recurring bills and invoices from supplier websites. No need to submit them within the Receipt Bank app or by emailing in!

You can either set up Invoice Fetch yourself or your accountant can do it for you if you have shared your supplier login credentials.

To set it up yourself:

- 01 Login to your Receipt Bank account and click the 'Add Items' menu.
- 02 Select "Click here connect suppliers" in the Invoice Fetch window.
- 03 Then click on the 'Browse Suppliers' tab.
- 04 Use the search bar to locate suppliers to connect to Invoice Fetch.



- 05 Use your login details for the supplier portal to authenticate the connection.
- 06 See the connected suppliers in the 'Connected Suppliers' tab of the 'Invoice Fetch' page. You can edit or disconnect the supplier connection from this screen.

Once your suppliers have been set up, Invoice Fetch will collect any documents already present in the supplier portal and post them to your Receipt Bank inbox within 24 hours. Following that, Receipt Bank will automatically check each of your authorised suppliers once a week and add any new documentation straight to your inbox.



NOTE:

- Invoice Fetch will import ALL previous documents from the supplier portal. If these files have been previously submitted to Receipt Bank, they will be merged automatically with the fetched items.
- If you make changes to your supplier portal login credentials, this will remove Receipt Bank's ability to Fetch from that supplier. If this happens, your supplier login credentials may need to be updated or the connection needs to be reauthorised.