Agenda

• Overview of the receipt faxing process
• The 4 steps
  1. Print cover page
  2. Prepare receipts
  3. Fax cover page & receipts
  4. Confirm fax received
• Faxing additional receipts
• Troubleshooting
• Questions
Overview of the receipt faxing process

1. Print cover page & check quality
2. Prepare receipts & check quality
3. Fax cover page & receipts
4. Confirm fax received

Submit expense report
So you’ve entered and submitted your expense report and are ready to fax your receipts.

Now what?
Step 1 (of 4): Print fax cover page and check quality

- Click **Submit** or **Print** on the report
- Select the format **Fax Receipt Cover Page** and then click **Print Preview**
- Click **Print** on the preview page
- Check print quality – especially the **barcodes**
Step 1: Print fax cover page and check quality

Printing tips

- Highest resolution (at least 300 dots per inch, usually pre-set)
- Print on plain white paper (no logos, watermarks, etc.)
Step 1: Print fax cover page and check quality

How printouts should look

INSTRUCTIONS FOR FAXING RECEIPTS

To fax your receipts:

1. Print the fax cover page and check for good quality (see below).
2. Prepare receipts. Either make photocopies, use a clear faxing jacket, or tape receipts to sheets of paper if your fax machine accepts these.
3. Fax the cover page and receipts to:
   B00-xxx-xxxx
4. Confirm that the fax was received. Wait a few minutes, then click the Check Receipts link for this expense report. Keep all receipts at least until the expense report has been paid.

Quality checklist:
- Use the highest resolution possible on your printer
- Print on plain white paper
- Print using portrait orientation, not landscape
- Make sure the print is dark and clear, with no smudges, streaks, or marks
- Check that there are three barcodes with the words TOP and BOTTOM
- Place the pages so the cover page is faced first
- Place pages facing correctly (face down for most fax machines)
- Feed the pages as straight as possible
- Set the fax machine to Fine Resolution and turn Polling Off
- Make sure that half-tone or photo mode is not on

To fax receipts again:

If you want to submit more receipts for the same expense report, or if your receipts appear unclear, you can fax additional receipts using the same cover page as before. These receipts will be appended to the earlier transmission.
Step 1: Print fax cover page and check quality

Checking print quality

3 barcodes, TOP and BOTTOM visible (set margins in browser)

Portrait orientation ☐, not ☐ (set this in browser)

Printing dark and clear – no smudges, streaks, or marks (check toner; have printer serviced)
Step 1: Print fax cover page and check quality

Setting print margins & orientation in the browser

Click **Page Setup** in the File menu (in Internet Explorer)

Select **Portrait** orientation

Set all margins 1 inch or less
Step 2 (of 4): Prepare receipts

- Photocopy your receipts
- Or place receipts in a clear faxing jacket or carrier
- Or tape receipts to sheets of paper, if your fax machine accepts these (could cause jamming)
Step 3 (of 4): Fax the cover page & receipts

- Make sure the cover page is first.
- Receipts should be right side up.

Insert pages face-down (for most machines).
Step 3: Fax the cover page & receipts

Faxing tips

Make sure pages feed as straight as possible (use side guides)

Set resolution to Fine (better than Standard, but not Photo)

In case receipt images aren’t received, check that:
• Polling is off
• Halftone or photo mode is off
Step 4 (of 4): Confirm that the fax was received

Click **Check Receipts** for the report...

If what you see looks like this, your receipt images were received.
(Save your original receipts until the report has been paid.)
Step 4: Confirm that the fax was received

If you see this message...

There is currently no receipt image available. If the fax was sent less than five minutes ago, try to access this page again in a few minutes, as the image may be in process.

If you have not yet sent a fax, click the Print Report button on the Edit Entries page, then choose the Fax Receipt Cover Page option. Print the cover page, then fax it and the applicable receipts to the number printed on the cover page.

If significant time has elapsed, the fax may have been sent incorrectly or may have been unreadable. You should resend the fax, reviewing the instructions on the fax cover page to minimize problems. If the issue persists, review the Help for this feature, or contact your administrator.

...wait a few minutes and click Receipts again.

If your receipts aren’t there after 7 minutes, try faxing again (re-check all the quality points).

If your receipts don’t appear after the second try, get help from your administrator.
Faxing additional receipts

What if you forget to fax a receipt? Need to fax a receipt again?

Follow steps 1 - 4 using the same cover page as before. You can print it again if necessary (open the report and click Print).

Include only the receipts you want to add or re-fax.

These receipts will be appended onto the existing ones.
Troubleshooting

- “Bad” barcodes
- Unreadable receipts
- Checking fax image quality
Troubleshooting

“Bad” barcodes

Extraneous lines (retry - printer or fax machine may need cleaning)

Smudging (retry - printer or fax machine may need repair)
Troubleshooting

“Bad” barcodes

Vertical streak (retry - printer or fax machine may need cleaning)

Horizontal streak (retry - printer or fax machine may need cleaning)
Troubleshooting

“Bad” barcodes

Skewing (paper fed crooked into fax machine)

Barcodes cut off (top & bottom margins too wide)
Troubleshooting

“Bad” barcodes

Barcode missing (side margins too wide)

Graphic “noise” (use plain white paper)
Troubleshooting

Unreadable receipts

<table>
<thead>
<tr>
<th>Colored receipt paper</th>
<th>Very light print</th>
<th>Good receipt image</th>
</tr>
</thead>
</table>

Solution: Photocopy the receipt, adjusting the contrast and darkness to enhance the readability, then fax the copy.
Did you know?

You can use the Copy function of your fax machine to check the image quality.
Thank you for your attention!
Any questions?