Xero 1
Attaching receipts to transactions

This article contains step by step instructions for you to take advantage of the best time-saving function of accounting software - keeping your receipts.

ASKVALERIE
Your Business Numbers in a Nutshell

Xero 1 Attaching receipts to transactions

What is the future possibility that strikes fear into the heart of all business-people? Causes many to pay hundreds of dollars every year? The possibility of an ATO audit.

How much fear and foreboding could you make simply disappear by doing one simple thing? All of it. How? Attach copies of receipts to your transactions.

There are a couple of different ways to do this. The first is by sending scanned copies of your receipts into your Xero datafile by email. The second is by adding a scanned copy after its been matched.

Sending scanned copies of your receipts into your Xero datafile by email.
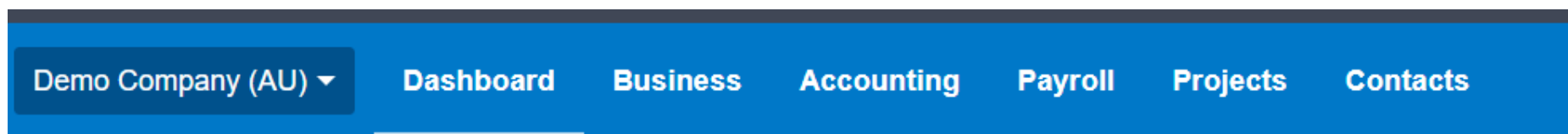
Click on the down arrow to the right of your company name, and select Files.

Files

Settings

On the top right hand corner you'll find your email address to forward your receipts to.

Send files to this email address:
xero.inbox.rfyz.hpv0tmqb81ty65nw@xerofiles.com

Alternatively, you can use the Upload File button on that page to directly upload copies of receipts (or contracts or any other document you want to keep with your Xero Datafile) directly into your inbox.

Once a receipt is in your inbox, you then have to classify it according to which bank account it was paid from, and it creates a Spend Money with the copy attached.

Adding a copy after the transactions has been matched.

Transactions that have been matched are found in the account transactions list for each bank account:

Find the transaction that you want to attach a receipt to in the list of all matched transactions. The search function is very good. Click on the transaction to open it. Don't click on the work reconcile, but somewhere in the middle of the line.

See the file icon on the top right hand corner? To the left of the Options button. Click on it.
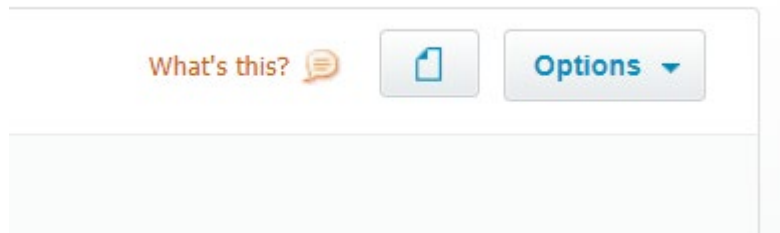
Use the Add from file library or Upload files button as appropriate, and the copy is then attached to the transaction.

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