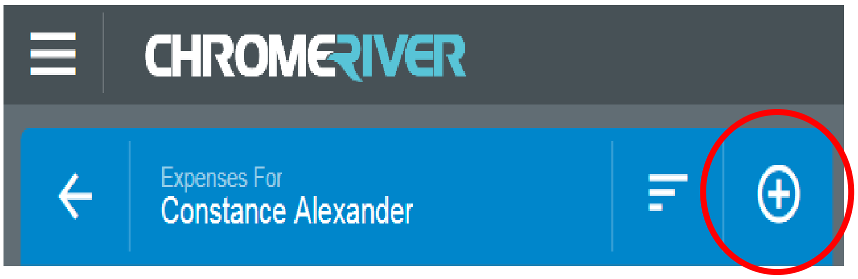
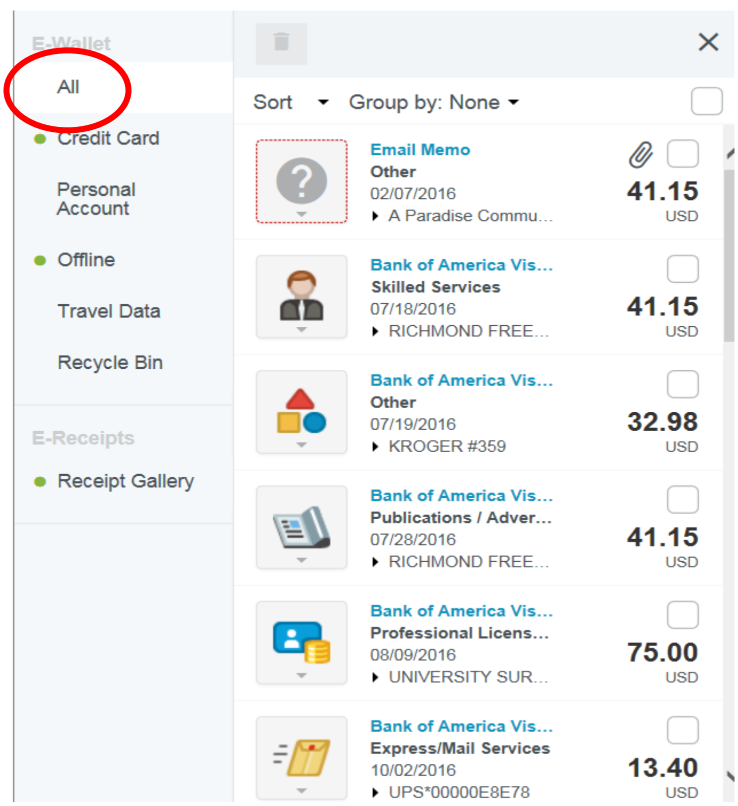
UVAFinance

Merge Credit Card Transactions (System Merge)

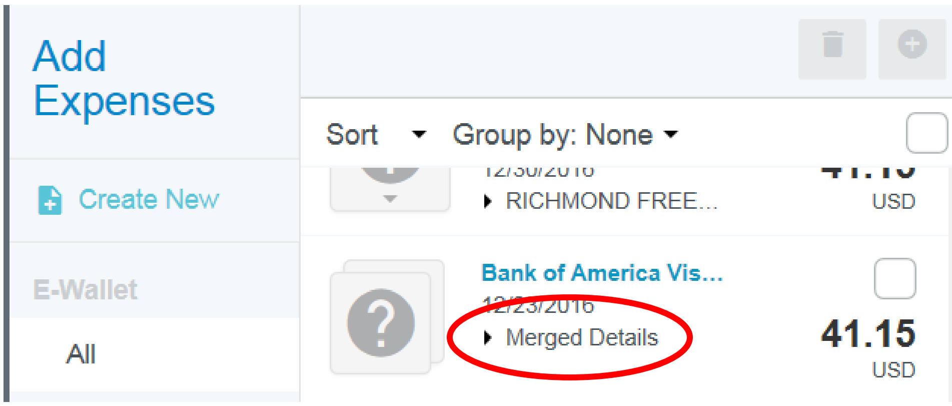
1. E-Wallet contains all the credit card transactions that have been automatically imported into Chrome River. You can access your E-Wallet credit card transactions by creating a new expense report or opening a draft expense report. Click the +Button.



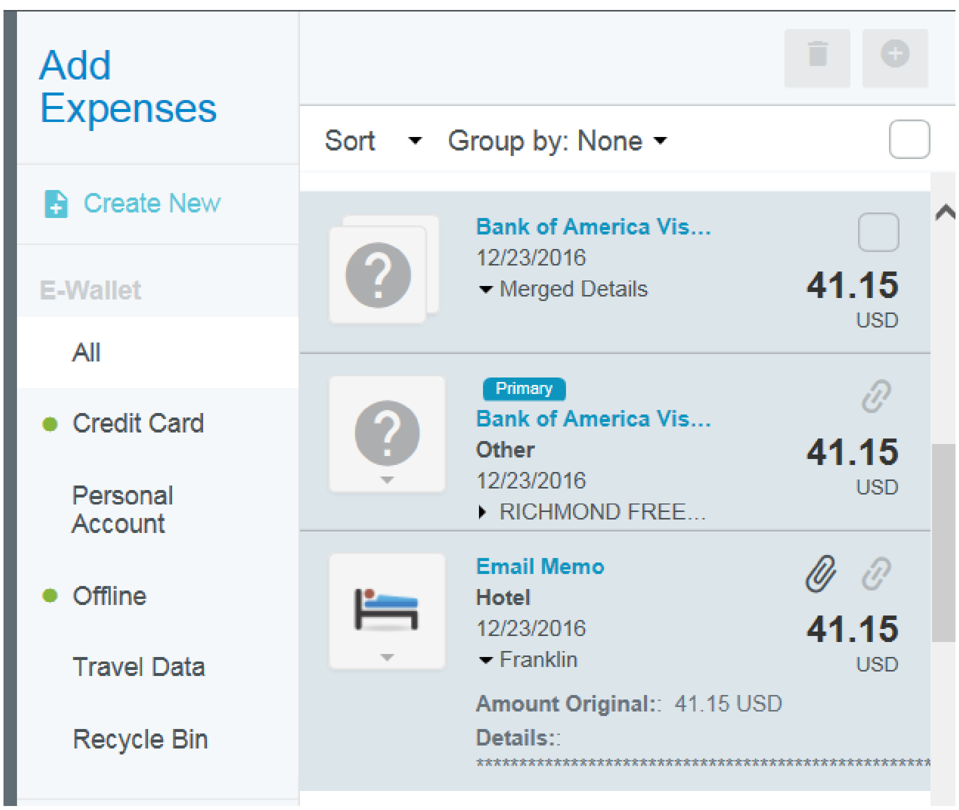
2. Select **ALL** to view all transactions. You can select Credit Card if you only want to see your credit card transactions that have been imported into Chrome River. A green dot next to an expense category in E-Wallet indicates that there are unused items available.



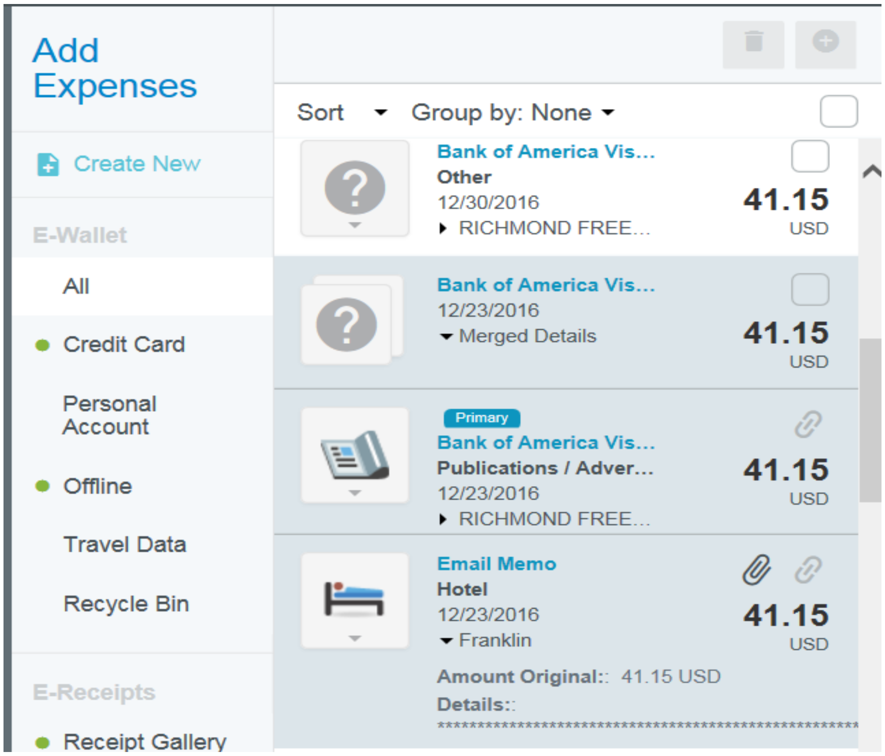
3. You will see Bank of America transactions and Email Memo transactions listed. By clicking on sort you have the option to sort your transactions by date, amount spent, expense type, transaction source and merchant. Only those with matching dates, types and amounts may be already merged. If your Bank of America transaction and your emailed receipt match you will see the word "Merged Details" under the transaction.



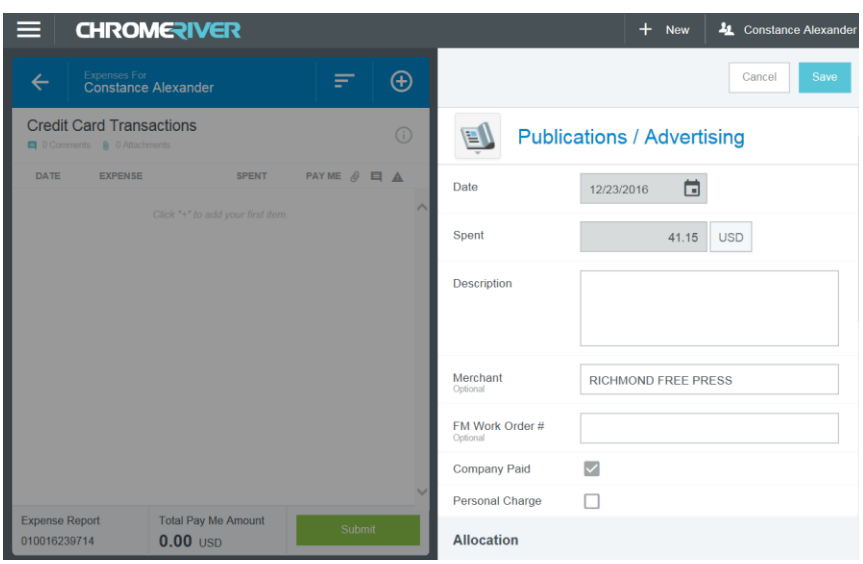
4. To expand the already merged transactions to make sure that the system merged correctly click on "Merged Details" You can click on the Email Memo to make sure that this is the correct receipt for the Bank of America transaction.

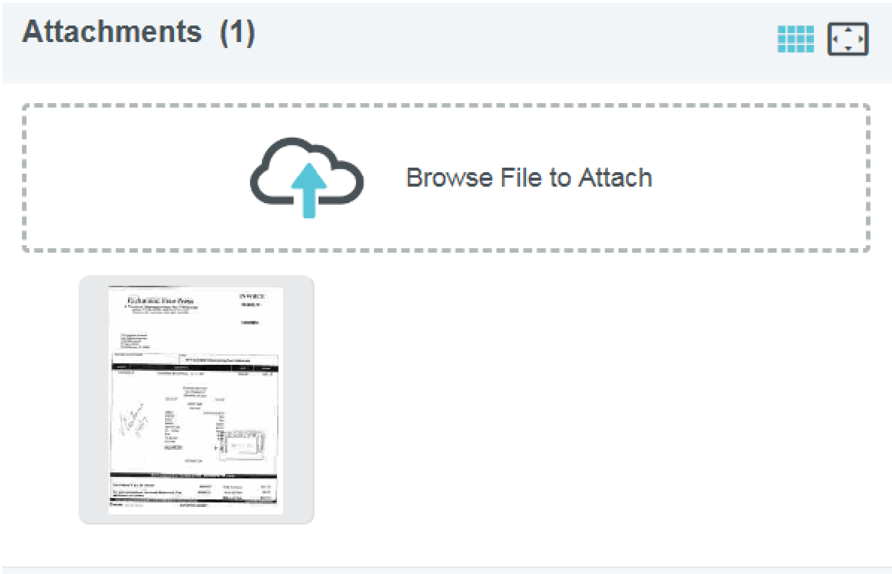


5. If your transaction did not map to the correct expense tile you will need to click on "Merged Details" Change the expense tile picture on the "Primary" tile from the question mark or any other expense type to the appropriate expense type.



6. Click on the expense drag and drop onto your expense report. You will notice that some of the information has already been entered for you. You will need to enter the required information that did not populate. Your receipt will already be attached





7. If you click on the receipt image it will appear on the left side of your screen.