

Tips for getting a picture-perfect image of receipts and invoices

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To all adult members and Rangers

There are three ways to take and provide an image of receipts and invoices for your Unit Banking Clerk – scan, save and upload the emailed invoice, or use your mobile device to take a picture.

Tips for picture-perfect images:

Provide the full image of the receipt or invoice. The Unified Banking Clerk must see the following information to process the transaction:

1. Name of the merchant/organization
2. Date of the transaction
3. Address of the merchant or where the event is held
4. Details of the services received/items purchased
5. Cost and tax(es) breakdown
6. HST/GST registration number, if applicable

Scanning:

1. If more than one receipt/invoice is being scanned, please ensure the receipts/invoices are not overlapping each other or over the margin lines on the scanner. This will cut off details of the receipt/invoice
2. Check your scanned documents before uploading to the transaction
3. Increase the resolution. Your final file size will be larger, but the resulting documents will be much better quality. Files should not exceed 15 MB

Emailed Invoices:

1. Invoices received via email can be saved as a PDF file. PDF files will show under the transaction as *image not shown*. This means you need to download the file to view what was attached to the transaction. To save an emailed invoice, please do the following:
2. Open the email
3. Click Print
4. Find the Printer – drop down menu – select print to PDF
5. Click Print
6. Create a file name – it can be helpful to include the transaction number
7. Save as type will show as *PDF document*

Now attach the file to the transaction

1. Go to the transaction
2. Select File
3. Find the file on your desktop/laptop
4. Check the PDF file prior to uploading the document to the transaction, ensuring the full image of the invoice is saved

Mobile Devices:

1. Set your camera's focus
 2. Focus on the subject
 3. Hold your phone still
 4. The further away the picture of the image is taken, the more quality of the image becomes distorted or blurry when magnified
 5. If using a mobile device to take a picture of the receipt/invoice, please ensure the largest size and a higher resolution is selected
 6. Ensure the room is well lit when taking the picture
 7. Take the picture of the receipt/invoice from above. When taking it an angle, the information does become distorted
 8. It is suggested, when taking pictures of multiple receipts, to have approximately two to three receipts per picture frame. When adding more than three receipts ensure all receipts are included in the image
- File sizes should not exceed 15 MB for each transaction. The Unified Banking System will only accept file types: jpeg, gif, pdf, xlsx, docx