

Receipt Upload Portal

User Guide

A Step-by-Step Guide for Desktop & Mobile

Need help? Contact your parish administrator.

Last updated: March 2026

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1. Welcome

This portal lets you upload pictures of your receipts and invoices to your parish. Your administrator reviews them and records them in the parish accounting system.

What You Need

- An email address and password from your administrator
- A computer, tablet, or phone with internet access
- Your receipts (paper or digital)

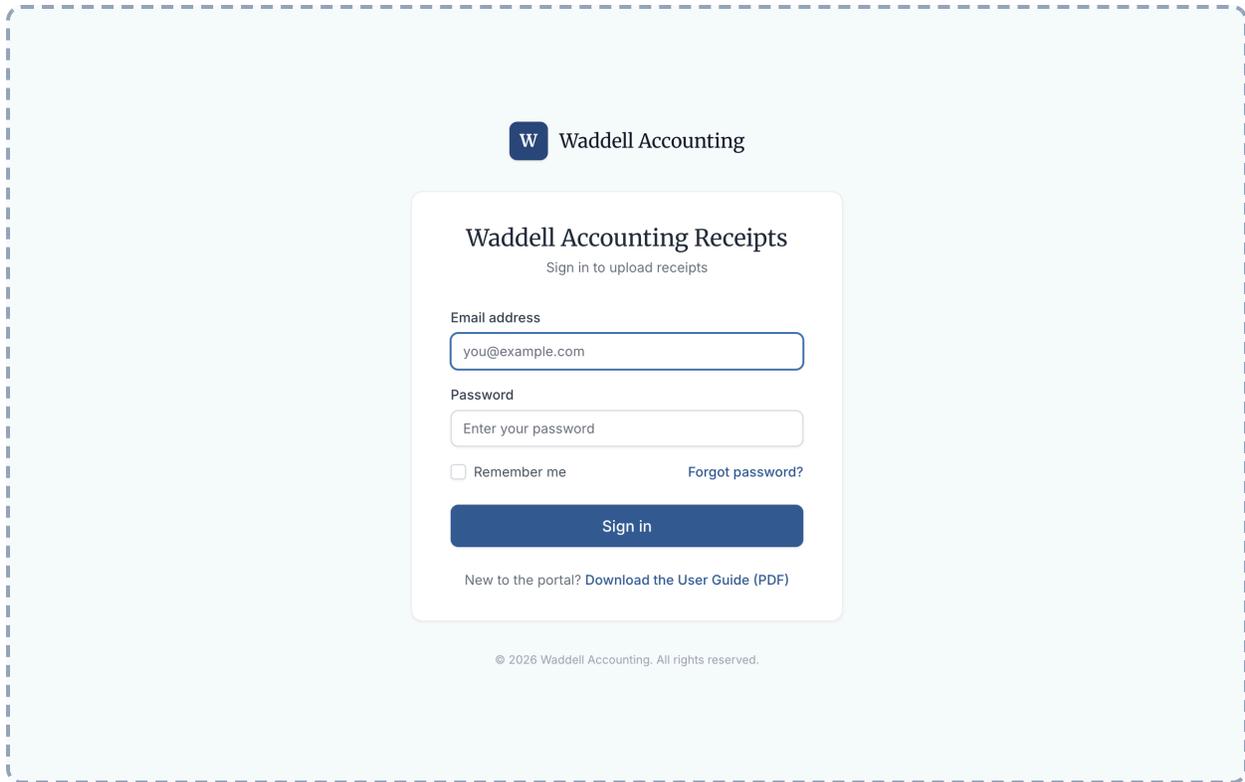
Tip

If you need help at any time, contact your parish administrator.

2. Logging In

Desktop

- 1 Open your web browser (Chrome, Safari, Edge, or Firefox).
- 2 Type the portal address into the long box at the top of your browser window. Your administrator will provide this address to you.
- 3 Type your email address in the "Email" box.
- 4 Type your password in the "Password" box.
- 5 (Optional) Check "Remember me" if you are using your personal computer.
- 6 You may be asked to check a box to prove you are not a robot. Check the box and follow any instructions if prompted.
- 7 Click the "Sign in" button.

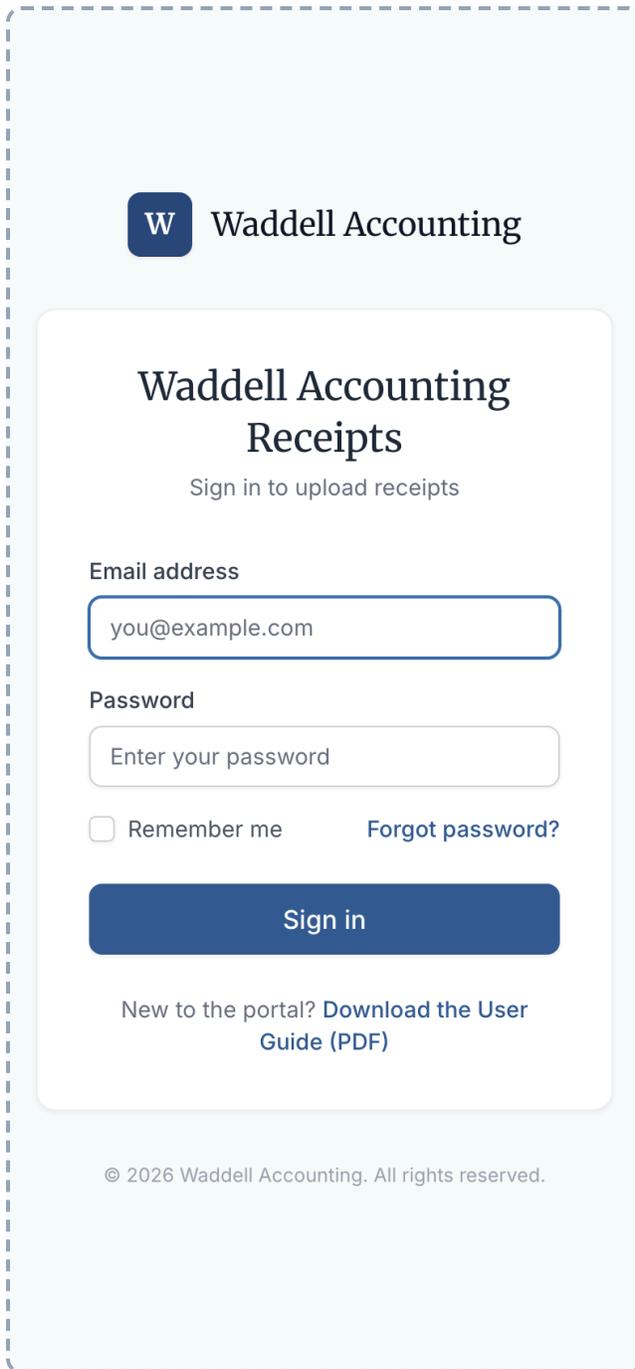


Desktop login screen

Mobile

- 1 Open your browser (Safari on iPhone, Chrome on Android).
- 2 Type the portal address into the long box at the top of your screen.
- 3 Tap the "Email" box and type your email address.
- 4 Tap the "Password" box and type your password.
- 5 (Optional) Check "Remember me" if you are using your personal device.
- 6 You may be asked to check a box to prove you are not a robot. Check the box and follow any instructions if prompted.

7 Tap the "Sign in" button.



The image shows a mobile login screen for Waddell Accounting. At the top left, there is a dark blue square icon with a white letter 'W', followed by the text 'Waddell Accounting'. Below this is a white rounded rectangle containing the title 'Waddell Accounting Receipts' and the subtitle 'Sign in to upload receipts'. There are two input fields: 'Email address' with the placeholder 'you@example.com' and 'Password' with the placeholder 'Enter your password'. Below the password field is a checkbox labeled 'Remember me' and a link 'Forgot password?'. A dark blue 'Sign in' button is centered below these elements. At the bottom of the white box, there is a link: 'New to the portal? Download the User Guide (PDF)'. At the very bottom of the screen, there is a copyright notice: '© 2026 Waddell Accounting. All rights reserved.'

Mobile login screen

After Logging In

You will see a welcome screen. From here, click or tap **Upload** to upload a receipt, or **My Receipts** to see your history.

3. Resetting Your Password (If You Forgot It)

- 1 On the login page, click or tap "Forgot password?"
- 2 Type your email address.
- 3 Click or tap "Email Password Reset Link."
- 4 Check your email inbox. The email may take a minute to arrive.
- 5 Open the email and click or tap the reset link.
- 6 Type your new password.
- 7 Type the same new password again to confirm.
- 8 Click or tap "Reset Password."
- 9 You will be taken back to the login page. Log in with your new password.



Forgot your password? No problem. Just let us know your email address and we will email you a password reset link that will allow you to choose a new one.

Email

EMAIL PASSWORD RESET LINK

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Forgot password screen



Email

Password

Confirm Password

RESET PASSWORD

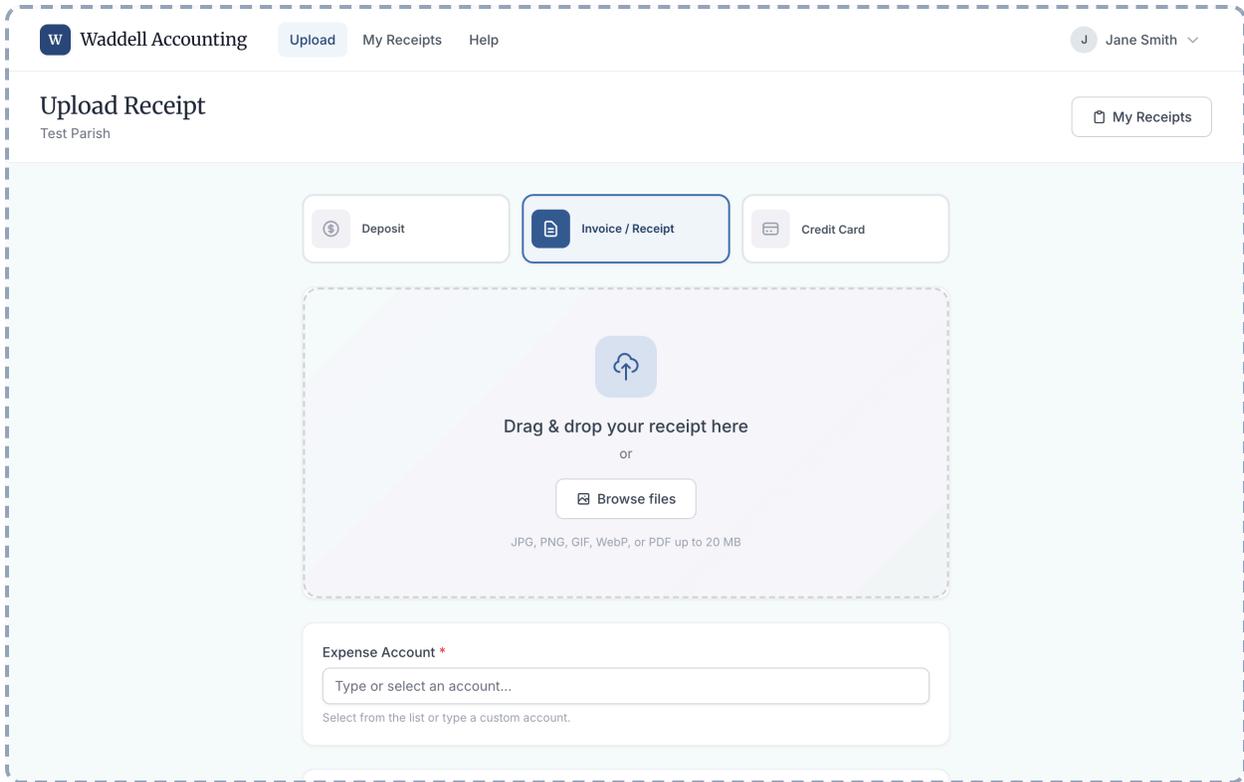
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Reset password screen

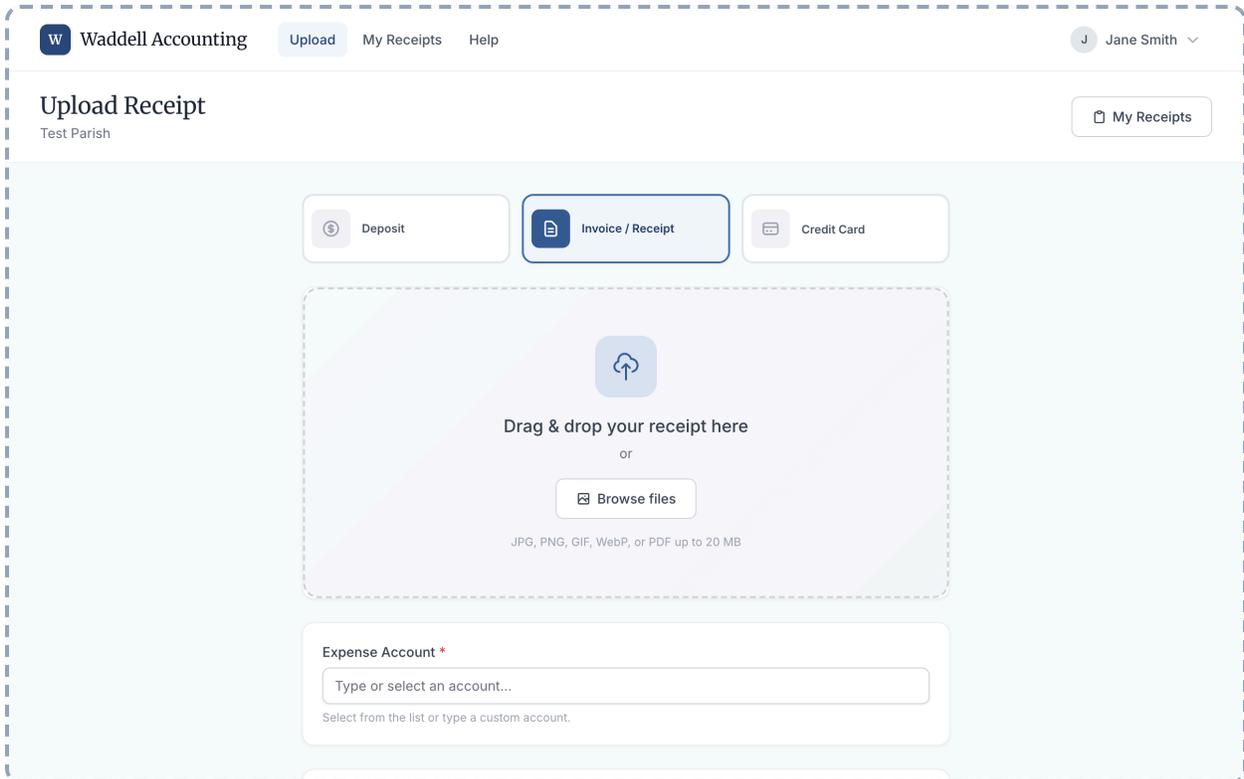
4. Uploading a Receipt

Desktop

- 1 Click "Upload" in the top menu bar.
- 2 Choose the type of upload: **Deposit** (money coming in), **Invoice/Receipt** (money going out), or **Credit Card** (credit card statement).
- 3 Click "Browse Files" to find your receipt on your computer. You can also drag and drop a file onto the upload area.
- 4 You will see a preview of the file. Make sure it is the right one.
- 5 (Optional) Add notes in the "Memo" box to help your administrator.
- 6 Click the upload button. The button text changes depending on the type you selected (for example, "Upload Invoice / Receipt").
- 7 Wait while the file uploads. A progress bar will show how far along it is.
- 8 You will see a green checkmark and "Receipt Uploaded" when the upload is done.
- 9 The portal may show information it extracted from the receipt, such as the store name and amount.
- 10 Click "Upload Another" to add more receipts, or "View My Receipts" to see your history.



Upload page before selecting a file



Upload page with type selected

Waddell Accounting Upload My Receipts Help Jane Smith

Upload Receipt

Test Parish

My Receipts

Deposit Invoice / Receipt Credit Card

grocery-receipt-march.png
286 B

Expense Account *
Type or select an account...
Select from the list or type a custom account.

Memo (optional)
Add a memo about this receipt...
Brief description of the purchase or any relevant details

Upload page with a file selected and preview showing

Deposit Invoice / Receipt Credit Card

grocery-receipt-march.png
286 B

Expense Account *

Type or select an account...

Meals & Entertainment

Please fill out this field.

Memo (optional)

Add a memo about this receipt...

Brief description of the purchase or any relevant details.

Upload Invoice / Receipt

Upload success confirmation

Mobile

- 1 Tap the menu icon (three lines ≡) in the top-right corner.
- 2 Tap "Upload."
- 3 Choose the type of upload: **Deposit**, **Invoice/Receipt**, or **Credit Card**.
- 4 Tap the upload area.
- 5 Choose "Take Photo" to use your camera, or "Photo Library" to pick an existing photo.

- 6 If taking a photo, hold your phone steady. Place the receipt flat on a surface with good lighting.

Tip

Natural light works best. Avoid shadows across the receipt.

- 7 (Optional) Add notes in the "Memo" box.
- 8 Tap the upload button at the bottom of the screen.
- 9 Wait while the file uploads.
- 10 You will see a green checkmark when the upload is complete.



Upload Receipt

Test Parish

 My Receipts



Deposit



Invoice /
Receipt



Credit Card



Drag & drop your receipt here

or

 Browse files

 Take photo

JPG, PNG, GIF, WebP, or PDF up to 20 MB

Expense Account *

Type or select an account...

Select from the list or type a custom account.

Mobile upload page

Deposit **Invoice / Receipt** Credit Card

receipt-mobile.png
286 B

Expense Account *
Type or select an account...

Meals **!** Please fill out this field.

Memo (optional)
Add a memo about this receipt...

Brief description of the purchase or any relevant details.

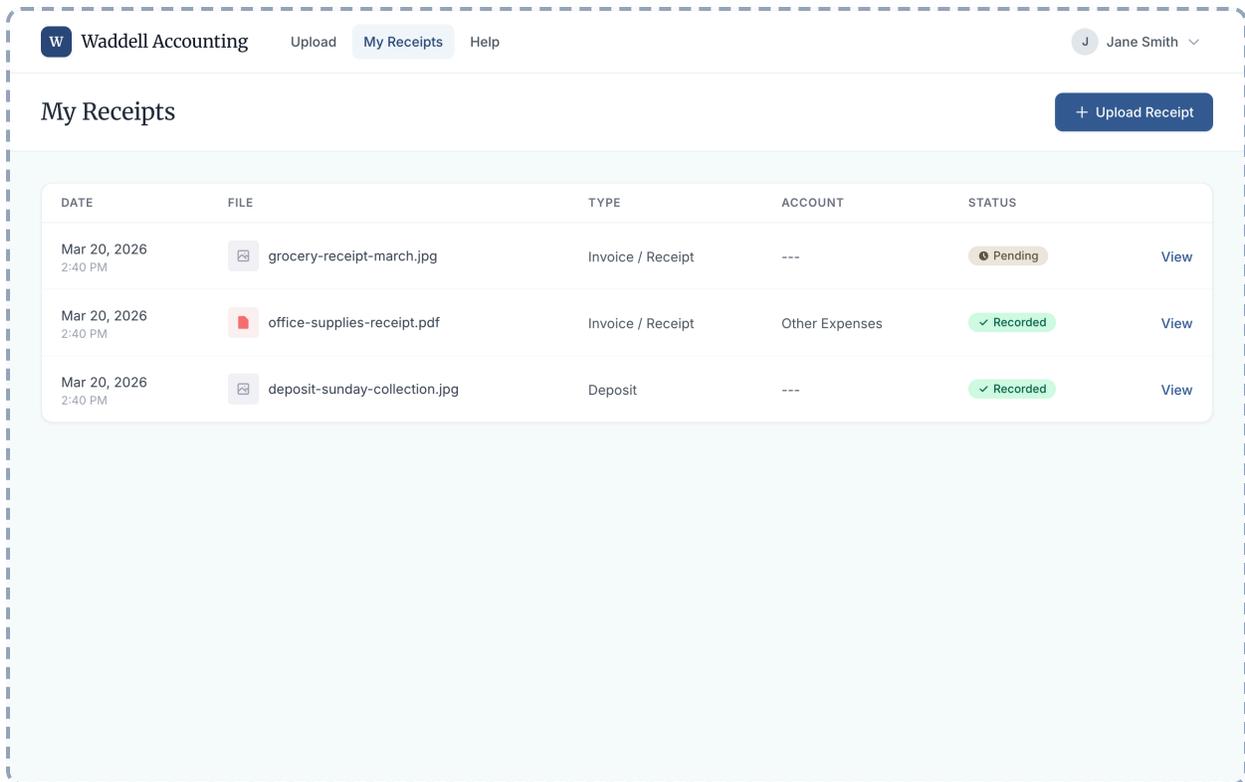
 Upload Invoice / Receipt

Mobile upload success confirmation

5. Viewing Your Receipts

Desktop

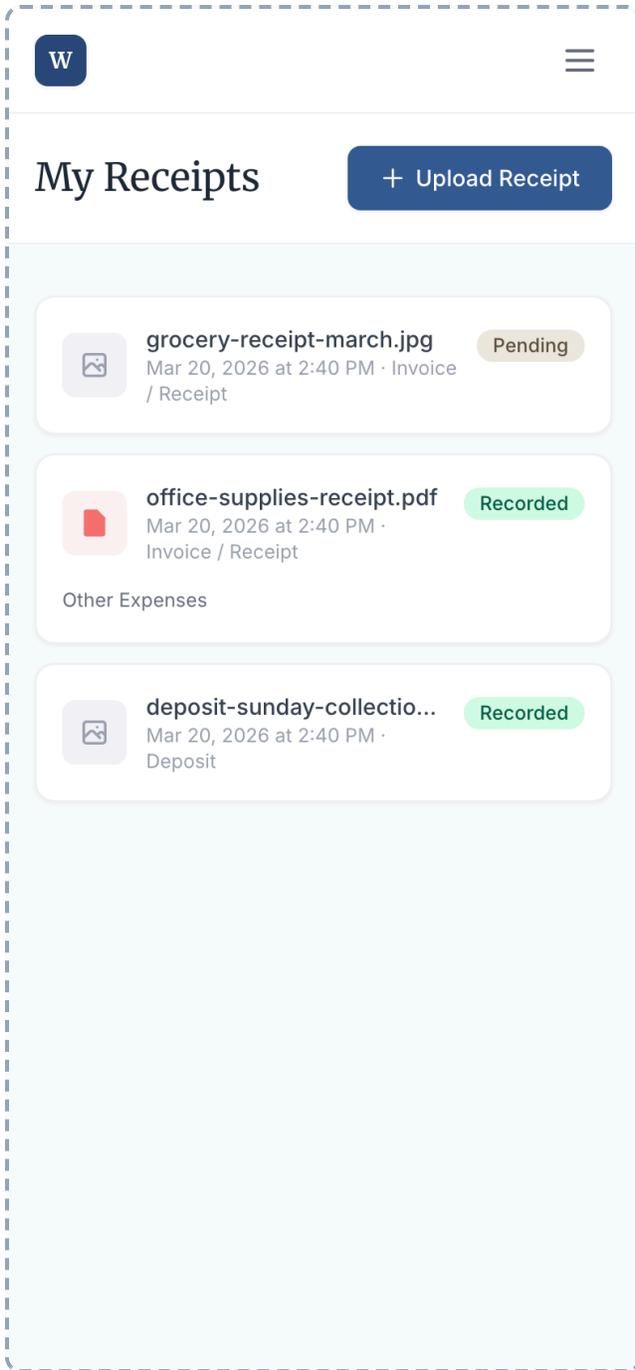
- 1 Click "My Receipts" in the top menu.
- 2 You will see a table of all your receipts.
- 3 Each row shows: the date you uploaded it, the filename, the type, and the status.
- 4 Status meanings:
 - 5 **Pending** — Uploaded, but not yet recorded by your administrator.
 - 6 **Recorded** — Your administrator has reviewed and recorded this receipt.
- 7 Click "View" on any row to see the receipt details.



Desktop receipts list

Mobile

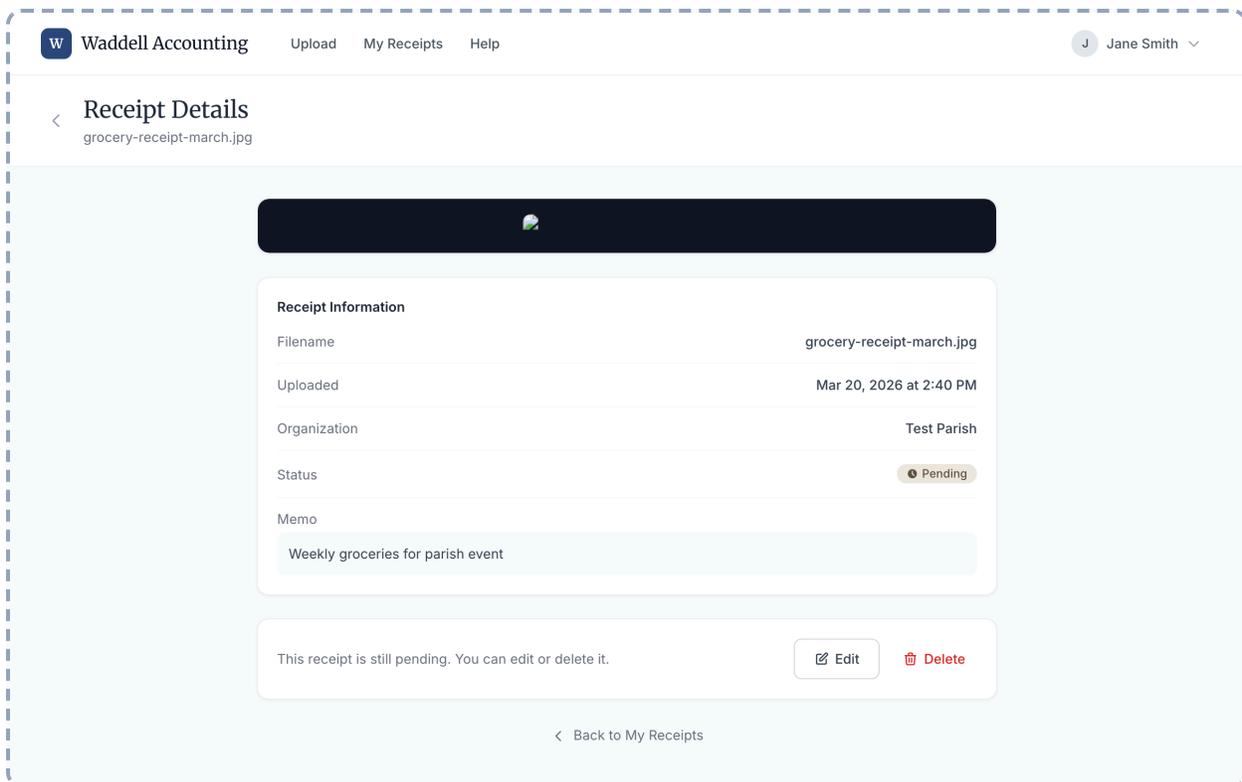
- 1 Tap the menu icon (\equiv) in the top-right corner.
- 2 Tap "My Receipts."
- 3 You will see cards for each receipt showing the date, filename, type, and status.
- 4 Tap any card to see the receipt details.



Mobile receipts list

6. Viewing Receipt Details

- 1 From My Receipts, click or tap a receipt to view its details.
- 2 You will see a picture of the receipt (or a link to the PDF if you uploaded a PDF).
- 3 For images: click or tap the image to make it larger. Click or tap again to return to normal size.
- 4 For PDFs: click or tap "Open PDF" to view the file in a new window.
- 5 Below the image you will see the filename, upload date, and status.
- 6 If the portal extracted information (store name, amount, date), it will appear under "Extracted Information."



Editing a Pending Receipt

If your receipt shows "Pending," you can make changes to it.

- 1 Click or tap the "Edit" button.
- 2 Change the type or memo as needed.
- 3 Click or tap "Save Changes."

Deleting a Pending Receipt

- 1 Click or tap "Delete."
- 2 A warning will appear. Click or tap "Confirm" to delete.

Warning

Deleting a receipt cannot be undone. You will need to upload the receipt again.

7. Changing Your Password

- 1 Click or tap your name in the top-right corner of the screen.
- 2 Click or tap "Profile."
- 3 Scroll down to the "Update Password" section.
- 4 Type your current password.
- 5 Type your new password.
- 6 Type the new password again to confirm.
- 7 Click or tap "Save."
- 8 You will see a confirmation message that your password has been updated.

Profile

Profile Information

Update your account's profile information and email address.

Name

Email

SAVE

Update Password

Ensure your account is using a long, random password to stay secure.

Current Password

New Password

Confirm Password

SAVE

Update password section on Profile page

8. Updating Your Name or Email

- 1 Click or tap your name in the top-right corner of the screen.
- 2 Click or tap "Profile."
- 3 Change your name or email address as needed.
- 4 Click or tap "Save."
- 5 If you changed your email address, check your inbox for a verification email and follow the instructions.

The screenshot shows the 'Profile' page of the Waddell Accounting application. The top navigation bar includes the Waddell Accounting logo, 'Upload', 'My Receipts', and 'Help' links, and a user profile dropdown for 'Jane Smith'. The main content area is titled 'Profile' and contains two sections: 'Profile Information' and 'Update Password'. The 'Profile Information' section has a sub-header 'Profile Information' and a description 'Update your account's profile information and email address.' It features two input fields: 'Name' with the value 'Jane Smith' and 'Email' with the value 'jane.smith@example.com'. A blue 'SAVE' button is positioned below the email field. The 'Update Password' section has a sub-header 'Update Password' and a description 'Ensure your account is using a long, random password to stay secure.' It includes a 'Current Password' input field and a partially visible 'New Password' input field at the bottom.

Profile page

9. Logging Out

Desktop

Click your name in the top-right corner, then click "Log Out."

Mobile

Tap the menu icon (≡), scroll down, then tap "Log Out."

10. Using Dark Mode

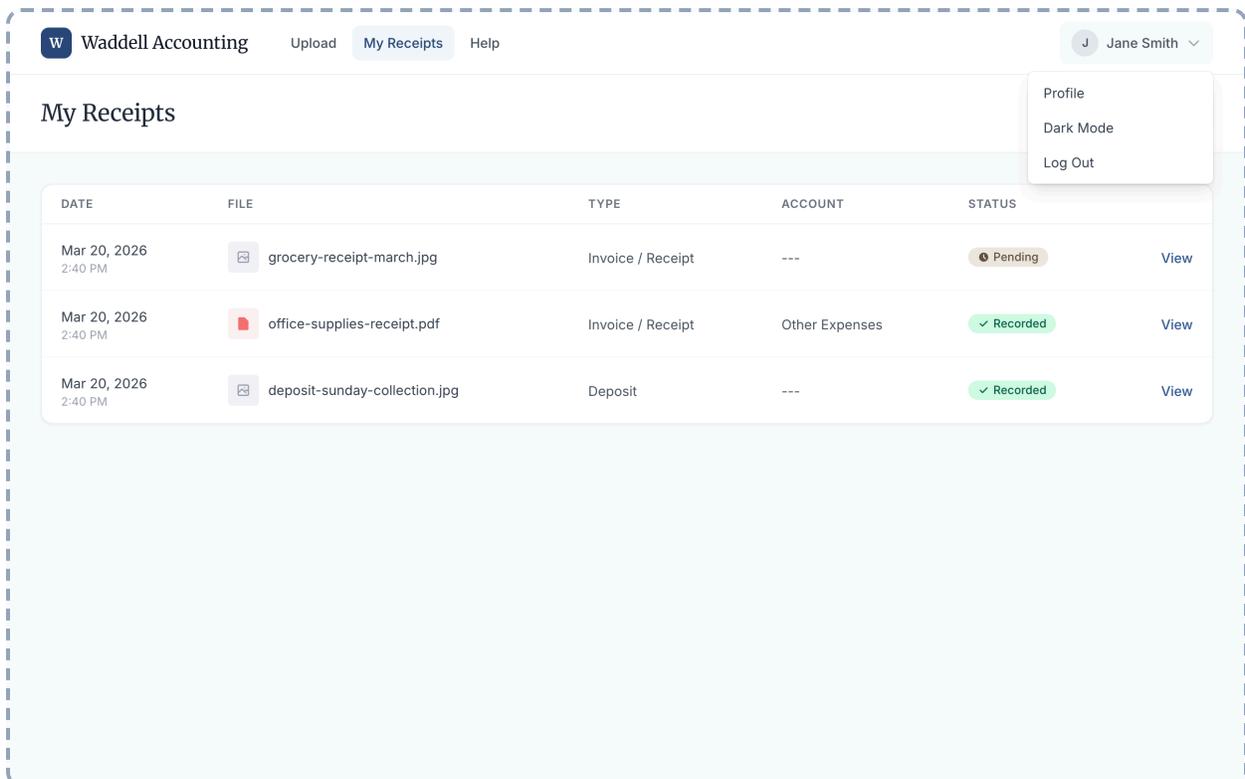
Dark mode changes the screen to use a dark background with light text. This can be easier on the eyes, especially at night.

Desktop

Click your name in the top-right corner, then click "Dark Mode" to turn it on, or "Light Mode" to switch back.

Mobile

Tap the menu icon (\equiv), scroll down, then tap "Dark Mode" or "Light Mode."



Dark mode toggle in the menu

W Waddell Accounting Upload My Receipts Help J Jane Smith

My Receipts

+ Upload Receipt

DATE	FILE	TYPE	ACCOUNT	STATUS	
Mar 20, 2026 2:40 PM	 grocery-receipt-march.jpg	Invoice / Receipt	---	 Pending	View
Mar 20, 2026 2:40 PM	 office-supplies-receipt.pdf	Invoice / Receipt	Other Expenses	 Recorded	View
Mar 20, 2026 2:40 PM	 deposit-sunday-collection.jpg	Deposit	---	 Recorded	View

Example of the portal in dark mode

11. Troubleshooting & Common Questions

Q: I can't log in.

A: Double-check that you are typing the correct email address and password. Make sure Caps Lock is not turned on. If you forgot your password, click the "Forgot password?" link on the login page (see Section 3). If you still cannot log in, contact your parish administrator.

Q: I logged in but I do not see the Upload button.

A: Your account may not yet be assigned to an organization. You will see a message that says "Account Setup Required." Contact your parish administrator to finish setting up your account.

Q: My upload is not working.

A: Make sure your file is a supported type: JPG, PNG, GIF, WebP, or PDF. The file must be under 20 MB. Check that you have an internet connection. Try refreshing the page and uploading again.

Q: I uploaded the wrong file.

A: If the receipt still shows a status of **Pending**, you can delete it from the receipt detail page (see Section 6). If it has already been marked as **Recorded**, contact your parish administrator to correct it.

Q: I see extra fields on the upload page that are not in this guide.

A: Some parishes have additional fields such as Expense Account or Department. If you are unsure what to select, ask your parish administrator.

Q: My old receipt shows "File Expired" instead of the picture.

A: Files older than 1 year may be removed from storage. The record of your receipt is still saved, but the original image or PDF is no longer available.

Q: The page looks strange or broken.

A: Try refreshing the page. If that does not help, try a different browser (Chrome, Safari, Edge, or Firefox). You can also try clearing your browser's saved data (cache and cookies).

Q: I don't see certain options that others mention.

A: Features and options can vary depending on how your parish has configured the portal. Contact your parish administrator if you have questions about available features.