ReceiptWorks

User Guide

Scan, organize, and export your receipts —
step by step, with pictures.

Version 1.1.6 · iPhone and Android · receiptworkspr.com

Made in Puerto Rico by PAC General LLC

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Need help?

- Email **help@receiptworkspr.com** or visit **receiptworkspr.com**.
- The screenshots in this guide use sample data and show the iPhone app. The Android app works the same way.

1. Getting started

1. **Install ReceiptWorks** from the App Store (iPhone) or Google Play (Android), or visit **receiptworkspr.com**.
2. **Open the app.** A short welcome explains the basics. You can see it again anytime in **Settings → Welcome to ReceiptWorks**.
3. **Start right away** — no account needed. The free trial includes **20 scans and 1 export**, and your records are saved on your phone.

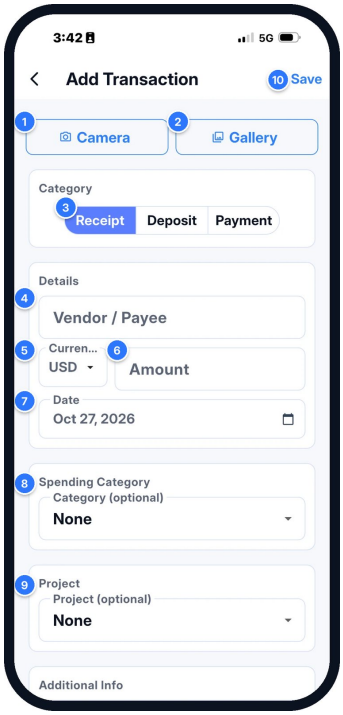
The bar at the bottom of the app has three tabs:

Tab	What it's for
Transactions	Your receipts, deposits, and payments — add, search, filter, and open them
Analytics	Charts of your spending by week, month, or year
Settings	Subscription, currency, workspaces, help, and your account

At the top of **Transactions** are buttons for **Workspaces**, **Projects**, **Spending Categories**, and **Export**.

2. Adding a transaction

On **Transactions**, tap **+**. Choose how to add the receipt — the **camera** or a photo from your **gallery** — and pick the type: **Receipt**, **Deposit**, or **Payment**. You can also type everything in by hand.



Add Transaction

1. **Camera** — scan a paper receipt
2. **Gallery** — use a photo you already have
3. **Type** — Receipt, Deposit, or Payment
4. **Vendor / Payee**
5. **Currency**
6. **Amount**
7. **Date**
8. **Spending category**
9. **Project** (optional)
10. **Save**

3. Scanning with the camera

1. Tap **Camera**. The first few times, a tip reminds you how far to hold the phone: **10–12 inches (25–30 cm)** — about a forearm's length.
2. **Frame the receipt** and hold still. Its edges are found automatically. For a long receipt, step back until the whole receipt fits.
3. Tap the **shutter**, then **Done**. ReceiptWorks reads the details for you.



Scanning

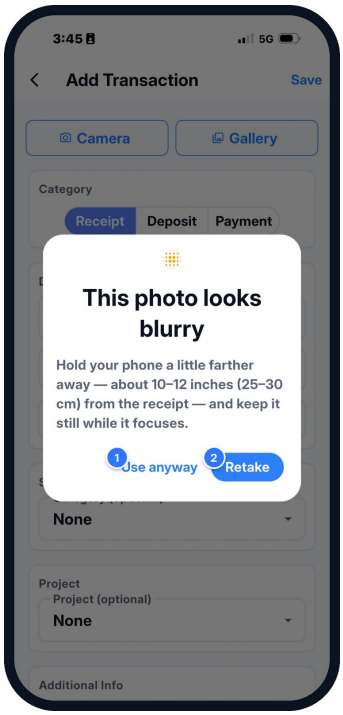
1. The receipt is outlined in blue when it's found
2. **Flash** — Auto turns it on in low light
3. **Take the photo** (auto-shutter can take it for you)
4. **Cancel**



After the photo

1. **Ready for next scan** — the photo was taken
2. Your scanned pages — tap to review
3. **Done** — continue to the details

If the photo is blurry, ReceiptWorks tells you before reading it. Tap **Retake** — a retake doesn't use another scan — or **Use anyway**.



Blurry photo

1. **Use anyway** — keep this photo
2. **Retake** — doesn't use another scan

Tips for a perfect scan

- Flat receipt, good light, no shadows across the text.
- Hold the phone parallel to the receipt, not at an angle.
- Don't get closer than about 10 inches — the camera can't focus up close.

4. Adding a photo from your gallery

1. Tap **Gallery** and pick a photo.
2. On iPhone, the receipt's **edges are detected automatically**. Drag any corner to adjust, then tap **Done**. (On Android, the document scanner handles this.)
3. If the photo is blurry, choose **Choose another** or **Use anyway**.



Gallery photo — Crop Receipt

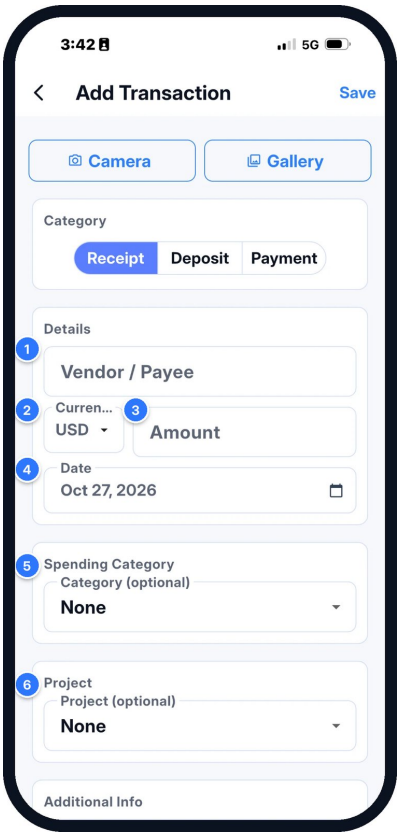
1. Drag any **corner** to adjust the edges
2. **Done**

5. Reviewing and saving

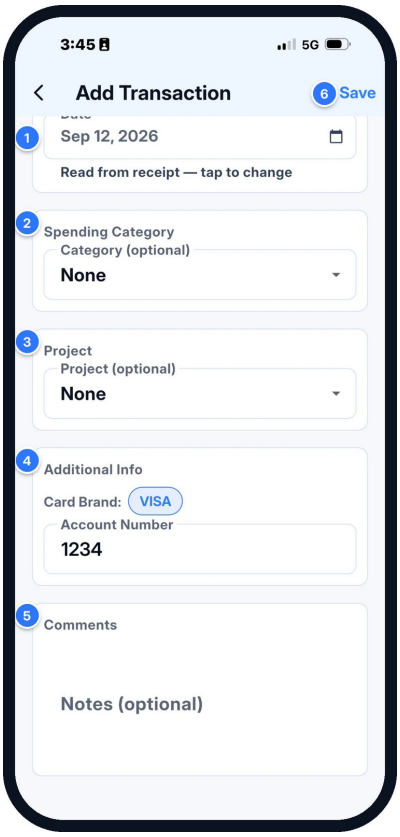
After a scan, ReceiptWorks fills in the details for you:

Field	Filled in automatically
Vendor / payee	The store or company name
Amount	The total, including tax and tip
Date	The receipt's date
Currency	From symbols like €, £, kr or codes like EUR
Card / account	The last 4 digits, when printed
Check number	For payments

Always check every field before saving — automatic reading is very good, but not perfect. Then choose a **spending category**, optionally a **project**, add a **comment**, and tap **Save**.



Top of the form



Scroll down for more

1. **Vendor / Payee** — read from the receipt
2. **Currency** — detected from €, £, EUR...
3. **Amount** — the total
4. **Date** — the receipt's date
5. **Spending category** — choose one
6. **Project** (optional)

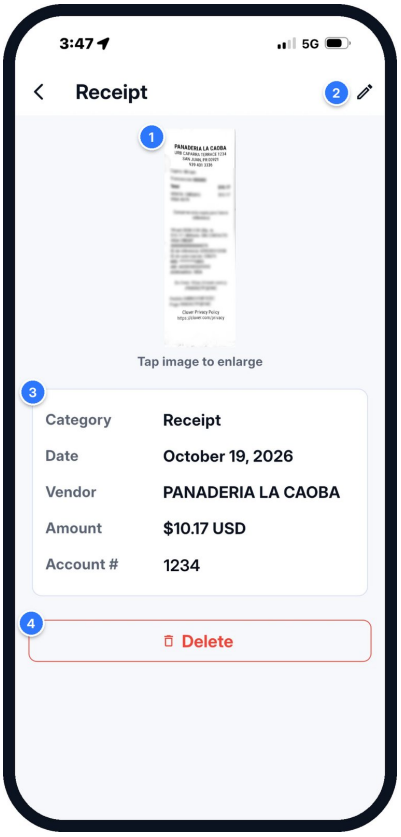
1. **Date** read from the receipt — tap to change
2. **Spending category**
3. **Project**
4. **Card brand** and last 4 digits
5. **Comments**
6. **Save**

AI reading (optional). The first time you scan, ReceiptWorks asks whether to use AI to read hard receipts. If you allow it, only the **text** read from the receipt is sent — **never the photo**. Choose **No Thanks** to read everything on your phone only.

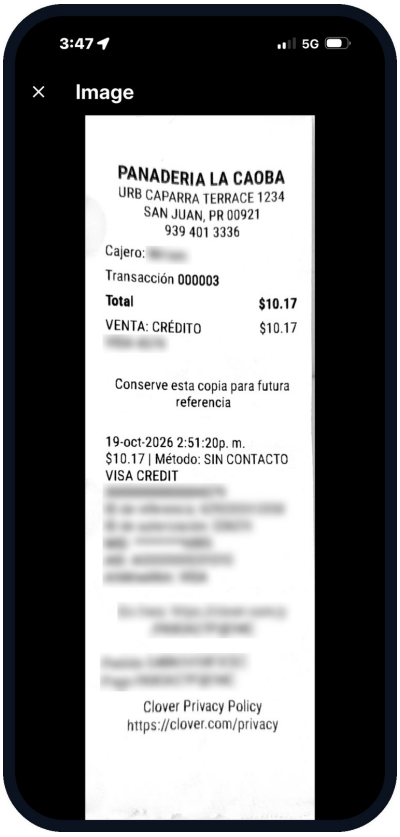
More pages. Long receipts or invoices can have more than one image — tap the camera or gallery again while editing.

6. Viewing a transaction

Tap any transaction to see its details and images. Tap an image to view it full screen — **pinch to zoom**, **double-tap** to fit, and **X** to close. Tap **Edit** (the pencil) to change anything or move it to another workspace.



A saved receipt



Full-screen image

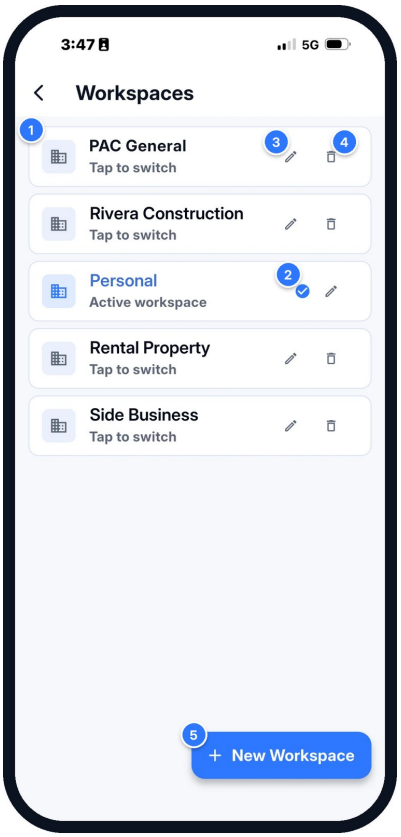
1. Tap the image to **enlarge**
2. **Edit**
3. The saved details
4. **Delete**

7. Currencies

- Set your **Base Currency** in **Settings → Currency**. Totals and reports use it.
- Each transaction keeps its own currency. When a receipt shows one (€, £, EUR…), it's selected automatically.
- The **exchange rate** for the receipt's date is filled in for you, and you can edit it.
- Totals that mix currencies are marked ≈ because they use converted amounts.

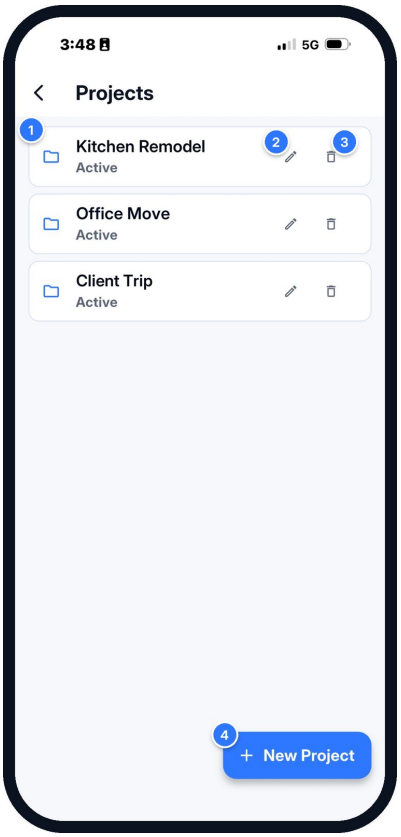
8. Workspaces and projects

- **Workspaces** keep records separate — for example, one per business, or business and personal.
- **Projects** group transactions inside a workspace — a job, a trip, a renovation.
- Open them from the buttons at the top of **Transactions** or from **Settings**.



Workspaces

1. Tap a workspace to **switch** to it
2. The **active** workspace
3. **Rename**
4. **Delete**
5. **New Workspace**

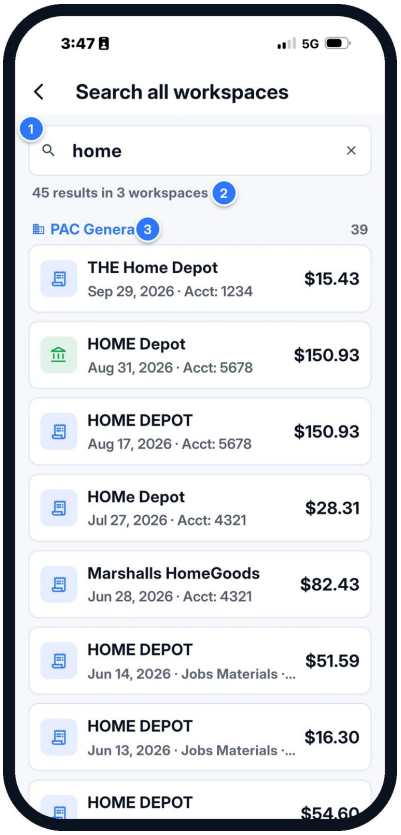


Projects

1. A project
2. **Rename**
3. **Delete** — its transactions go back to the workspace
4. **New Project**

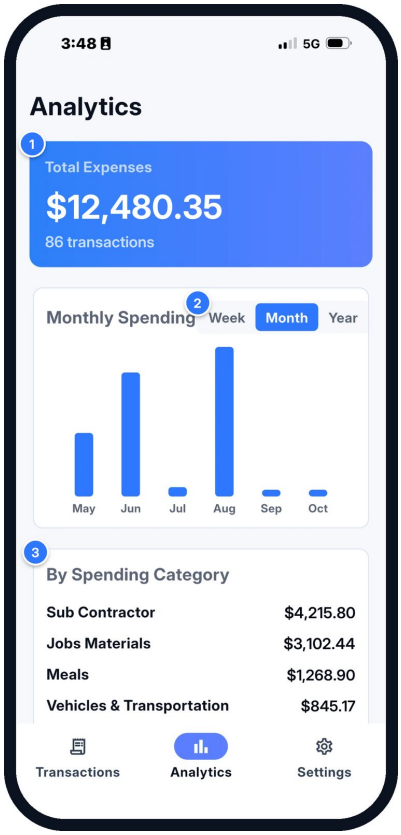
9. Search and charts

- **Search** by store, amount, or notes in the box at the top of **Transactions**. With more than one workspace, tap **Search all workspaces** to find anything, anywhere.
- **Filters** narrow the list by type, spending category, project, and date.
- The **Analytics** tab shows your spending as charts — weekly, monthly, or yearly.



Search all workspaces

1. Type a store, amount, or note
2. Number of matches
3. Results grouped by workspace



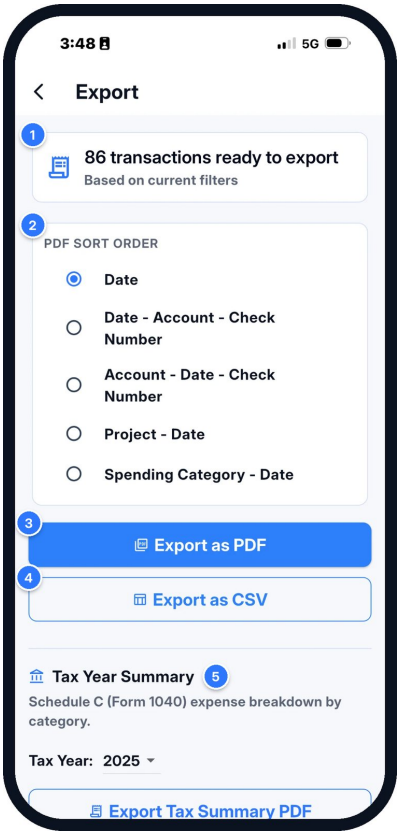
Analytics

1. **Total expenses** and number of transactions
2. **Week**, **Month**, or **Year**
3. Spending by **category**

10. Exporting reports

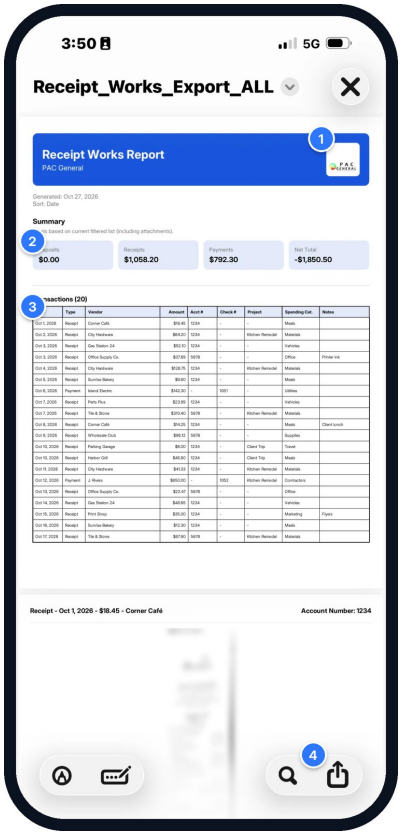
Tap **Export** at the top of **Transactions**. Reports follow your current filters, and every report can be **shared, saved, or printed**.

Report	Best for
PDF report	Sharing or printing — includes receipt images and your company logo
CSV file	Excel, Google Sheets, or your accountant — includes currency, rate, and base-currency amount
Tax Summary PDF	Spending by category with Schedule C references (for information only — not tax advice)



Export

1. How many transactions will be exported (follows your filters)
2. **Sort order** for the PDF
3. **Export as PDF**
4. **Export as CSV**
5. **Tax Year Summary** (Schedule C)



A PDF report

1. Your **logo** (Settings → Workspace Branding)
2. **Summary** totals
3. The **transaction table**
4. **Share**, save, or print

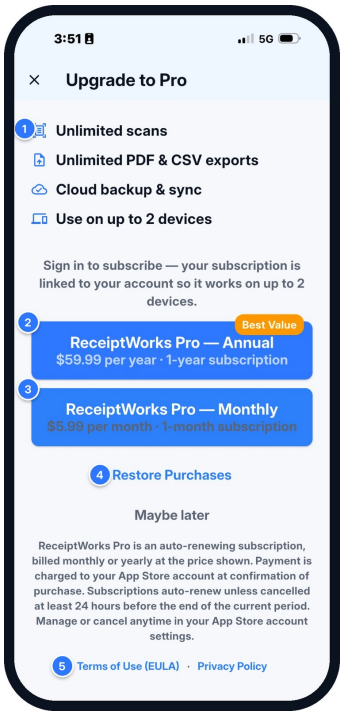
11. Free trial and ReceiptWorks Pro

	Free trial	ReceiptWorks Pro
Scans	20	Unlimited
Exports	1	Unlimited
Account needed	No	Yes — Google or email
Where records are kept	On your phone	Backed up to the cloud and synced
Devices	This phone	Up to 2

- **Subscribe** from **Settings** — monthly or annual. You'll sign in or create an account as part of subscribing, and the app offers to move your trial records into your account.
- **Already subscribed on another phone?** Sign in, then tap **Restore Purchases**.
- Subscriptions **renew automatically**. Manage or cancel them in your **App Store** or **Google Play** account settings.

If your subscription ends

- Your records stay available to **view and export for 60 days**.
- We email you when it ends and 7 days before deletion.
- After 60 days, your account and its cloud data are deleted unless you subscribe again. Records saved on your phone aren't affected.

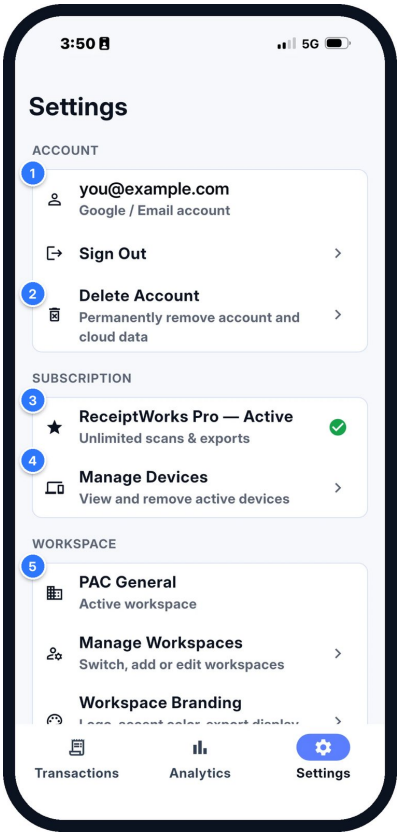


Upgrade to Pro

1. What **Pro** includes
2. **Annual** plan
3. **Monthly** plan
4. **Restore Purchases**
5. Terms of Use and Privacy Policy

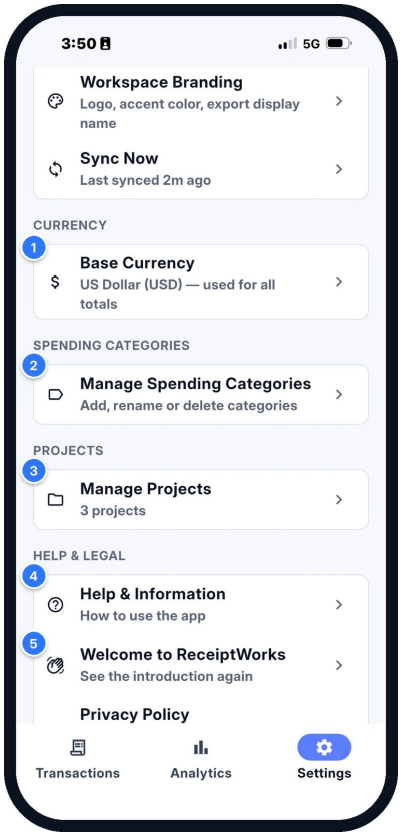
12. Settings, devices, and backup

- Pro works on **up to 2 devices** signed in to your account. On a third device you'll be asked which one to remove.
- See and remove devices in **Settings → Manage Devices**.
- New phone or reinstalled the app? Sign in, and your records come back from the cloud.
- Add your logo and company name to reports in **Settings → Workspace Branding**.



Settings — account

1. Your **account**
2. **Delete Account**
3. **Subscription** status
4. **Manage Devices**
5. Your **workspace** and branding



Settings — more options

1. **Base Currency**
2. **Spending categories**
3. **Projects**
4. **Help & Information**
5. **Welcome to ReceiptWorks** — the introduction again

13. Privacy and your account

- **No ads, no tracking**, and we never sell your data.
- Text recognition, blur checks, and edge detection run **on your phone**.
- **Delete your account** anytime in **Settings → Delete Account**. This deletes your cloud records and photos. Cancel any subscription separately in your store settings. You can also email **help@receiptworkspr.com**.
- Full details: **receiptworkspr.com/privacy-policy-1**.

14. Frequently asked questions

How far should I hold my phone?

About 10–12 inches (25–30 cm). Closer than that, the camera can't focus.

Why does it say my photo is blurry?

Every photo is checked before reading. Retake it (camera) or choose another (gallery), or use it anyway.

A field was read wrong. What do I do?

Tap it and correct it before saving — or open the transaction later and tap Edit.

Is my receipt photo sent to an AI service?

No. If you allow AI reading, only the text is sent, and it isn't stored.

Does a cancelled camera scan use one of my free scans?

No — a scan counts only when a photo is actually taken.

How do I cancel my subscription?

In your App Store or Google Play account settings. Deleting the app or your account doesn't cancel it.

Can I use it in Spanish or with other currencies?

Yes — it reads English and Spanish receipts and more than 30 currencies.