Receipt Box

Mobile application User Guide
Version 3.5.0

Date: 05/06/2021

CONTENTS

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GETTING STARTED

Thank you for choosing **ReceiptBox** and welcome!

ReceiptBox is the next generation of finance expenditures management app it's a comprehensive personal finance expenditures management application with powerful features that are easy to use.

In this user guide, you will learn how to start managing your personal finance expenditures.

The guide is divided into five areas: Registration, Transactions, Reports, Cards Wallet, and More…

Which devices does the mobile app support?

ReceiptBox is compatible with both Android and iOS operating systems, it best fits Mobile devices use.

How to install ReceiptBox

How to install **ReceiptBox** depends on your mobile device, go either to App Store or Google Play, and search for the **ReceiptBox** app.

To find and install **ReceiptBox** app for Android:

1. On your Android device, open Google Play Store.
2. Tap the Search icon.
3. Enter **ReceiptBox** in the search field.
4. Select **ReceiptBox** in the search results to go to the app page.
5. Follow the standard installation procedure.

The procedure to find and install **ReceiptBox** app for iOS is similar.

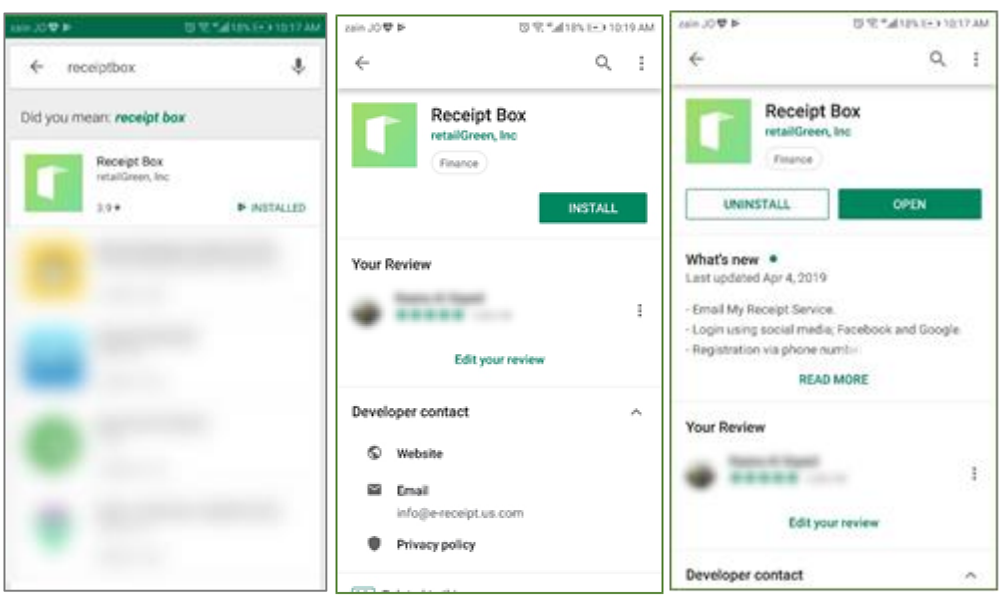

Figure 1: Install ReceiptBox App

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REGISTRATION

When **ReceiptBox** mobile application is downloaded and opened for the first time.

For registering a new account, please follow the below steps:

1- Click on sign up link which appears in the first login screen
2- Fill all your mandatory account details
3- Read and Accept Terms and Conditions and the Privacy Policy
4- Click on Sign up
5- You will receive a verification code to your mobile number as a message or an email if you signed up using your personal email
6- Enter the received verification code and click on Verify

You are now successfully registered with **ReceiptBox** mobile application

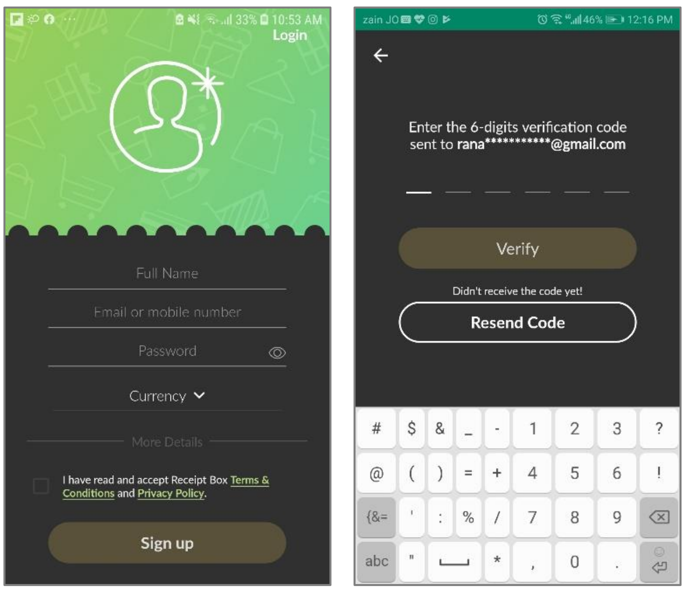

Figure 2: ReceiptBox SignUp

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LOGIN / LOGOUT

You can login to your **ReceiptBox** account using your registered email or mobile number or using your Google or Facebook account for Android and IOS devices, you can also login using you Apple ID on IOS devices.

NORMAL LOGIN

1- Enter the registered email or mobile number and password in the fields provided
2- Click the Login button
3- You will be taken to your account's Dashboard.

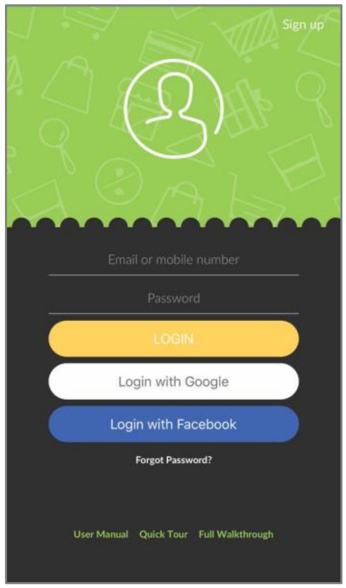

Figure 3: Normal Login

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LOGIN WITH GOOGLE ACCOUNT

1- Click on **"Login with Google"**
2- You will be directed to a list of your google accounts on your device
3- Select the Google account you wish to login with
4- When logged in, read and accept Terms and Conditions and Privacy Policy if prompted to
5- You will then be directed to your account dashboard

Note: In case your google account is registered for the first time, an email will be sent to your Google mail account with you a temporary password and email, you can use this email and password in the normal login.

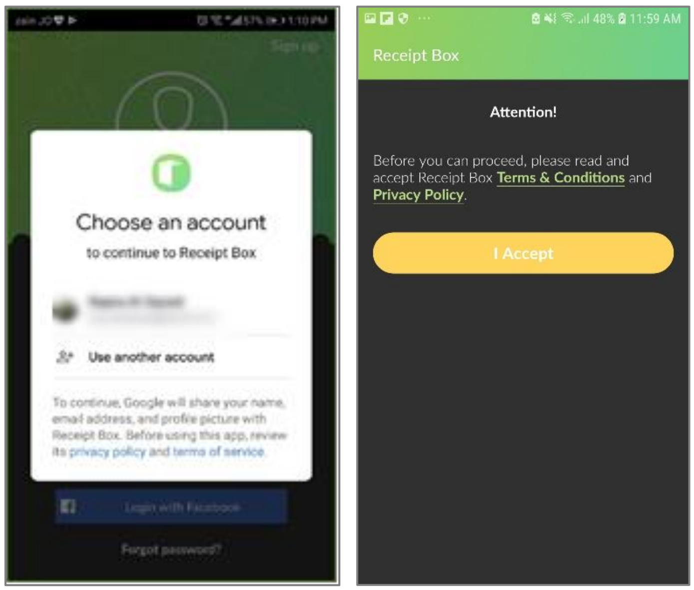

Figure 4: Login with Google account

LOGIN WITH FACEBOOK ACCOUNT

1- Click on **"Login with Facebook"**
2- You will be directed to a confirmation page to link your Facebook account to your Facebook.
3- You can choose to edit the info you provide like your email when logging in for the first time
4- Click on "Continue"
5- You will either be logged in to the system, or be directed to the Sign Up screen in case you didn't provide your email
6- When logged in, read and accept Terms and Conditions and Privacy Policy if prompted to
7- You will then be directed to your account dashboard

Note: In case you provided your email and Facebook account email is registered for the first time, an email will be sent to your Facebook linked mail account, with an email and Temporary password, you can use this email and password in the normal login.

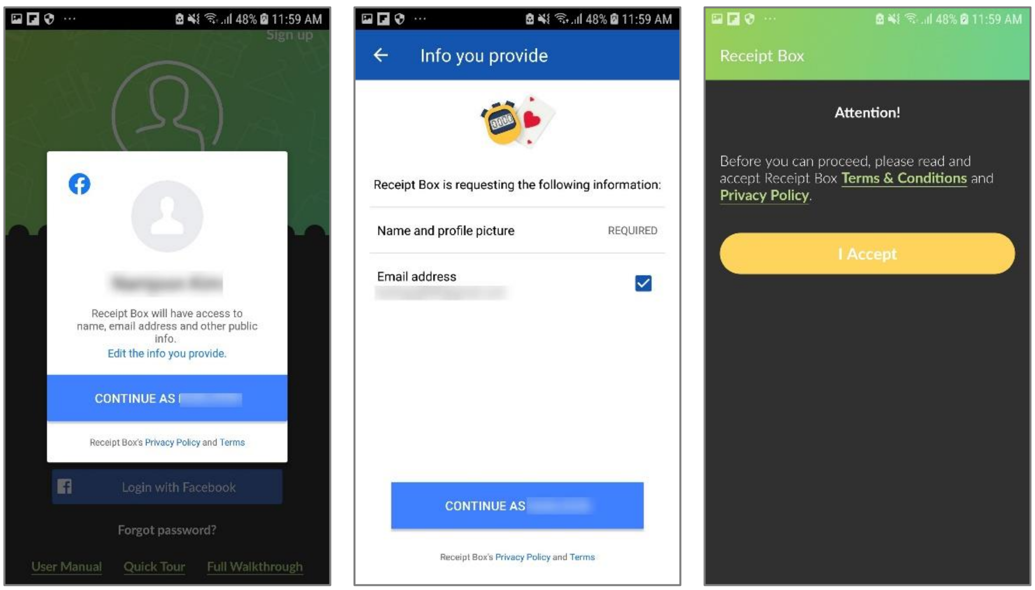

Figure 5: Login with Facebook account

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LOGIN WITH APPLE ID FOR IOS DEVICES

1- Click on **"Login with Apple"** from your IOS device
2- Your current apple id that's logged in to the device iCloud will be retrieved.
3- When logging in for the first time, choose which information you wish to provide, like name and email
4- Click continue with the security method on your device
5- When logged in, read and accept Terms and Conditions and Privacy Policy if prompted to
6- You will then be directed to your account dashboard

Note: In case your apple account is registered for the first time, an email will be sent to your apple id mail account with you a temporary password and email, you can use this email and password in the normal login.

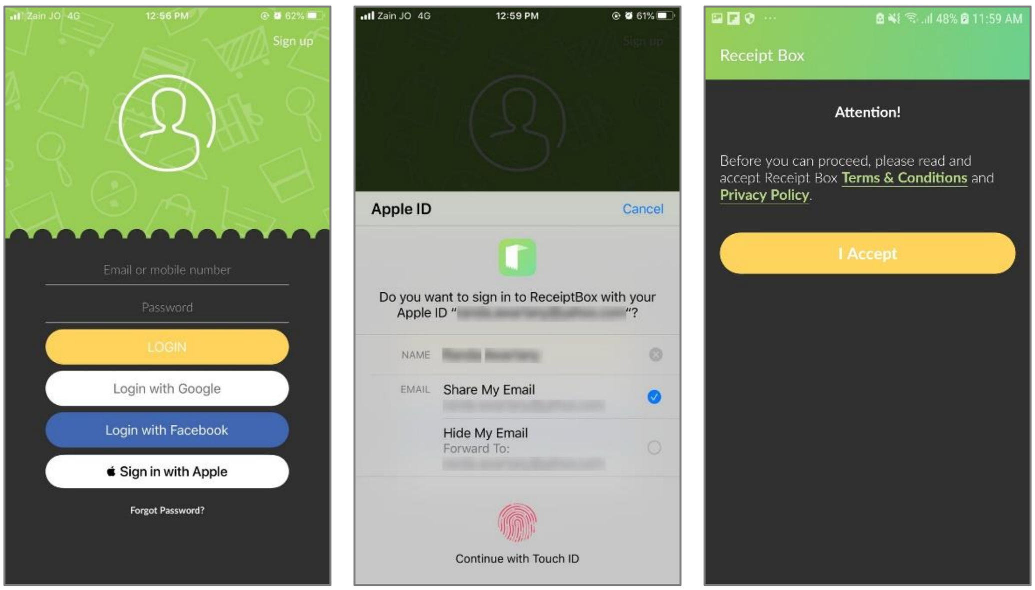

Figure 6: Login with Apple ID

RESETTING YOUR PASSWORD

If you have forgotten your password, you can reset it by following the below steps:

1- On the sign in page, click **Forgot password?**
2- Enter the email or mobile number you use to sign in with.
3- Click “Reset Password”, a reset password code will be sent to your email or mobile number
4- Enter the code in the app, then click “Verify”
5- Once you’re redirected to the reset password screen, enter the new password
6- Click Save to change your password, then you’ll be logged in and redirected to the account dashboard

Note: By default, you need to sign in only when you start the application for the first time and the session does not expire.

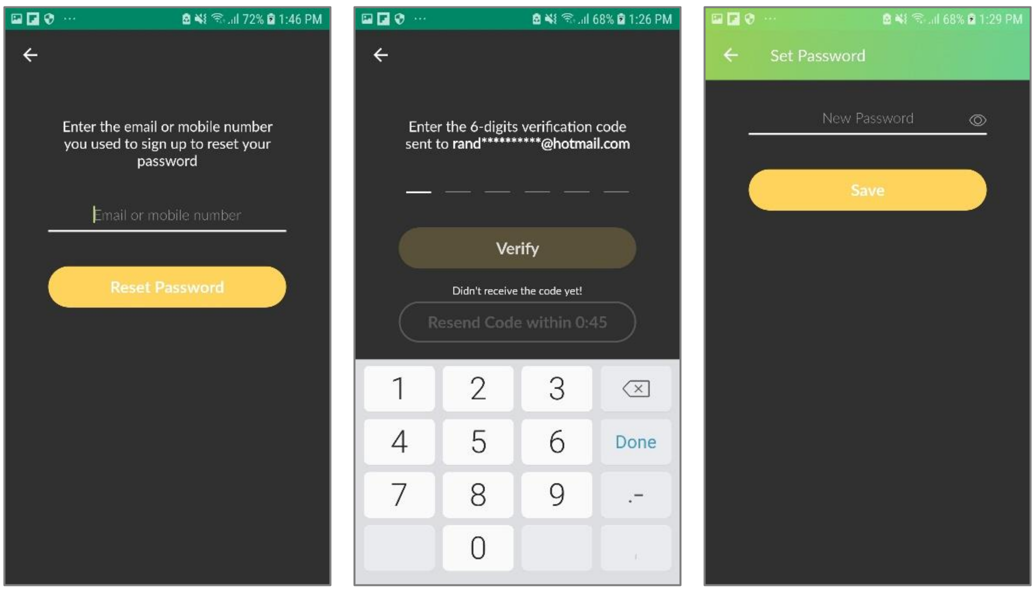

Figure 7: Login with Apple ID

NAVIGATION

You can navigate through the app using the side menu by clicking the side menu icon that appears on the top left side of all screens of the app.

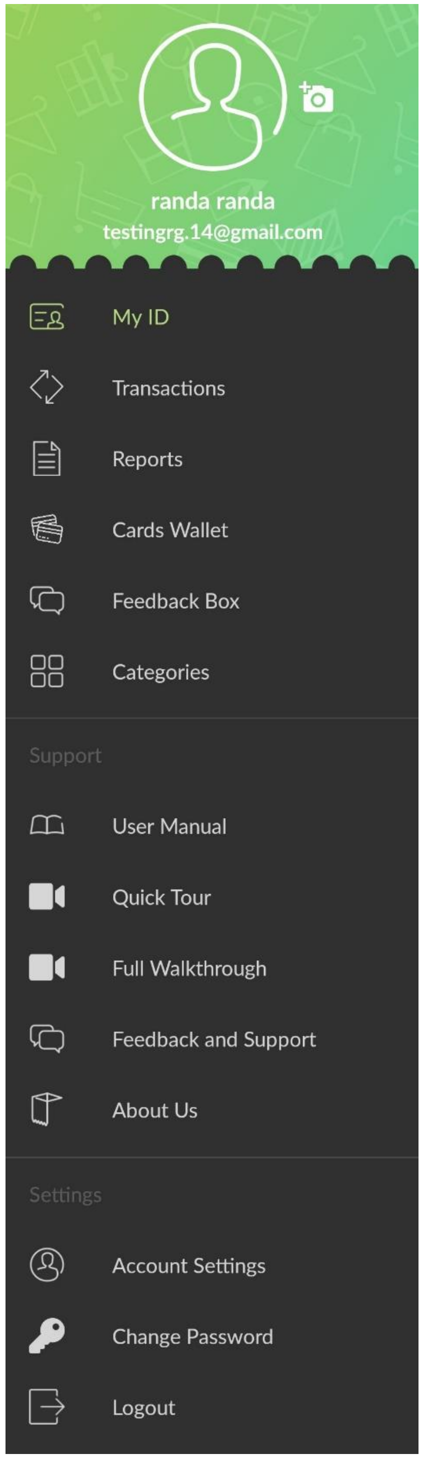

Figure 8: Side menu

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Refer to the following sections for more information about each area:

- Transactions
- Reports
- Cards Wallet
- Feedback Box
- Categories
- Support
- Settings

TRANSACTIONS

If you need to add new transactions or search for a specific transaction, you have to tap Transactions from the side menu bar.

From this page, you can do the following:

- Add new transaction
- Filter transaction list
- Add Feedback

ADD NEW TRANSACTION

To add new transactions you must first select the transaction type you want to add (Income or Expense) transaction. The app allows you to add transactions in four ways:

- Scan Transaction
- Manual Record
- Sent from ReceiptBox POS Component
- Email My Receipt

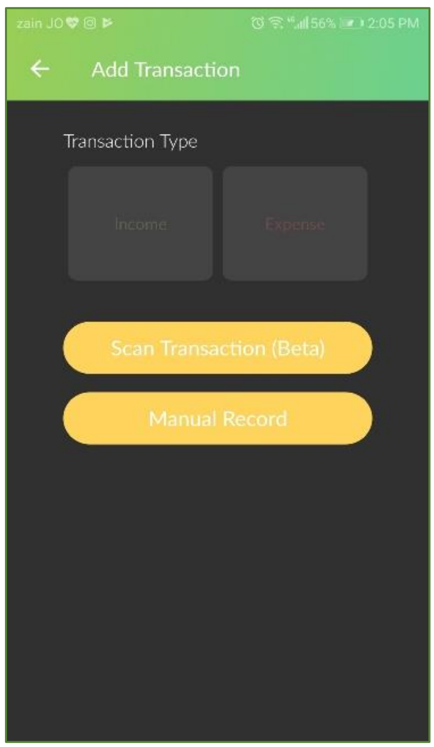

Figure 9: Add transaction

SCAN TRANSACTION

If you want to add new transaction by scanning the Receipt you get from any shop, please follow the below steps:

1- From adding new transaction page, select transaction type (Income or Expense)
2- Click on Scan transaction Button
3- Select the scanned transaction source (From mobile storage or Camera)
4- If you select storage, select the wanted image from your mobile storage, modify it and click on ok (✔)

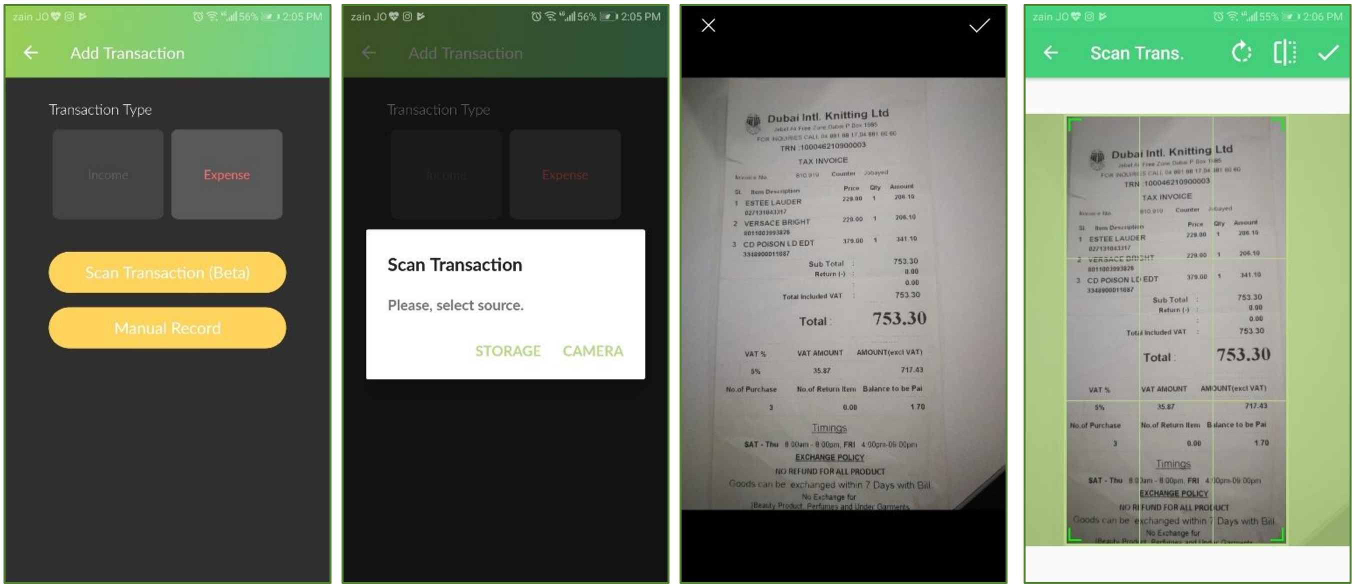

Figure 10: Scan Transaction (from Camera)

1- The transaction will be added under transactions list with Misc. Expenses category, and will include the main scanned image details (transaction ID, Total, and Date)
2- You can update the transaction by clicking on the edit icon
3- You can remove the transaction by clicking on the remove icon

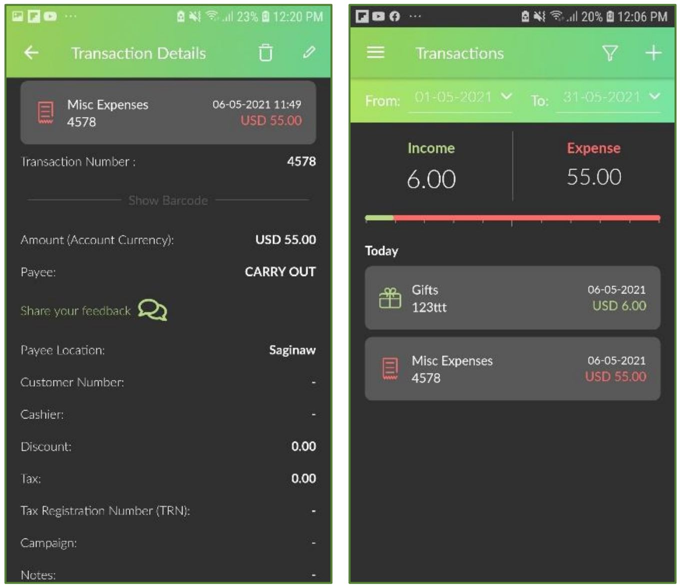

Figure 11: Scanned Transaction

MANUAL RECORD

If you want to add new transaction manually by entering Receipt details you get from any shop, please follow the below steps:

1- From adding new transaction page, select transaction type (Income or Expense)
2- Click on Manual Record Button
3- Select the Category
4- Enter all mandatory fields
5- Click on save
6- The transaction will be added under transactions list with selected category
7- You can update the transaction by clicking on the edit icon
8- You can remove the transaction by clicking on the remove icon

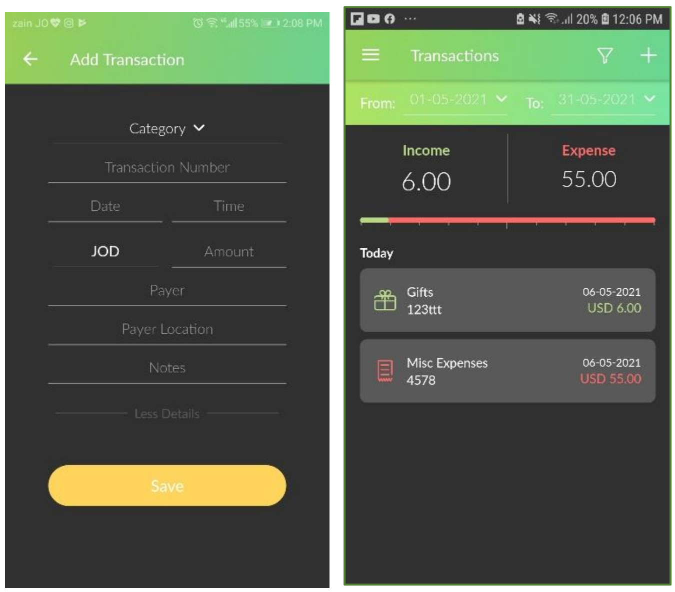

Figure 12: Add manual Transaction

SENT FROM RECEIPTBOX POS COMPONENT

When you buy any product, the shop should provide you with a receipt, either physical copy or email. As **ReceiptBox** came to collect all your receipts in one repository, it succeeded to collect receipts (physical and email) from any shop that uses ReceiptBox POS component.

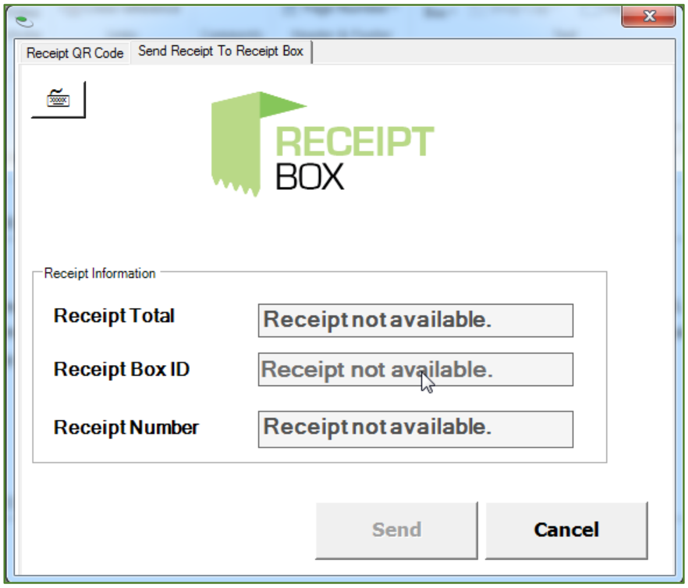

Figure 13: ReceiptBox POS component

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To use this feature, please follow the below steps:

1- Ask the shop if they have ReceiptBox POS component
2- Give them your ReceiptBox ID which appears in My ID page
3- The cashier will get your ReceiptBox ID (by number, barcode, or QR code) and send the receipt to ReceiptBox.
4- The new transaction will be added under the transactions list with Misc. Expenses category, and will include the main receipt details (transaction ID, Total, and Date)
5- You can update the transaction by clicking on the edit icon
6- You can remove the transaction by clicking on the remove icon

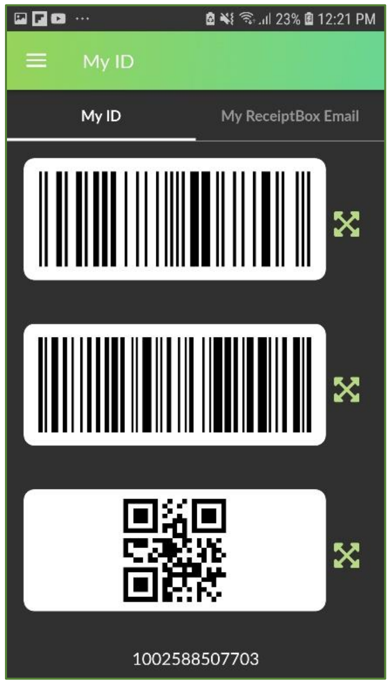

Figure 14: MY ID

EMAIL MY RECEIPT

For those shops that don't have ReceiptBox POS component, you can collect all physical receipts using the scan receipt feature in **ReceiptBox** application. Or you can ask the shop to send you the receipt as an email using Email My Receipt (EMR) feature.

To enable this feature please follow the below steps:

1- Click on the main side menu
2- Scroll down to settings, and choose Account Settings
3- Select the enable email my receipt option.

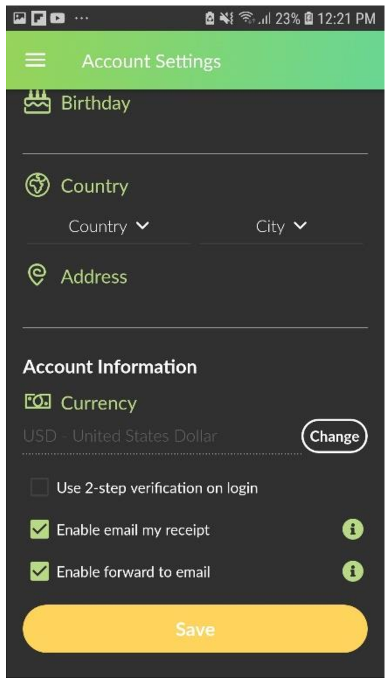

Figure 15: Enable email my receipt option

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To get value from this feature, please follow the below steps:

1- Ask the shop to send you the receipt by email
2- Give him your ReceiptBox email which appears in My ID page
3- The cashier will get your ReceiptBox email (by text, barcode, or QR code) and send the receipt by email.
4- New transaction will be added under transaction list with misc. expenses category, and will include main receipt details (transaction ID, Total, and Date)
5- You can update the transaction by clicking on the edit icon
6- You can remove the transaction by clicking on the remove icon

Figure 16: My ReceiptBox email

Note: You are able to forward the receipt to your email that is linked with the **ReceiptBox** account by selecting the “enable forward email” option in your account settings page.

FILTER TRANSACTION LIST

Using filters options you can filter the transaction list according to the following options:

- By date:
    - Custom period (you can select a transaction from and to dates)
    - This month
    - Last month
    - This week
    - Last week
- By category
- By Retailer
- By transaction type (income or expends)

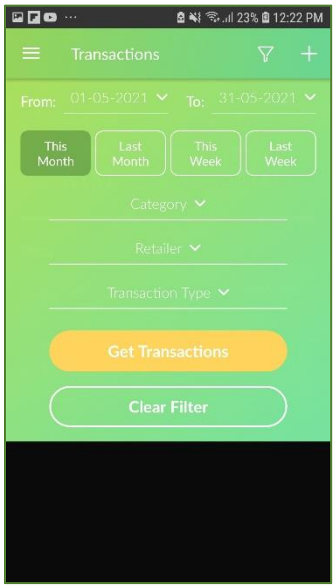

Figure 17: filter transaction list options

To filter transactions list, please follow the below steps:

1- Click on the filter icon in the top right of the page
2- Select the filters options and criteria
3- Click on the get transactions button to get the results according to the entered criteria
4- To clear the selected filters options and criteria click on the Clear filter button

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ADD FEEDBACK

If your transaction had payee/payer and location (Retailer) filled, you can add feedback to that retailer from the transaction details screen, please follow the below steps to add feedback:

1- From transactions page, select the transaction with the retailer to want to review.
2- Click on share your feedback button
3- Fill in the required information, in this case the overall stars rating
4- You can fill the categorized ratings, enter free text, or add attachments to the feedback
5- Click on send
6- A confirmation message will appear to confirm sending your feedback to RB public feedback box, click Approve to send feedback
7- You can click Cancel to cancel sending the feedback

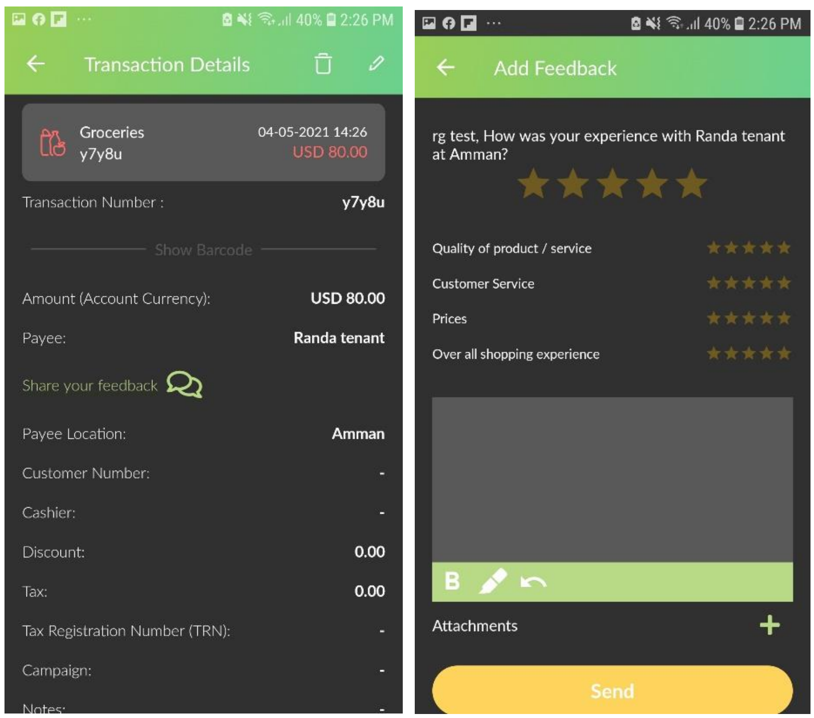

Figure 18: Add Feedback

8- When your feedback is sent, you can share it to social media by clicking the share icon from feedback details screen

Note: You can edit the feedback by going back to the transaction details screen, and clicking "Share your feedback" button again. Also if the transaction retailer is edited/changed you will be asked if you want to delete the feedback or move it to the new retailer.

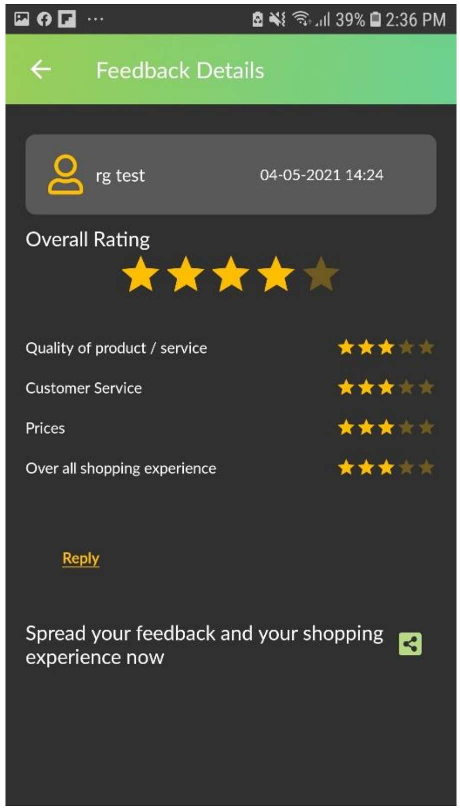

Figure 19: Feedback Details

REPORTS

Using ReceiptBox app you can view some useful predefined reports. To reach the reports screen, click on the side menu and choose Reports which will appear as the following:

- Income/Expense Report
- Saving Report

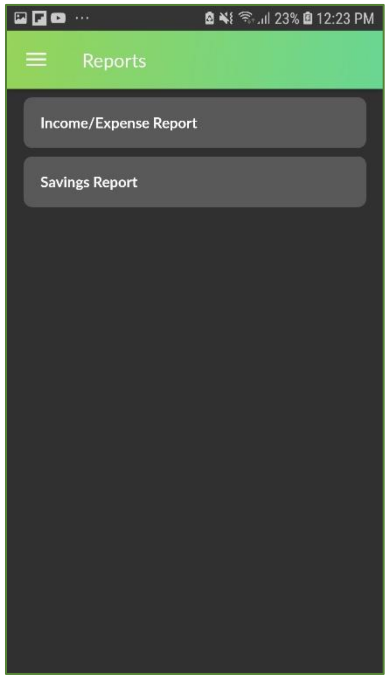

Figure 20: Reports

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INCOME / EXPENSE REPORT

1. From Income / Expense report you can view a summary of all Income and expense transactions.
2. You can group the retrieved results by:
   - Specific report period (using filter option placed in the top of the chart)
   - Retailer or Category
   - Charts view: (list, pie or line chart)

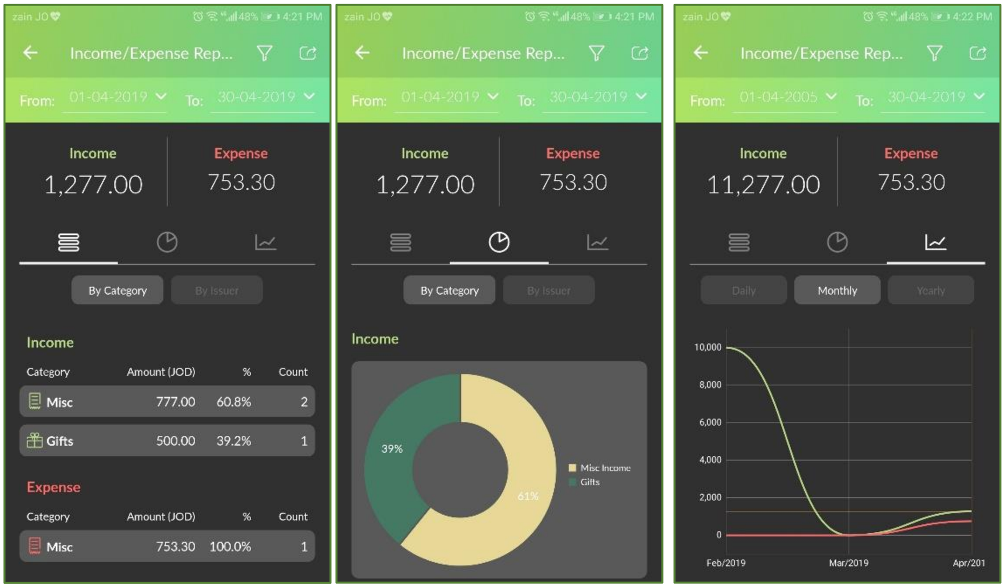

Figure 21: Income / Expense report – chart views

3. By clicking the export icon placed at the top of the report you can either print the report or send it as an email.

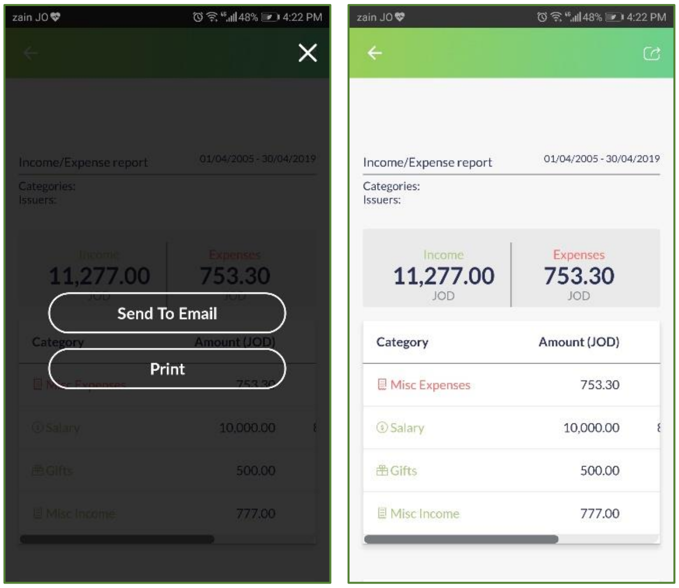

Figure 22: Income / Expense report – export the report

SAVING REPORT

1. From savings report you can view a summary of your savings, the app will calculate the saving by calculating the difference between income and expense transactions.
2. You can group the retrieved results by:
   - Specific report period (using filter option placed in the top of the chart)
   - Charts view: (list or line chart)

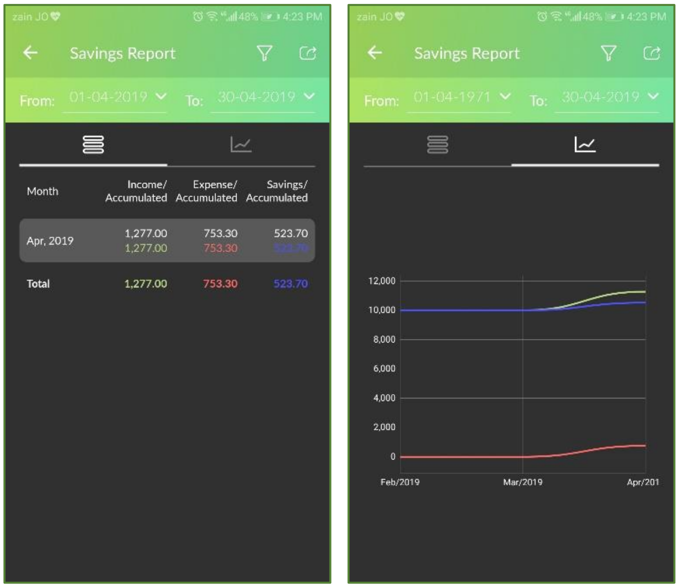

Figure 23: Savings report – chart views

3. By clicking the export icon placed in the top of the report you can either print the report or send it as an email.

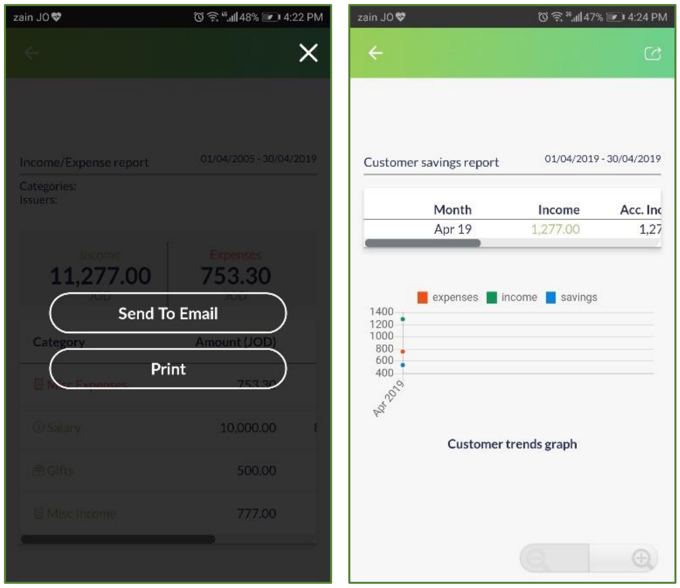

Figure 24: Savings report – export the report

CARDS WALLET

This screen allows you to store several cards, including loyalty cards, cards from banks, as well as vouchers cards on ReceiptBox and show your digital card for scanning to receive all benefits just like the original plastic card, to reach this screen just tap Cards Wallet menu from the main side menu bar.

From this page, you can do the following:

- Add new Card in your Cards Wallet
- Filter Cards list

ADD NEW CARD

To add a new card to your cards wallet, all you need to do is to follow the below steps:

1- Click on the add new card icon at the top right corner of the Cards Wallet screen
2- Enter the card number manually or by scanning the card barcode (from the camera, or phone storage)

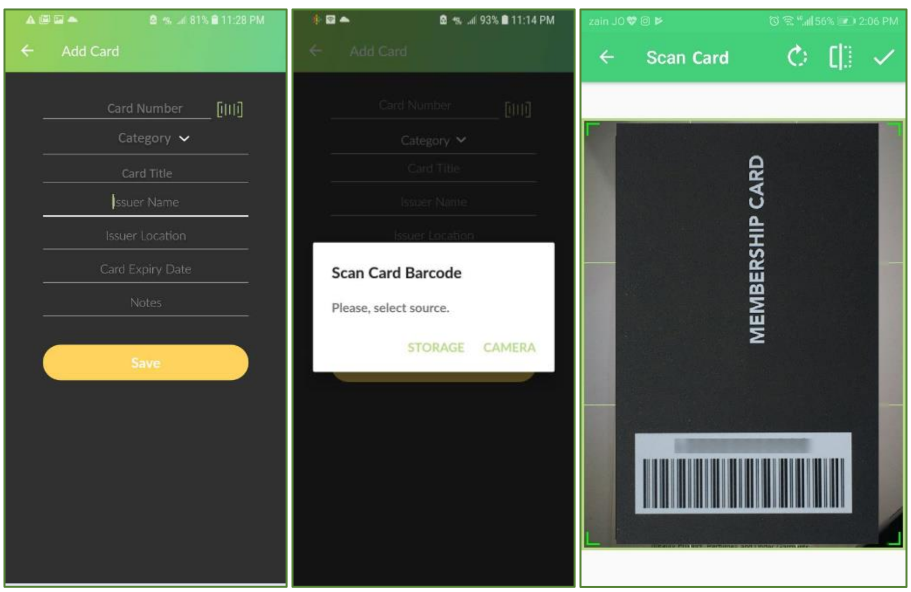

Figure 25: Scan Card Number (from Camera)

1- Fill in other card data
2- Click on save
3- The card will be added under Cards Wallet list

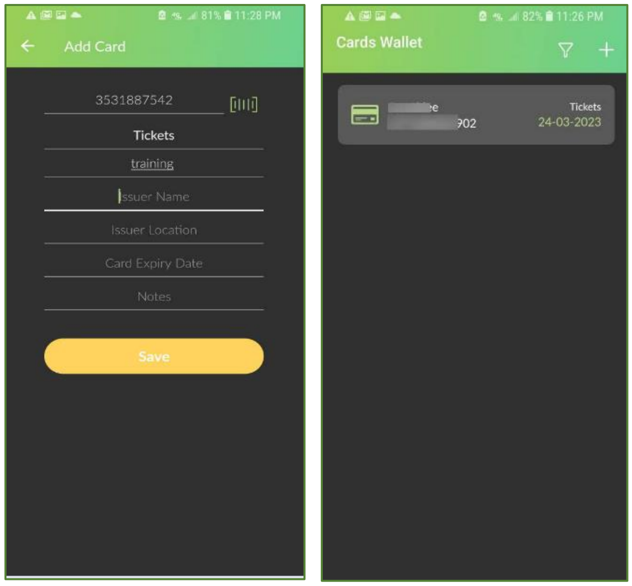

Figure 26: Add Card

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EDITING EXISTING CARD

Once your card is added, you can display and edit the data on your card like (Card Details, Card Number, Card Photos) as shown below:

To edit your card details and Card Number:

1- Click on the card from the Cards Wallet list screen
2- Click the edit icon on the top right corner of the screen
3- Change card details where you can also scan Card Number Barcode
4- Click on save
5- The card details will be changed
6- You can delete your card by clicking on the Delete icon.

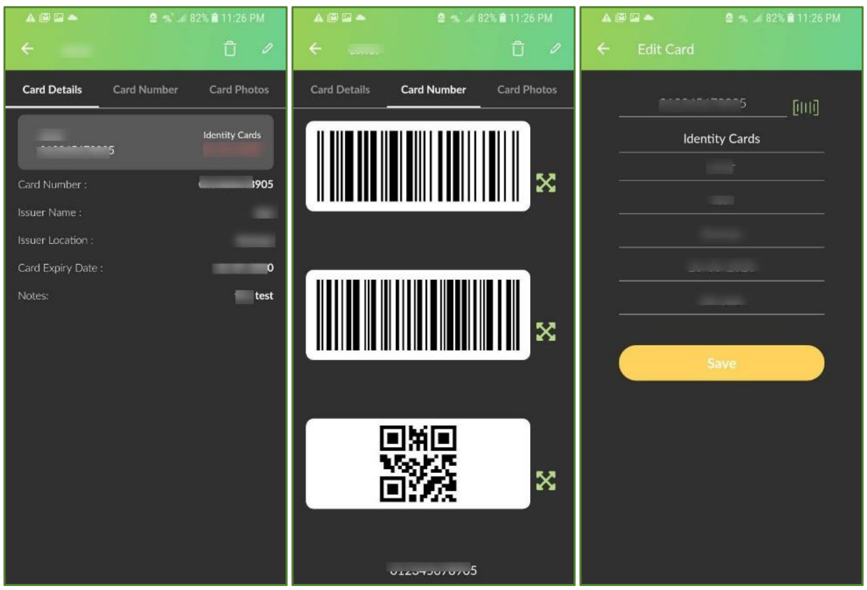

Figure 27: Edit Card Details or Card Number

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To edit your card Photos:

1- Click on the card from the Cards Wallet list screen
2- Go to Card Photos tab.
3- Click on the Upload icon next to each card photo (Card Front Photo, Card Back Photo, Card Logo)
4- Card Photos will be updated, and Card logo will appear next to the card in Cards list
5- You can expand each card photo by clicking on the Expand icon next to it.
6- You can delete each card photo by clicking on the Delete icon next to it.

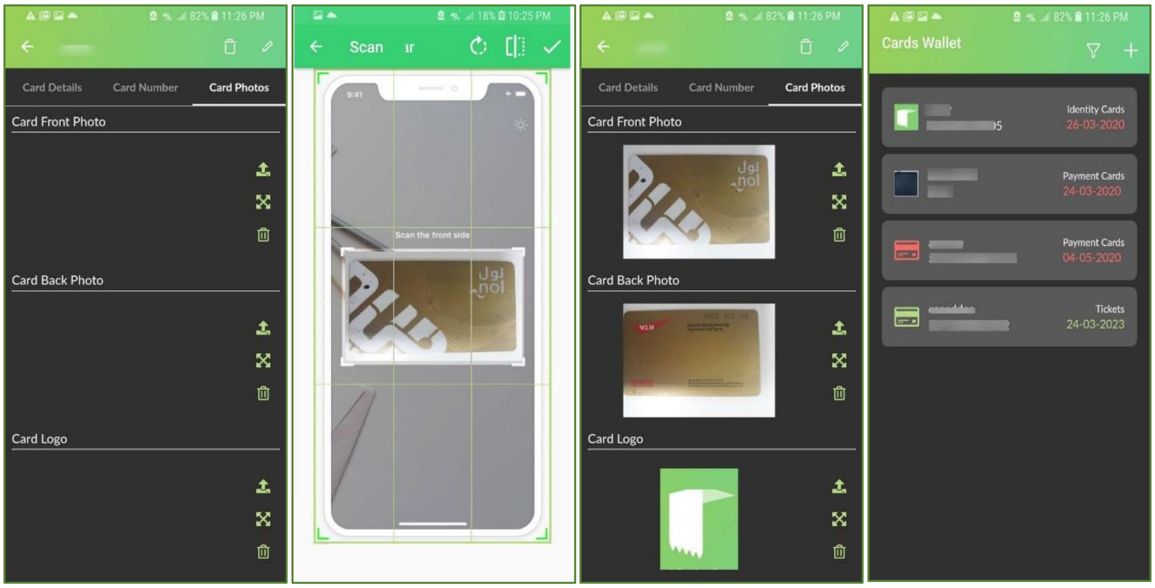

Figure 28: Edit Card Photos

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FILTER CARDS WALLET LIST

Using filters options you can filter the Cards list according to the following options:

- By Category
- By Card title or number

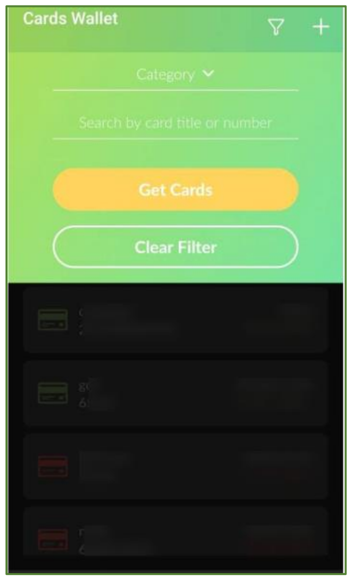

Figure 29: filter Cards Wallet list options

To filter the Cards Wallet list, please follow the below steps:

1- Click on the filter icon in the top right of the cards wallet page
2- Select the filters options and criteria
3- Click on Get Cards to get the results according to the entered criteria
4- To clear the selected filters options and criteria click on the Clear filter button

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FEEDBACK BOX

This screen allows you to see all the retailers added to the ReceiptBox application by you or other users of the application, and view their details, feedbacks and other information, to reach this screen just tap Feedback Box menu from the main side menu bar.

From this page, you can do the following:

- Add new retailer
- View Retailer Details
- Add Feedback to Retailer
- Filter Retailers list

ADD NEW RETAILER

To add a new Retailer to the feedback box retailers list, all you need to do is to follow the below steps:

1- Click on the add new retailer icon at the top right corner of the Feedback Box screen
2- Fill in the mandatory fields consisting of Retailer Name, Location and Category
3- You can also add a retailer photo by clicking on the camera icon
4- Click Save to add the retailer in the retailers list
5- You can update the retailer by clicking on the edit icon

Note: Retailers are also added in transaction when a new Payee/Payer and location is filled in the transaction details.

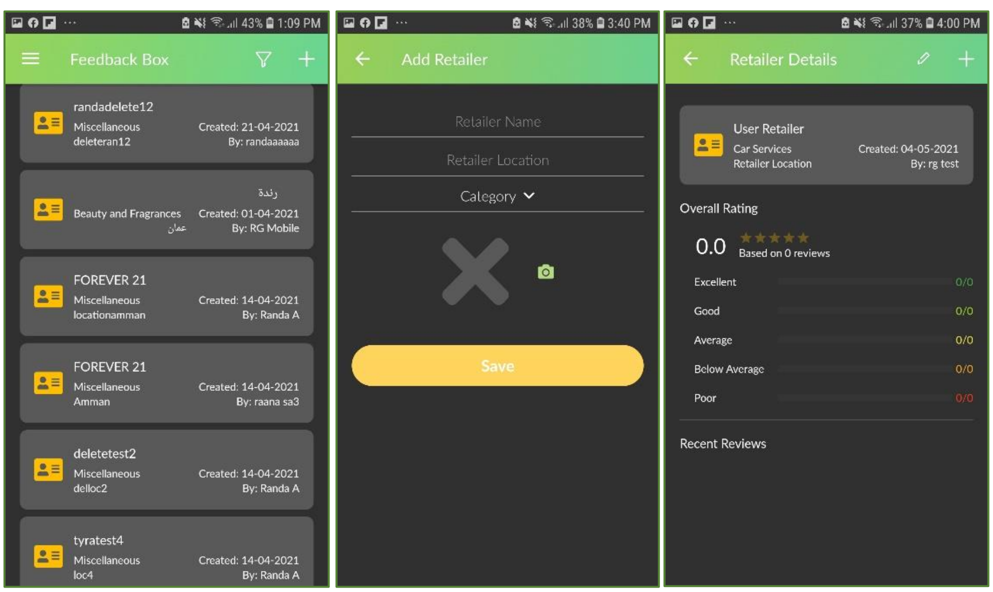

Figure 30: Add New Retailer

VIEW RETAILER DETAILS

To view an existing Retailer in feedback box retailers list, please to follow the below steps:

1- Click on the retailer you wish to view from Feedback Box screen
2- Retailer details screen will show the overall rating and reviews by other users
3- Click on an existing feedback/review to show its details
4- Click Reply to add reply to a feedback
5- Click Report to report other people's feedback if necessary

Note: Retailers are also added in transaction when a new Payee/Payer and location is filled in the transaction details.

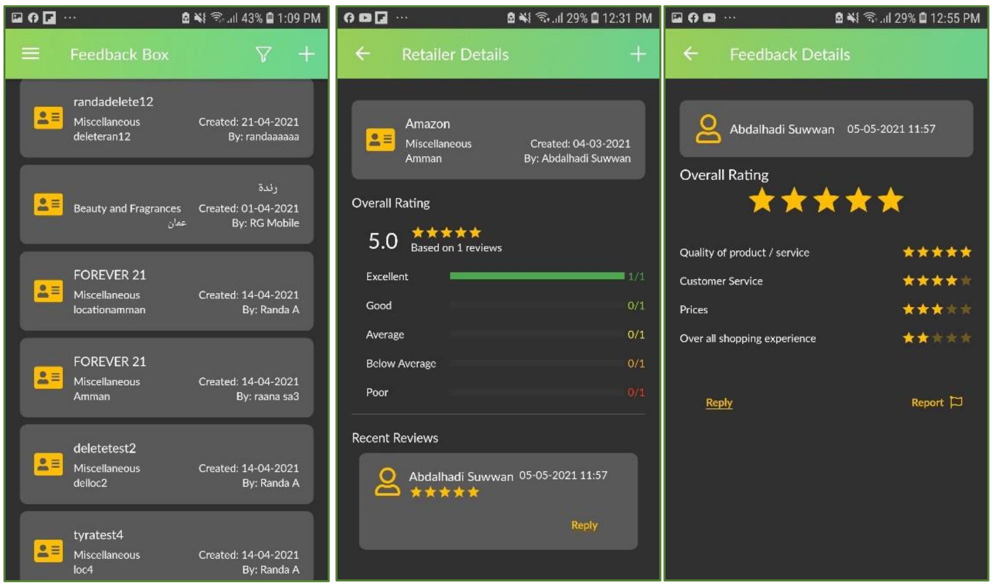

Figure 31: View Retailer Details

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ADD FEEDBACK TO RETAILER

To add a new feedback to a retailer in feedback box retailers list, all you need to do is to follow the below steps:

1- Click on the add feedback icon at the top right corner of the Retailer Details screen
2- Fill in the required information, in this case the overall stars rating
3- You can fill the categorized ratings, enter free text, or add attachments to the feedback
4- Click on send
5- A confirmation message will appear to confirm sending your feedback to RB public feedback box, click Approve to send feedback
6- You can click Cancel to cancel sending the feedback

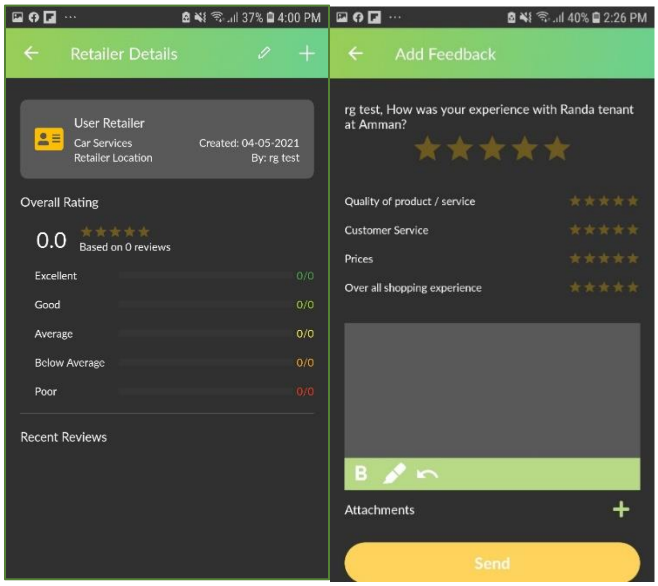

Figure 32: Add Feedback to Retailer

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7- When your feedback is sent, you can share it to social media by clicking the share icon from feedback details screen

Note: You can edit the feedback by going back to the retailer details screen, and clicking the add feedback icon again.

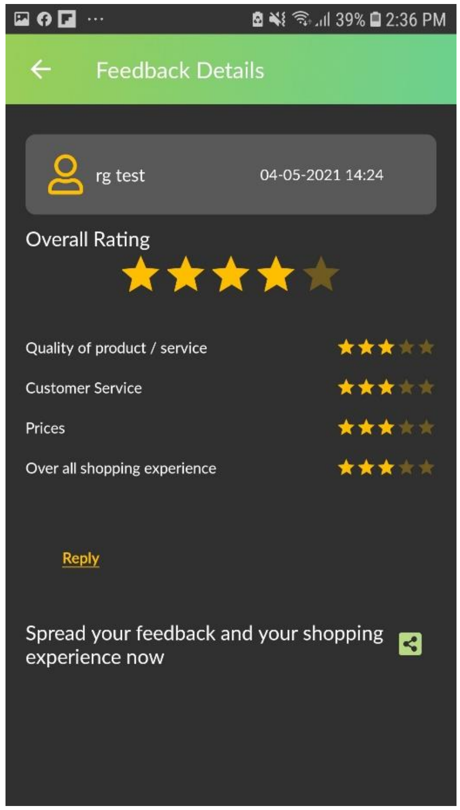

Figure 33: Feedback Details

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FILTER RETAILERS LIST

Using filters options you can filter the Cards list according to the following options:

- By Retailer Name or Location
- By Category
- By Overall Rating
- By logged in user retailers

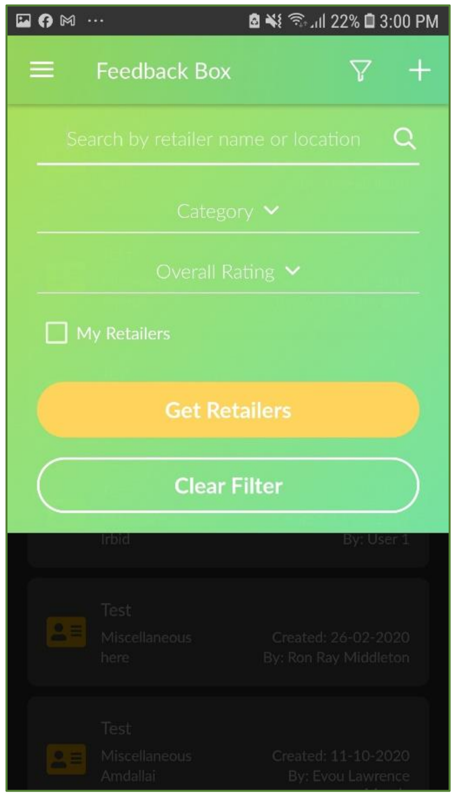

Figure 34: filter Retailers list options

To filter the Retailers list, please follow the below steps:

1- Click on the filter icon in the top right corner of the feedback box page
2- Select the filters options and criteria
3- Click on Get Retailers to get the results according to the entered criteria
4- To clear the selected filters options and criteria click on the Clear filter button

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CATEGORIES

The categories screen enables you to add new, update or remove categories used in transactions, to reach this screen just tap Categories menu from the main side menu bar.

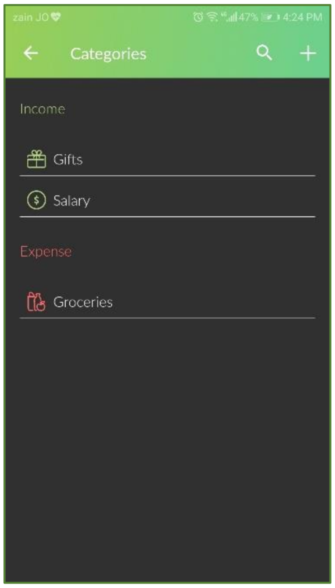

Figure 35: categories list

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To add a new category, please follow the below steps:

1- Click on add button placed in the top of the page
2- Enter the mandatory fields
3- Save the category
4- The new category will be added to category list per specified type

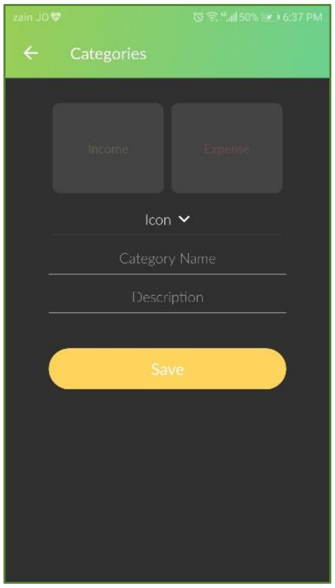

Figure 36: Add new Category

To merge different categories, please follow the below steps:

1- Click on merge button placed in the top of category view page
2- Select the category you want to move all the transactions to.
3- Click on merge
4- The first category will be removed from the list and all its transactions will be moved to the newly selected one.

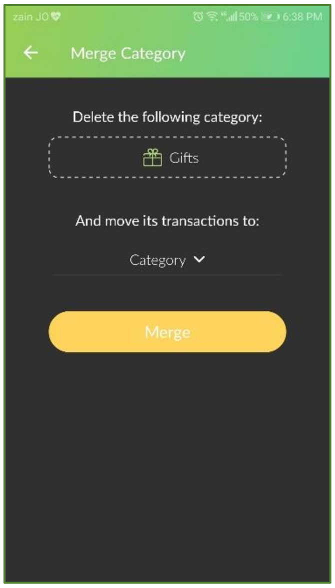

Figure 37: Merge categories

Note: You can delete categories, but it's not allowed to delete any category that has transactions; you should merge the categories instead

SUPPORT

The support list will show the main screens needed to support the ReceiptBox user, you can access it from the side menu. This list contains the following:

- User Manual
- Quick Tour
- Full Walkthrough
- Feedback and Support
- About Us

USER MANUAL

This is the screen where you can download the user manual from to help you understand the application more.

Figure 38: User Manual

QUICK TOUR

This screen contains a short video to introduce you to the application.

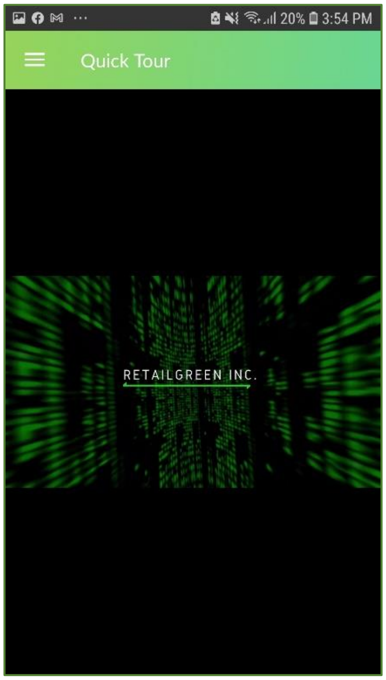

Figure 39: Quick Tour

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FULL WALKTHROUGH

This screen contains a detailed video to walk you through the application.

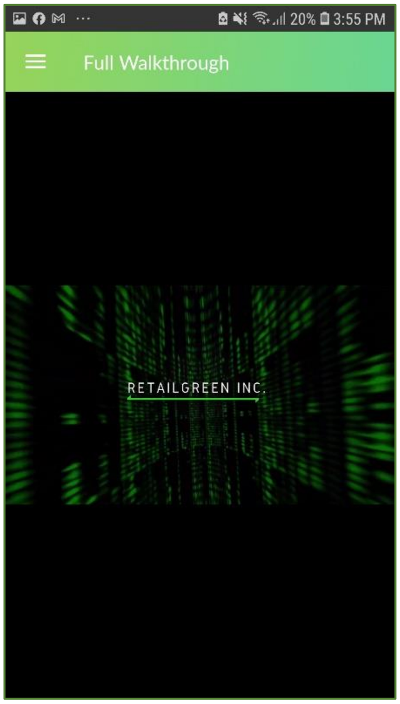

Figure 40: Full Walkthrough

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FEEDBACK AND SUPPORT

Could you please inform us if you faced any problem by sending your feedback, then our support team will resolve the problem as soon as possible.

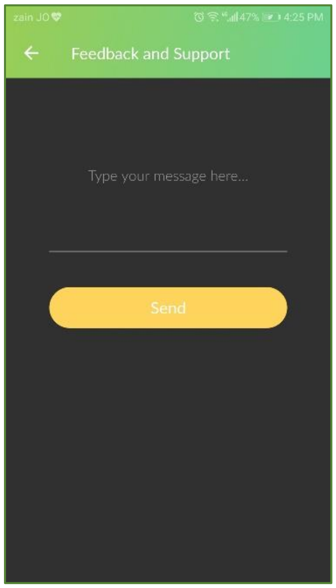

Figure 41: Send feedback

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ABOUT US

You can refer to our About Us page as you will find a lot about the app, and Retail green company. You can find the previously agreed privacy policy and terms and conditions as well.

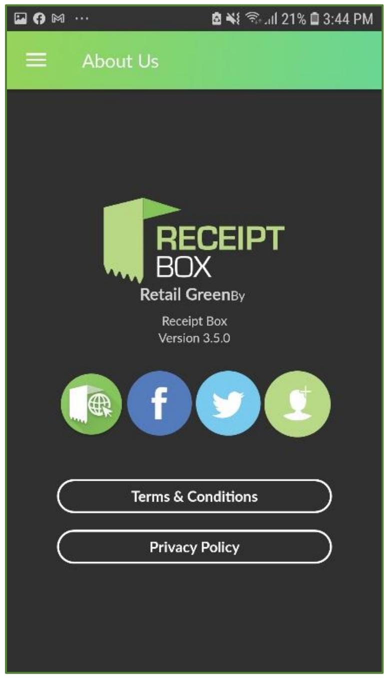

Figure 42: About Us

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SETTINGS

The Settings list will show the main screens needed to support the ReceiptBox user, you can access it from the side menu. This list contains the following:

- Account Settings
- Change Password
- Logout

ACCOUNT SETTINGS

Account setting page includes your **ReceiptBox** account settings

- Verify your personal contacts if not verified with verification code
- Update your personal information
- Update your account information like currency, enable or disable 2 steps of verification on login (that will send vilification code on each login), or enable Email My Receipt feature.

To update your account settings, please follow the below steps:

1- Click on the side menu of the application
2- Scroll down to the “settings” section
3- Click on Account Settings
4- Update the settings
5- Click on the save button.

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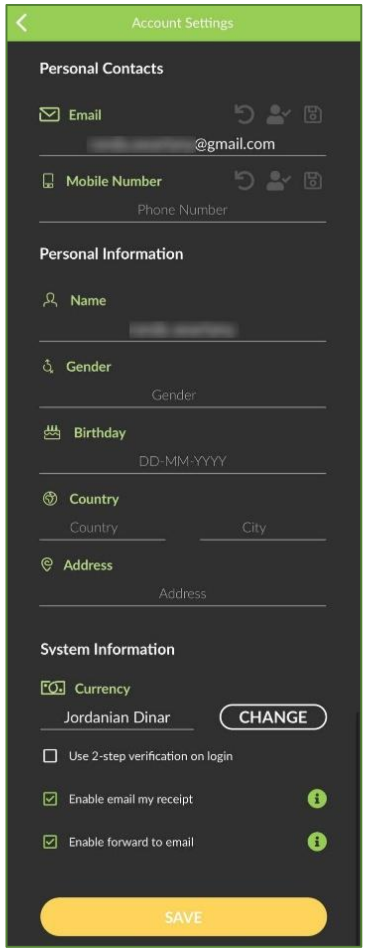

Figure 43: Account Settings

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CHANGE PASSWORD

To change your password, please follow the below steps:

1- Click on the side menu of the application
2- Scroll down to the “settings” section
3- Click on change password
4- Enter the old and new password
5- Click on the save button.

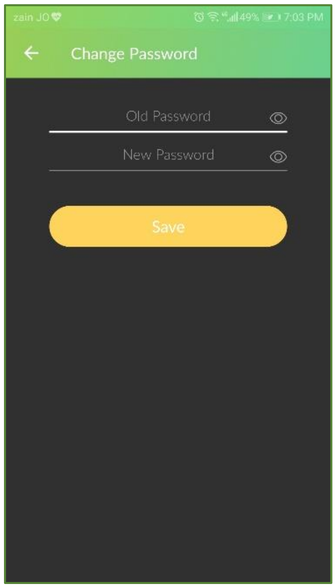

Figure 44: Change your password

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LOGOUT

If you have to logout from **ReceiptBox:**

1- Click on the side menu of the application
2- Scroll down to the “settings” section.
3- Click “Logout”
4- You will be taken out of your account.

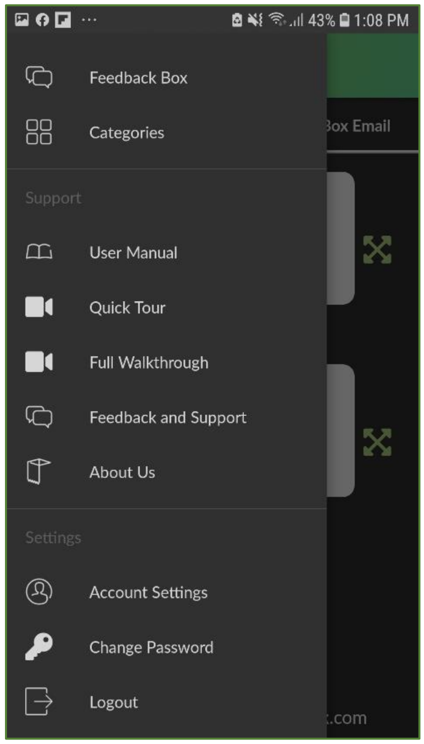

Figure 45: Logout

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