Managing transactions in Crowded

How to attach receipts and review and export your transaction history.

1. Adding a receipt to a transaction 2. Viewing and exporting transactions

SECTION 1 · MOBILE APP

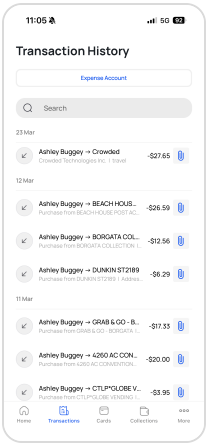
Adding a receipt to a transaction

Attach a receipt to any transaction directly from the Crowded mobile app.

1

Open your transaction history

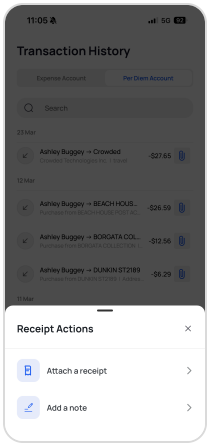
Open the Crowded app and tap **Transactions** in the bottom menu to view your transaction history.



2

Tap the paperclip icon

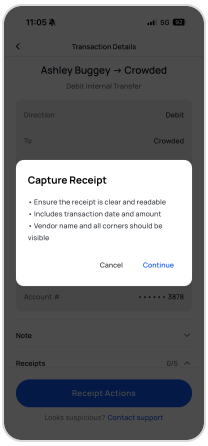
Find the transaction you want to add a receipt for and tap the **paperclip icon** on the right-hand side. Then select **Attach a receipt**.



3

Tap Continue

Review the tips on the **Capture receipt** pop-up, then tap **Continue**. Make sure the receipt is readable and shows the date, amount, and vendor name.

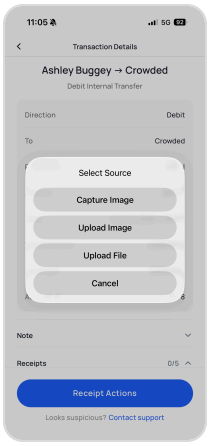


4

Choose how to add your receipt

Tap **Receipt actions** and select a method:

- **Capture image**: take a photo
- **Upload image**: choose from your library
- **Upload file**: attach a file, such as a PDF



5 You're done

The receipt is now attached to the transaction record. You can add **up to 5 receipts** per transaction.

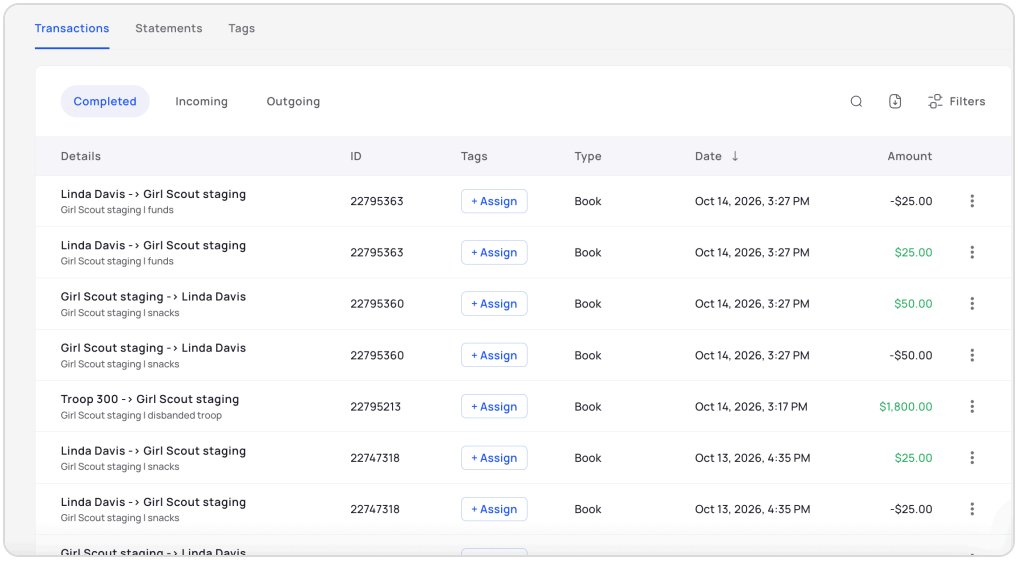
SECTION 2 · WEB DASHBOARD

Viewing and exporting transactions

Review, filter, and export your account activity from the Crowded web dashboard.

1 Your transaction history

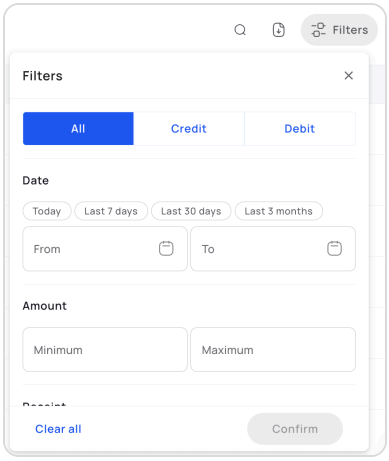
The **Transactions** tab shows every transaction in your Crowded account as a separate row, with its details, ID, tags, type, date, and amount.



2 Filter the list

Click **Filters** to narrow the list by:

- Credits or debits
- Date range
- Amount
- With or without a receipt
- Tags



3 Export a report

Once your filters are set, click the **export icon** to download a report of the filtered transactions. The report downloads as a **CSV** file.



4 Download monthly statements

Open the **Statements** tab at the top of the transaction history dashboard to view monthly statements. Export any statement as a **PDF** or **HTML** file, and print it for your records if you wish.

