

Creating a New Expense Report in Certify

Step 1: Upload Receipts to Certify

Before you start filling out the expense report – you must upload the receipts you want to expense.

2 Ways of Uploading receipts using Computer:

1. Scanning Receipts and Using the *Upload* option to upload any receipts saved on your computer – whether you are scanning them, downloading them, etc..

6/19/19	Hilton	\$933.80
4/7/19	Shuttle Park 2 Parking Facilities	\$72.57
1 MORE ITEMS		

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[Pending P](#)

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Add Receipts



MOBILE



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Scheduled Expense Reports



ReportExecutive™ is on.
Next Build Day:
Sunday, July 7, 2019

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Add Receipts And Expenses

Certify Mobile

Certify Mobile allows you to easily manage your Certify Wallet on the go.



Email

Just send the email from cvazquez@eoiservice.com and receipts will be added to your wallet.

Email your receipts to:

Upload

Browse to select receipt images to upload to your Certify Wallet.

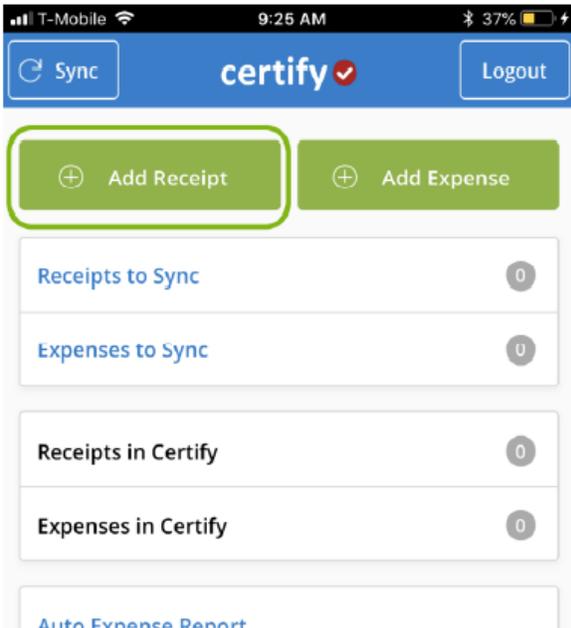
No file chosen

2 Ways of Uploading receipts using Computer (cont):

2. Emailing receipts directly to Certify

- a. You can forward any email receipts to Certify and they will be automatically uploaded to your wallet
- b. **MUST USE EOI SERVICE EMAIL ADDRESS**
- c. Please make sure email has no extra attachments other than actual receipt.
- d. If Receipt is in the body of the email – remove any attachments and unnecessary text (conversations about receipt, fwds, etc.) so that only the receipt is being sent over.
- e. Email receipts to receipts@certify.com

Uploading Receipts using your mobile phone:



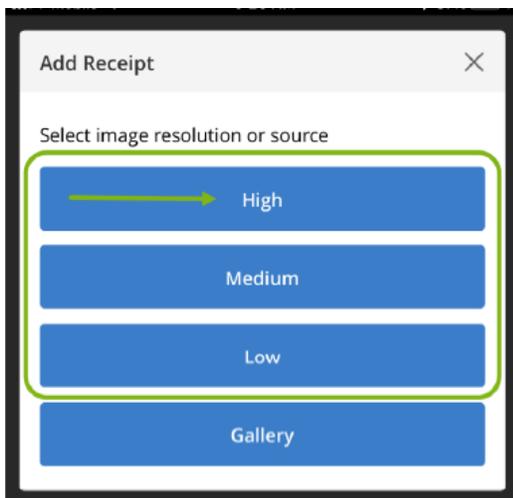
Step 1: Tap the green **Add Receipt** button and take a photo of your receipt.

Step 2: Select a photo resolution to open the camera screen on your mobile device. Photo resolution options include:

- **High / Medium** – Recommended
- **Low** – Use only if your device is short on storage
- **Gallery** – Use to add a receipt image from your mobile device's photo gallery.

Once you have selected your resolution, take a picture of your receipt and hit

SAVE



Uploading Receipts using your mobile phone (cont)

The screenshot shows the 'Enter Expense' screen in the Certify mobile app. At the top, there are 'Cancel' and 'Save' buttons. Below the title 'Enter Expense', there is a 'Receipt' section with a photo of a receipt and an 'AutoFill' button highlighted with a green box. The form fields are as follows:

Date	Oct 1, 2018
Department	Administration
Category	Airfare
Amount	0.00 USD
Carrier	
From	
To	

Step 3: Fill in the required fields for the receipt category

AutoFill can be used, but you must make sure to check the information entered! It will not fill in all fields required!!

***Fields will be explained later in the tutorial*

Once finished hit

SAVE!

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The screenshot shows the home screen of the Certify mobile app. At the top, there are 'Sync' and 'Logout' buttons, with the 'Sync' button highlighted by a green box. Below the navigation bar, there are two green buttons: 'Add Receipt' and 'Add Expense'. The main content area shows a summary of receipts and expenses:

Receipts to Sync	0
Expenses to Sync	0
Receipts in Certify	1

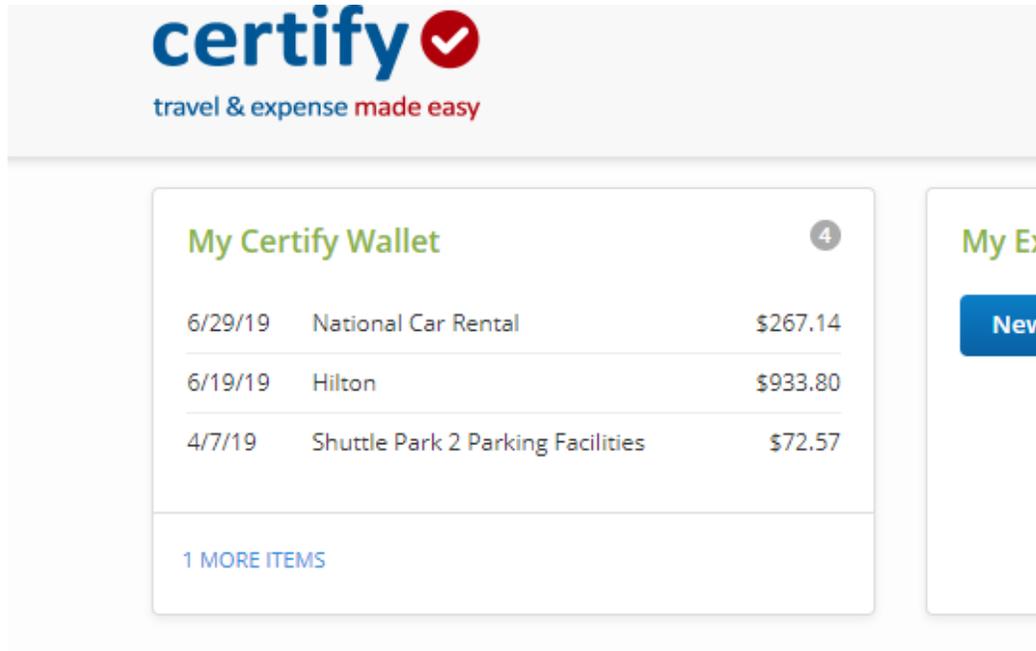
Step 4: Hit Sync Button

- You will see the Sync option in the "Home" Screen of the app
- The receipt will be uploaded to Certify.com once the Sync is complete
- You should see "**Receipts in Certify**" highlight the number of receipts you have uploaded!

Receipts that have been uploaded will be shown in the *My Certify Wallet*

Hitting the “More Items” Option will allow you to see everything in your wallet with some information already pre-filled out. Continue to upload receipts until they are all showing before moving on to creating the report.

For now just make sure that all receipts are in, you can edit the information later in the expense reporting pro



The screenshot shows the 'My Certify Wallet' interface. At the top, the Certify logo is displayed with the tagline 'travel & expense made easy'. Below the logo, the title 'My Certify Wallet' is shown with a notification badge containing the number '4'. A list of three expense items is displayed:

Date	Category	Amount
6/29/19	National Car Rental	\$267.14
6/19/19	Hilton	\$933.80
4/7/19	Shuttle Park 2 Parking Facilities	\$72.57

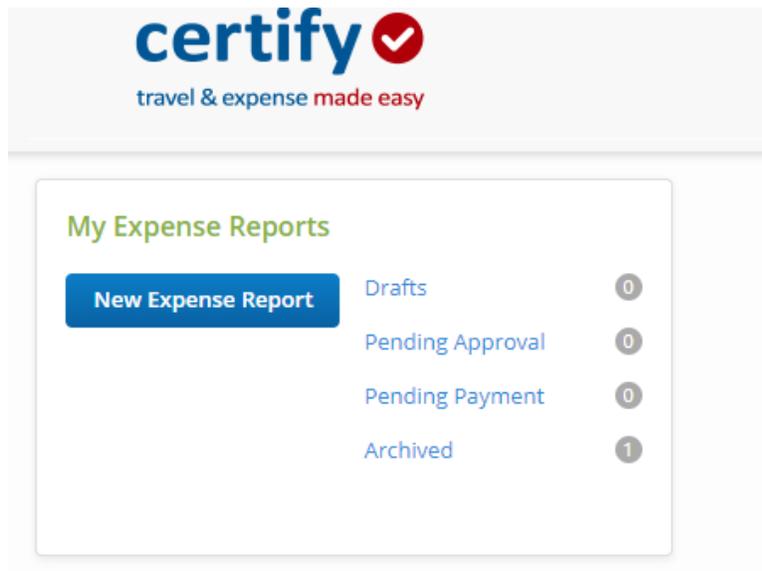
At the bottom of the list, there is a link that says '1 MORE ITEMS'. To the right of the main wallet view, there is a partial view of another section titled 'My Ex' with a 'New' button.

Receipts

<input type="checkbox"/>	Source	Receipt	Date	Category/Details	Vendor	Description	Amount
<input type="checkbox"/>			3/27/2019	>	ShuttlePark 2	image.jpg	\$38.05
<input type="checkbox"/>			4/7/2019	>	Shuttle Park 2 Parking Facilities	image.jpg	\$72.57
<input type="checkbox"/>			6/19/2019	>	Hilton	image.jpg	\$933.80
<input type="checkbox"/>			6/20/2019	> HOTEL	Hampton Inn	Fwd: Payano__Legacy_Hotel_6/23-6/25_\$293.94 Fw...	
<input type="checkbox"/>			6/25/2019	> AIRFARE	American Airlines	Fwd: Brinton_Flight_7/18_\$430.61 Fwd: Your trip co...	\$430.61
<input type="checkbox"/>			6/29/2019	> RENTAL CARS	National Car Rental	Fwd: Isaacson_Legacy_Car_6/23-6/29_\$267.14 Fwd:...	\$267.14

Step 2: Starting the Expense Report

To begin the report hit the “New Expense Report” option



You will get 3 Options to choose from:

1. *Add All Items to a new expense report*
 - i. This option will add all the items in the “My Certify Wallet” into the new report
2. *Use a date range to add some items to a new expense report*
 - i. Use this to separate expense reports with date ranges- Certify will only use receipts that were uploaded within the specified date range
3. *Start with a blank expense report*

****Normally, if all receipts that will be used are for the same expense report, use the first option “Add All Items to a new expense report” to start the process.**

Expense Report Name: C. Vazquez Week of 07/01/2019

Billable to Client:

Start Date: 3/27/2019

End Date: 6/29/2019

Description: [Empty]

Case Name: [Empty]

How to Name Report

Expense Report Name Should include your First Initial, Last name and the Week of

Select your date range

Add any notes if necessary, for the entire report

If you are expensing more than 1 case, select the main case, and you can adjust case for individual items later.