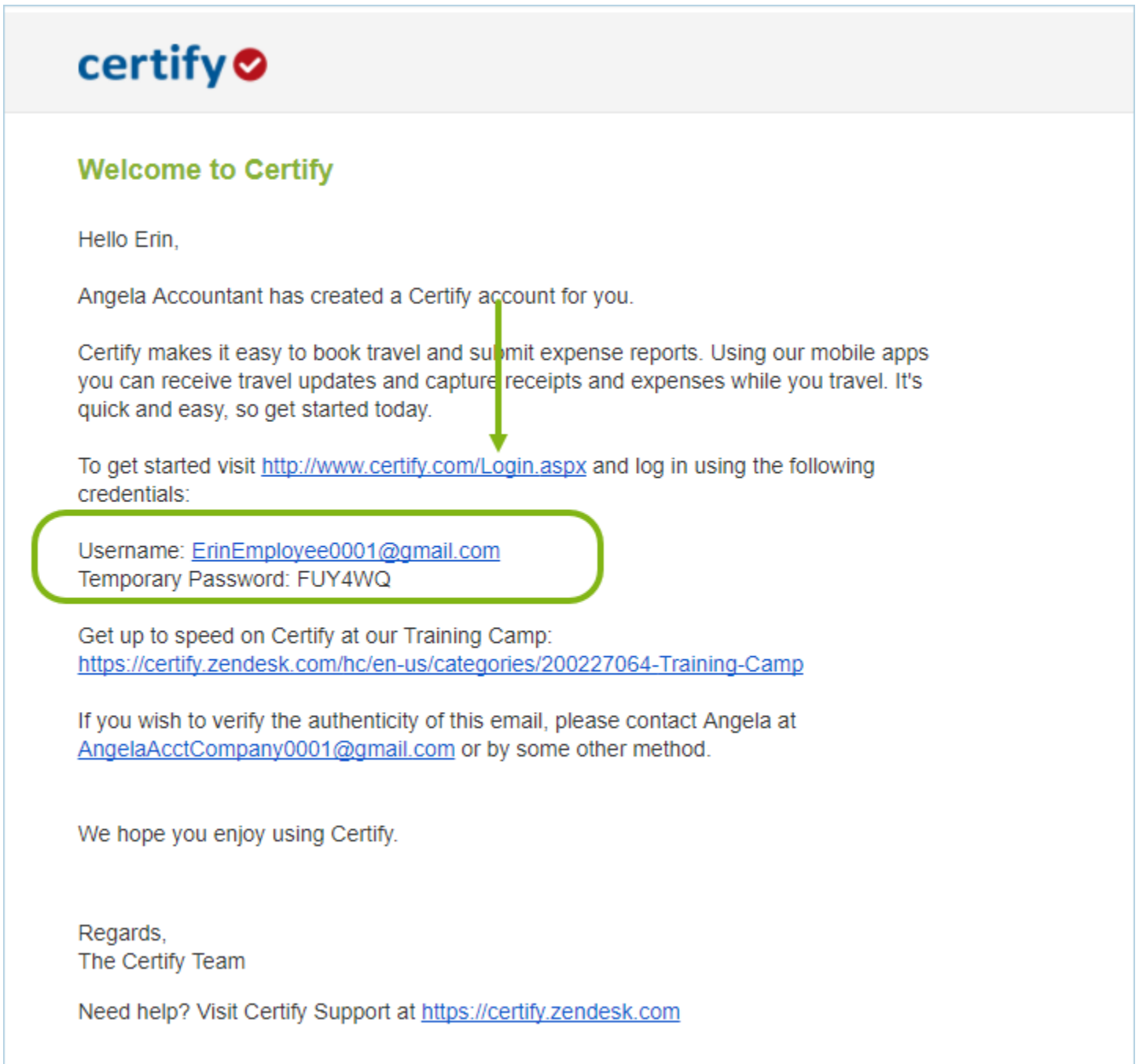


Logging Into Certify for the First Time

When a company releases Certify to new users, you will receive your login instructions directly from your company. If not directed otherwise, you will be sent a **Welcome Email** with your email address and a temporary password to use for your first login. This article shows you how to login to Certify for the first time using your **Welcome Email**.

Step 1: To begin creating your Certify account, select the link from your email.



certify ✓

Welcome to Certify

Hello Erin,

Angela Accountant has created a Certify account for you.

Certify makes it easy to book travel and submit expense reports. Using our mobile apps you can receive travel updates and capture receipts and expenses while you travel. It's quick and easy, so get started today.

To get started visit <http://www.certify.com/Login.aspx> and log in using the following credentials:

Username: ErinEmployee0001@gmail.com
Temporary Password: FUY4WQ

Get up to speed on Certify at our Training Camp:
<https://certify.zendesk.com/hc/en-us/categories/200227064-Training-Camp>


If you wish to verify the authenticity of this email, please contact Angela at AngelaAcctCompany0001@gmail.com or by some other method.

We hope you enjoy using Certify.

Regards,
The Certify Team

Need help? Visit Certify Support at <https://certify.zendesk.com>

Step 2: The link takes you to the Certify website. Enter the login credentials you received in your **Welcome to Certify** email into the **Email** and **Password** fields, and click **login**.

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product features services resources about us **free trial**

Certify Login

Welcome to Certify

Email

Password


login

[Forgot your password?](#)

[Frequently Asked Questions](#)

System Status: ● All good

Step 3: On the next page, you are prompted to create a new password. The strength of your new password is evaluated as you type it. Click **Submit**.

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Your password has expired.

Please enter your temporary or old password, and choose a new password.

Temporary or Old Password

New Password ? **Strongest** ←

Confirm Password

Submit Reset

Step 4: On the **Security Question Profile** page, you are prompted to provide answers to three security questions. These questions provide an extra security layer when you log into your Certify account.

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Security Question Profile

Select three Security Questions that will help you access your account if you forget your password. Security Questions are also used to help protect your account from fraudulent use.

Security Question 1	What is the phone number you remember most from your childhood?
Secret Answer	What is the phone number you remember most from your childhood?
Security Question 2	Who is your favorite actor, musician, or artist?
Secret Answer	Who is your favorite actor, musician, or artist?
Security Question 3	What is the first and last name of your favorite author?
Secret Answer	What is the first and last name of your favorite author?

Submit **Reset**

Step 5: Click **Submit** after you have entered answers to the security questions in the fields provided.

Security Question Profile

Select three Security Questions that will help you access your account if you forget your password. Security Questions are also used to help protect your account from fraudulent use.

Security Question 1

Secret Answer

Security Question 2

Secret Answer

Security Question 3

Secret Answer

Submit

Reset

Getting Started with Certify Expense

Is it your first time using Certify or maybe you need a refresher? This article will lead you through Certify's best practices for creating and submitting expense reports.

Add Receipts using the Certify Mobile App

Step 1: Download the Certify Mobile app on your [iPhone](#), [Android](#) or [Windows](#) mobile device.

Step 2: Login to the app with your Certify username and password.

Step 3: Tap the yellow **Add Receipt** button and take a photo of your receipt.

Step 4: Tap the **Autofill** button, and then enter the remaining expense details. Tap **Save**.

Step 5: Tap the **Sync** button in the upper left-hand corner of the homepage. Receipts will now be available in your [Certify Wallet](#).

The screenshot displays the Certify Mobile app interface. The top navigation bar includes a 'Cancel' button, the 'certify' logo, a 'Save' button (highlighted with a green box), a 'Sync' button (highlighted with a green box), and a 'Logout' button. The main content area is titled 'Enter Expense' and is divided into two columns. The left column features a 'Receipt' section with a photo of a CVS pharmacy receipt and an 'AutoFill' button (highlighted with a green box). Below the photo are input fields for 'Date' (Oct 5, 2018), 'Department' (General & Admin), 'Category' (Airfare), and 'Amount' (0.00 USD). The right column contains two green buttons: 'Add Receipt' and 'Add Expense'. Below these are several summary items with counts: 'Receipts to Sync' (1), 'Expenses to Sync' (0), 'Receipts in Certify' (0), 'Expenses in Certify' (0), 'Auto Expense Report', 'Draft Expense Reports' (4), 'Inquiries' (0), 'Travel', and 'Tools & Support'.

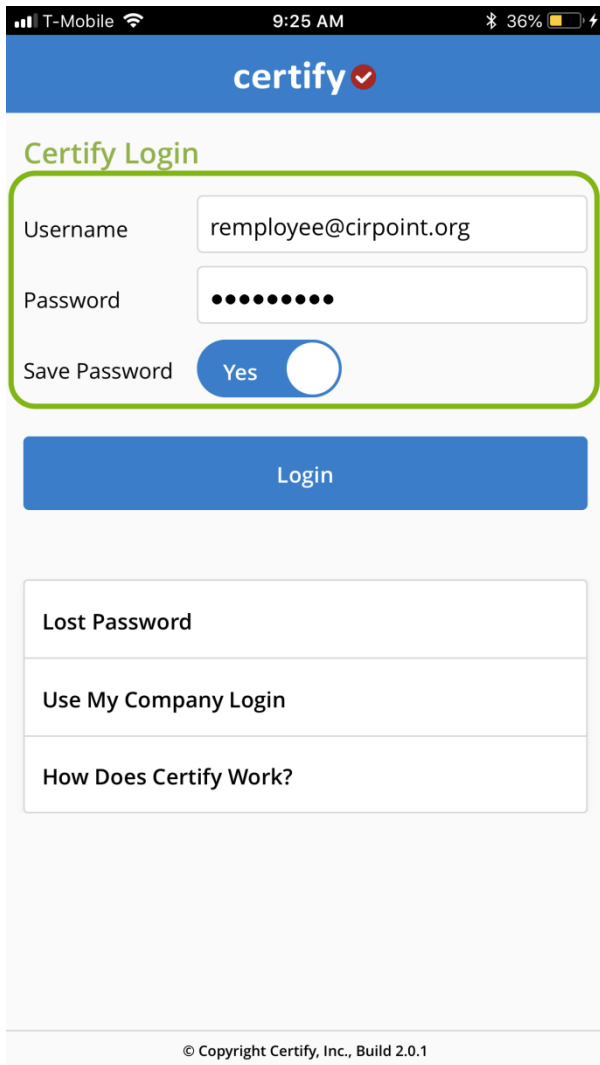
For a more in-depth guide on using the Certify Mobile app, please see our article [Adding Receipts Using Certify Mobile](#)

Adding Receipts using Certify Mobile

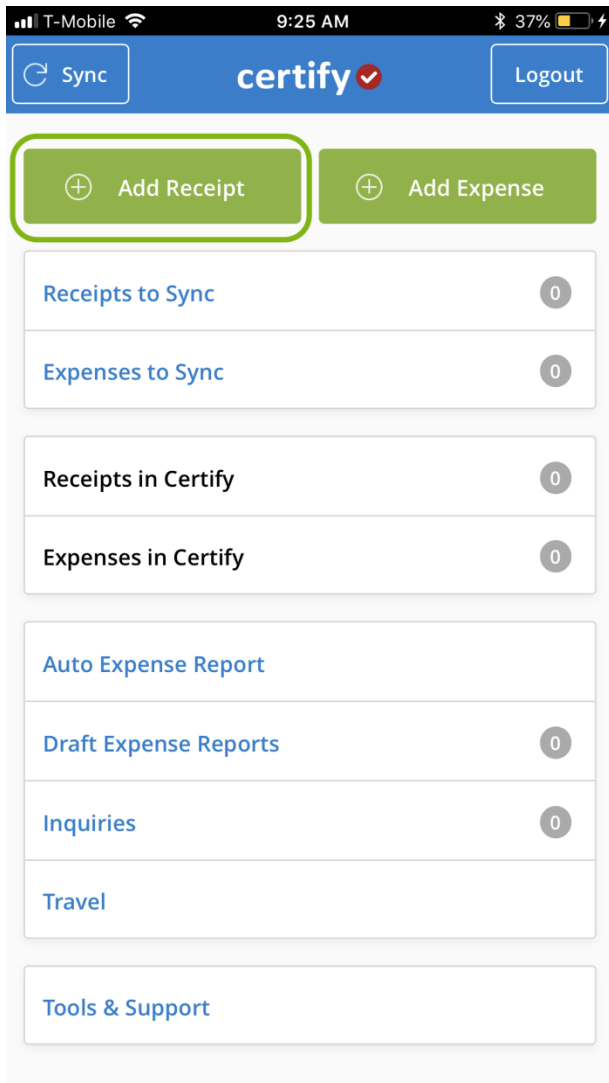
You can use the **Certify Mobile** app to easily upload receipts to your **My Certify Wallet** from your mobile device. The Certify Mobile app works with most devices including [Windows Phone](#), [Android](#), [BlackBerry](#) and [iPhone](#).

This article shows you how to add receipts in the **Certify Mobile** app and sync them to your **My Certify Wallet**.

Step 1: Open the **Certify Mobile** app on your mobile device. Log in with your Certify **Username** and **Password**. Your username and password for Certify Mobile are the same as your login credentials you use to log into www.certify.com.



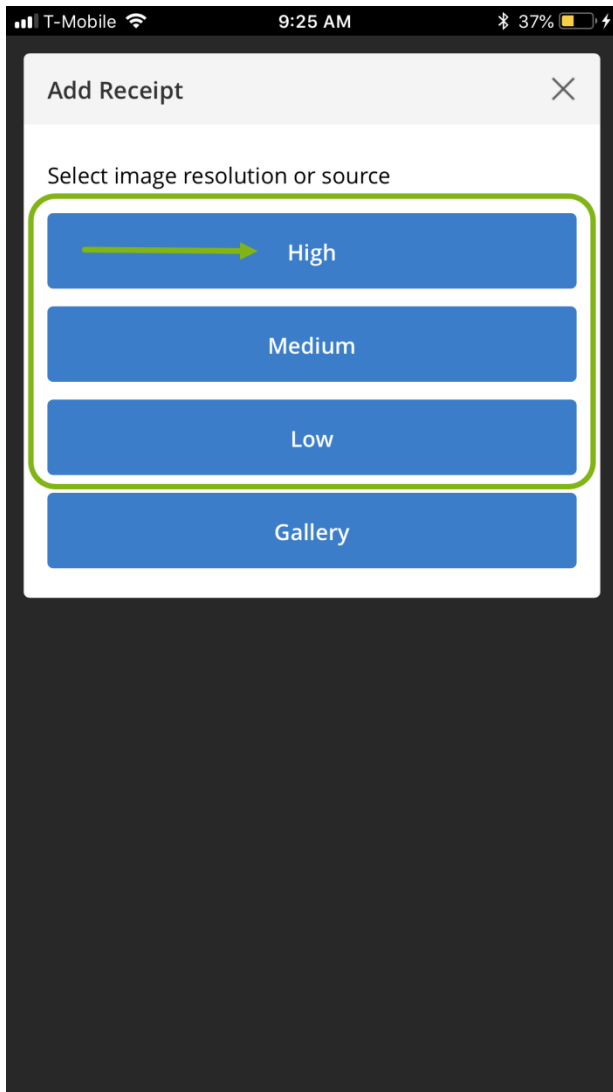
Step 2: On your **Certify Mobile** homescreen, tap **Add Receipt**.



Step 3: 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

Please Note: To add *multiple* receipts at a time to your **Certify Wallet**, use the [Upload](#) or [Email](#) options available in your online Certify account at www.certify.com.



Step 4: The camera screen opens. Hold your camera 6 to 12 inches away and focus the camera screen on your receipt. Make sure the receipt fills the screen. Once the receipt looks clear and centered, tap the **Photo** button to capture the receipt image.



Step 5: On the next screen, tap **Use Photo** to save the receipt image.



Please Note: The average Certify Mobile image size per photo resolution is:

- *High Resolution:* 200 – 325 Kilobytes (KB)
- *Medium Resolution:* 100 – 200 Kilobytes (KB)
- *Low Resolution:* 10 – 100 Kilobytes (KB)

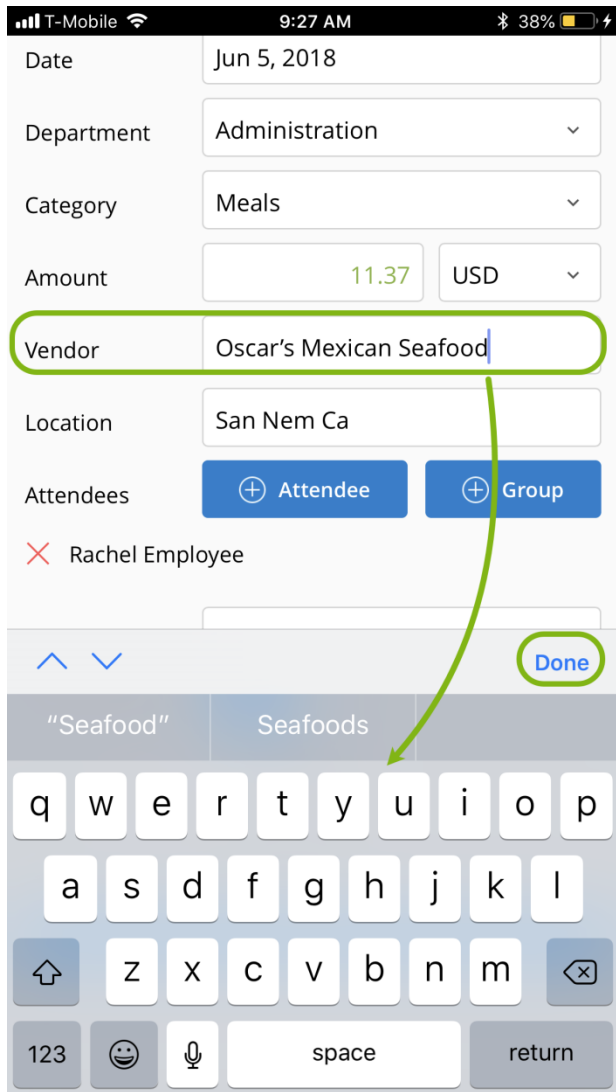
Step 6: On the next screen, tap **AutoFill** to scan the receipt image and populate the expense detail fields. See [AutoFill Tips & Tricks](#) to maximize this feature.

Need to replace with EOI configuration pictures

The screenshot shows the 'certify' mobile application interface. At the top, there is a blue header with 'Cancel' and 'Save' buttons, and the 'certify' logo. Below the header, the title 'Enter Expense' is displayed in green. A receipt image is shown on the left, and a blue 'AutoFill' button is highlighted with a green border on the right. Below the receipt, there are several input fields: 'Date' (Oct 1, 2018), 'Department' (Administration), 'Category' (Airfare), 'Amount' (0.00) with a 'USD' currency selector, and empty fields for 'Carrier', 'From', 'To', and 'Reason'.

Need to explain fields and do with all categories that different

Step 7: If needed, make edits to the expense data by tapping the field you want to edit, entering the data, and tapping **Done** to save your edits.



Step 8: Tap **Save** to save the receipt information.

The screenshot shows a mobile application interface for entering a receipt. The status bar at the top indicates T-Mobile service, 9:27 AM, and 38% battery. The form fields are as follows:

- Date: Jun 5, 2018
- Department: Administration
- Category: Meals
- Amount: 11.37 USD
- Vendor: Oscar's Mexican Seafood
- Location: San Nem Ca
- Attendees: + Attendee, + Group
- Reason: Lunch
- Reimbursable: Yes (toggle)
- Billable: No (toggle)
- Policy: Meets Policy (checked)

A blue 'Save' button is located at the bottom of the form, highlighted with a green border.

Step 9: On your **Certify Mobile** homescreen, tap **Sync** to upload the receipt and add it to your **My Certify Wallet**.

Please Note: If you find you uploaded a receipt in error, you can easily delete it from Certify Mobile

Step 1: From your homescreen, tap **Receipts in Certify**.

Department Administration

Category Meals

Amount 14.00 USD

Vendor Chili's

Location Detroit Metro Airport

Attendees + Attendee + Group

✗ Rachel Employee

Reason

Reimbursable Yes

Billable No

Policy Meets Policy

Save

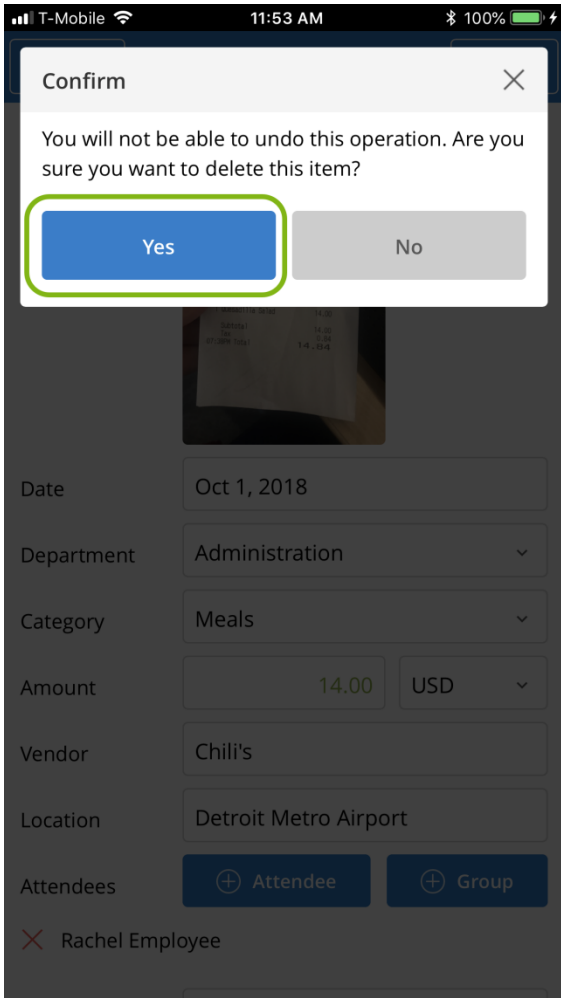
Delete

Step 2: A list of the receipts stored in your **My Certify Wallet** displays. Tap the receipt you want to remove.

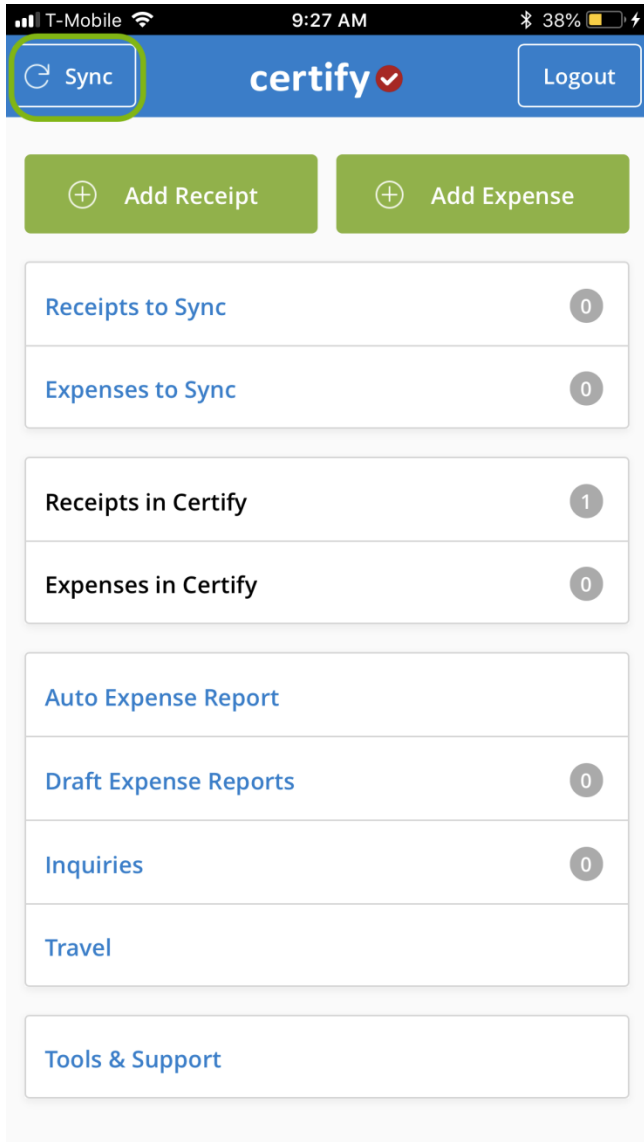
Step 3: On the next screen, the receipt detail displays. Scroll towards the bottom and tap **Delete**.

Step 4: A warning message displays asking you to confirm that you want to delete the receipt. Tap **Yes** to delete the receipt from your **My Certify Wallet**.

Please Note: Once a receipt has been deleted, it cannot be recovered.



Step 5: The receipt is deleted from your **My Certify Wallet**.



Automatic Expense Report Buffer Days

When building expense reports, adjust the date range to days before Build Day (recommended = 3) ?

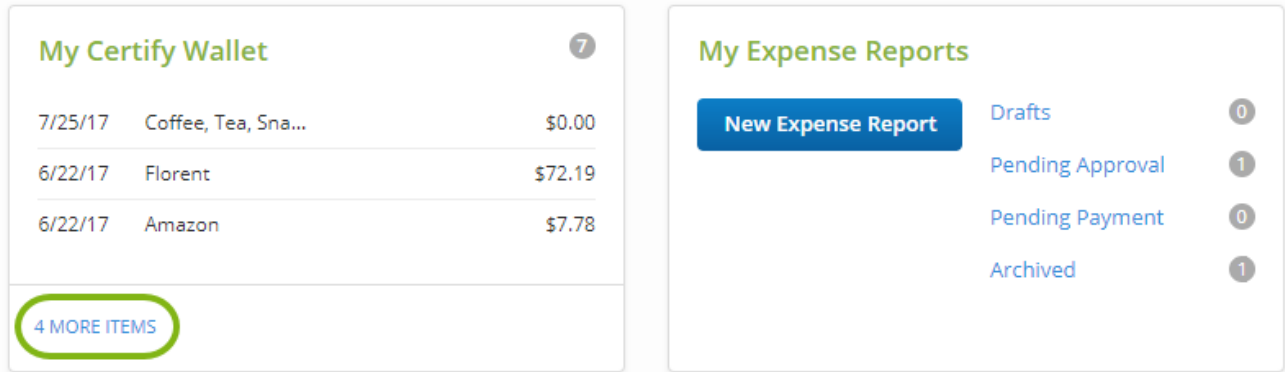
Automatic Expense Report Content

When creating expense reports, include the following:

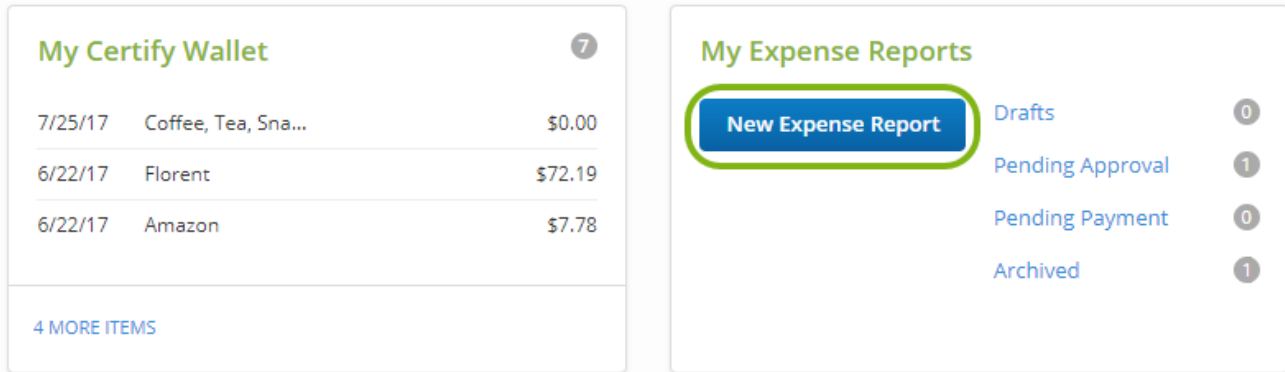
- Only those items falling within the date range (default)
- All wallet items

Create your Expense Report

Step 1: In your Certify account on the web, view your Receipts and Expenses in your [Certify Wallet](#).



Step 2: On the Certify homepage, click the **New Expense Report** button.



Step 3: Select the option to **Add all items to a new expense report**.

Step 4: Enter an expense report name and date range. Click **Next**.

Step 5: On the next page, click **Finish** to see your new draft expense report. Certify will automatically merge receipts and credit card expenses with the same date and amount.

Expense Report

[Link Receipts](#) | [Cleanup Wizard](#) | [Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

Submit for Approval

Dates 6/1/2017 - 6/30/2017

Expenses										
Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
	6/8/2017	Operations	Unknown		144.00	Yes	144.00	No		
	6/16/2017	Operations	Miscellaneous		32.40	No	0.00	No		
	6/22/2017	Operations	Meals - Breakfast		7.78	No	0.00	No		
	6/22/2017	Operations	Meals - Dinner		72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

For a more in-depth guide on creating your expense report, please see our article [Creating a New Expense Report](#)

Edit your Expense Report

Step 4: Add mileage expenses in the **Add Expense** box.

Add Expense

Date: 6/22/2017

Department: Operations

Category: Mileage

From: 20 York Street, Portland, Maine

To: 1 Monument Square, Portland, Maine

Miles: 1.8

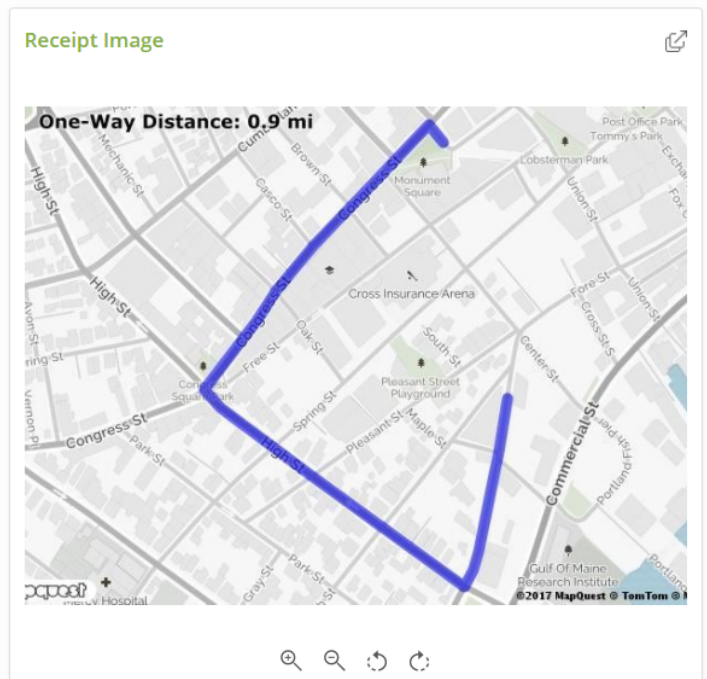
Round Trip:

Reason:

Reimbursable: I paid for this, please reimburse me.

Billable:

Receipt:



Step 5: Use the **Other Actions** menu to **split expenses** (itemize).

Expense Report

[Link Receipts](#) | [Cleanup Wizard](#) | [Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>			Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/>			Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No		<input type="button" value=">"/>
<input checked="" type="checkbox"/>			Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input checked="" type="checkbox"/>			Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		<input type="button" value=">"/>
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Submit for Approval

Step 1: Verify that everything on your expense report is accurate.

Step 2: Click **Submit for Approval**.

Expense Report

[Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>	6/8/2017	Operations	Parking	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/>	6/16/2017	Operations	Gifts and Promotions	<input checked="" type="checkbox"/>	32.40	No	0.00	No		<input type="button" value=">"/>
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		<input type="button" value=">"/>
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Step 3: Enter optional comments for your Approver, and click **Submit**.

Submit Expense Report for Approval

This is a preview of the message that will be used to submit the expense report. You may add your own comments if you like.

To Miley Manager (Molly.Mgr.Test@gmail.com)
Subject Expense Report Approval Request From Eric Employee (Eric.Emp.Test@gmail.com)
Body Hello Miley,

Eric Employee (Eric.Emp.Test@gmail.com) has sent an expense report for your approval.

Enter your comments:

Additional Approver (optional):

Expense Report Summary

Employee: Eric Employee (Eric.Emp.Test@gmail.com)
Expense Report Name: Expenses - 6/1/2017 - 6/30/2017
Dates: 6/1/2017 - 6/30/2017

Non Reimbursable Total: \$112.37
Reimbursable Total: \$144.00
Total: \$256.37

Login to Certify to view this report.
Login at: <https://www.certify.com/Login.aspx>

Step 4: Review your expense report status in the **Pending Approval** folder.

The image shows two side-by-side panels from a software interface. The left panel, titled "My Certify Wallet", has a small grey circle with the number "0" in the top right corner. The main text reads "Your wallet is empty" in green, followed by "Add receipts or expenses to your Wallet." in blue. At the bottom, it says "0 ITEMS". The right panel, titled "My Expense Reports", features a blue button labeled "New Expense Report". To its right is a list of report statuses: "Drafts" with a grey circle containing "0", "Pending Approval" with a grey circle containing "1" (this row is highlighted with a green oval), "Pending Payment" with a grey circle containing "0", and "Archived" with a grey circle containing "148".