

Certify User Guide APPROVING EXPENSE REPORTS



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This version is current as of April 1, 2021 For continuously updated instructions, please visit our Help Center within the Certify Support tab.

Certify is T&E expense management made easy

With thousands of users and satisfied customers worldwide, Certify is the leading fully automated travel and entertainment expense management solution for companies of every size. The easy-to-use Certify cloudbased interface and mobile application with electronic receipt capture allow organizations to book travel and complete expense reports and reimbursement quickly, easily, and cost-effectively. All while reducing overhead processing costs, increasing compliance with corporate policy and simplifying the overall T&E management process for employees, accountants and administrators.

Please Note: As a SaaS-based software, Certify offers several additional services and configuration options that companies may choose, or choose not to, use. Please refer to our online Help Center for even more how-to articles about extra processes and features.

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APPROVING EXPENSE REPORTS

A **Certify Approver** is defined as a user who has expense reports sent to them for review and approval. Approvers can:

- Approve and then the report forwards to Accounting
- Disapprove the report and send back to the Employee

The guide will review how to:

- Use all review tools
- Send an inquiry back to an employee
 - Approve a report
 - Disapprove a report
- Perform approval tasks using Certify Mobile

Approver's Review Tools

Other Actions Menu – Approvers

When you are reviewing an expense report, there are several actions you can take under the **Other Actions** menu. This article shows you how to use the actions available in the **Other Actions** menu.

Step 1: On your Certify homepage, click Approval Requests.

certify ~							0	Frank Manager Circle Point Communications
My Spend Requests			My Expense Reports			(Approval Requests	6
New Spend Request	Drafts	0	New Expense Report	Drafts	0			
	Requested	0		Pending Approval	0		Reimbursements	8
	Approved	0		Pending Payment	0			
	Archived	0		Archived	0		Travel & Expense P	olicy
							View my company's T	ravel and
							Expense policies	
My Certify Wallet		0	Add Receipts					
, co, manee							What's New In Cert	ify

Step 2: On the next page, you will see all the expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser



Step 3: There are several actions available in the **Other Actions** menu. To access this menu, click the arrow (>) under the **Approval** column. Actions in the **Other Actions** menu include:

- Add Note Add a note to a specific expense line
- Inquire Ask the submitter a question about an expense and/or allow the submitter to edit the expense
- Add Bank Fee Add a bank fee for any currency conversion charges
- Split Expense Split a portion of an expense into a different category or department
- Disapprove Disapprove the expense line

To access an action in the **Other Actions** menu, select the action name. Complete the fields under that action as needed and save.

Companies can also configure their settings and allow approvers to edit an expense line. Depending on your company's configuration, you may already see these actions available in the **Other Actions** menu:

- Edit Expense Edit any of the expense details in an expense line
- Edit Reim. Amount Edit the reimbursable amount of an expense line

Expenses	Approve /	All									
Actions	Status	Date	Category		Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage		 > 	119.84	Yes	119.84	No		>
Approve 🔇	Other	0	×			191.96	Yes	191.96	No		>
Approve	Other	Actions				5.82	Yes	5.82	No		>
Approve >	Add N	ote	Edit Expense		 > 	93.11	Yes	93.11	No		>
	Split E	e xpense	Edit Reim. Amount Add Bank Fee	Total Non-Reimb	ursable	\$0.00					
	Disapp	prove		Total Pe	ersonal	\$0.00					
				Total Reimbo	ursable	\$410.73					
				Total Disap	proved	\$0.00					
				Total Company Ex	penses	\$410.73					

Sending and Receiving an Inquiry – Approvers

As a manager reviewing a submitted expense report, you can send an inquiry to the submitter to request specific information such as a new or different receipt, or request an edit to an expense line. This method allows the submitter to make corrections to expense lines without you having to disapprove the entire expense report. This article shows you how to send an **Inquiry** on a expense line, as well as how to view the submitter's reply.

Creating an Inquiry

🔽 certify 🗸							O Frank Circle Point Comm	Manager 🗸 nunications
My Spend Requests	Drafts Requested	0	My Expense Reports New Expense Report	Drafts Pending Approval	0	(Approval Requests 3 Reimbursements 3	
	Approved Archived	0		Pending Payment Archived	0		Travel & Expense Policy View my company's Travel and Expense policies	
My Certify Wallet		0	Add Receipts				What's New In Certify	

Step 1: On your account homepage, select Approval Requests.

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

My Approval Requests The following expense reports have been sent to you for approval. View Policy Status Employee Start Date Submit Date End Date Expense Report Total Pending Kelly Employee 10/27/2016 9/21/2016 9/27/2016 Expenses - 9/21/2016 - 9/27/2016 \$709.55 Ľ 9/1/2016 9/15/2016 ReportExecutive - 9/1/2016 - 9/15/2016 10/31/2016 ď Pending Meredith Employee \$413.48 Total \$1,123.03

Step 3: If you have a question about an expense line, or about the expense report, you will need to open the **Other Actions** menu. To access this menu, click the arrows (>) under the **Approval** column. Select **Inquire**.

	s Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason	
/e >	10/1/2016	Mileage			119.84	Yes	119.84	No		▷
/e >	10/3/2016	Lodging			191.96	Yes	191.96	No		▷
e >	10/3/2016	Coffee, Tea, Snacks			5.82	Yes	5.82	No		▷
/e 🕨	10/4/2016	Meals - Large Group			93.11	Yes	93.11	No		▷
e 🔇 Othe	x Actions	×			2.75	Yes	2.75	No	!	>
Add I Inqui Split Disag	Note re Expense oprove	Edit Expense Edit Reim. Amount Add Bank Fee	Total Non-Reimbu Total Pe Total Reimbu Total Disap	ursable ersonal ursable proved	\$0.00 \$0.00 \$413.48 \$0.00					

Step 4: On the next page, enter text in the **Enter Question** field. If you would like to allow the submitter to make edits to the expense line, click the checkbox next to **Allow Expense Edit**. Click **Save**.

Ask a Question A	bout an Expense
Your question will be sent	to Meredith Employee. The question and answer will be saved with this expense.
Enter Question	This is missing a receipt. Do you have one?
Allow Expense Edit 🔊	
Save Ca	ncel

Step 5: After saving your **Inquiry**, the expense report status will change from **Pending** to **Inquiry** to indicate that the expense report has been sent back to the submitter.

My Approval Requests

ollowi	ng expense reports	have been sent to you for approv	val.			
/iew	Policy Status	Employee	Submit Date	Start Date	End Date Expense Report	Total
2	Pending	Kelly Employee	10/27/2016	9/21/2016	9/27/2016 Expenses - 9/21/2016 - 9/27/2016	\$709.55
2	Inquiry	Meredith Employee	10/31/2016	9/1/2016	9/15/2016 ReportExecutive - 9/1/2016 - 9/15/2016	\$413.48
					Total	\$1,123.03

Viewing the Inquiry Reply

When the submitter responds to your inquiry, you can view their response in the expense line. Your original inquiry and the submitter's reply are both saved in the expense line within the expense report. When you have finished reviewing the submitter's response, you can continue moving forward with the expense report approval process.

ons	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
ve >		10/1/2016	Mileage		119.84	Yes	119.84	No		>
ove >		10/3/2016	Lodging		191.96	Yes	191.96	No		>
ove >		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		>
ove >		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		>
ove >		10/9/2016	Other Transportation		2.75	Yes	2.75	No	!	>
	Edit 11/1	0/2016, Dan N	lanager asks: This is missing a receipt. Do	you have one?						
	11/10/20)16, Meredith	Employee answers: Sorry, I do not.							
			Total No	n-Reimbursable	\$0.00					
				Total Personal	\$0.00					

Approving/Disapproving Reports

When an expense report is submitted for approval, the approver receives an email alerting them that an expense report is awaiting their approval. This article shows you how, as a Manager, to approve expense reports.

Step 1: On your account homepage, select **My Approval Requests.**

certify ~	,						Frank Ma Circle Point Communi	nager 🗸
My Spend Request	S Drafts Requested Approved	0 0	My Expense Reports New Expense Report	Drafts Pending Approval Pending Payment	0	(Approval Requests Reimbursements)
	Archived	0		Archived	0		Travel & Expense Policy View my company's Travel and Expense policies	
My Certify Wallet		0	Add Receipts				What's New In Certify	

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, select the **Employee** name or the view (document) icon under the **View** column to open the expense report in a new browser window.

Му Арр	oroval Reques	its				
The followi	ng expense reports l	have been sent to you for approva	al.			
View	Policy Status	Employee	Submit Date	Start Date	End Date Expense Report	Total
C	Pending	Kelly Employee	10/27/2016	9/21/2016	9/27/2016 Expenses - 9/21/2016 - 9/27/2016	\$709.55
Ľ	Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016 ReportExecutive - 9/1/2016 - 9/15/2016	\$413.48
					Total	\$1,123.03

Step 3: On the next page, you will see options for different detail views. Click the view icon to expand or collapse the expense details.

To view a receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green checkmark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company's policies.

To view vendor and location details, click the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.

IS	Pending A	pproval		Approval Hi	story							No.11			
ent Approver	Dan Mana	ger		11/10/2016	Submitted	Meredith I	Employee			Rec	eipt Ima	age		Ē	Z X
rtment	General &	Admin (01)			Pending	Dan Mana	ger								
mary	Meredith I	mployee	>			Send Ema	il to All								
	ReportExe	cutive - <mark>1</mark> 0/	1/2016 -			Full Appro	val History				1-way D	istance;	106 miston	Rockland	50
	10/15/201	6								Retland	\mathbf{V}	4.4	Brunswick	•Bath	
	10/1/2016	- 10/15/201	б							13	The second	Lew B	iddeford		
	Print Repo	ort								77	Ham	pshire	Portsmouth		
	Submit	for Peimb	reamont							rattlebor	not it	Manchester			
	Submit	TOF REITIDO	irsement							Hd I	Massact	Nashua US et tes	P		
	Dis	approve Re	port							sampton	Worce	Newtone OB	loston cy		
										Sido	We with	Providence		1000 ALC: 1000	
										6.254	a Clare	⊙ 0	200	Map Gata 62205	014 Goo
xpenses	Approve Al	1									and Actional L	⊕ €	২৩৫)14 Goo
xpenses Actions	Approve Al	Date	Category			Details	Amount	Reim	Reim Amt	Billable	Receipt	⊖ € Reason	ঽ৩৫)14 Goo
Actions	Approve Al Status	Date 10/1/2016	Category Mileage			Details	Amount 119.84	Reim Yes	Reim Amt 119.84	Billable	Receipt	€ € Reason	200)14 Goog
Actions	Approve Al Status	Date 10/1/2016 10/3/2016	Category Mileage Lodging			Details	Amount 119.84	Reim Yes	Reim Amt 119.84	Billable	Receipt	€ C Reason ▷	200)14 Goog
Actions Approve > Approve > Approve >	Approve A Status]]]]	Date 10/1/2016 10/3/2016	Category Mileage Lodging Coffee, Tea, Snar	:ks		Details	Amount 119.84 Details	Reim Yes	Reim Amt 119.84 ×	Billable No No	Receipt	Reason	200))
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Actions Approve (> Approve (> Approve (> Approve (>	Status]	Date 10/1/2016 10/3/2016 10/4/2016	Category Mileage Lodging Coffee, Tea, Snat Meals - Large Gr	:ks oup	t al Non-Reim	Details	Amount 119.84 Details Meets policy. Location: TAMPA Hotel Name: Court	Reim Yes Westshore tyard by M	Reim Amt 119.84 X Airport Iarriott	Billable No No No	Receipt	Reason > > > > >	200		Э
Actions Approve > Approve > Approve > Approve >	Status)	Date 10/1/2016 10/3/2016 10/3/2016 10/4/2016	Category Mileage Lodging Coffee, Tea, Snat Meals - Large Gr	:ks oup To	tal Non-Reimł Totał i	Details	Amount 119.84 Details Meets policy. Location: TAMPA 1 Hotel Name: Cour Check-out: 10/3/2	Reim Yes Westshore tyard by M 16 016	Reim Amt 119.84 Airport Iarriott	Billable No No No	Receipt	Reason	200)
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Step 4: If you have a question about an expense line, or about the expense report, there are several actions available under the **Other Actions** menu. To access this menu, click the arrow (>) under the **Approval** column and select the item name.

Actions	Status	Date	Category		Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
pprove >		10/1/2016	Mileage		>	119.84	Yes	119.84	No		>
rove 🔇)		~		>	191.96	Yes	191.96	No		>
prove 🔰	Other	Actions	^		 > 	5.82	Yes	5.82	No		>
rove >	Add No	ote	Edit Expense		>	93.11	Yes	93.11	No		>
	Inquire Split Ex	e kpense	Edit Reim. Amount Add Bank Fee	Total Non-Reimbu	ırsable	\$0.00					
	Disapp	orove		Total Pe	ersonal	\$0.00 \$410.72					
				Total Disap	proved	\$0.00					
				Total Company Ex	penses	\$410.73					

Step 5: To approve the entire expense report, select **Approve All** next to **Expenses**. To approve specific expense lines, click the green checkmark under the **Approval** column for that expense line. After approving, select **Submit for Reimbursement** to send the expense report to the next approver.

kpense Report											
Pending Approval	Approval His	story									
r Dan Manager	11/10/2016	Submitted M	leredith Er	nployee			Rec	eipt Im	age		C ×
General & Admin (01)	Pending D	an Manag	er							
Meredith Employee	2	Se	end Email	to All							
ReportExecutive - 10	/1/2016 -	FL	ull Approva	al History			No.	1-way [Distance: 1	06 miston	Rockland
10/15/2016								(<i>)</i> 9	1-11	Brunswick Bath	10
10/1/2016 - 10/15/20	016						autland	The	N.e w Bidd	tbrook opPortland eford	
Print Report								Han	pshire	aver .	
[rattlebor	of the	Manchester	Portsmouth	
Submit for Reimt	pursement						eid N	lassac	Nashua h-u-s e t tes		
Disapprove F	Report						sampton	Word	Newtone OBot ester Quincy	ston	
							Goo		Ply	mouth	Map data 62014 Google
									Q Q	50	
Approve All											i i
Status Date	Category		Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason		
10/1/2016	Mileage			119.84	Yes	119.84	No		\triangleright		
10/3/2016	Lodging			191.96	Yes	191.96	No		>		
10/3/2016	Coffee, Tea, Snacks		>	5.82	Yes	5.82	No		\triangleright		
10/4/2016	Meals - Large Group			93.11	Yes	93.11	No		>		
	Tot	tal Non-Reimbur	sable	\$0.00							
		Total Per	sonal	\$0.00							
		Total Reimbur	sable	\$410.73							
		Total Disapp	roved	\$0.00							
	xpense Report Pending Approval er Dan Manager General & Admin (01 Meredith Employee ReportExecutive - 10 10/15/2016 10/1/2016 - 10/15/20 Print Report Submit for Reimt Disapprove F Status Date Status Date Di 10/1/2016 10/3/2016 Di 10/3/2016 Di 10/4/2016	Spense Report Approval Hill Pending Approval 11/10/2016 General & Admin (01) Meredith Employee [2] ReportExecutive - 10/1/2016 - 10/15/2016 10/15/2016 10/17/2016 - 10/15/2016 10/17/2016 - 10/15/2016 Print Report Status Submit for Reimbursement Disapprove Report Status Date Category 1 10/12/2016 Mileage 1 10/3/2016 Lodging 1 10/3/2016 Coffee, Tea, Snacks 1 10/4/2016 Meals - Large Group	Spense Report Approval History Pending Approval Manager 11/10/2016 Submitted M General & Admin (01) Pending D M	Pending Approval Approval History er Dan Manager 11/10/2016 Submitted Meredith Err General & Admin (01) Pending Dan Manage Meredith Employee [> Send Email ReportExecutive - 10/1/2016 - Full Approval 10/1/2016 Full Approval 10/1/2016 Full Approval 10/1/2016 Full Approval Submit for Reimbursement Disapprove Report Disapprove Report Details Status Date Category Details 1 10/1/2016 Mileage W 2 2 1 10/3/2016 Coffee, Tea, Snacks W 2 2 1 10/4/2016 Melas - 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Large Group Y 3.8.11 Yes 2 10/4/2016 Keals - Large Group Y 3.8.11 Yes 2 10/4/2016 Keals - Large Group Y 3.8.00 </td <td>Status Date Category Details Amount Reim Ant. 2 10/1/2016 Wileage Y 119.84 Yes 119.84 2 10/1/2016 Wileage Y 119.84 Yes 119.84 2 10/1/2016 Yes Yes 119.84 Yes 119.84 2 10/1/2016 Wileage Yes 119.84 Yes 119.84 2 10/3/2016 Yes 119.84 Yes 119.84 119.84 3 10/3/2016 Keinge Group Yes 119.36 119.36 119.36 3 10/3/2016 Loging Yes 119.36 Yes 119.36 4 10/3/2016 Loging Yes 119.36 Yes 139.36 3 10/3/2016 Coffee, Tea, Snacks Yes 5.82 Yes 5.82 3 10/4/2016 Meals - Large Group Yes 30.31 Yes 33.11</td> <td>Submit for Reinbursement Status Date Category Details Amount Rein Amt Billable Status Date Category Details Amount Rein Amt Billable Somer All 10/1/2016 Submit Confere, Fea, Snacks Image Status Image Status</td> <td>Spending Approval Approval History er Dan Manager 11/10/2016 Submitted Meredith Employee General & Admin (01) Pending Dan Manager Meredith Employee S Send Email to All ReportExecutive - 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Large Group Yes 30.31 Yes 33.11	Submit for Reinbursement Status Date Category Details Amount Rein Amt Billable Status Date Category Details Amount Rein Amt Billable Somer All 10/1/2016 Submit Confere, Fea, Snacks Image Status Image Status	Spending Approval Approval History er Dan Manager 11/10/2016 Submitted Meredith Employee General & Admin (01) Pending Dan Manager Meredith Employee S Send Email to All ReportExecutive - 10/1/2016 - Full Approval History Output to All 10/1/2016 - 10/15/2016 Full Approval History Output to All 10/1/2016 - 10/15/2016 Full Approval History Output to All Submit for Reimbursement Disapprove Report Full Approval History Status Date Category Details Amount Reim Ant Billable Receipt 2 10/1/2016 Mileage Imploy Y 119.84 Yes 119.84 No E 2 10/3/2016 Codiging Imploy Yes 191.96 No E 3 10/3/2016 Codiging Imploy Yes 39.31 No E 3 10/3/2016 Codiging Imploy Yes 39.31 No E 3 10/3/2016 Codiging Imploy Yes 3	Status Date Category Details Amount Reim Am Billable Receipt Reason 101/2016 Mileage Y 119.84 Yes 119.84 No Image Image	Spense Report Approval History ending Approval Approval History ending Approval Yending General & Admin (01) Pending Dan Manager General & Admin (01) Pending Dan Manager Reportskeeutive 101/2016 Send Email to All Reportskeeutive 101/2016 Fill Approval History 101/2016 Fill Approval History Submit for Reimbursement Fill Approval History Disapprove Report New Yenter Status Date Vertext Vertext 101/2016 Mileage 101/2016

Step 6: By clicking **Submit for Reimbursement**, an email preview will be displayed. Enter text in **the Enter your comments** field as needed for the next approver. Click **Submit** to complete the approval process.

Submit Expense Report for Reimbursement

This is a previet like.	w of the message that will be used to submit the expense report. You may add your own comments if you
То	Annie Accountant (aaccountant@circp1.com)
Subject	Expense Report Reimbursement Request From Dan Manager (dmanager@circp1.com)
Body	Hello Annie,
	Dan Manager (dmanager@circp1.com) has sent an expense report for reimbursement.
	Enter your comments:
	Expense Report Summary
	Employee: Meredith Employee (memployee@circp1.com)
	Expense Report Name: ReportExecutive - 9/1/2016 - 9/15/2016
	Dates: 9/1/2016 - 9/15/2016
	Non Reimbursable Total: \$0.00
	Reimbursable Total: \$410.73
	Disapproved Total: \$0.00
	Total: \$410.73
	Login to Certify to view this report.
	Login at: https://www.certify.com/Login.aspx
	Submit Cancel

Approving on Certify Mobile

Certify allows you to approve and process reports using the Certify Mobile app. This article shows you how to approve or process expense reports using Certify Mobile.

Step 1: On your Certify Mobile app Home screen, tap **Approval Requests**. If the number of approval requests is incorrect, tap **Sync** to update the data.



Step 2: To view an expense report, tap the view (document) icon under the **View** column next to the expense report you would like to o pen.

📶 T-Mobile 🗢	10:33 AM	\$ 77% <u> </u> ∙ /
certify 🛇		≡ ≙
My Certify Wallet		0
Your	wallet is empty	
Add receipts or	r expenses to your Wallet.	
0 ITEMS		
My Expense Report	S	
	Drafts	0
New Expense Report	Pending Approval	2
	Pending Payment	
	Archived	0
	Archived	0
	Archived	0
Add Receipts	Archived	0
Add Receipts	Archived	0
Add Receipts	Archived	

Step 3: To view a specific receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green check mark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company's policies.

To view vendor and location details, tap the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.



If you have a question about an expense line, or about the expense report, there are several actions available in the Other Actions menu. To access this menu, tap the arrow (>) under the **Actions** column. In the **Other Actions** menu, select the action name.



Disapprove

Step 4: To approve the entire expense report, tap **Approve All** next to **Expenses**. To approve specific expense lines, tap the green check mark under the **Approval** column for that specific expense line. After approving, tap **Submit for Reimbursement** to send the expense report to the next approval in the approval workflow.



Approving and Disapproving Spend Requests

Certify's Pre-Approval feature enables end-users to budget for an expense before the spend occurs. Once the **Spend Request** is submitted, a **Manager** can see the expected costs for specific projects, trips, or people, providing opportunities for increased spend management.

Once a **Spend Request** has been submitted, the **Manager** can review the expected costs and approve of deny the request.

This article shows you, a Certify Manager, how to approve and disapprove a Spend Request.

Spend Requests and **Expense Reports** follow the same initial **Approval Workflow**. Though once a request is approved by all **Approvers** in the workflow, it is returned to the submitter's **Approved Spend Requests** folder rather than being moved along to the **Accountant**.

Approving a Spend Request

Step 1: Open Approval Requests on your Certify homepage.

certify ~						Prank Manager Circle Point Communications
My Spend Requests			My Expense Reports			Approval Requests (5)
New Spend Request	Drafts	0	New Expense Report	Drafts	0	
	Requested	0		Pending Approval	0	Reimbursements 3
	Approved	0		Pending Payment	0	
	Archived	0		Archived	0	Travel & Expense Policy
						View my company's Travel and
						Expense policies
My Certify Wallet		0	Add Receipts			
						What's New In Certify

Step 2: Once the Approval Requests page opens, select a Spend Request to view.

	g expense	reports have b	een sent to you for app	roval.					
The follo	wing expe	nse reports ha	ave been sent to you for	r approval.					
View	Policy	Status	Employee	Submi	t Date	Start Date	End Date	Report Name	Tota
C	~	Pending	Harry Employee	3/24	4/2020	1/27/2020	1/28/2020	Expenses - 1/27/2020 - 1	\$1,043.7
C	1	Pending	Harry Employee	3/24	4/2020	1/21/2020	1/27/2020	Expenses - 1/21/2020 - 1	\$699.1
								Total	\$1,742.8
Spend	Reques	ts							
The follow	ving spend	requests have	been sent to you for ap	proval.					
View	Status	Employee		Submit Date	Star	t Date	End Date	Spend Request	Tota
	Pendin	g Tommy A	ccountant	10/12/2020	10/1	2/2020	10/21/2020	Project Wizard	\$1,042.7
R									

Step 3: After the request opens, click the arrow (>) under the **Details** or **Reason** columns to see more information about the **Spend Request Items**.

atus	Pending		Spend Reques	t History Full A	oproval History			
urrent Approver epartment ubmitter ame ates	David Cal Accountin Tommy A LA Hacka 10/09/20 Comp	natsey ng uccountant thon 20 - 10/13/2020 Diete Request	10/09/2020 10/09/2020	Requested Tomr Pending Davic	ny Accountant Canatsey			
	Disapp	prove Request						
Request Deta	Disapp ills Appro Status	orove Request	Department	Category	Details	Requested Amount	Attachment	Reaso
Actions	Disapş iils Appro Status	Expense Type Lodging	Department Sales	Category Lodging	Details	Requested Amount 1,955.12 USD	Attachment	Reaso
Request Deta Actions Approve Approve	Disapı tils Appro	Expense Type Expense Type Meals	Department Sales Sales	Category Lodging Meals - Dinn	Details () er)	Requested Amount 1,955.12 USD 391.02 USD	Attachment	Reaso

Step 4: View the **Spend Tracker** tool at the top of the expense report to compare the user's spend against the pre-approved amount from the spend request. This helps you know right away if the user spent more than what they were approved for, and by how much.

▲ Total: 3 E	rpenses								5	1,347.76 s	spent of \$1,775.00 approv
Miscellan	eous: 0 (Expenses								\$0	1.00 spent of \$0.00 approv
Lodging:	Expense	r								\$455.98	8 spent of \$850.00 approv
Meals: 0 1	xpenses									50	1.00 spent of \$0.00 approv
Rentals:	Expense	,								\$213.66	6 spent of \$200.00 approv
xpenses	Expense									3078.12	2 spent of \$725.00 approv
xpenses	Expense Approve A	3								30/8.1/	2 spent of \$725.00 approv
Actions	Approve A Status	Date	Category	Details	Amount	Reim.	Reim. Amt	Billable	Receipt	Reason	2 spent of 3723.00 approv
Actions	Approve At Status	Date 12/1/2020	Category Lodging Airfare	Details v 3	Amount 455.98 678.12	Reim. Yes	Reim. Amt 455.98 678.12	Billable No	Receipt	Reason	2 spent of 3723.00 approv
Actions Actions Approve Approv	Approve Al	Date 12/1/2020 12/1/2020 12/3/2020	Category Lodging Airfare Rental Car	Details V 1 2 V 3 V 3	Amount 455.98 678.12 213.66	Reim. Yes Yes	Reim. Amt 455.98 678.12 213.66	Billable No No	Receipt	Reason	spent of \$723.00 approv

Step 5: Once the **Items** have been reviewed, select the **Approve** button for each line. To approve all **Items** at once, click the **Approval All** button.

tatus	Pending		Spend Request	History Full Approv	al History			
urrent Approver	David Car	natsey	10/09/2020 R	equested Tommy Acc	ountant			
Department	Accountin	ig scountant	10/09/2020 P	ending David Cana	sey			
Jame	LA Hackat	thon						
Dates	10/09/202	20 - 10/13/2020						
	Disapp	prove Request						
Request Deta	Disapp ils Appro	ve All	Department	Category	Details	Requested Amount	Attachment	Reaso
Request Deta	Disapp ils Appro Status	ve All Expense Type	Department	Category	Details	Requested Amount	Attachment	Reaso
Request Deta Actions	Disapp ils Appro Status	ve All Expense Type Im Lodging	Department Sales	Category Lodging	Details >	Requested Amount 1,955.12 USD	Attachment	Reaso
Actions	Disapp ils Appro Status	ve All Expense Type Im Lodging Meals	Department Sales Sales	Category Lodging Meals - Dinner	Details > >	Requested Amount 1,955.12 USD 391.02 USD	Attachment	Reaso >
Actions	Disapp ils Appro	Expense Type Em Lodging Meals Travel	Department Sales Sales Sales	Category Lodging Meals - Dinner Airfare	Details > > >	Requested Amount 1,955.12 USD 391.02 USD 3,258.53 USD	Attachment	Reaso > >

Step 6: When an **Item** is approved, a green checkmark will appear in the **Status** column. Click **Complete Request** once all **Items** are approved.

Status	Pending		Spend Request	History Fu	ll Approval History				
Current Approver Department Submitter Name	David Car Accountir Tommy A LA Hacka	natsey og ccountant thon	10/09/2020 F	Requested To Pending Da	mmy Accountant ivid Canatsey				
Dates	10/09/202	20 - 10/13/2020							
	Disapp	rove Request							
Request Deta	Disapp ails Appro	ve All Expense Type	Department	Category	y Detail	s F	Requested Amount	Attachment	Reasor
Actions	Disapp ails Appro	ve All Expense Type Im Lodging	Department Sales	Category Lodging	y Detail	s F	Requested Amount	Attachment	Reasor
Actions Approve Approve	Disapp ails Appro Status Status	Expense Type Lodging Meals	Department Sales Sales	Category Lodging Meals - D	y Detail	s F	Requested Amount 1,955.12 USD 391.02 USD	Attachment	Reasor > >
Actions Approx Approx Approx Approx	Disapp bils Approv Status Status Status	Expense Type Medal Meals Travel	Department Sales Sales Sales	Category Lodging Meals - D Airfare	y Detail	s F	Requested Amount 1,955.12 USD 391.02 USD 3,258.53 USD	Attachment	Reasor > >

Step 6: On the next page, click Complete to finish approving the Spend Request.

Complete Spend Reques	t
Please review the spend request details as complete and the submitter will be a	s for accuracy. Upon submission the spend request will be marked able to link the spend request to an expense report.
Spend Request Details	
Submitter	Tommy Accountant (ttrainer@cirpoint.com)
Spend Request Name	LA Hackathon
Dates	10/9/2020 - 10/13/2020
Total	5,604.67 USD
Comments (optional)	
	Your comments will be visible to anyone viewing this spend request.
Complete	

Disapproving a Spend Request

A **Manager** can disapprove single **Items**, or an entire **Spend Request**. If the entire **Spend Request** is disapproved, it will return to the submitter's **Spend Request Drafts**.

Step 1: To disapprove single **Items**, click the arrow (>) under **Actions**. Select **Disapprove** in the **Other Actions** pop-up window.

JS	Pending		Spend Requ	est History Fu	ll Approval History			
ent Approver artment nitter le s	David Ca Accounti Tommy A LA Hacka 10/09/20	natsey ng kccountant thon 20 - 10/13/2020	10/09/2020 10/09/2020	Requested To Pending Da	mmy Accountant vid Canatsey			
	Disap	prove Request						
equest Deta Actions	Disap Disap Approximation Status	orove Request	Department	Category	Details	Requested Amou	nt Attachment	Reaso
equest Deta Actions	Disapi Disapi AllS Approved Status	Expense Type	Department Sales	Category	Details	Requested Amou 1.955.12 U	nt Attachment	Reaso
Actions	Disapp bills Approved Status Other Actio	erove Request	Department Sales	Category Lodging Meals - D	Details	Requested Amou 1,955.12 U 391.02 U	Attachment	Reaso

Once the **Item** has been disapproved, a red **X** will appear in the **Status** column.

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reasor
Approve		🛤 Lodging	Sales	Lodging	>	1,955.12 USD		>
Approve	×	🚔 Meals	Sales	Meals - Dinner	>	391.02 USD		>
Approve		🛧 Travel	Sales	Airfare	>	3,258.53 USD		>

Step 2: As items are **disapproved**, the **spend tracker** tool will update accordingly bringing the user under their budget.

Linked Spend Request									
 Total: 3 Expenses 							5	1,334.10	spent of \$1,775.00 approved
Miscellaneous: 0 Expenses								50	.00 spent of \$0.00 approved
Im Lodging: 1 Expense								\$455.9	8 spent of \$850.00 approved
Meals: 0 Expenses								\$0	.00 spent of \$0.00 approved
Rentals: 1 Expense								\$200.0	0 spent of \$200.00 approved
Travel: 1 Expense								\$678.1	2 spent of \$725.00 approved
Expenses Approve All									= \$
Actions Status Date	Category	Details	Amount	Reim.	Reim. Amt	Billable	Receipt	Reason	
Approve 12/1/2020	Lodging	2	455.98	Yes	455.98	No	Ð		
Approve > 12/1/2020	Airfare	! >	678.12	Yes	678.12	No			
Approve > 12/3/2020	Rental Car		200.00	Yes	200.00	No	U.		
Edit 12/4/2020, David V	Nallace says: Edited on 12/4/2020. You were only a	pproved for \$20), Dwight! The re	st is comin	g out of your po	cket			
	Total Non-Re	imbursable	\$0.00						
	Tot	al Personal	\$0.00						
	Total Re	imbursable	\$1,334.10						
	Total D	isapproved	\$0.00						
	Total Compan	y expenses	\$1,334.10						

Step 3: To disapprove a **Spend Request** completely, click the **Disapprove Request** button.

tatus	Pending		Spend Reques	t History	Full Approval	History			
urrent Approver epartment ubmitter ame ates	David Car Accountin Tommy A LA Hackat	natsey Ig ccountant chon 20 - 10/13/2020	10/09/2020 10/09/2020	10/09/2020 Requested 10/09/2020 Pending		untant ey			
	Disapp	rove Request							
Request Deta	Disapp	ve All	Duranterest	6.00		Dataila	Derived Amount	Aug. 1	
Request Deta	Disapp ils Appro Status	ve All Expense Type	Department	Cate	gory	Details	Requested Amount	Attachment	Reaso
Request Deta Actions Approve	Disapp ils Appro Status	ve All Expense Type Image Lodging	Department Sales	Cate	gory ing	Details	Requested Amount 1,955.12 USD	Attachment	Reaso
Actions Approve Approve	Disapp ils Appro	ve All Expense Type Image Lodging Meals	Department Sales Sales	Cate Lodg Meal	gory ing s - Dinner	Details >	Requested Amount 1,955.12 USD 391.02 USD	Attachment	Reaso
Actions Approve Approve Approve Approve	Disapp ils Appro	Expense Type Employee Meals Travel	Department Sales Sales Sales	Cate Lodg Meal Airfa	gory ing s - Dinner re	Details > > >	Requested Amount 1,955.12 USD 391.02 USD 3,258.53 USD	Attachment	Reaso > >

Step 3: On the Disapprove Spend Request Page, click Submit.

Disapprove Spend I Please review the spend reque to the original submitter. Spend Request Details	Request st details for accuracy. Upon submission, the spend request will be returned
Submitter Spend Request Name Dates Total Comments (optional)	Tommy Accountant (ttrainer@cirpoint.com) LA Hackathon 10/9/2020 - 10/13/2020 \$5,604.67 USD
Submit Cance	Your comments will be visible to anyone viewing this spend request.

Reimbursing through Certify Payments

Certify Payments enables your organization to reimburse employees using direct deposit, both domestically and internationally. To initiate reimbursements, your Certify Administrator must first designate you as a Treasurer within Certify. This article show you, a **Certify Treasurer**, how to reimburse your employees using **Certify Payments**.

Ξ	ertify	~					0	\$	Becca Accountan Circle Point Communication	nt 🗸 ns
A	Home	My Spend Requests			My Expense Reports			Proc	cessing Requests	8
	Add Receipts	New Spend Request	Drafts	0	New Expense Report	Drafts	0	-		-
C	Wallet		Requested	0		Pending Approval	0	Reir	nbursements	8)
∷	New Expense Report		Approved Archived	0		Pending Payment Archived	0	Aud	it Alerts	0
	Drafts									
	Alcohol test							Trav	rel & Expense Policy	
Β	Pending	My Certify Wallet		0	Add Receipts			View	r my company's Travel and	i
	Boston Business Trip	1/27/21 Honte Alban Hexid	tan Gri	\$53.58		~ ^		Expe	inse policies	
th	Reporting				MOBILE EM		D	Wha	it's New In Certify	
		1 ITEM			MORE METHODS			Brov	vse the Release Notes the Roadmap	

Step 1: Login to your Certify account homepage. Click **Reimbursements**.

Step 2: In the Reimbursements Requests queue, select the reports you want to reimburse.

Please Note: Only reports from employees who have entered and saved their **Direct Deposit Information** will allow selection.

Please Note: If an employee has not saved their **Direct Deposit Information**, you may select **Mark as Paid** to reimburse outside of Certify.

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~	certity	

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Becca Accountant ∨ Circle Point Communications

Reimbursement Requests

The following reports have already been approved and processed. Use this page to reimburse employees and pay vendors for these reports. If the employee or vendor has direct deposit configured, you can reimburse that employee or pay the vendor by checking the report's checkbox, selecting a Payment Method, and clicking Reimburse Reports. If an employee or vendor does not have direct deposit configured, you can manually reimburse or pay the report and select Mark as Paid as Payment Method before clicking Reimburse Reports.

	Approval		Reimbursement	Pay to		
Expense Report	Code	Process Date	Amount	Account	Payment Method 💿	
Expenses - 5/01/2019 - 5/15	/2019 14	5/23/2019	\$556.20 (r	none)	Mark as Paid	~
Expenses - 6/5/2014 - 6/27/2	2019 16	6/28/2019	\$2,026.81 (r	none)	Mark as Paid	~
		Total	\$2,583.01			
Appro Invoice Report Coo	oval de Process Date	Due Date	Reimbursement Amount	Pay to Account	Payment Method 🔘	
Invoice - 5/22/2010 11	5/23/2019	5/30/2019	\$50.25 (r	none)	Mark as Paid	~
1100ice - 5/25/2015						
	Expense Report Expenses - 5/01/2019 - 5/15 Expenses - 6/5/2014 - 6/27/ Notes - 6/5/2014 - 6/27/ Expenses - 6/5/2014 - 6/5/2014 - 6/5/2014 - 6/5/2014 - 6/5/2014 - 6/5/2014	Expense Report Code Expenses - 5/01/2019 - 5/15/2019 14 Expenses - 6/5/2014 - 6/27/2019 16 Approval Invoice Report Code Process Date	Expense Report Code Process Date Expenses - 5/01/2019 - 5/15/2019 14 5/23/2019 Expenses - 6/5/2014 - 6/27/2019 16 6/28/2019 Total Approval Invoice Report Code Process Date	Approval Reimbursement Expense Report Code Process Date Amount Expenses - 5/01/2019 - 5/15/2019 14 5/23/2019 \$556.20 (r Expenses - 6/5/2014 - 6/27/2019 16 6/28/2019 \$2,026.81 (r Total \$2,583.01	Approval Reimbursement Pay to Expense Report Code Process Date Amount Account Expenses - 5/01/2019 - 5/15/2019 14 5/23/2019 \$556.20 (none) Expenses - 6/5/2014 - 6/27/2019 16 6/28/2019 \$2,026.81 (none) Total \$2,583.01	Approval Reimbursement Pay to Expense Report Code Process Date Amount Account Payment Method Expenses - 5/01/2019 - 5/15/2019 14 5/23/2019 \$556.20 (none) Mark as Paid Expenses - 6/5/2014 - 6/27/2019 16 6/28/2019 \$2.026.81 (none) Mark as Paid Total \$2,583.01

If an employee has incorrectly entered or has not changed their direct deposit information, a red exclamation point alerts you prior to processing.

Reimbursement Requests

The following reports have already been approved and processed. Use this page to reimburse employees and pay vendors for these reports. If the employee or vendor has direct deposit configured, you can reimburse that employee or pay the vendor by checking the report's checkbox, selecting a Payment Method, and clicking Reimburse Reports. If an employee or vendor does not have direct deposit configured, you can manually reimburse or pay the report and select Mark as Paid as Payment Method before clicking Reimburse Reports.

Evne	neo Doporte								
Expe	ise keports			Anoroval		Reimhursement	Pay to		
	Employee	Expense Report		Code	Process Date	Amount	Account	Payment Method 💿	
	Ned Newguy	September		6		\$166.49	***** 0125	Mark as Paid	Ŧ
	Ned Newguy	November		9		\$35.00	***** 0125	Mark as Paid	Ŧ
\sim		Catalana -		10		£00.00	11111 0137	Teres H : e UNER	-
-	This employee	has not completed all necessary	direct depo	osit informati	on required fo	or reimburseme	nt. This exp	ense report must be re	eimburse
	Mel Manager	October 2		13		\$186.00	***** 0125	TCFCU – Main Street (USD)	•
	Mel Manager	Attendees		15		\$23.00	***** 0125	TCFCU – Main Street (USD)	•
					Total	\$490.49			
Invoi	ce Reports								
			Approval			Reimbursement	Pay to		
	Vendor	Invoice Report	Code	Process Date	Due Date	Amount	Account	Payment Method 🕥	
	LL Bean	Invoice - 8/9/20	5			\$464.16	***** 0126	TCFCU – Main Street (USD)	•
					Total	\$464.16			

Step 3: Click **Reimburse Report**. Depending on your company's ACH contract, reimbursement is sent to the employee within 2-7 business days.

certify 🗸							0	\$	Becca Accountar Circle Point Communication
eimbursement Re	equests								
e following reports have alr nfigured, you can reimburs es not have direct deposit c	eady been approved and processed e that employee or pay the vendor t configured, you can manually reimb	d. Use this page t by checking the r urse or pay the r	o reimburse em eport's checkbo eport and select	ployees and pay v x, selecting a Payn Mark as Paid as P	endors for these rep nent Method, and clic ayment Method befo	orts. If the en king Reimbu ore clicking Re	nployee o rse Repor eimburse	r vendor has ts. If an empl Reports.	direct deposit oyee or vendor
Expense Reports 2 of 2	t visible								
			Approval		Reimbursement	Pay to			~
Employee	Expense Repor	T	Code	Process Date	Amount	Account	Paym	ent Method	0
	Expenses - 5/01/2	2019 - 5/15/2019	14	5/23/2019	\$556.20	(none)	Marka	is Paid	~
	Expenses - 6/5/20	014 - 6/27/2019	16	6/28/2019	\$2,026.81	(none)	Mark a	as Paid	~
				Total	\$2,583.01				
nvoice Reports 1 of 1 v	visible								
		Approval			Reimbursement	Pay to			0
Vendor	Invoice Report	Code	Process Date	Due Date	Amount	Account	Paym	ent Method	G
Staples	Invoice - 5/23/2019	11	5/23/2019	5/30/2019	\$50.25	(none)	Mark a	as Paid	~
				Total	\$50.25				
	2 150								

Disapproving an Expense Report – Approvers

Occasionally, you may need to disapprove an expense report due to policy violations or other issues. A disapproved expense report is sent back to the submitter's **Drafts** folder where they can make edits and resubmit their expense report.

Step 1: On your account home page, select the number of items under **My Approval Requests.**

🗸 certify 🗸						() Cir	Frank Manager 🗸
My Spend Requests New Spend Request	Drafts Requested Approved	0	My Expense Reports New Expense Report	Drafts Pending Approval Pending Payment	0	Approval Requests Reimbursements	8
	Archived	0		Archived	0	Travel & Expense Polic View my company's Trave Expense policies	y el and
My Certify Wallet		0	Add Receipts			What's New In Certify	

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

у Арр	Approval Requests								
followir	ng expense reports h	nave been sent to you for approv	al.						
10		E	Subasia Data	6 D					
view	Policy Status	Employee	Submit Date	Start Date	End Date Expense Report	Total			
view	Policy Status Pending	Employee Meredith Employee	10/31/2016	9/1/2016	End Date Expense Report 9/15/2016 ReportExecutive - 9/1/2016 - 9/15/2016	Total \$410.73			

Step 3: To disapprove the entire expense report, select **Disapprove Expense Report** next to **Actions**. When you select **Disapprove Expense Report**, a popup will advise you that the expense report will be sent back to the submitter, and will ask you to confirm the disapproval. Click **Yes** to continue the disapproval process.





Step 4: By selecting **Disapprove Expense Report**, an email preview will be displayed where you can enter text for the submitter in the **Enter your comments** in the field provided. Click **Next** to complete the disapproval process.

Disapprove	Expense Report
This is the messa report. You may a	ge that will be sent to the expense report submitter, as well as any previous approvers of this expense add your own comments if you like. Click Next to disapprove this expense report.
То	memployee@circp1.com
сс	dmanager@circp1.com
Subject	Expense Report Disapproval From Dan Manager (dmanager@circp1.com)
Body	Hello Meredith,
	Dan Manager (dmanager@circp1.com) has disapproved an expense report that you submitted.
	Enter your comments:
	Expense Report Summary
	Expense Report Name: ReportExecutive - 9/1/2016 - 9/15/2016
	Dates: 9/1/2016 - 9/15/2016
	Login to Certify to view this report.
	Login at: https://www.certify.com/Login.aspx
Back	Next

Certify Mobile - Approving/Disapproving

Certify allows you to approve and process expense reports using the Certify Mobile app. This article shows you how to approve or process expense reports using Certify Mobile.

Step 1: On your Certify Mobile app Home screen, tap **Approval Requests**. If the number of approval requests is incorrect, tap **Sync** to update the data.

∞ AT&T 중 4:07 PM Sync certify⊘	Logo
Add Receipt Add	I Expense
Receipts to Sync	0 0
Expenses to Sync	0 6
Receipts in Certify	• •
Expenses in Certify	• •
Auto Expense Report	e
Draft Expense Reports	0.0
Inquiries	0 0
Travel	e
Approval Requests	10
Tools & Support	Ø

Step 2: To view an expense report, tap the view (document) icon under the **View** column next to the expense report you would like to open.

•••∘ AT&T 穼	4:07 PM		
certify	9	≡	≙
My Approva	l Requests		
The following exper approval.	nse reports have been se	nt to you for	
View Policy	Employee	Total	
6 🗹	Kelly Employee	\$808.49	
		\$808.49	
© Certify, Inc.	Contact Terms	Privacy	Blog
Done			

Step 3: To view a specific receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green check mark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company's policies.

To view vendor and location details, tap the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.

Actions	Status	Details	Amount	Receip
Approve D		0	25.00	
Approve >		 > 	34.40	
Approve >			12.00	
Approve			75.58	
Approve >		 > 	491.73	
Approve >		>	68.80	
Approve 🜔		2>	100.98	
Tetal Compa	otal Pers eimburs Disappro	onal : able \$1. oved : nses \$8	\$0.00 25.98 \$0.00 08.49	

If you have a question about an expense line, or about the expense report, there are several actions available in the **Other Actions** menu. To access this menu, tap the arrow (>) under the **Approval** column. In the **Other Actions** menu, select the action name.

Other Actions	×
Add Note	Edit Expense
Inquire	Edit Reim. Amount
Split Expense	Add Bank Fee
Disapprove	

Step 4: To approve the entire expense report, tap **Approve All** next to **Expenses**. To approve specific expense lines, tap the green check mark under the **Approval** column for that specific expense line. After approving, tap **Submit for Reimbursement** to send the expense report to the next approver in the approval workflow.



Approving with InstantAudit

With **InstantAudit**, **Approvers** gain beneficial information to help make approval decisions. When a **Submitter** sends an expense report for reimbursement, **Certify InstantAudit** combs through the expenses, and flags those that fall into any of the **InstantAudit Rules** set by the **Certify Administrator**. Flagged expenses are then sent to the **Approval Requests** page with the **Audit** flag to indicate the expense needs extra attention.

This article shows you, a Certify Approver, how to view InstantAudit flags on your Approval Requests page.

Step 1: On your Certify homepage, click Approval Requests.

certify ~						Frank Manager Circle Point Communications
My Spend Requests			My Expense Reports			Approval Requests 3
New Spend Request	Drafts	0	New Expense Report	Drafts	0	
	Requested	0		Pending Approval	0	Reimbursements 3
	Approved	0		Pending Payment	0	
	Archived	0		Archived	0	Travel & Expense Policy
						View my company's Travel and
						Expense policies
My Certify Wallet		0	Add Receipts			
						What's New In Certify

Step 2: The Approval Requests page opens. Click the View icon to view the Submitter's expense report.

Certify ~	0	Frank Manager 🗸 Circle Point Communications
My Approval Requests		
Expense Reports The following reports have been sent to you for approval.		
View Policy Audit Status Employee/Vendor Submit Date Invoice Date Due Date Report Approved Amazon 5/23/2019 5/22/2019 5/30/2019 Invoice - 5/22/2019	9 Tota	Total \$25.00 Il \$25.00

Step 3: You now have three data points that can help inform a better approval decision:

- InstantAudit Flag: A flag in the Audit column indicates if the expense has triggered one of your company's InstantAudit rules.
- Submitter's return **Reply** note from the **Inquiry**
- Auditor's note

Status indicates that an **Inquiry** is pending with the submitter. It can be helpful in letting the **Approver** know to ignore this report until the submitter answers.

My A	My Approval Requests											
The fo	The following expense reports have been sent to you for approval.											
The	The following expense reports have been sent to you for approval.											
Vie	ew Polic	y Au	udit S	itatus	Employee	Submit Date	Start Date	End Date	Expense Report	Total		
C			P	ending	Ellie Employee	10/8/2019	10/1/2019	10/8/2019	Oct 8 Business Trip	\$478.40		
C			P	Pending	Erin Employee	10/8/2019	10/1/2019	10/30/2019	Trip Expenses October	\$43.12		
C			P	Pending	Erin Employee	10/8/2019	10/2/2019	10/6/2019	Expenses - 10/2/2019 - 10/6/2019	\$51.10		
C			P	Pending	Erin Employee	10/8/2019	10/1/2019	10/8/2019	Expenses - 10/8/2019	\$25.00		
C			P	Pending	Ellie Employee	10/10/2019	10/1/2019	10/10/2019	North Carolina Business Trip	\$479.72		
C	!	Q)	Pending	Ellie Employee	10/10/2019	10/8/2019	10/8/2019	Expenses - 10/8/2019	\$69.78		
C			P	Pending	Ellie Employee	10/10/2019	10/10/2019	10/10/2019	Expenses - 10/10/2019	\$86.28		
C		Q	P	ending	Ellie Employee	10/10/2019	10/10/2019	10/10/2019	Expenses - 10/8/2019	\$86.28		
C			Р	Pending	Erin Employee	10/10/2019	10/10/2019	10/10/2019	Erin's Expenses for Layover	\$0.00		
									Total	\$1,319.68		

You can now approve your expenses as normal, using the **InstantAudit** flags to help make your approval decision.

Using Administrative Flags

Administrative Flags can be manually added to submitted expense lines to note report submitter actions. After an Approver adds a note to an expense line, it will be flagged for review. These flags are known as **Administrative Flags**.

This article shows you, an **Approver**, how to review and enter administrative flags.

Step 1: On your Certify homepage, click Approval Requests.

certify ~						Frank Ma Circle Point Communi
My Spend Requests			My Expense Reports			Approval Requests 3
New Spend Request	Drafts	0	New Expense Report	Drafts	0	
	Requested	0		Pending Approval	0	Reimbursements 3
	Approved	0		Pending Payment	0	
	Archived	0		Archived	0	Travel & Expense Policy
						View my company's Travel and
						Expense policies
v Certify Wallet		0	Add Receipts			
,,,						What's New In Certify

Step 2: Select the report you want to review.

My Approval Requests

The following reports have been sent to you for approval.

The foll	The following reports have been sent to you for approval.										
View	Policy Status	Employee/Vendor	Submit Date	Start Date	Due Date Report	Total					
ď	Approved	NuAmazon	10/3/2017	8/15/2016	11/1/2017 Invoice - 8/15/2016	\$443.00					
C	Inquiry	Kelly Employee	10/5/2017	8/1/2017	ReportExecutive - 8/1/2017 - 8/15/2017	\$410.73					
C	Inquiry	Kelly Employee	10/5/2017	8/21/2017	Expenses - 8/21/2017	\$34.40					
Ľ	Pending	Kelly Employee	10/9/2017	8/24/2017	Expenses - 8/24/2017	\$16.60					
					Total	\$904.73					

Please Note: If an administrative flag has been added to a user's expense report within the last 90 days, details from those prior flags will be present in the **Approval Requests** queue to hover over.

Step 3: Select the **Other Actions menu** of the specific expense line that needs a note.

xpenses Approve All										
Actions Status Dat	te	Category		Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve 🔇		×			16.60	No	0.00	No		>
Add Note Inquire Split Expen Disapprove	nse	Edit Expense Edit Reim. Amount Add Bank Fee	Total Non-Rein Tota Total Rein Total Dis Total Company	nbursable l Personal nbursable approved Expenses	\$16.60 \$0.00 \$0.00 \$0.00 \$16.60					

Step 4: In the **Enter Note** box, enter your note. Click the **Flag for Review** checkbox, and then **Save**.

Add a Note to an Expense

Your note will be saved with this expense for future reference.



Step 5: The note is now permanently added to the expense line. This report will be added to the **Expense_Policy Review** report, and also added to the user's count of administrative flags within the last 90 days.

Ex	Expenses Approve All										
	Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
	Approve >		8/23/2017	Miscellaneous	 > 	16.60	No	0.00	No		>
	Edit 10/9/2017, Jon Manager says: Please use correct expense category next time. (flagged)										

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