Certify Customer Launch Kit

Dear Customer…

Thank you for your business!

Now that you have completed implementation, you are ready to launch Certify for the rest of your company.

This Launch Kit is to help provide a successful rollout based on our past customers' experiences and best practices from the Certify Customer Success Team.

Customer Success includes your Implementation Specialists, Support Experts, Trainers, and Customer Success Managers. We have seen it all!

Please use this kit any way you need. We have templates to use, links and directions for other materials, recommended best practices, and general tips.

Welcome aboard!

Certify Customer Success

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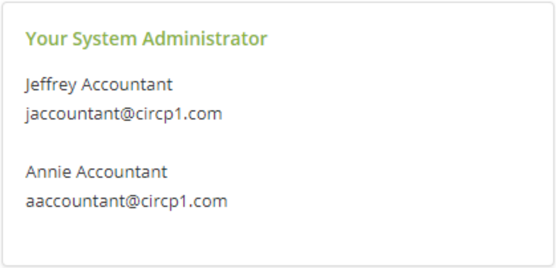
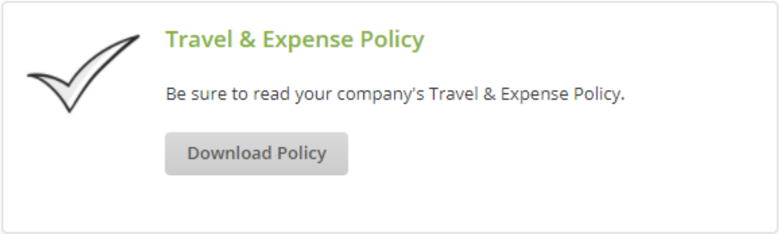
Enter internal System Administrator contact information

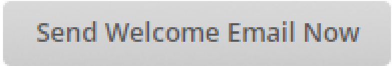


Upload full T&E policy to Certify



Send early communication prior to release date

Send Welcome Emails



Define and communicate internal T&E policies

!! Dinner Limit: $40.00!! Receipts required for all expenses!! Expense reports due every Monday!!

Internal Policies to Define, Pre-Launch

Depending on the question, Certify Support and Training will refer users to ask their question internally at your company. Certify is the vessel, but you make the rules as far as policies and processes go.

These are common questions that we answer with, *"It would be best to confirm with your internal Certify administrator."*

When Users Can Login

Can you send me my login credentials?

Mileage

How do I enter personal mileage?

Can I save my mileage until the end of the week/month?

Tips

How do I enter the tip amount from a restaurant?

Tolls

How do I enter my tolls, and/or EZ pass statement?

Credit Cards

How does my company card get paid?

Reimbursement Policy

What do I do if I expense over what my company allows?

Do I enter the full amount or only what I'm supposed to be reimbursed?

Personal Expenses

Will I be able to delete personal charges from my account?

Best Practices for Company Rollouts

Communicate.

No one likes change - we know. On top of change, no one wants to be surprised by it. Relay the message that a new (great!) system is coming – early and often. The more that you communicate, the less push-back you'll experience.

Be Positive.

Implementing a new system for a whole company can be frustrating and a LOT of work on you. Positivity and negativity run from the top down. Keep the message clear that the new process will make things easier and will be a positive change.

Be Clear.

Define your travel and expense policies and make them known and clear. While learning a new process, users will at least be familiar with the rules.

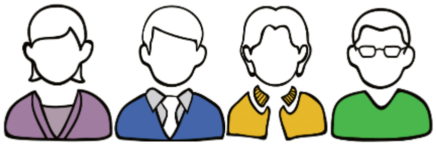
Require Training.

Set a date (or a few) in which all users should have watched Certify Training Camp.

Pilot.

A pilot group is beneficial in all areas. Not only do they give you the first impression of the new system, but they also may identify things you may not have thought of. Let the pilot group work out the kinks.

The Art of Change Management



The success of your rollout depends on two things: learning how to use the new system and changing old habits.

Certify is an “end-user” based system. This means that the end-users do a little work, approvers do a little work, accountants do a little work, and ultimately, it’s less work for everyone.

We often find Managers and Accountants still doing the clean-up on their employees’ reports, long after going live on Certify. This creates a lot of frustration. Not only are they doing the same work, but they are also learning a new system to boot!

Certify can take care of the “learning how to use it” part, but the real change management takes place with you – enforcing the use of the new system and the correct resources for help.

Our best advice: have employees fix their own errors and lean on Certify to take care of the questions.

Send inquiries, disapprove expenses, add notes, disapprove reports, and direct questions to Certify Support. It is up to the Managers and Accountants to help enforce the behavior change to really see the value of Certify.

Let’s face it - when employees need help, they want to talk to someone they know instead of calling a mystery tech Support line. We ask that you guide employees to give our Support team **one chance** for a completely different level of customer service. Our Support Experts know all the tips and tricks, current issues/bugs and handy workarounds, and they ultimately live up to their name – the experts!

Getting the employees in the right habits only makes it easier for everyone. If everyone does their little piece of the puzzle, everyone feels the difference.

Miscellaneous Tips

- **Hold managers accountable** to help manage the change within their own teams; disapprove expenses, send inquiries, and send reports back to submitters for correction.

- **Use reporting** to monitor behavior (long-pending expense reports, enterprise dashboard for a spend summary, etc.)

- **Use loose policy limits to start,** if possible. Use reporting to identify policy changes needed after a few months.

- **Use "Send Email to Users" feature** to communicate Certify-related information. This keeps messaging consistent, and even more "official."

  "Hey everyone, we changed the dinner limit to $40.00, effective September 1."

  "Managers – please make sure to review reports within 3 business days of receiving them. We have holdups in processing."

  "All Employees – there is a trend of users not splitting their own expenses – please refer to this document https://help.certify.com/hc/en-us/articles/203520920-Splitting-an-Expense*."*

  "If you have not watched the Certify Training Camp recording, please do so by the end of next week."

- **Use ReportExecutive to help set behavior** if your business requirements allow (even just in the beginning).

Free Training Resources

Demo Webinars

- Creating & Submitting Expense Reports
- Approving & Processing Expense Reports
- Configuring Company Settings for Administrators
- Reporting Overview
- Submitting & Approving Invoice Reports
- Configuring AP Invoice Settings for Administrators
- Submitting & Approving AP Invoices

[Training Links]

[Tutorial Videos]

Short, bite-sized tutorials for basic tasks.

Help Center

help.certify.com

Great, but… where do I start?

- Logging in
- Getting through the New User Setup Wizard
- Certify 101

Certify Training Camp uses the following prep and outline for our webinars. Please feel free to use these examples and material for your own internal training needs with Certify.

Creating & Submitting Reports Webinar

Example Prep

(as seen in Training Camp)

- Submit one receipt using Certify Mobile, but “forget” to fill in the Vendor and Location. Sync to Wallet (this triggers the **Cleanup Wizard**).
- Enter credit card expenses using COPY/PASTE to mimic real ones.
- Take one receipt that matches a credit card expense and use the UPLOAD method. This will upload it with the current date, so that it doesn’t match the credit card expense date (this triggers the **Link Receipts Wizard**).

Outline and Order of Material

- Login
- My Account
- Certify Wallet
- Mobile App
- Receipt Submission Methods
- New Expense Report Button
- Link Receipts Wizard
- Cleanup Wizard
- Split Expense
- Manual Mileage Entry
- Submit Report

Approving & Processing Reports Webinar

Example Prep

(seen in Training Camp)

- Create and submit report as an employee
    - Categorize one line incorrectly (used to demo **Inquiry** – ‘please change expense category’)
    - Create an expense line manually, do not include a receipt (used to demo **Inquiry** – ‘do you have a receipt?’)
    - Create an expense line that flags a policy limit, where the employee will be reimbursed a lower amount than what they spent (used to demo **Edit Reimbursable Amount**).
    - Create an expense that an approver could approve as an exception (used for adding a **Note**)
    - Create an expense line that would always be disapproved (used to demo **disapproving a single expense line**).

Outline and Order of Material

- Login
- Approval Requests queue
- Other Actions menu
    - Edit reimbursable amount
    - Inquiry – send question
    - Inquiry – use ‘edit expense’ checkbox to request an edit to an expense
    - Add Note
    - Disapprove single expense line
- Processing Requests queue
- Process report
- Accounts Payable Report
- ACH queue
- Quickbooks queue

Best Practice Hints for Using Certify

Report Submitters

Use the New Expense Report Button/ReportExecutive to avoid expense line duplication

- Use the **Link Receipts Wizard** and the **Cleanup Wizard** on red-flagged items for easy fixes
- Submit receipts often
- Enter mileage on-the-go using **Certify Mobile**
- Submit reports often instead of saving hundreds of receipts/expenses in the Wallet

Report Approvers

- Send **Inquiries** for employees to correct mistakes
- Approve via **Certify Mobile**
- Add **Notes** for issues that may not be flagged, but should be reported
- Use the **Expense Reports Pending** report to catch straggling employees
- Use the **Enterprise Dashboard** to stay in-the-know

Report Accountants

- Use **Fast-Track Processing** when you "get in the groove" so that you do not have to double-check every report.
- Disapprove expense reports that still have errors on them when they get to the processing queue – not only does it send it back and email the employee, it copies the approvers who let the error slide.
- Use **Analytics – Pcard Reconciliation Report**, **Reconciliation and Accrual Workbench**, **Client Billable Report** – all of it! Monitor the behavior to help enforce the change.

FAQs from New Certify Users

How do I link credit card expenses and receipts together on my expense report when they didn't automatically match up?

To fix:

- Use the **Merge Expenses** button on the expense line (not in the Wallet); or
- Send the line with the receipt back to the wallet. Then, use **Link Receipts** to attach the receipt onto the existing credit card transaction line.

To prevent:

- Be sure that users are waiting for credit card charges to import into the Wallet before creating their expense reports/adding to a new one.
- Use the **New Expense Report** button or **ReportExecutive** for automation when creating report.

Merge Duplicate Credit Card Expense Lines in a Draft Report

How do I submit more than one receipt for the same expense? Like a restaurant with two receipts.

Add everything into the Wallet first.

- **Email:** one email = one receipt
- **Certify Mobile:** take a photo of both receipts together. One photo = one receipt image.
- **Upload:** One selected file = one receipt

To add a secondary attachment/receipt to an already existing expense line, use **Add Image** to grab it from the Wallet

Adding Multiple Images to an Expense Line

How do I create an expense report for someone else?

You must be given delegate access by that person, or by an Administrator on their behalf. When that is done, you will access their name in your drop-down menu to toggle into their account.

To submit receipts to Certify on behalf of someone else, submit them into your own Certify Wallet and use the "**Send to Another User**" button in your Wallet.

Send Selected Receipt as a Delegate

Announcement Email Sample #1

We liked this customer-created email as it tackles questions right from the start.

NEW EXPENSE MANAGEMENT PROCESS!

Certify Expense Management Solution

Launch Date: [insert date]

Effective this date, all employees must create and submit expense reports using Certify.

Who is Certify?

Certify is a cloud-based management solution that makes expense reporting EASY.

Why change the current process?

The current process is very labor intensive for the expense report submitter, approver, and accounting staff. A seamless, automated workflow allows expense reports to be created, submitted, approved, and paid more efficiently.

Why Certify?

After selecting and testing several solutions, the team determined that Certify was the best option for us. Ease of use, available support, built-in training, and seamless workflow were key factors in partnering with Certify.

What’s Next?

You will receive a Welcome Email with your login credentials. Upon receiving the email, set up your account and begin creating and submitting expense reports.

Numerous Training Resources and Help Center articles are available on the Certify website via the Support tab.

Certify Live Support is available Monday-Friday, 24/5 EST at 1-888-925-0510 option 2. When contacting Support, please have your support code ready, or contact Certify support at support@certify.com. Certify Support is also available via Live Chat in the Support Help Center.

Questions?

Contact [internal contact names].

Announcement Sample Email #2

This email was created by Certify a few years ago for a “short and sweet” announcement.

Certify is a travel and expense software made easy. You will be able to access Certify anywhere you have internet access to build your expense reports. Over the course of the next few days, you will receive a Welcome Email from accounts@certify.com. If you do not receive a Welcome Email, please check your junk/spam folder or with your Certify Administrator [**Insert Name**]. After receiving your Welcome Email, you are ready to get started!

Follow four easy steps:

1

Education - Visit the Certify Training Camp website to begin the step-by-step web based tutorials, watch one of the training sessions and review the Help Center.

2

Registration – To begin, login to Certify on your desktop computer. Enter your email address and the temporary password provided in your Welcome email. Complete the New Account Setup Wizard to complete your account.

3

Mobilization – From your mobile phone, download the Certify mobile app using the Apple iTunes Store, Android Google Play Store, Windows Phone Store or Blackberry Store. (If viewing this email on your mobile phone just click on the link for direct access.)

4

Get Started - Begin utilizing your Certify Mobile App and Certify desktop application. Use these steps to submit your first expense report!

Your Certify Team

Customer Success Manager

Certify Support

support@certify.com

1-888-925-0510 option 2

Chat within the Certify Help Center