Trainer's Tips & Tricks

emburse certify

Trust us, we’ve seen it all here. Here, find some tips from our team to facilitate your own, and best, training on Certify!

Getting Ready

How many employees? If over 50, think about more than one session to accommodate different schedules. For a large employee base, consider utilizing a “power” group of users – employees tasked with becoming experts to train and support the larger group.

Who needs to be trained? If it is just administrators, you can cover that in one session. If end users, perhaps split up sessions on how to login/submit their first expense report, and how to review/approve at a different time.

Will everyone have access at the time of training? We often find you can go in two directions:

- Watch & Listen
- Watch & Practice

We recommend separating the formal instruction from the practice time. This allows everyone to receive the same message without going off track. Then, schedule a separate workshop for others with you to practice and ask questions.

When do we need to train? We always encourage planning ahead for training – however, remember things can change when implementing. Something might take longer than expected, requirements may change, and/or your organization may decide to purchase an add-on product. Have a solid plan but try to keep some flexibility in timing. Always wait to train until configuration is completely done. We recognize there can be pressure to go-live by a certain date, but we advise to prioritize employees’ adoption success as well.

Require Training

Often, the amount of training that one receives can make or break their success with new software. A user may have very simple questions, but a negative reaction on the system as a whole; therefore, deterring them from even trying to use it correctly. Require that they attend your training, send them all the resources you can find, and follow-up. Let them know where they can find support after you are finished.

Define and Communicate T&E Policies Early

Certify will be new to everyone, so define your travel and expense policies early to limit questions. Keeping questions related to the software will help keep the group focused.

Prepping the Material

Creating & Submitting Expense Reports Prep:

- 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 car 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).

Creating & Submitting Expense Reports 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 Prep:

- Create and submit report as an employee
    - Categorize one line incorrectly (use 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).

Approving & Processing Reports 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 Practices

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, but it also 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.

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Anticipate the Questions

Common FAQs

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]
