Configuring Policies

Company Policies allow you to create expense reporting policies. You can establish policies to require certain details to be added onto expense transactions. Using this guide, you will learn:

- How to enable policies
- How to configure policies
- How policies are displayed on the Purchases page

Enable Policies

1. Click on the Company Preferences tab
2. Select Features
3. Ensure Setup policies for expenses and expense reports is set to Yes. If not, click on the button to toggle it
4. Click Save
5. A new button for Policies will appear under the Company Preferences navigation bar
Configure Policies

1. Navigate to **Company Preferences**
2. Click on **Policies**
3. To add a new policy, click on **Add a New Policy**
4. Click on the pencil icon to edit a pre-existing policy

5. Select an **Expense Category** and/or input an amount in **Set a total spend limit**.
   - You can choose to utilize any combination of these fields. For example, if you leave expense category blank and enter “25” as the amount, then all transactions $25 or greater will require the below selections regardless of category.
   - If both fields are blank, then this policy will be applied to all expenses entered into Purchases.
6. In **Policy Requirements**, check off details you’d like users to add based on the conditions set above. (Note: If Entertainment or Meals type expense categories are selected, another policy requirement will appear called “Attendees.”)

![Policy Requirements screenshot](image)

7. In the **Policy Outcomes** section, you can choose whether to allow the employees to submit expenses that fall out of restrictions and let the approvers decide based on the out of policy warning flag, or strictly prevent those from being submitted.
   - (Note: If the first option is chosen, the out of policy message will remain on transactions throughout the submission, approval, and export processes.)

![Policy Outcomes screenshot](image)

8. **Warning Text** is optional. There will be a default message that displays when someone is in violation.

9. Name this policy and click **Create Policy**.
How Policies are displayed on the Purchases page

If the expense is missing details and is violating a policy you’ve set, this is how it appears for the user.

Click the **View Policy** flag to view the warning text