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 cloud-based 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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A Certify Approver is defined as a user whom has expense reports sent to them for review and approval. Approvers can:

- Approve and then the report forward 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 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.

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
Approver’s Review Tools

- **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

### 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

**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.

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.
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.

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.

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
 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.
Approving/Disapproving Reports

**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.

![My Approval Requests Table]

**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.
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.
Approving/Disapproving Reports

**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.

**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.
Approving/Disapproving Reports

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 open.
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.
Approving/Disapproving Reports

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.

**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 approval in the approval workflow.
Approving/Disapproving Reports

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.

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.
If an employee has incorrectly entered or has not changed their direct deposit information, a red exclamation point alerts you prior to processing.
Step 3: Click **Reimburse Report.** Depending on your company’s ACH contract, reimbursement is sent to the employee within 2-7 business days.
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.
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.

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.
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.
**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.
**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 *Approval* column. In the *Other Actions* menu, select the action name.
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.

![Approval Screen](image-url)
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