emburse certify

End User Learning Map

KEY TASKS AND LEARNING AREAS

★ COMPLETE YOUR ACCOUNT DETAILS

★ ADD RECEIPTS & EXPENSES

★ EDIT & SUBMIT EXPENSE REPORTS

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2 Complete 'My Account'

Configuring Your Account
★ Account Details
Adding Your Credit Card
Adding Your Phone Number
Enter Direct Deposit Details
Change Default Language
Add an Additional Email Address

Download Certify Mobile
Install on Your iPhone
Install on Your Android
Connect Certify and Uber

User Delegation
★ Act as a Delegate User
Assign a Delegate Yourself

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1 First-Time Introduction

Understanding Certify Expense
Getting Started
New User Setup Wizard
Create & Submit Expenses

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4 Managing Your Wallet

Working in your Wallet
Deleting an Item
Editing Items
Merge Items
Reviewing Items
Creating Expenses from
Credit Card Transactions

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3 Add Receipts & Expenses

Emailing & Uploading
Emailing Receipts
Uploading From Your Computer
Sending to Another User

Add Receipts & Expenses on the App
★ Adding Expenses on the App
Adding Receipts on the App
Add Receipts from your Photo Gallery
Using Autofill

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5 Review Your Expense Report

Edit Expenses
Editing with the Cleanup Wizard
Splitting Expenses

★ **Edit Receipts**
Adding Additional Images
Attach to an Expense Line
Using the Link Receipts Wizard

Add Mileage
Create a Mileage Expense Line
★ Add a UK Mileage Expense

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6 Submit Your Expense Report

★ **Submit**
Expense Reports
Recalling Reports

Inquiries
Replying to an Inquiry

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7 Extra Help

System Administrator
When to Contact

★ **Password**
Reset