



KEY TASKS AND LEARNING AREAS

- ★ COMPLETE YOUR ACCOUNT DETAILS
- ★ ADD RECEIPTS & EXPENSES
- ★ EDIT & SUBMIT EXPENSE REPORTS

1 First-Time Introduction

Understanding Expense Professional

[Getting Started](#)
[New User Setup Wizard](#)
[Create & Submit Expenses](#)



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](#)

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[Connect Certify and Uber](#)

User Delegation

★ [Act as a Delegate User](#)
[Assign a Delegate Yourself](#)

4 Managing Your Wallet

Working in your Wallet

[Deleting an Item](#)
[Editing Items](#)
[Merge Items](#)
[Reviewing Items](#)
[Creating Expenses from Credit Card Transactions](#)

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](#)

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](#)



6

Submit Your Expense Report

Submit

★ [Expense Reports](#)
[Recalling Reports](#)

Inquiries

[Replying to an Inquiry](#)

7 Extra Help

System Administrator

[When to Contact](#)



Password

[Reset](#)

