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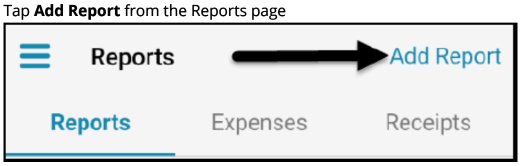
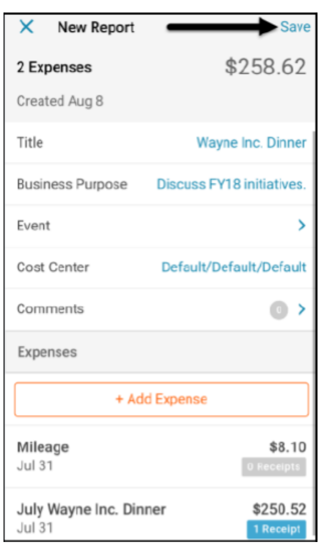
Create and Submit Expense Report in Mobile

1. Open an active session on your mobile device and log into the app.
2. Tap **Expense** from the main menu.
3. Tap **Add Report** from the Reports page



4. Tap **Title** to give the expense report a unique name, then tap **Save**.
5. Depending on the expense policy assigned to, tap **Business Purpose** and enter text as applicable, then tap **Save**.
6. Depending on the expense policy assigned to, tap **Event** to view and apply an event to the report.
7. Tap **Cost Center** to access the Cost Centers page, then tap into the different cost centers and select alternative cost centers if applicable.
   - Depending on the expense policy assigned to, the Cost Center field may or may not be adjustable, or not appear at all.
   - Enable **Jobs** for the expense policy to enter applicable jobs.
8. Tap **Comments** to add any additional detail, then tap **Save**.
9. Tap **+ Add Expense** to bring up two options for adding an expense: **Add Existing Expense** or **Create New Expense**.
   - Populate all required fields.
   - Tap **+ Add Expense**
   - Tap **Add Existing Expense** to select an existing expense from the Expenses page. Tap **Attach** to add the expense to the report.
   - Tap **Create New Expense** to create a New Expense. Tap **Save** once the expense has been created, then tap **Ok** once the **Expense Saved** window appears to attach to the expense report.
   - As expenses are added to the expense report, the dollar figure will populate based on the dollar amounts associated with the added expenses.
10. Tap **Save** for two options to appear: **Save & Submit** to send the expense report for approval and **Save for Later** for the expense report to appear within the In Progress section of the Expense > Reports page in a status of Unsubmitted.



Important Information:

- Only employees assigned to an expense policy can add expense reports, expenses, and receipts via the mobile app.

- To receive notifications after report is approved, returned or paid (via payroll processing) enable notifications for the app within the mobile device.
- The Reports page will display three sections: In Progress, Pending, and History. In Progress displays any expense reports in an Unsubmitted or Returned status. Pending displays any expense reports in a Submitted, Approved, Partially Approved, or Pending Paid status. History displays any expense reports which are in a Paid status.
- Recall a previously submitted expense report by opening an expense report in a Submitted status in the Pending section and tapping Recall. Once the Recall Expense Report? window appears, tap **Confirm**.
- If a user has proxy access, see Submit Expense Report as Proxy via Mobile for more information.
- Only the submitter can delete an expense report. The admin or approver must return the report to the submitter at which point they can delete.

Please see the video below:

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