

How to Submit an Expense Report for Approval- Airline, Baggage and Ground Transportation examples

These are examples only. Below you will find a step-by-step guide on how to add receipts into your wallet, submit a new expense report and check on pending submission of expenses. Below is an example of submitting expenses for air, baggage and ground transportation, these are examples only.

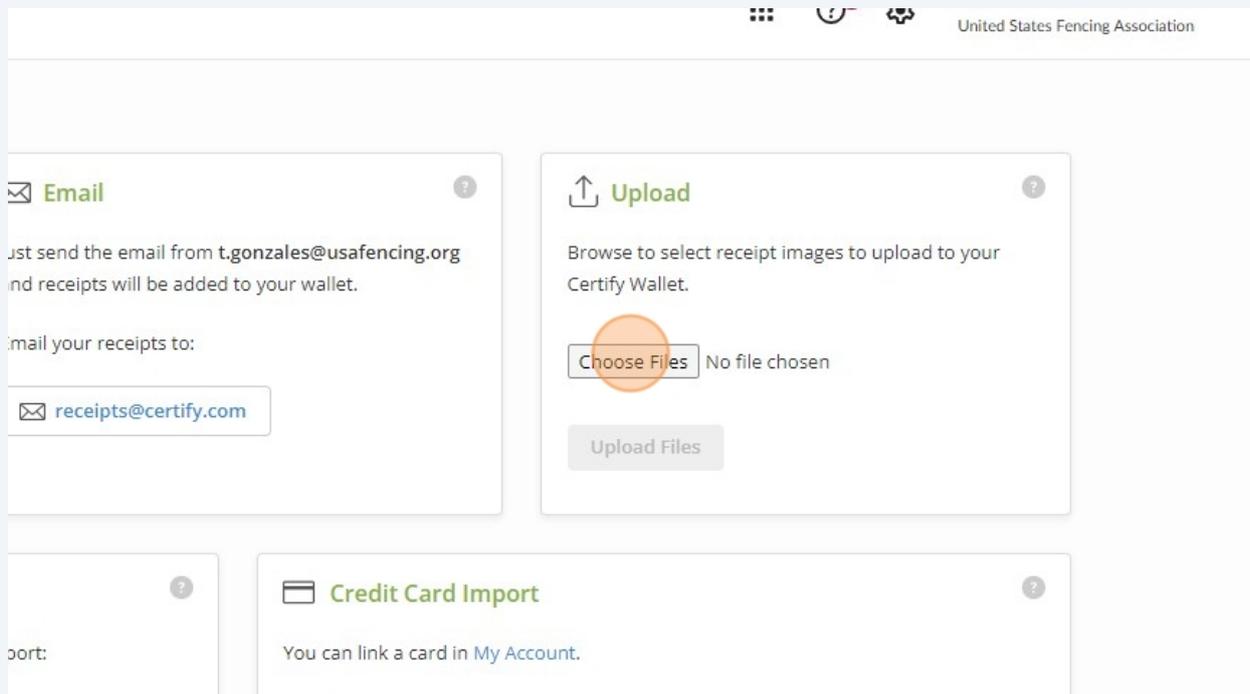
1 Navigate to <https://expense.certify.com/Home.aspx>

2 Click "Add Receipts"

The screenshot shows the 'emburse certify' web application. On the left is a navigation menu with items: Home, Add Receipts (highlighted with an orange circle), Wallet, Processing Requests, New Expense Report, Drafts, Pending, and Reporting. The main content area is divided into four panels: 'My Certify Wallet' (0 items, empty), 'My Expense Reports' (with a 'New Expense Report' button), 'Add Receipts' (with icons for mobile, email, and upload), and 'Schedule Expense Report' (partially visible).

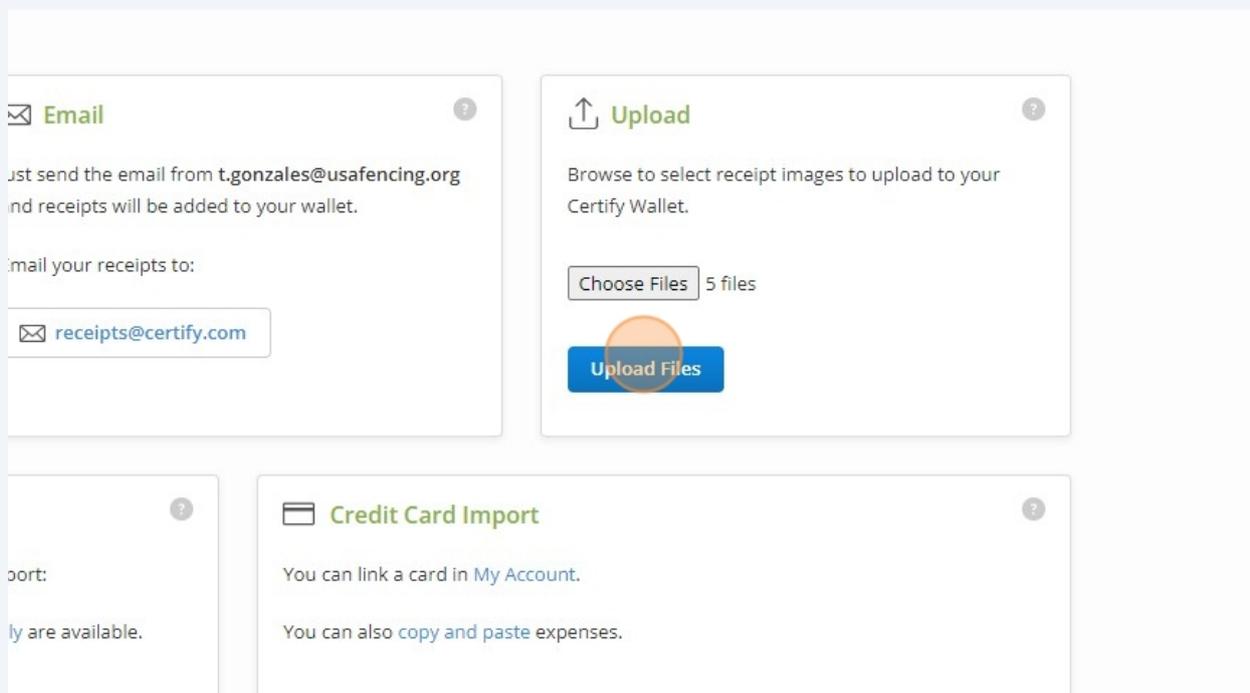
3

Click the "Choose Files" button, upload the receipts you will be submitting for your expenses.



4

Click Upload Files.



5 Click "Wallet" to view your recently uploaded receipts.

emburse certify

Home

Add Receipts

Wallet

Processing Requests

New Expense Report

Drafts

Pending

Reporting

Add Receipts And Expenses

5 files have been uploaded to your Certify Wallet.

Certify Mobile

Certify Mobile allows you to easily manage your Certify Wallet on the go.

Download on the App Store

GET IT ON Google Play

Email

Just send the email from **t.gon** and receipts will be added to y

Email your receipts to:

receipts@certify.com

Receipt Integration

6 Once your receipts are uploaded into your wallet, click "New Expense Report"

emburse certify

Home

Add Receipts

Wallet

Processing Requests

New Expense Report

Drafts

Pending

Reporting

My Certify Wallet

Receipts

<input type="checkbox"/>	Source	Receipt	Date	Category/Details	Vendor
<input type="checkbox"/>	↑	📄	10/15/2018	> Ground Transportation	Uber
<input type="checkbox"/>	↑	📄	3/3/2022	> Bagagge Fees	American Airlir
<input type="checkbox"/>	↑	📄	1/14/2023	>	Airbnb HQ
<input type="checkbox"/>	↑	📄	1/3/2024	> Air	United
<input type="checkbox"/>	↑	📄	9/20/2024	>	

Expenses

7 Click "Start with a blank expense report".

Home

Add Receipts

Wallet

Processing Requests

New Expense Report

Drafts

Pending

Reporting

Create a New Expense Report

What would you like to do?

Add all items to a new expense report

Use a date range to add some items to a new expense report

Start with a blank expense report

Back Next

8 Click Next.

Add Receipts

Wallet

Processing Requests

New Expense Report

Drafts

Pending

Reporting

Create a New Expense Report

What would you like to do?

Add all items to a new expense report

Use a date range to add some items to a new expense report

Start with a blank expense report

Back Next

9 Name your Expense Report, i.e. "October NAC Expenses".

emburse certify

Create a New Expense Report

Enter expense report information

Expense Report Name

Start Date

End Date

Description

Location

Back Next

10 Click the start date for the range of your expenses.

emburse certify

Create a New Expense Report

Enter expense report information

Expense Report Name

Start Date

End Date

Description

Location

Back Next

11 Click the end date for the range of expenses.

Verify

Receipts

Expense Report

g

ng

Create a New Expense Report

Enter expense report information

Expense Report Name

Start Date

End Date

Description

Location

12 In the "Location" field, find the NAC for which you are submitting your expenses.

Receipts

Expense Report

g

ng

Create a New Expense Report

Enter expense report information

Expense Report Name

Start Date

End Date

Description

Location

13 Click Next.

The screenshot shows a web interface for creating an expense report. On the left is a sidebar with navigation options: Processing Requests (checked), New Expense Report, Drafts, Pending, and Reporting. The main form area contains the following fields: Start Date (10/3/2024), End Date (10/8/2024), Description (empty text box), and Location (October NAC dropdown). At the bottom of the form are two buttons: a grey 'Back' button and a blue 'Next' button, which is circled in orange to indicate it should be clicked.

14 Click the date for the receipt you are submitting.

The screenshot shows the same web interface as in step 13, but with a date picker calendar open over the 'Date' field. The calendar is for September 2024 and shows the days of the week (Sun to Sat) and the dates (1 to 30). The date '20' is highlighted in blue, indicating it is the selected date for the receipt. The 'Next' button from the previous step is still visible and circled in orange. The main content area above the form displays the message: 'There are no expenses in' followed by 'Enter the details of the new expense or click on an item i'.

15

Select the dropdown menu for category, find the correct category for your receipt you are submitting, i.e. "Air"

There are no expenses in this report yet.

Enter the details of the new expense or click on an item in your Certify Wallet to add it to the report.

Add Expense

Date: 10/3/2024

Category: Air

Location: October NAC

Reason:

Receipt:

My Certify Wallet

	Date	Category
<input type="button" value="Add"/>	10/15/18	Ground Tran
<input type="button" value="Add"/>	11/10/20	
<input type="button" value="Add"/>	3/3/22	Bagagge Fee
<input type="button" value="Add"/>	1/14/23	
<input type="button" value="Add"/>	1/3/24	Air

16

For "Carrier" on air receipts, type the airline you are flying on.

Pending

Reporting

Add Expense

Date: 10/3/2024

Category: Air

Amount: United States Dollar

Location: October NAC

Carrier:

From:

To:

Reason:

Receipt:

17 In the "From" box, type where your flight is coming from.

Reporting

Add Expense

Date: 10/3/2024

Category: Air

Amount: United States Dollar

Location: October NAC

Carrier: American

From:

To:

Reason:

Receipt:

18 In the "To" box, type where your flight is going.

Reporting

Add Expense

Date: 10/3/2024

Category: Air

Amount: United States Dollar

Location: October NAC

Carrier: American

From: Denver

To:

Reason:

Receipt:

19 Click Select.

Reporting

Add Expense

Date: 10/3/2024

Category: Air

Amount: United States Dollar

Location: October NAC

Carrier: American

From: Denver

To: Atlantic City

Reason:

Receipt: **Select**

Save Cancel

20 On the right hand side, locate your air receipt, and click select.

United States Dollar

My Certify Wallet

Merge Items

	Date	Category	Description
Select	No Receipt		
Select	10/15/18	Ground Transp...	Emburse Test- Ground Tran...
Select	11/10/20		Emburse test- Meals.jpg
Select	3/3/22	Bagagge Fees	Emburse test- Airline.png
Select	1/14/23		Emburse Test- Hotel.png
Select	1/3/24	Air	Emburse test- Baggage.png

Cancel

21

In the "Amount" field, the amount will populate based off the receipt you just selected, ensure the amount in this area matches that on the receipt.

rafts

October NAC expenses

ending

porting

Enter the details of the new expense or click on an item in your C

Add Expense

Date: 10/3/2024

Category: Air

Amount: 225.60 United States Dollar

Location: October NAC

Carrier: American

From: Denver

To: Atlantic City

Reason:

Receipt

Americ

American Air
333 Amon C
ort Worth TX
http://www.aa
-800-433-73

Passenger

Description

Ticke

JS

75

22

Click Save.

Reporting

Add Expense

Date: 10/3/2024

Category: Air

Amount: 225.60 United States Dollar

Location: October NAC

Carrier: American

From: Denver

To: Atlantic City

Reason:

Receipt

Change

Save

Cancel

23 If you need to edit an expense after you saved it click the pencil icon.

The screenshot shows the 'Expense Report' interface. On the left is a navigation sidebar with options: Home, Add Receipts, Wallet, Processing Requests, New Expense Report, Drafts, October NAC expenses, Pending, and Reporting. The main content area is titled 'Expense Report' and shows a report for 'October NAC expenses' covering dates '10/3/2024 - 10/8/2024'. Below this is a table of expenses:

Expense	Date	Category	Details
 	10/3/2024	Air	<input checked="" type="checkbox"/> Meets policy. From Denver to Atlantic City Carrier: American Location: October NAC

At the bottom right of the table, there are summary labels: 'Total Non-Reimbursat', 'Total Reimbursat', and 'Total Expens'. Below the table is an 'Add Expense' button.

24 Make any edits and click save.

The screenshot shows the 'Expense Edit' form. The left sidebar has 'Pending' and 'Reporting' options. The form fields are:

- Carrier: American
- From: Denver
- To: Atlantic City
- Reason: Emburse test- Airline.png
- Receipt: Change

At the bottom, there are three buttons: 'Save' (highlighted with an orange circle), 'Cancel', and a greyed-out 'Change' button.

25

To add another receipt to your expense submission, re click into the date for your next receipt.

October NAC expenses

Carrier: American
Location: October NAC

Total Non-Reimbursable
Total Reimbursable
Total Expenses

Pending
Reporting

Add Expense

Date 

Category

Location

Reason

Receipt

26

Find the category for your next receipt, i.e. "Baggage Fees".

Total Non-Reimbursable \$0.00
Total Reimbursable \$225.60
Total Expenses \$225.60

Add Expense

Date 

Category 

Location

Reason

Receipt

My Certify Wallet

	Date	Category	Descrip
<input type="button" value="Add"/>  	10/15/18	Ground Transp...	Emburs
<input type="button" value="Add"/>  	11/10/20		Emburs
<input type="button" value="Add"/>  	1/14/23		Emburs
<input type="button" value="Add"/>  	1/3/24	Air	Emburs

27 In the "Vendor" field, type in your airline for your baggage receipt.

Reporting Total Expense

Add Expense

Date

Category

Amount

Location

Vendor

Location

Reason

Receipt

28 In the "Location" field, enter the city for the tournament.

Reporting Total Expense

Add Expense

Date

Category

Amount

Location

Vendor

Location

Reason

Receipt

29 Click Select.

Reporting Total Expenses

Add Expense

Date: 10/3/2024

Category: Baggage Fees

Amount: United States Dollar

Location: October NAC

Vendor:

Location: Atlantic City

Reason:

Receipt:

30 Locate your baggage receipt on the right hand side.

Total Expenses: \$225.00

My Certify Wallet Merge Items

	Date	Category	Description
<input type="button" value="Select"/>	No Receipt		
<input type="button" value="Select"/>	10/15/18	Ground Transp...	Emburse Test- Ground Tran...
<input type="button" value="Select"/>	11/10/20		Emburse test- Meals.jpg
<input type="button" value="Select"/>	1/14/23		Emburse Test- Hotel.png
<input type="button" value="Select"/>	1/3/24	Air	Emburse test- Baggage.png
<input type="button" value="Select"/>	10/3/24	Air	Emburse test- Airline.png

31

In the "Amount" field, the amount will populate based off the receipt you just selected, ensure the amount in this area matches that on the receipt.

New Expense Report

Drafts

October NAC expenses

Pending

Reporting

Total Reimbursat

Total Expens

Edit Expense

Date: 10/3/2024

Category: Baggage Fees

Amount: 35.00 United States Dollar

Location: October NAC

Vendor: United

Location: Atlantic City

Reason: Emburse test- Baggage.png

Receipt: Change

32

Click Save.

Reporting

Category: Baggage Fees

Amount: 35.00 United States Dollar

Location: October NAC

Vendor: United

Location: Atlantic City

Reason: Emburse test- Baggage.png

Receipt: Change

Save

Cancel

33

To add a receipt for Ground Transportation, such as Ubers, select the date the transportation was taken on. NOTE: If you are driving to the tournament you will select "Mileage" Ground Transportation is for ride services only.

The screenshot shows the 'Add Expense' form in a web application. On the left, there is a sidebar with navigation options: Drafts, October NAC expenses, Pending, and Reporting. The main content area shows a summary table with the following data:

Location: Atlantic City
Location: October NAC
Total Non-Reimbursable
Total Reimbursable
Total Expenses

Below the summary is the 'Add Expense' form. The 'Date' field is open, showing a calendar for September 2024. An orange circle highlights the calendar icon. The 'Category' dropdown is set to 'Ground Transportation'. The 'Location' dropdown is set to 'October NAC'. The 'Reason' field is empty. The 'Receipt' field has a 'Select' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

34

Select the "Ground Transportation" category.

The screenshot shows the 'Add Expense' form with the 'Ground Transportation' category selected. The 'Date' field is set to 10/4/2024. The 'Category' dropdown is highlighted with an orange circle. The 'Location' dropdown is set to 'October NAC'. The 'Reason' field is empty. The 'Receipt' field has a 'Select' button. At the bottom of the form are 'Save' and 'Cancel' buttons. To the right of the form is a 'My Certify W.' section with three 'Add' buttons, each with an upload icon and a document icon.

35 In the "Vendor" field, type the name of ground transportation you took, i.e. Uber.

Reporting

Add Expense

Date 

Category 

Amount 

Location 

Vendor

Location

Reason

Receipt

My Certify







36 In the "Location" field, enter where your ground transportation was taken.

Reporting

Add Expense

Date 

Category 

Amount 

Location 

Vendor

Location

Reason

Receipt

My Certify







37 Click Select.

Reporting

Date 10/4/2024

Category Ground Transportation

Amount United States Dollar

Location October NAC

Vendor Uber

Location Atlantic City

Reason

Receipt **Select**

Save Cancel

38 Locate your ground transportation receipt on the right hand side.

Total Reimbursable \$260.60

Total Expenses \$260.60

My Certify Wallet			
	Date	Category	Description
Select	No Receipt		
Select	10/15/18	Ground Transp...	Emburse Test- Ground Tran...
Select	11/10/20		Emburse test- Meals.jpg
Select	1/14/23		Emburse Test- Hotel.png
Select	10/3/24	Air	Emburse test- Airline.png
Select	10/3/24	Bagagge Fees	Emburse test- Baggage.png

39

In the "Amount" field, the amount will populate based off the receipt you just selected, ensure the amount in this area matches that on the receipt.

October NAC expenses

Total Reimbursat
Total Expens

Pending

Reporting

Edit Expense

Date: 10/4/2024

Category: Ground Transportation

Amount: 25.68 United States Dollar

Location: October NAC

Vendor: Uber

Location: Atlantic City

Reason: Emburse Test- Ground Transportation.png

Receipt: Change

40

You can view the receipt on the right hand side of the screen once it has been selected.

Location: Atlantic City
Location: October NAC

Total Non-Reimbursable	\$0.00
Total Reimbursable	\$286.28
Total Expenses	\$286.28

Receipt Image

UBER

Uber Technologies, Inc
1455 Market Street
San Francisco CA US 94103

\$25.68
American Express - 1004
10/15/2018 5:55 PM
Receipt: 2UWA

Pick-up 5:43 PM
San Francisco, CA US

Drop-off
San Francisco, CA US

Car
Black SUV

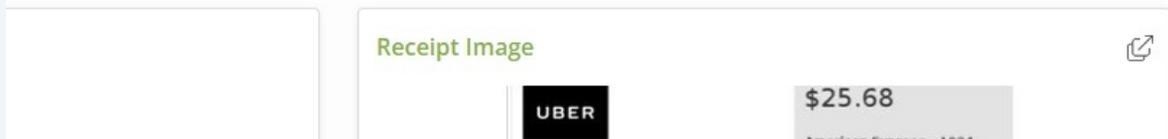
Duration
00:12:10

Distance
1.44 mi

Map

41 You can also view the receipt by click this button.

<input checked="" type="checkbox"/> Meets policy. From Denver to Atlantic City Carrier: American Location: October NAC	225.60		Emburse test- Airline.png
<input checked="" type="checkbox"/> Meets policy. Vendor: United Location: Atlantic City Location: October NAC	35.00		
<input checked="" type="checkbox"/> Meets policy. Vendor: Uber Location: Atlantic City Location: October NAC	25.68		
Total Non-Reimbursable		\$0.00	
Total Reimbursable		\$286.28	
Total Expenses		\$286.28	



42 Click Save.

 Reporting

Date 

Category 

Amount 

Location 

Vendor

Location

Reason

Receipt

43

Once you have added in your receipts and filled out all information, check to make sure everything looks correct. If so, click "Submit for Approval".

The screenshot shows the top right of a web application. In the top right corner, there is a user profile for "Tanner Gonzales" with a dropdown arrow and the text "United States Fencing Association". Below this, there is a "Print Report" link and a blue button labeled "Submit for Approval" which is circled in orange. Below the button is a table with the following data:

Details	Amount	Receipt	Reason
<input checked="" type="checkbox"/> Meets policy. From Denver to Atlantic City Carrier: American Location: October NAC	225.60		Emburse test- Airline.png
<input checked="" type="checkbox"/> Meets policy. Vendor: United Location: Atlantic City Location: October NAC	35.00		

44

Click the "I certify this expense report is true and accurate." field.

The screenshot shows the bottom part of an expense report form. On the left, there are two sections: "Pending" with a clock icon and "Reporting" with a calendar icon. On the right, there is a summary section with the following information:

Total \$260.60
Approver Tabitha Chamberlin
Comments (optional)
Your comments will be visible to anyone viewing your expense report

Below the summary, there is a checkbox labeled "I certify this expense report is true and accurate." which is circled in orange. At the bottom, there are two buttons: "Submit" (blue) and "Cancel" (grey).

45 Click Submit.

Reporting

Approver Tabitha Chamberlin

Comments (optional)

Your comments will be visible to anyone viewing your expense report

I certify this expense report is true and accurate.

Submit Cancel

46 Done. Your expenses have now been submitted, to see your pending expenses, click "Pending" on the right hand side.

Add Receipts

Wallet

Processing Requests

New Expense Report

Drafts

Pending

October NAC expenses

Reporting

1/14/23	Airbnb HQ	area of your Certify home page.
11/10/20	Emburse test- Meals.jpg	\$17.75
10/15/18	Uber	\$25.68

3 ITEMS

Add Receipts

MOBILE EMAIL UPLOAD

MORE METHODS

Schedule Expense Report

Report Meeting expense Cont