



Certify User Guide

QUICK START



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This version is current as of April 1, 2021

For continuously updated instructions, please visit our Help Center within the Certify Support tab.

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.

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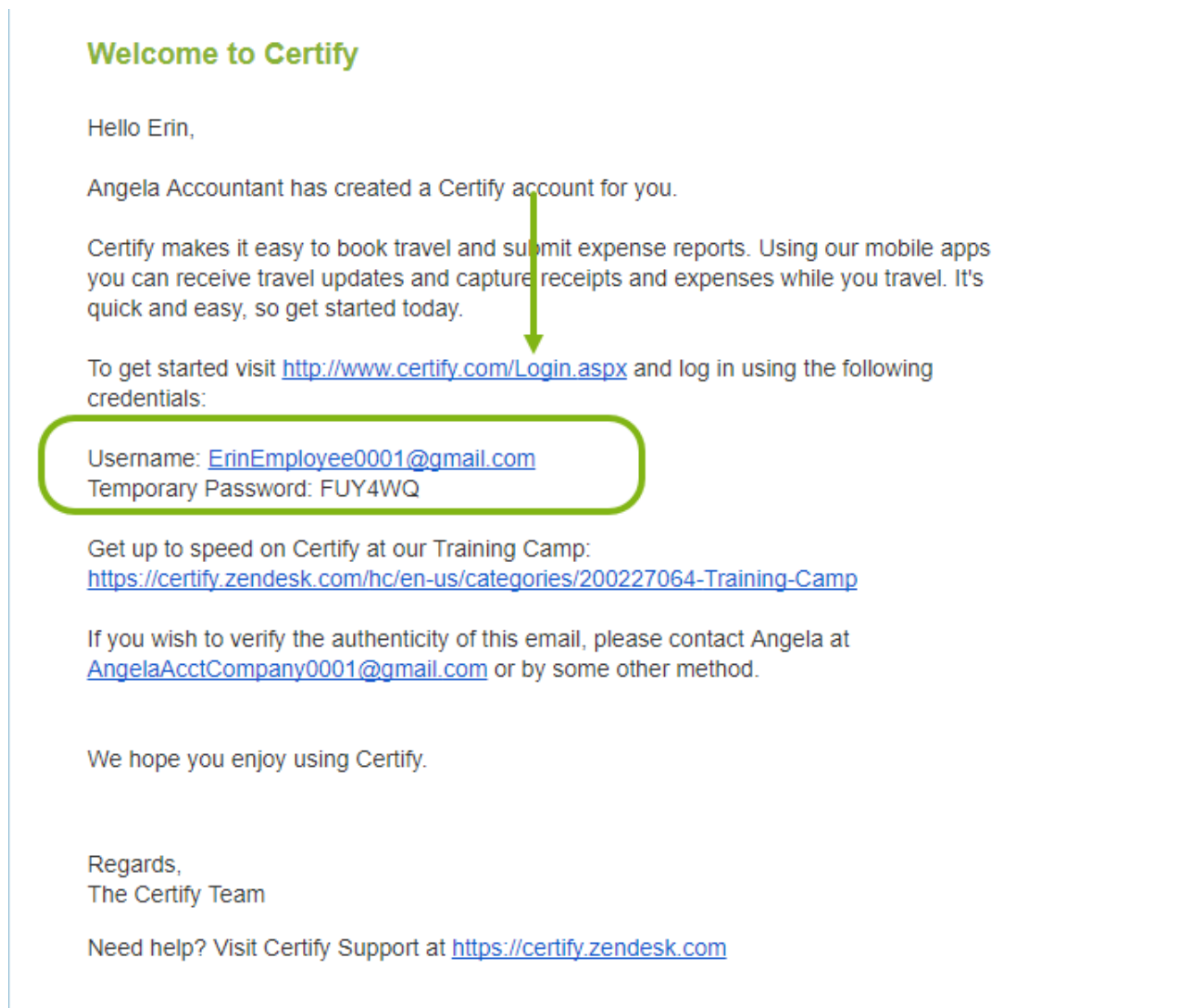
CERTIFY QUICK START GUIDE

This guide is a condensed version with the basics of how to get started in Certify. Please feel free to utilize our other User Guides for more detailed instructions, and as always, our online Help Center.

Logging into Certify for the First Time

When a company releases Certify to new users, you will receive your login instructions directly from your company. If not directed otherwise, you will be sent a **Welcome Email** with your email address and a temporary password to use for your first login. This article shows you how to login to Certify for the first time using your Welcome Email.

Step 1: To begin creating your Certify account, select the link from your email.



Welcome to Certify

Hello Erin,

Angela Accountant has created a Certify account for you.

Certify makes it easy to book travel and submit expense reports. Using our mobile apps you can receive travel updates and capture receipts and expenses while you travel. It's quick and easy, so get started today.

To get started visit <http://www.certify.com/Login.aspx> and log in using the following credentials:

Username: ErinEmployee0001@gmail.com
Temporary Password: FUY4WQ

Get up to speed on Certify at our Training Camp:
<https://certify.zendesk.com/hc/en-us/categories/200227064-Training-Camp>

If you wish to verify the authenticity of this email, please contact Angela at AngelaAcctCompany0001@gmail.com or by some other method.

We hope you enjoy using Certify.

Regards,
The Certify Team

Need help? Visit Certify Support at <https://certify.zendesk.com>

Step 2: The link takes you to the Certify website. Enter the login credentials you received in your **Welcome to Certify** email into the **Email** and **Password** fields and click **login**.

Account Login

System Status: ● Happy and healthy

Email

Password

LOGIN

[Recover your password](#)

Step 3: On the next page, you are prompted to create a new password. The strength of your new password is evaluated as you type it. Click **Submit**.

Your password has expired.

Please enter your temporary or old password, and choose a new password.

Temporary or Old Password

New Password

?

Strongest

Confirm Password

Submit

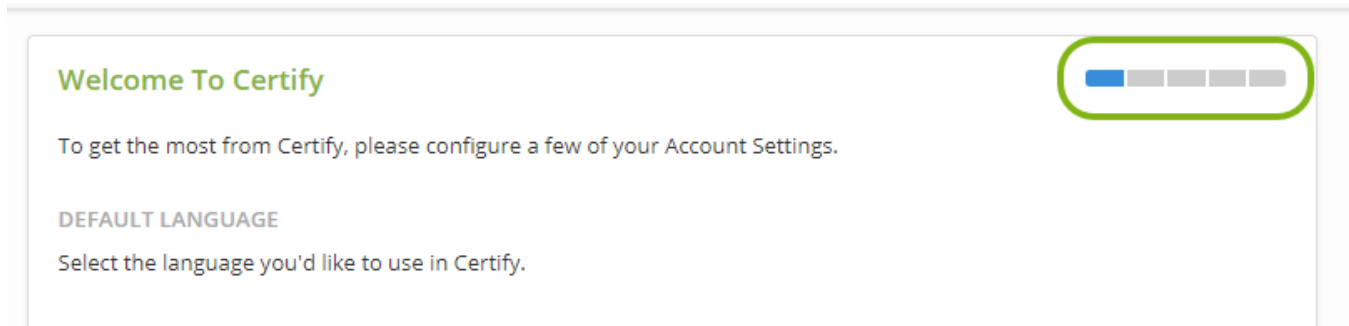
Reset

Once you click **Submit**, you will begin the **New User Setup Wizard**.

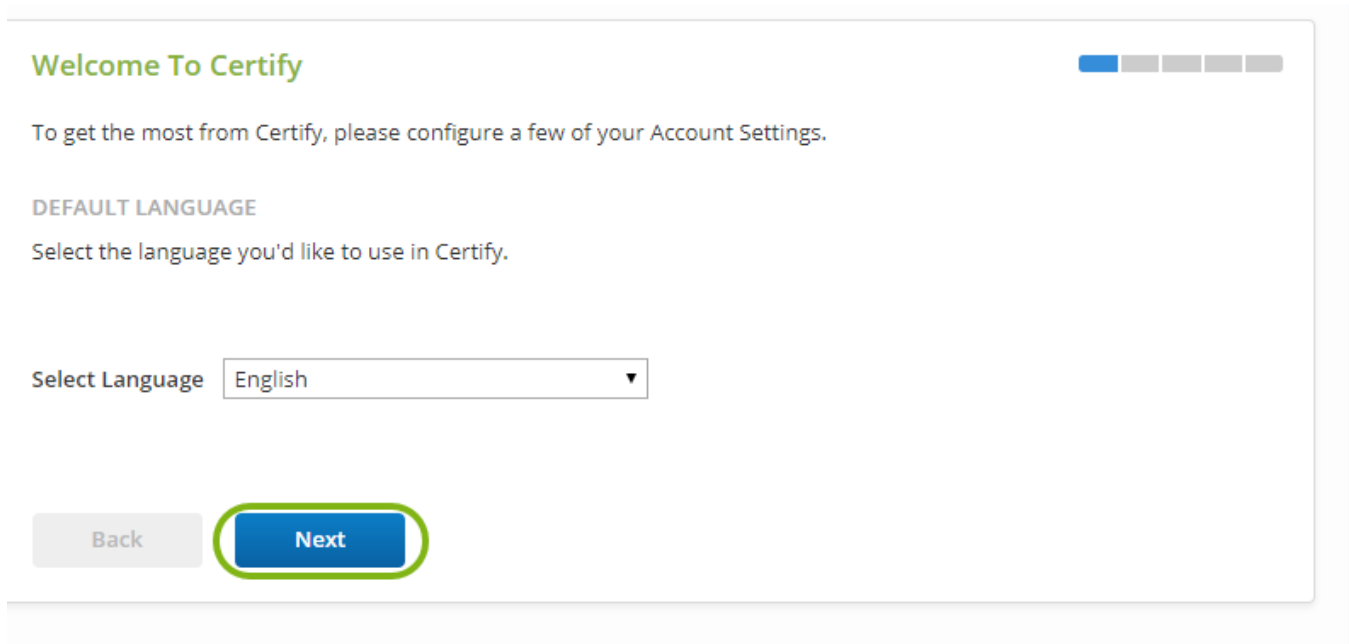
New User Setup Wizard

The first time you log into your Certify account, you will be prompted to complete the **New User Setup Wizard**. This article shows you how to navigate through the **New User Setup Wizard** to complete the setup of your Certify Account.

As a new user to Certify, the **Welcome to Certify** page displays and you are prompted to personalize your account settings. The **Progress Bar** in the upper right-hand corner will detail your setup progress.



Step 1: If your company uses Certify's Multiple Languages feature, the **DEFAULT LANGUAGE** section appears. Click the arrow next to the **Select Language** field to open a drop-down menu and choose a language to use in your Certify account. Click **Next**.



Step 2: Select your **Default Currency** from the drop-down menu provided. Click **Next**.

New User Setup Wizard

Welcome To Certify

DEFAULT CURRENCY
Select the currency you will use most often, and for reimbursement.

Default Currency ?

←

The screenshot shows a progress bar with four segments, the first of which is filled. A green circle highlights the 'Default Currency' dropdown menu, and a green arrow points to the 'Next' button.

Step 3: On the next page, enter your **Mobile Phone** number (optional). Select your country code from the drop-down menu provided, and enter the remaining numbers in the field provided. Click **Next**.

Welcome To Certify

MOBILE PHONE
You can add your mobile phone number for added security and important workflow alerts.

Mobile Phone ?

- United States +1
- United Kingdom +44
- Afghanistan +93
- Albania +355
- Algeria +213
- American Samoa +1

The screenshot shows a progress bar with four segments, the first two of which are filled. A green circle highlights the country code dropdown menu, which is open to show a list of countries. A 'Back' button is visible at the bottom left.

Step 4: The **ADDITIONAL EMAIL ADDRESS** page displays. If needed, use the **Add Email Address** field to set a secondary email address. This address can be used to email receipts to your **My Certify Wallet**. Click **Next**.

New User Setup Wizard

Welcome To Certify

ADDITIONAL EMAIL ADDRESS

You can enter a personal email address, if desired. This allows you to forward receipts from that account to your Certify Wallet.

Add Email Address

Step 5: From the **ACCOUNT DETAILS** section, confirm your account information is correct. To make changes, click **Back**. If the information listed is correct, click **Finish**.

Welcome To Certify

ACCOUNT DETAILS

Click Finish to save your changes. You can view and edit additional settings in My Account.

Default Language	English
Default Currency	United States Dollars
Mobile Phone	+1 123 456 7890
Login Email	ErinEmployee0001@gmail.com
Additional Email	ErinsOtherEmail@gmail.com

You can make changes to your account at any time by selecting **My Account** from your Certify account homepage.

Please Note: Some changes require your Certify Administrator.

New User Setup Wizard

My Account | [Account Settings](#) | [Email Notifications](#) | [ReportExecutive](#) | [Ratings Profile](#)

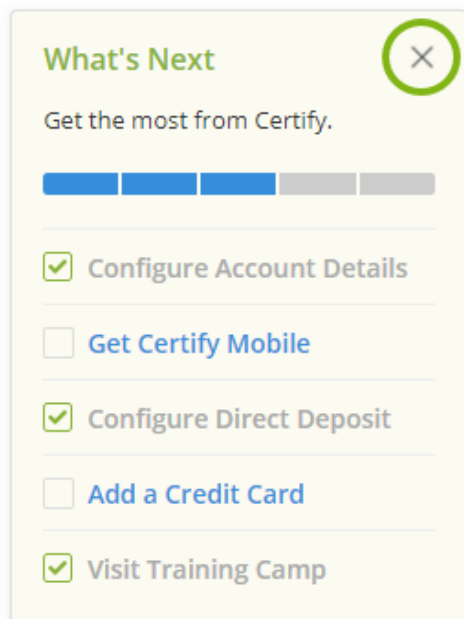
Use this page to make changes to your account settings and preferences.

User Information		Account Settings	
Name	Erin Employee	Language	English ▼
Email Address	ErinEmployee0001@gmail.com	Default Currency	United States Dollar: ▼
Employee ID	1223	Use Multiple Currencies	<input type="checkbox"/>
Mobile Phone	<input type="text" value="11234567890"/> ?	Use VAT/GST	<input type="checkbox"/>
Department	Customer Support (05)	Use PST/QST	<input type="checkbox"/>
Certify Role	Employees	Use HST	<input type="checkbox"/>
		Commute Distance	<input type="text" value="0"/> Miles ▼ ?
Password Reset		Add Email Address	<input type="text"/> ? ✗ ErinsOtherEmail@gmail.com
Old Password	<input type="password"/>	Add Credit Card	Personal Card ▼ <input type="text"/> ?
New Password	<input type="password"/> ?	Confirm	<input type="text"/> ?
Confirm Password	<input type="password"/>		
	Reset Security Questions		
<input type="button" value="Save"/>	<input type="button" value="Reset"/>	Direct Deposit Account	Add Account Information

After completing the **New User Setup Wizard**, the **What's Next** panel appears on your Certify homepage for five consecutive logins. Only extra features selected by your company will be available within the panel.

- **Get Certify Mobile** takes you to the Add Receipts and Expenses Screen for instructions on how to download the Certify Mobile app.
- **Configure Direct Deposit** (if available) brings you to your My Account page to enter your bank account details.
- **Add a Credit Card** (if available) brings you to your My Account page to enter your credit card number(s), for credit cards selected by your company.
- **Visit Training Camp** takes you to the Certify Support Help Center to register for live trainings, view tutorial videos, and browse help articles.

You can close **What's Next** at any time by clicking the **X** in the upper right corner.



Getting Started with Certify Expense

Is it your first time using Certify or maybe you need a refresher? This article will lead you through Certify's best practices for creating and submitting expense reports.

Add Receipts using the Certify Mobile App

Step 1: Download the Certify Mobile app on your **iPhone, Android or Windows** mobile device.

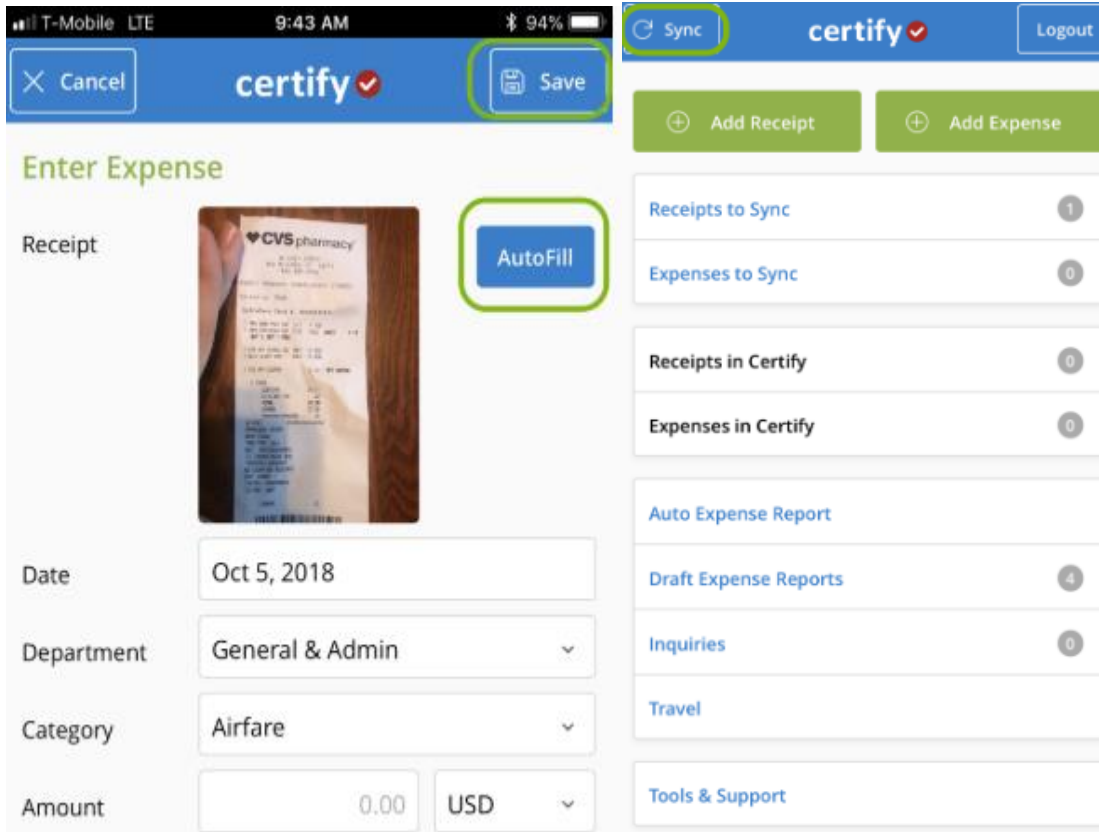
Step 2: Login to the app with your Certify username and password.

Step 3: Tap the yellow **Add Receipt** button and take a photo of your receipt.

Step 4: Tap the **Autofill** button, and then enter the remaining expense details. Tap **Save**.

Step 5: Tap the **Sync** button in the upper left-hand corner of the homepage. Receipts will now be available in your **Certify Wallet**.

Getting Started with Certify Expense



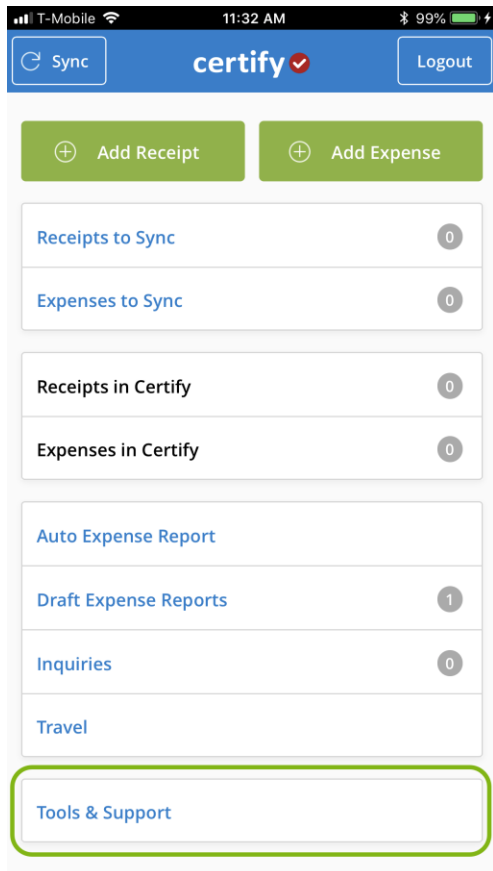
For a more in-depth guide on using the Certify Mobile app, please see our article **Adding Receipts Using Certify Mobile**

Mobile Tools and Support

If you experience difficulty using the Certify Mobile app, you may want to access Certify's **Tools & Support** page. This article shows you how to use the **Tools and Support** menu in the Certify Mobile App.

Step 1: On the Certify Mobile homescreen, tap **Tools & Support**.

Getting Started with Certify Expense



Step 2: On the **Tools & Support** page, you have several options:

Getting Started with Certify Expense

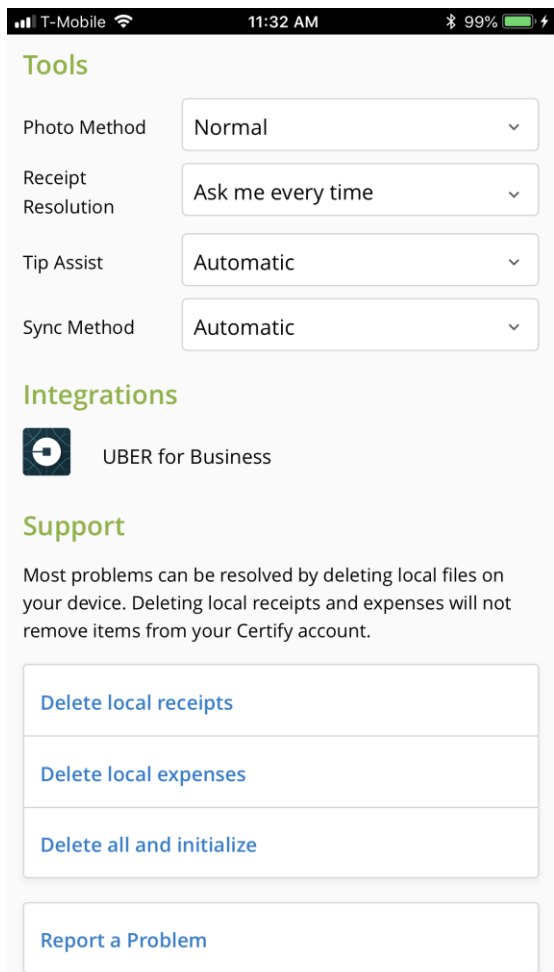
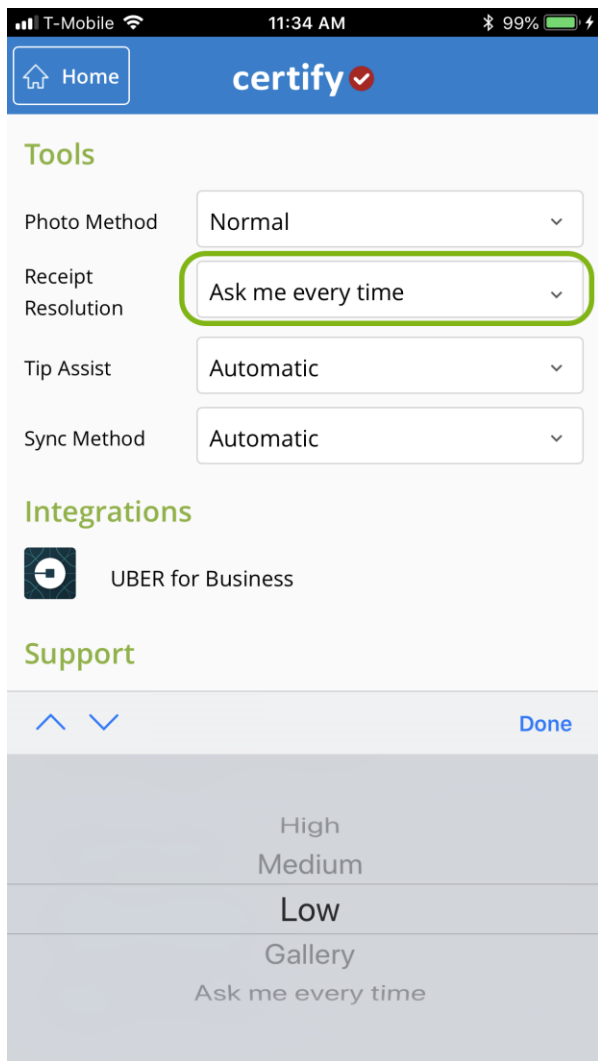


Photo Method – Normal, the recommended setting, allows you to take a normal photo and save it at the selected resolution. **Compatible** gives you the same result as **Normal**, but encodes the image differently. **High Compression** compresses the image’s file size and **Small Images** scales the image to half of its normal size. While the last three options aren’t recommended, they are helpful if you have trouble taking photos, a slow device, or have little available storage left on your device.

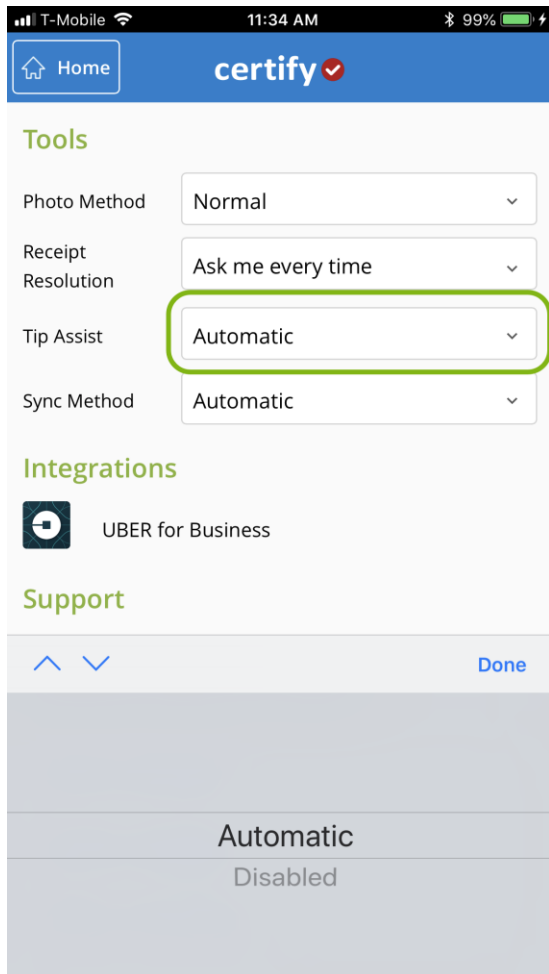
Receipt Resolution – Select a preferred photo resolution instead of being prompted each time; you may select **High, Medium, Low, Gallery, or Ask me every time**; for the best Autofill results, we recommend using **High** resolution.

Getting Started with Certify Expense



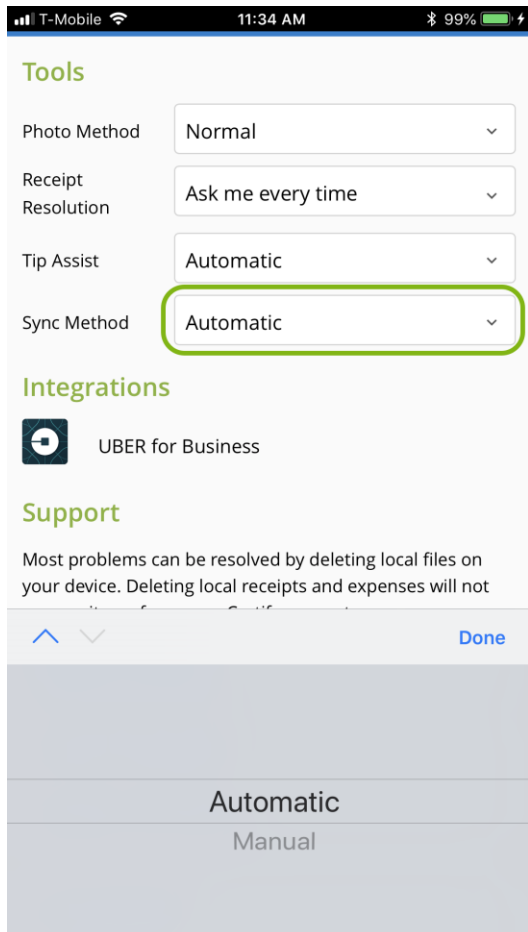
Tip Assist – Enable **Tip Assist** for easy entry of receipts containing an hand-written tip and amount; anytime Autofill identifies **Tip** or **Grauity** text, **Tip Assist** will be prompted.

Getting Started with Certify Expense



Sync Method – Allow Certify Mobile to automatically sync in the background, this helps ensure all account settings are up to date.

Getting Started with Certify Expense

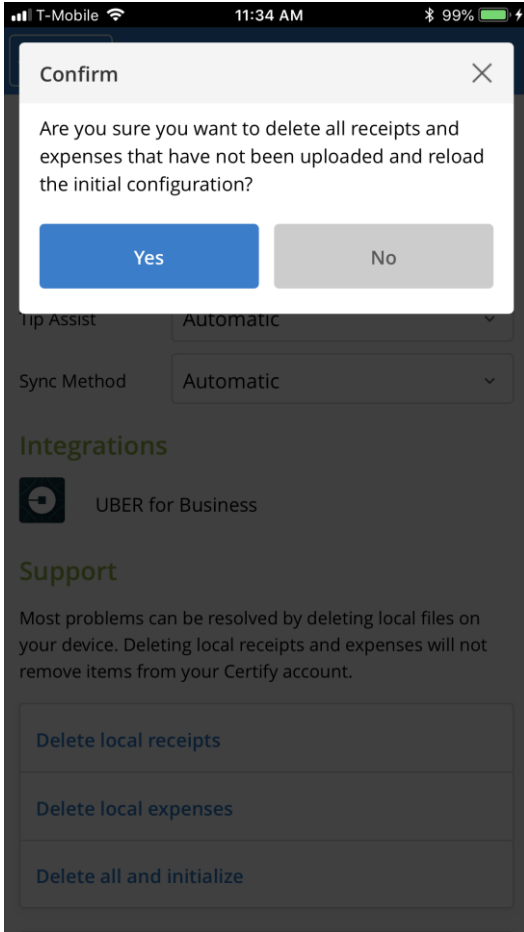


Delete Local Receipts – Deletes all receipts on your device that have not yet been synced.

Delete Local Expenses – Deletes all expenses on your device that have not yet been synced.

Delete All and Initialize – Deletes all receipts and expenses that have not been synced, and resets your account settings; on the next screen, select **Yes** to confirm the deletion.

Getting Started with Certify Expense



Please Note: Once receipts or expenses are deleted from Certify Mobile, they cannot be recovered.

Report a Problem – If you are having difficulty with the Certify Mobile app, complete each field in the form to submit a report to the Certify Support Team. Please include as much detail as possible. Your description, along with some diagnostic information, will be sent to our Support Experts, who will follow up with you shortly.

Create your Expense Report

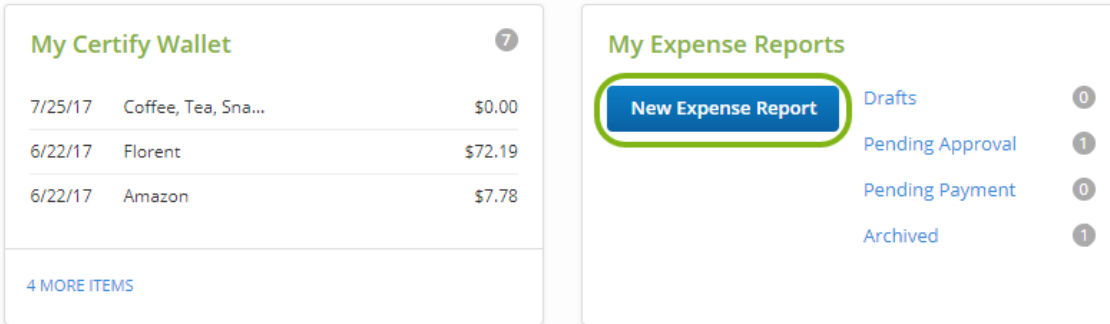
Step 1: In your Certify account on the web, view your Receipts and Expenses in your **Certify Wallet**.

My Certify Wallet 7		
7/25/17	Coffee, Tea, Sna...	\$0.00
6/22/17	Florent	\$72.19
6/22/17	Amazon	\$7.78
4 MORE ITEMS		

My Expense Reports	
New Expense Report	Drafts 0
	Pending Approval 1
	Pending Payment 0
	Archived 1

Getting Started with Certify Expense

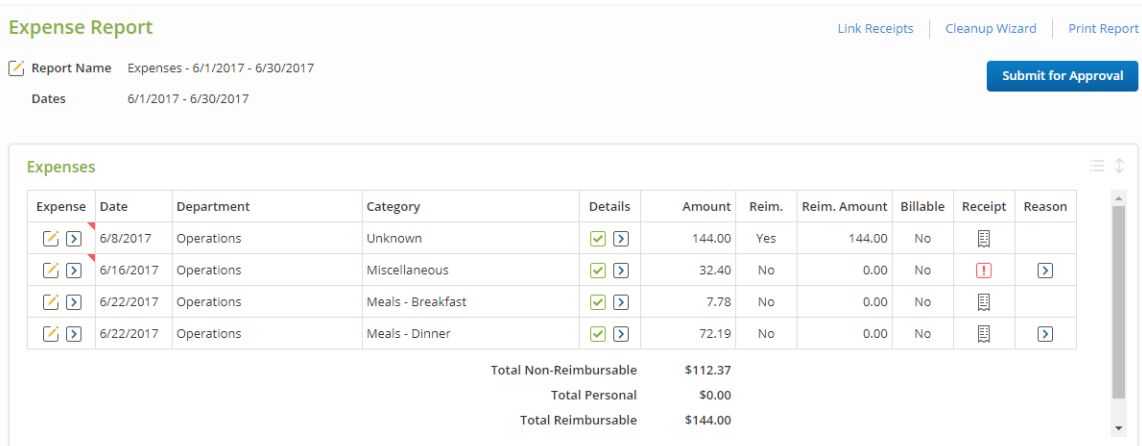
Step 2: On the Certify homepage, click the **New Expense Report** button.



Step 3: Select the option to **Add all items to a new expense report**.

Step 4: Enter an expense report name and date range. Click **Next**.

Step 5: On the next page, click **Finish** to see your new draft expense report. Certify will automatically merge receipts and credit card expenses with the same date and amount.



Edit your Expense Report

Step 1: Use the Link Receipts Wizard to attach receipts in your **Certify Wallet** to expense lines.

Getting Started with Certify Expense























Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Step 2: Use the Clean Up Wizard to edit receipts that need attention, indicated by the red triangle in the Expense column.























Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Step 3: Edit individual expense lines by clicking the pencil icon.























Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Step 4: Add mileage expenses in the **Add Expense** box.

Getting Started with Certify Expense

Add Expense

Date: 6/22/2017

Department: Operations

Category: Mileage

From: 20 York Street, Portland, Maine

To: 1 Monument Square, Portland, Maine

Miles: 1.8 [MapIt!](#)

Round Trip:

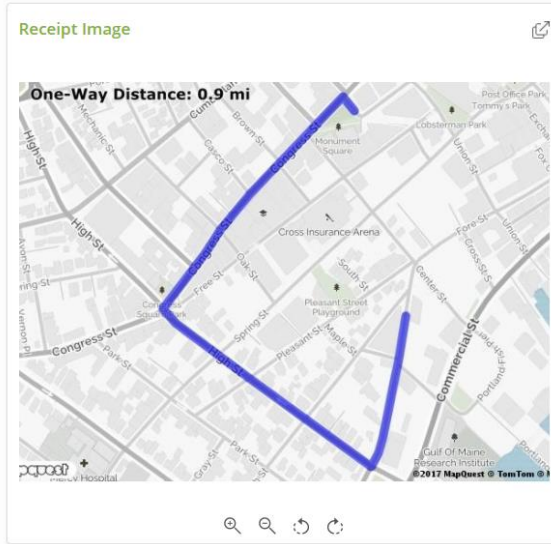
Reason:

Reimbursable: I paid for this, please reimburse me.

Billable:

Receipt: [Change](#)

[Save](#) [Cancel](#)



Step 5: Use the Other Actions menu to split expenses (itemize).

Expense Report

[Link Receipts](#) | [Cleanup Wizard](#) | [Print Report](#)

Report Name: Expenses - 6/1/2017 - 6/30/2017

Dates: 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/> Other Actions			Unknown	<input checked="" type="checkbox"/> Details	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/> Delete Expense			Miscellaneous	<input checked="" type="checkbox"/> Details	32.40	No	0.00	No		Details
<input checked="" type="checkbox"/> Split Expense			Meals - Breakfast	<input checked="" type="checkbox"/> Details	7.78	No	0.00	No		
<input checked="" type="checkbox"/> Add Bank Fee			Meals - Dinner	<input checked="" type="checkbox"/> Details	72.19	No	0.00	No		Details
<input checked="" type="checkbox"/> Add Image										
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Submit for Approval

Step 1: Verify that everything on your expense report is accurate.

Step 2: Click **Submit for Approval**.

Getting Started with Certify Expense

Expense Report























Print Report

Report Name Expenses - 6/1/2017 - 6/30/2017

Dates 6/1/2017 - 6/30/2017

Submit for Approval

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Parking	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Gifts and Promotions	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Step 3: Enter optional comments for your Approver, and click **Submit**.

Getting Started with Certify Expense

Submit Expense Report for Approval

This is a preview of the message that will be used to submit the expense report. You may add your own comments if you like.

To Miley Manager (Molly.Mgr.Test@gmail.com)
Subject Expense Report Approval Request From Eric Employee (Eric.Emp.Test@gmail.com)
Body Hello Miley,

Eric Employee (Eric.Emp.Test@gmail.com) has sent an expense report for your approval.

Enter your comments:

Additional Approver (optional):

Expense Report Summary

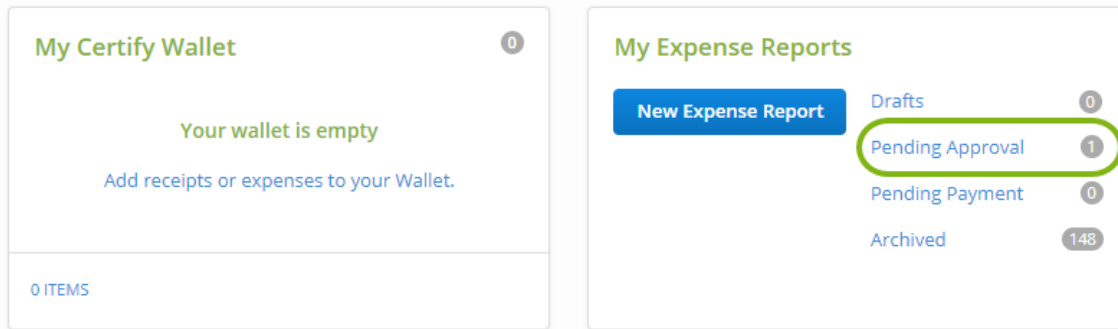
Employee: Eric Employee (Eric.Emp.Test@gmail.com)
Expense Report Name: Expenses - 6/1/2017 - 6/30/2017
Dates: 6/1/2017 - 6/30/2017

Non Reimbursable Total: \$112.37
Reimbursable Total: \$144.00
Total: \$256.37

Login to Certify to view this report.
Login at: <https://www.certify.com/Login.aspx>

Step 4: Review your expense report status in the **Pending Approval** folder.

Getting Started with Certify Expense



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