emburse certify

Certify User Guide
QUICK START

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.
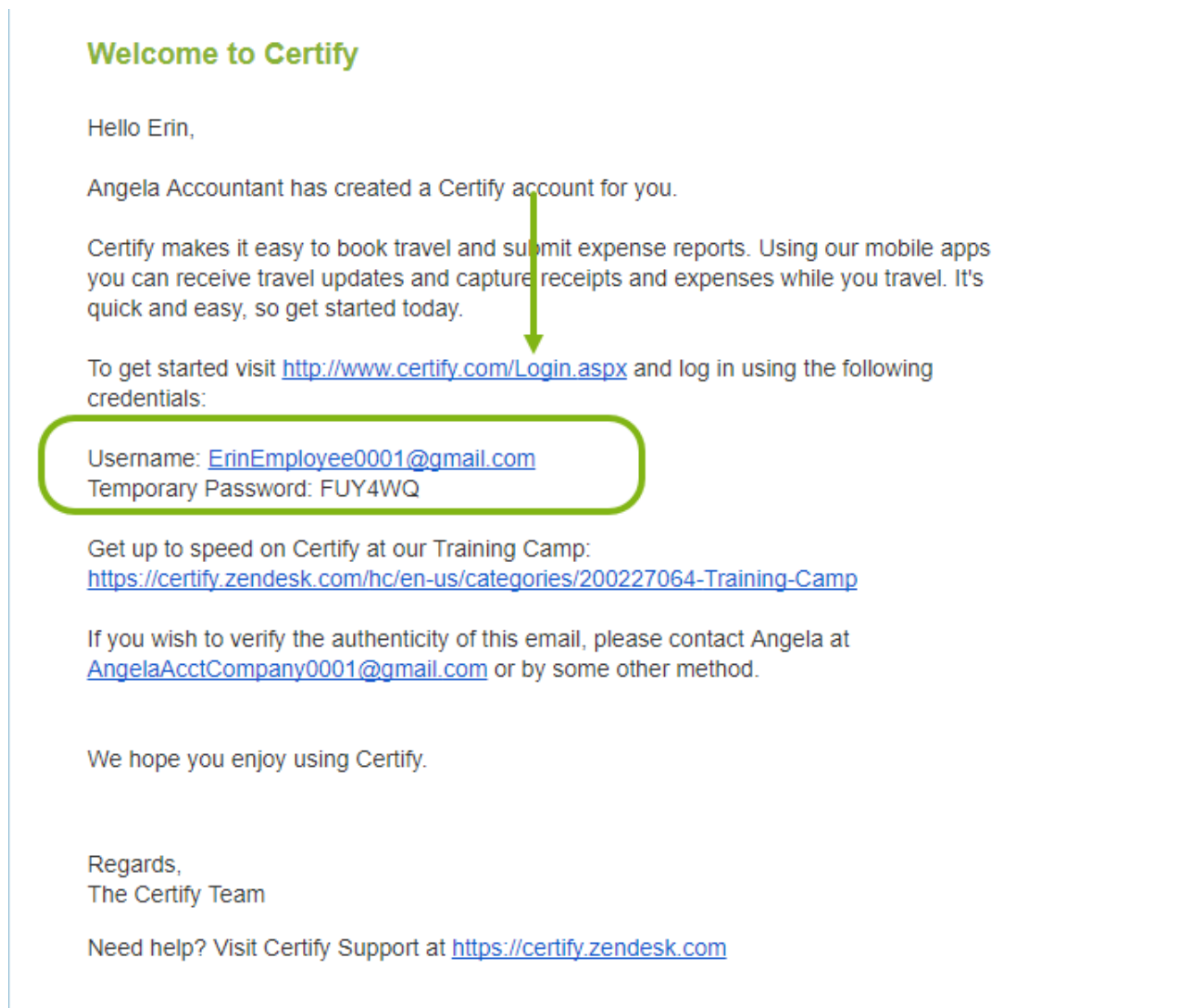
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CERTIFY QUICK START GUIDE

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.
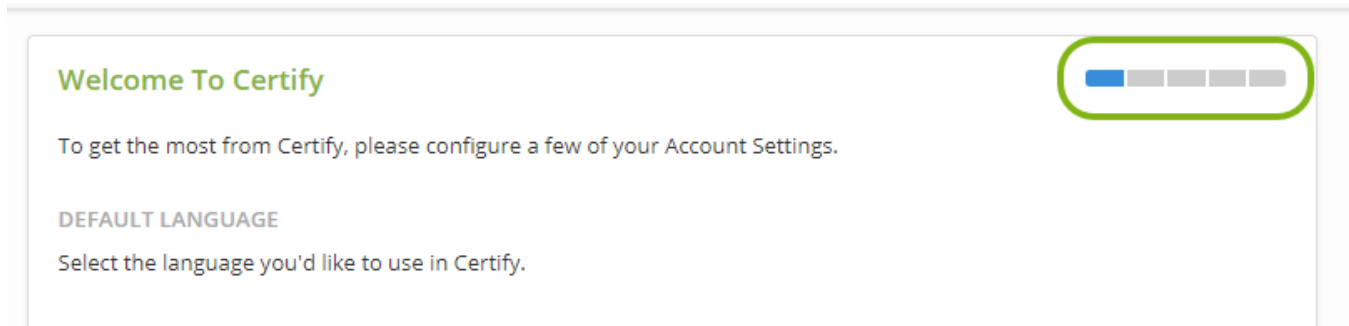
Step 1: If your company uses Certify's Multiple Languages feature, the **DEFAULT LANGUAGE** section appears. Click the arrow next to the **Select Language** field to open a drop-down menu and choose a language to use in your Certify account. Click **Next.**
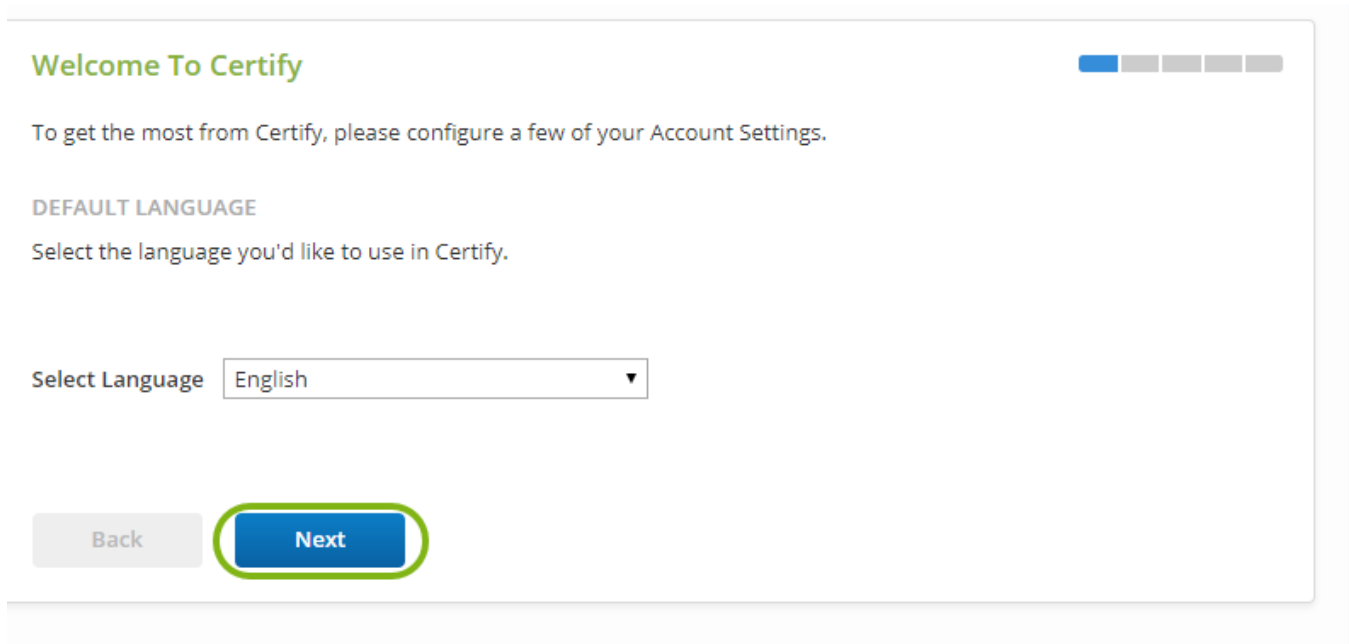
Step 2: Select your **Default Currency** from the drop-down menu provided. Click **Next.**

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**.

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**.

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**.

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.*

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.
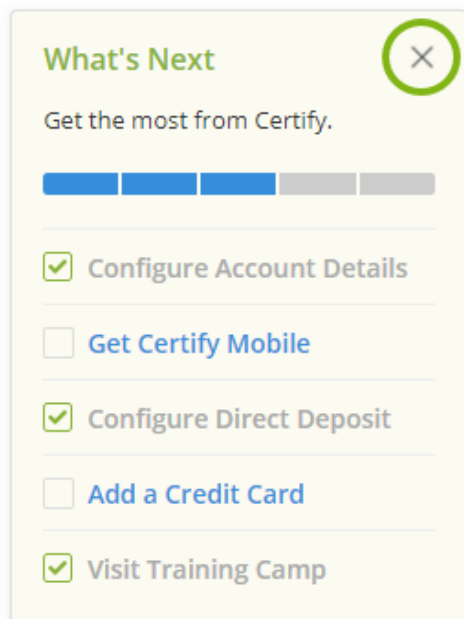
Getting Started with Certify Expense

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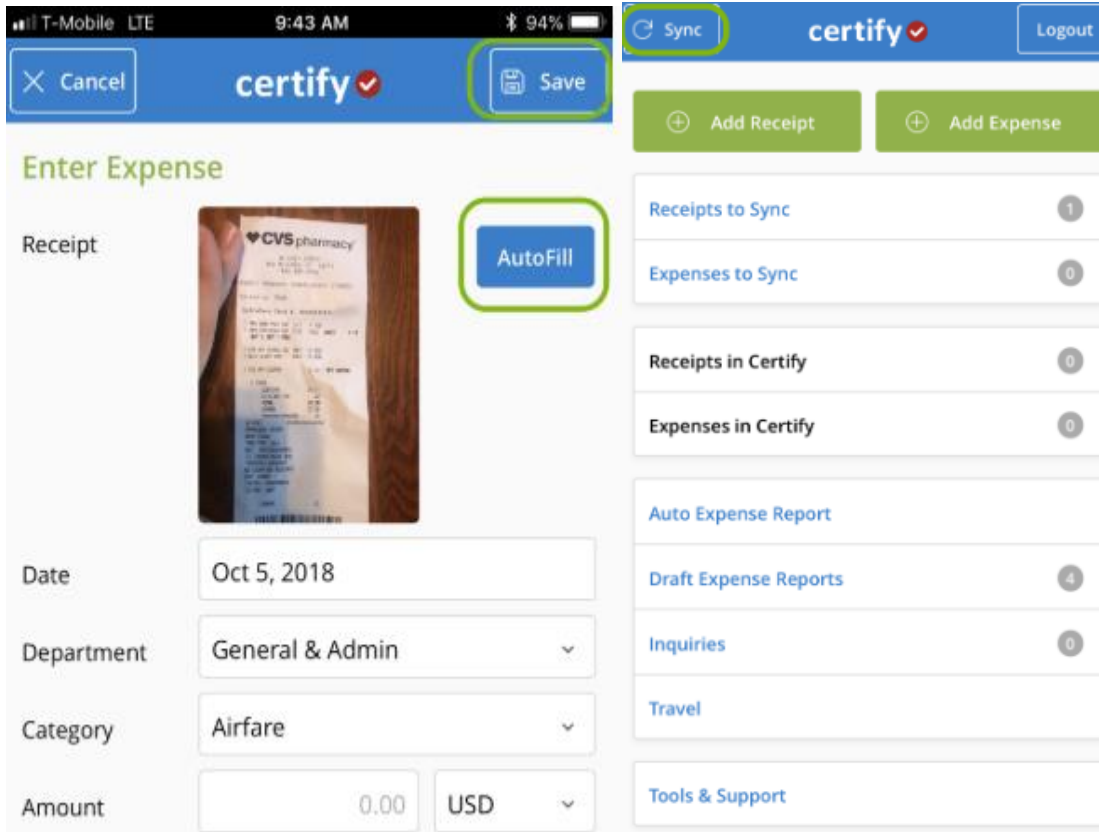
For a more in-depth guide on using the Certify Mobile app, please see our article **Adding Receipts Using Certify Mobile**

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**.
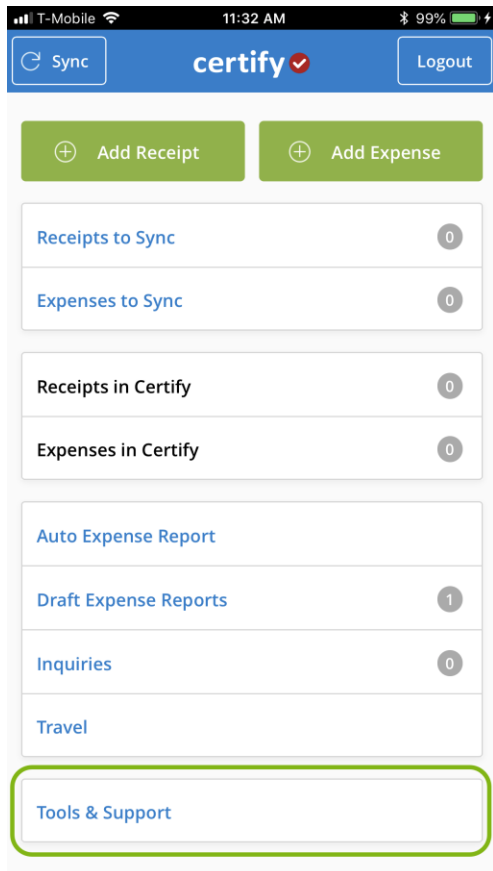
Step 2: On the **Tools & Support** page, you have several options:
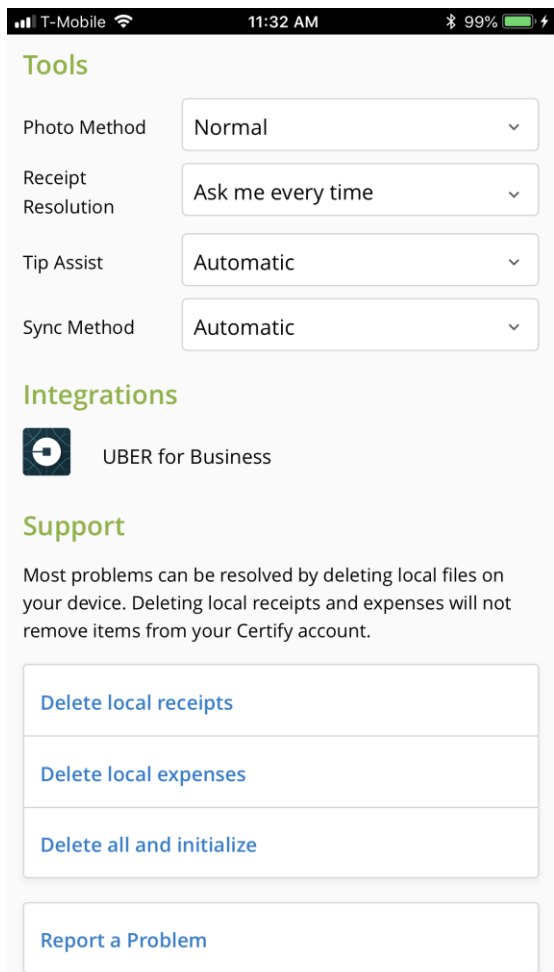
Photo Method – Normal, the recommended setting, allows you to take a normal photo and save it at the selected resolution. **Compatible** gives you the same result as **Normal**, but encodes the image differently. **High Compression** compresses the image's file size and **Small Images** scales the image 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.
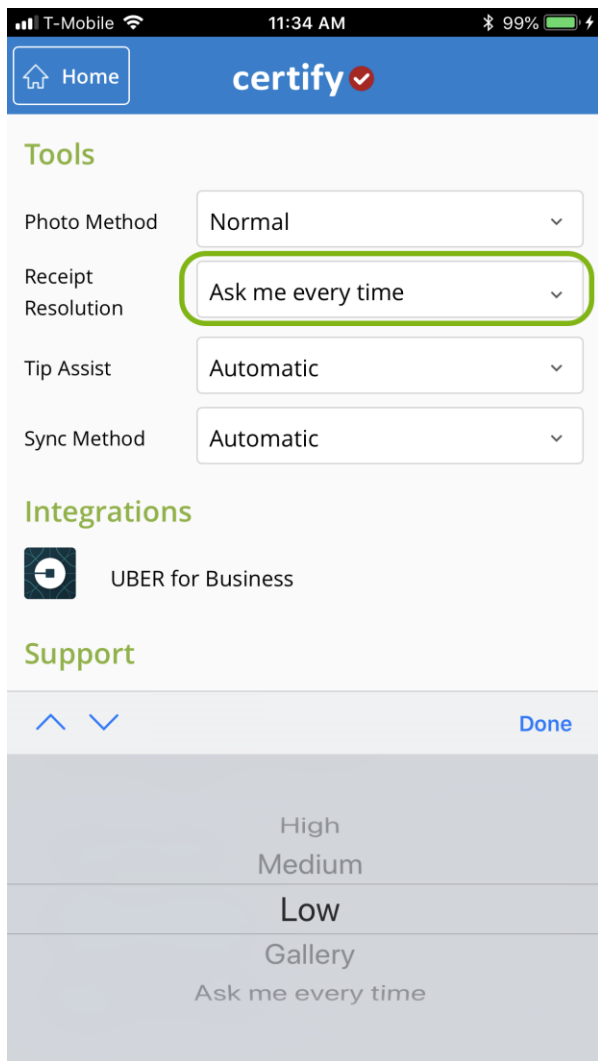
Tip Assist – Enable **Tip Assist** for easy entry of receipts containing an hand-written tip and amount; anytime Autofill identifies **Tip** or **Grautity** text, **Tip Assist** will be prompted.
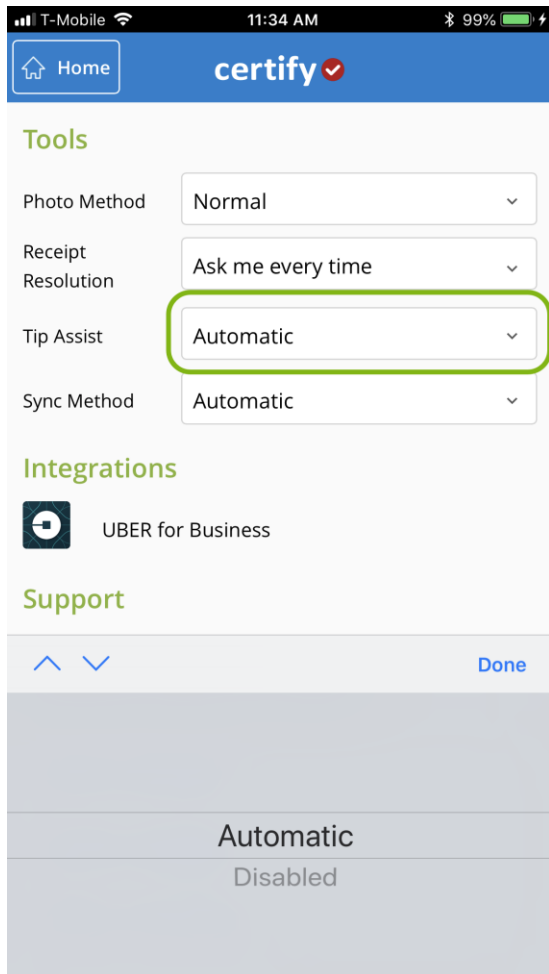
Sync Method – Allow Certify Mobile to automatically sync in the background, this helps ensure all account settings are up to date.

Getting Started with Certify **Expense**
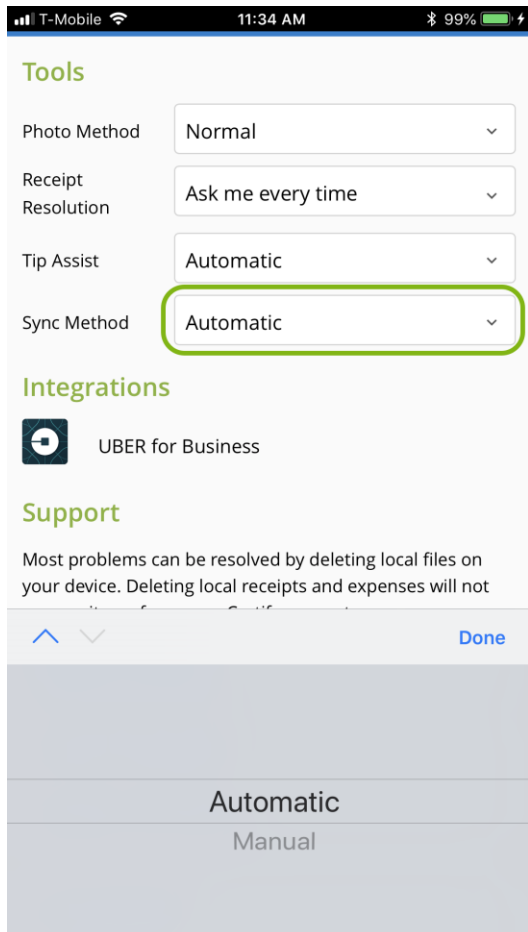
Delete Local Receipts – Deletes all receipts on your device that have not yet been synced.

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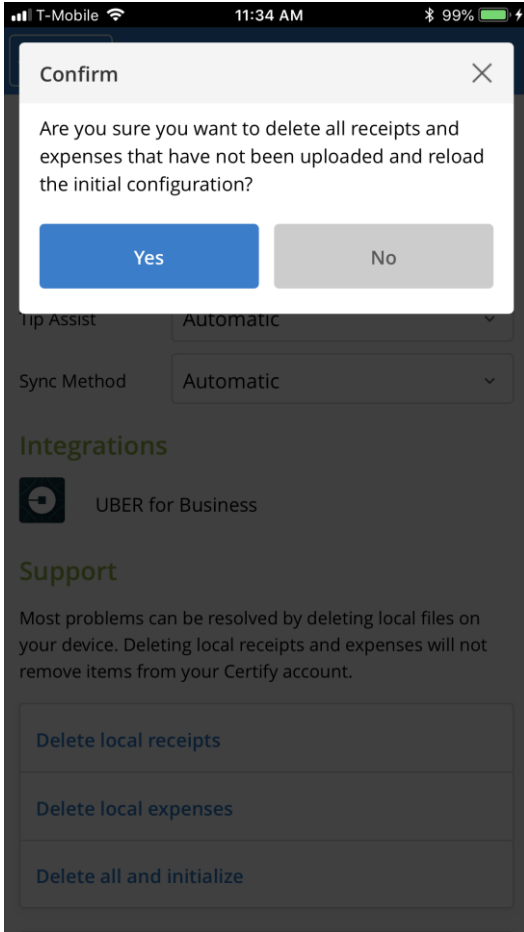
Please Note: Once receipts or expenses are deleted from Certify Mobile, they cannot be recovered.

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.**

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.
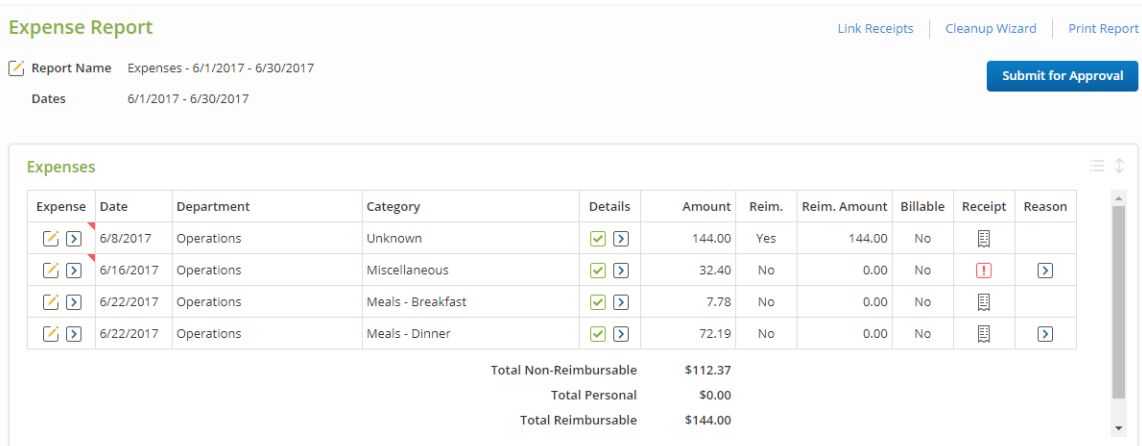
Edit your Expense Report

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

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

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

Step 4: Add mileage expenses in the **Add Expense** box.
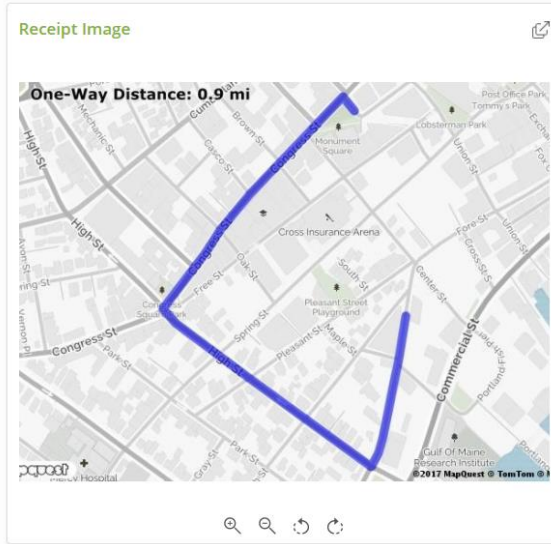
Step 5: Use the Other Actions menu to split expenses (itemize).

Submit for Approval

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

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

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

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

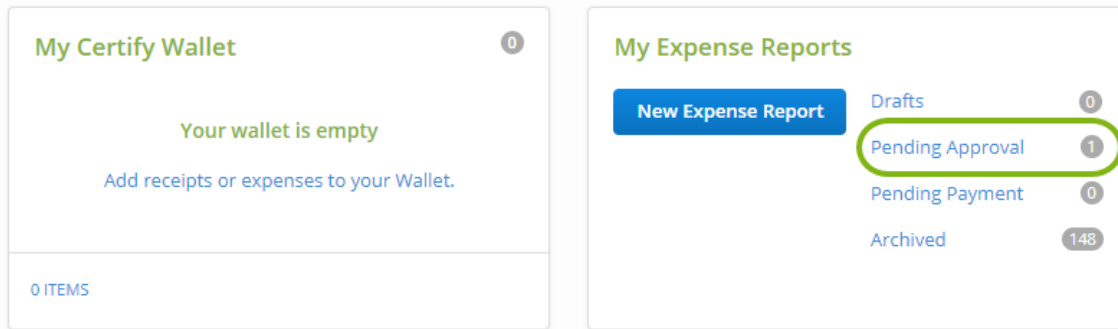Employee: Eric Employee (Eric.Emp.Test@gmail.com)
Expense Report Name: Expenses - 6/1/2017 - 6/30/2017
Dates: 6/1/2017 - 6/30/2017

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

Submit   Cancel

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

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My Certify Wallet   0

Your wallet is empty

Add receipts or expenses to your Wallet.

0 ITEMS

My Expense Reports

New Expense Report   Drafts   0

Pending Approval   1

Pending Payment   0

Archived   148

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