



Creating & Submitting Reports Guide

Step 1: My Account

On your **Certify** homepage, click the **My Account** tab to access your **My Account** page. From here, edit your password, select and edit your default currency, and edit email notifications.

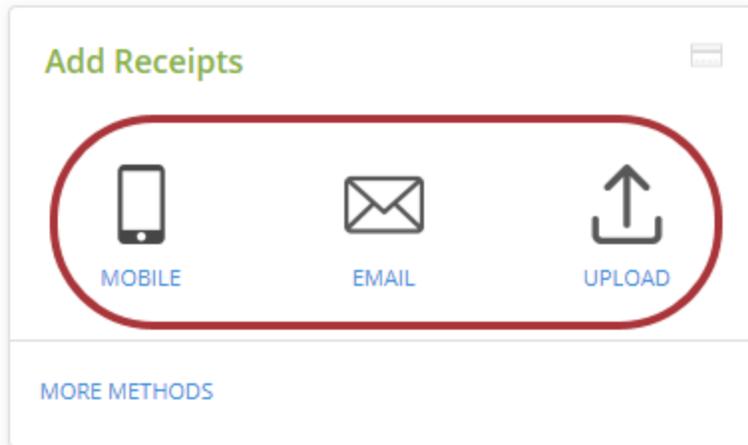
My Account | [Account Settings](#) | [Email Notifications](#) | [ReportExecutive](#) | [Ratings Profile](#)

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

User Information		Account Settings	
Name	Rachel Employee	Language	English ▼
Email Address	remLOYEE@cirpoint.org	Default Currency	United States Dollars ▼
Employee ID	789	Use Multiple Currencies	<input type="checkbox"/>
Mobile Phone	<input type="text"/> ?	Use VAT/GST	<input type="checkbox"/>
Department	Administration (01)	Use PST/QST	<input type="checkbox"/>
Certify Role	Employees	Use HST	<input type="checkbox"/>
Password Reset		Commute Distance	14 <input type="text"/> Miles ▼ ?
Old Password	<input type="password"/>	Add Email Address	<input type="text"/> ?
New Password	<input type="password"/> ?	Add Credit Card	Select Program ▼ <input type="text"/> ?
Confirm Password	<input type="password"/>		Confirm <input type="text"/> ?
Reset Security Questions		Pay By Check	✗ 20 York Street, Portland, ME
Manage Attendees			
Add Attendees			
Manage Attendees			
Add Groups			
Manage Groups			
<input type="button" value="Save"/>	<input type="button" value="Reset"/>		

Step 2: Submit Receipts

There are three main methods to add receipts:



- Use the **Certify Mobile App** to snap photos of your receipts on the go and easily sync them to your **Wallet**.
- **Email** a receipt, such as an online purchase, to receipts@certify.com. Just make sure you use the email address associated with your **Certify** account.
- Browse your computer for files to **Upload** to your **Wallet**, such as a multi-page cell phone bill.

Step 3: Review Wallet

To access your **Certify Wallet**, click the **Wallet** tab on your homepage.

The screenshot shows the "My Certify Wallet" interface. At the top right, there is a "Merge Items" toggle switch and several utility icons. Below the title, there are two sections: "Receipts" and "Expenses".

Receipts Table:

Source	Receipt	Date	Category/Details	Vendor	Description	Amount
MOBILE	[Receipt Icon]	4/9/2019	> Meals		Lunch	\$4.37
UPLOAD	[Receipt Icon]	4/1/2019	> Office Equipment	The Home Depot	Whiteboard and dry erase markers for conference ...	\$34.40
UPLOAD	[Receipt Icon]	4/22/2019	> Other Transportation	Standard Parking	Parking at airport	\$12.00
UPLOAD	[Receipt Icon]	4/27/2019	> Lodging	DoubleTree Hotel	Hotel stay - DoubleTree	\$560.53
UPLOAD	[Receipt Icon]	5/5/2019	> Office Equipment	Staples	Staples Webcam	\$75.58

5 ITEMS

Expenses Table:

Source	Receipt	Date	Category/Details	Vendor	Description	Amount
EMAIL	[Receipt Icon]	4/21/2019	> Office Equipment	The Home Depot	The Home Depot	\$34.40
EMAIL	[Receipt Icon]	4/22/2019	> Parking	Standard Parking	Standard Parking	\$12.00
EMAIL	[Receipt Icon]	4/24/2019	> Office Equipment	Staples	Staples	\$75.58
EMAIL	[Receipt Icon]	4/27/2019	> Hotel	DoubleTree	DOUBLETREE	\$560.53

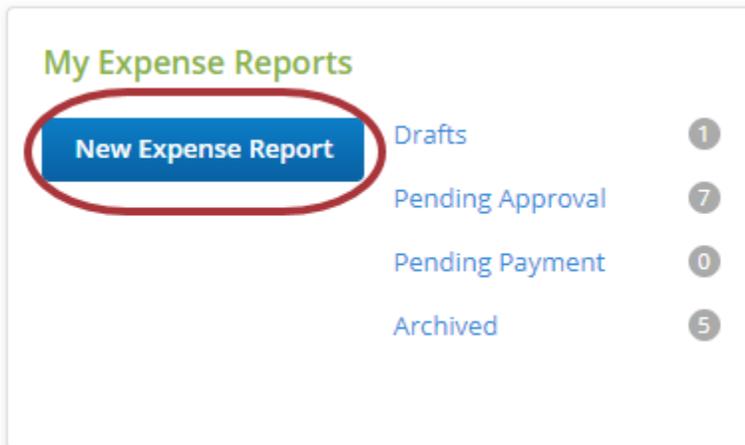
4 ITEMS

At the bottom of the interface, there are three buttons: "Add to Report" (blue), "Send Items" (grey), and "Delete" (grey).

From here, **delete**, **edit**, or **add** a receipt, or send items to another wallet.

Step 4: Create the Expense Report

There are two methods to create an expense report: **manually**, or by using **ReportExecutive**. To manually create the report, click the **New Expense Report** button on the homepage.



Alternatively, use **ReportExecutive** to pre-schedule automated reports. **ReportExecutive** will build an expense report for you by merging all of the receipts and expenses in your **Certify Wallet**. Your company **administrator** may configure this for you, or configure it yourself on your homepage.



Step 5: Review and Edit your Expense Report

Here are five easy steps to review your expenses:

1. Cleanup Wizard:

By clicking the **Cleanup Wizard**, you'll be able to review and edit all expenses that **Need Attention**.

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

Report Name Expenses - 4/1/2019 - 5/5/2019 [Submit for Approval](#)

Dates 4/1/2019 - 5/5/2019

Enter the missing details before clicking **Finish**.

Expense Report Cleanup Expenses - 4/1/2019 - 5/5/2019
Start Date: 4/1/2019 End Date: 5/5/2019

Current Step: 1

Expense Details

You must enter a Vendor.
You must enter a Location.

Date: 4/9/2019

Department: Administration

Category: Meals

Amount: 4.37

Vendor:

Location:

Attendees: First: Last: Relationship:

Title: Company: [Add](#) [Find](#) [Clear](#)

Rachel Employee, , , Self

Reason:

Reimbursable: The company paid, do not reimburse me.

Billable:

Skip: Skip this expense

Receipt Image



[Back](#) [Next](#) **Finish**

2. Link Receipts:

By clicking **Link Receipts**, you'll be able to review expenses that are missing receipts.

Expense Report **Link Receipts** [Print Report](#)

Report Name Expenses - 4/1/2019 - 5/5/2019 [Submit for Approval](#)

Dates 4/1/2019 - 5/5/2019

From here, you'll see the expense lines without an attached receipt, and the first receipt image in your **Certify Wallet**. Click the **check box** next to the expense line to attach the receipt to one or more of your expenses. Click **Finish** when complete.

Link Receipts with Expenses

Current Step: 1

View the receipt and select the matching expense. You can select multiple expenses if an image has more than one receipt.

Select Matching Expense

\$34.40 4/21/2019 Office Equipment

\$75.58 4/24/2019 Office Equipment

Receipt Image



Back Next **Finish**

3. Individual Edit

Click the **pencil icon** to edit your receipts manually from your **Expense Report**.

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
 	4/1/2019	Administration	Office Equipment	 	34.40	Yes	No		
 	4/9/2019	Administration	Meals	 	4.37	No	No		

Your expense will open at the bottom of the page and you can **edit** and **save** your corrections.

Edit Expense

Date: 4/22/2019

Department: Administration

Category: Parking

Amount: 12.00

Vendor: Standard Parking

Location: Portland, ME

Reason: Parking at airport during trip. Standard Parking

Reimbursable: The company paid, do not reimburse me.

Billable:

Receipt:

Receipt Image



4. Other Actions:

This menu provides several options to make further changes. To access, click the **arrow** in the expense line. From here, you can easily **Delete Expense**, **Split Expense**, **Add Bank Fee**, **Send to Wallet**, **Copy Expense** and **Add Image** to an expense.

Expenses

Expense	Date	Department	Category	Details
 			Office Equipment	 
 			Meals	 
 			Parking	 
 			Office Equipment	 
 			Hotel	 
 	5/5/2019	Administration	Office Equipment	 

Other Actions

- Delete Expense
- Send to Wallet
- Split Expense
- Copy Expense
- Add Bank Fee
- Add Image

5. Manually Add Expense Line

If you'd like to **manually add an expense line** to your **expense report**, scroll down to enter details on the left, or click **Add** to manually add a receipt from your **Wallet**.

Add Expense

Date

Department Administration

Category

Reason

Reimbursable I paid for this, please reimburse me.

Billable

Receipt

My Certify Wallet

Merge Items

Date	Category/Deta...	Description	Amount	
 	4/15/19	Meals	Dinner Receipt	\$30.42

Step 5: Submit Expense Report

When your expense report is ready, click **Submit for Approval**.

Expense Report

[Print Report](#)

 Report Name Expenses - 4/1/2019 - 5/5/2019

Dates 4/1/2019 - 5/5/2019

[Submit for Approval](#)

Expenses



Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
 	4/1/2019	Administration	Office Equipment	 	34.40	Yes	No		
 	4/9/2019	Administration	Meals	 	4.37	No	No		

Need More Help?

Visit our support page directly from your **Certify** account and browse our **Help Center**. You can also contact our local **Support** team at **888-925-0510** or email us at support@certify.com.

Support



Browse Help Center

Learn to use Certify, and get answers to common questions



Submit a Support Ticket

Get assistance from a member of our support team



View Existing Requests

Check on the status of your existing support tickets

Frequently Asked Questions

- [Lost Password Wizard](#)
- [Adding Receipts using Certify Mobile](#)
- [Managing Expenses in your Certify Wallet](#)
- [Using ReportExecutive](#)
- [Auto Expense Report Wizard](#)

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