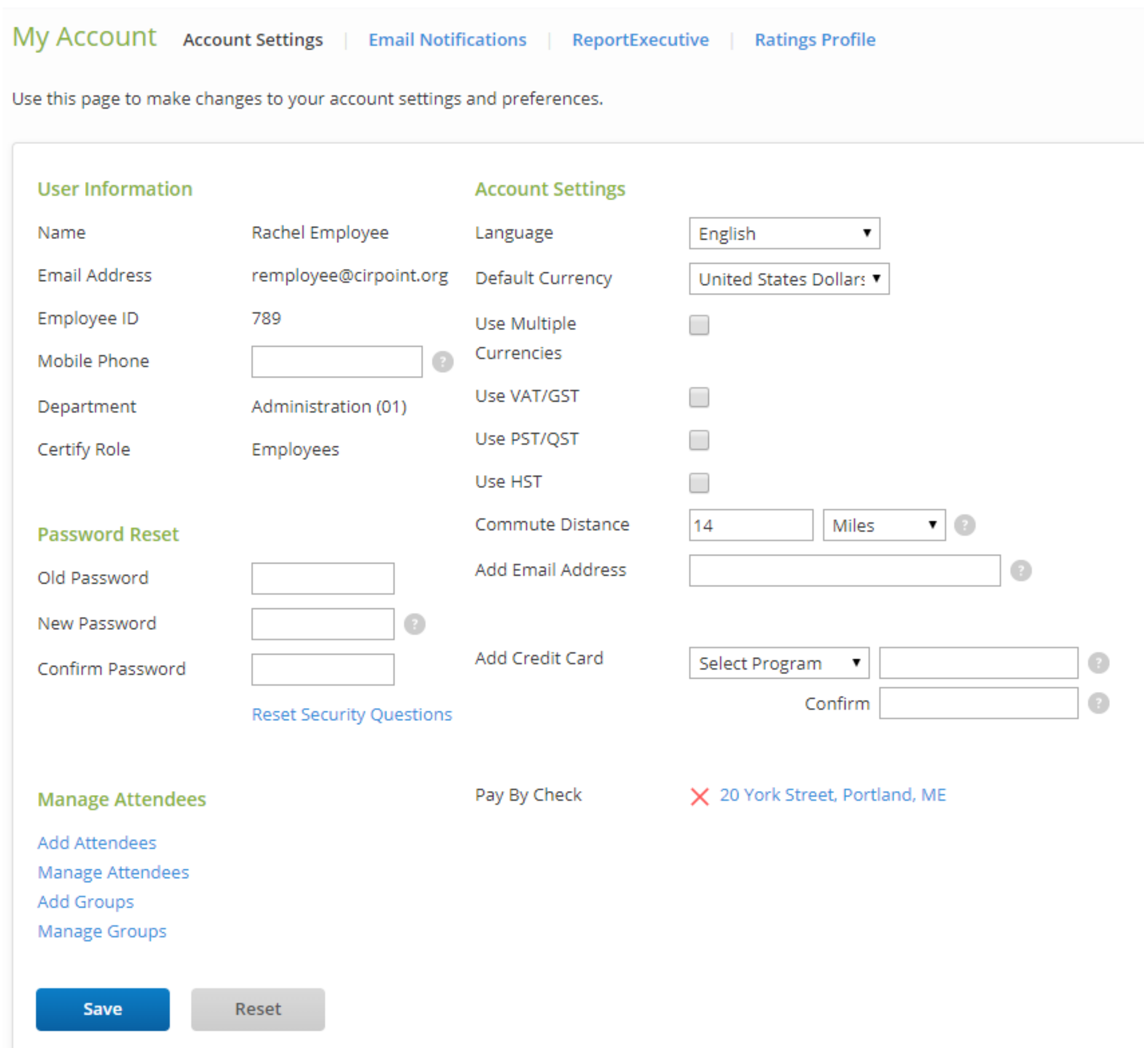
Creating & Submitting Reports Guide

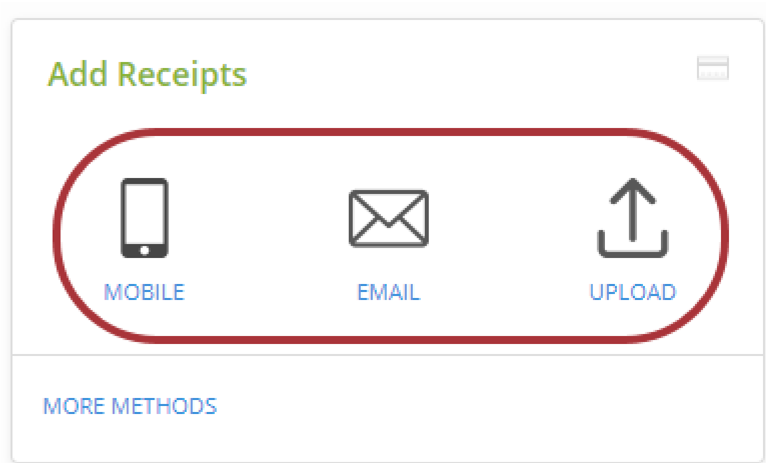
Step 1: My Account

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.



Step 2: Submit Receipts

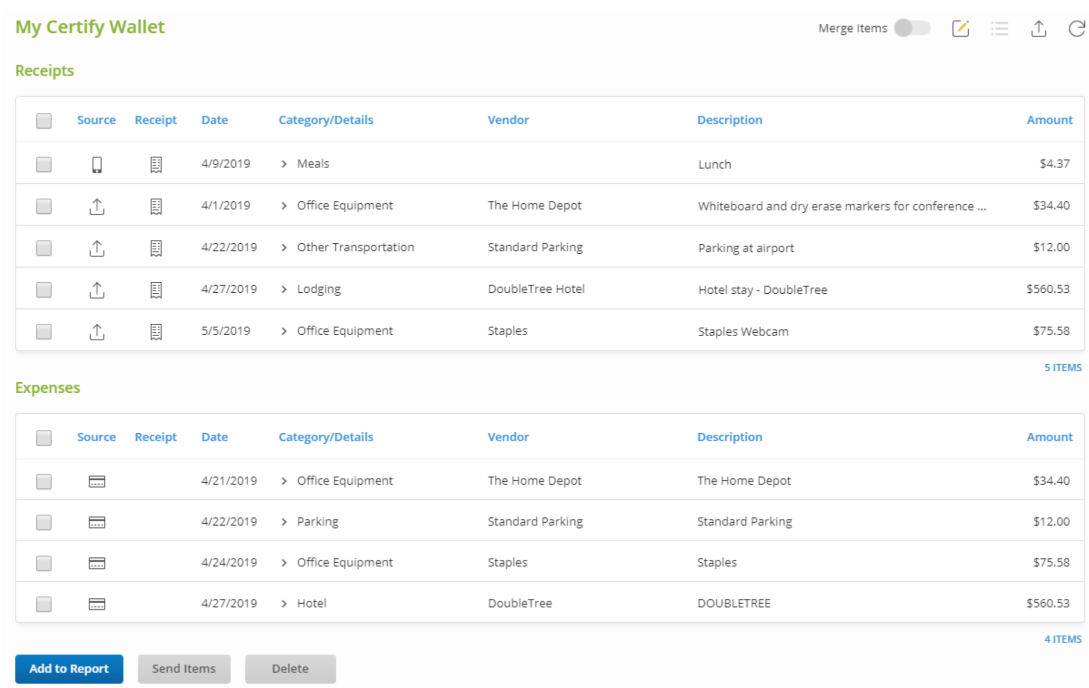
There are three main methods to add receipts:



- 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.


My Certify Wallet

Merge Items

Receipts

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

5 ITEMS

Expenses

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

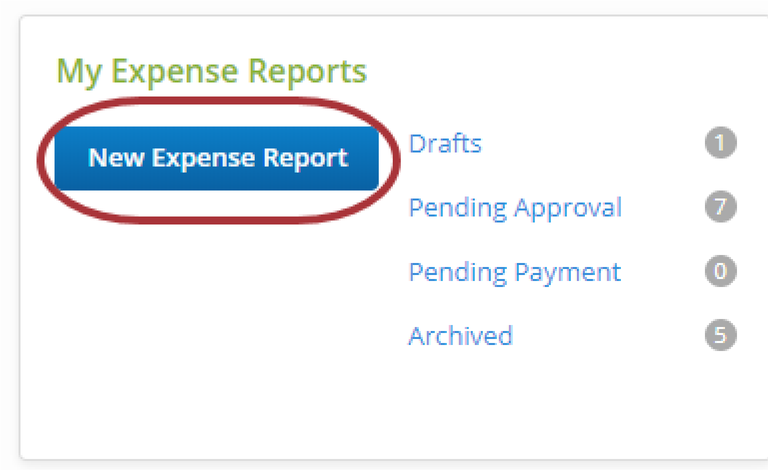
4 ITEMS

Add to Report | Send Items | Delete

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.

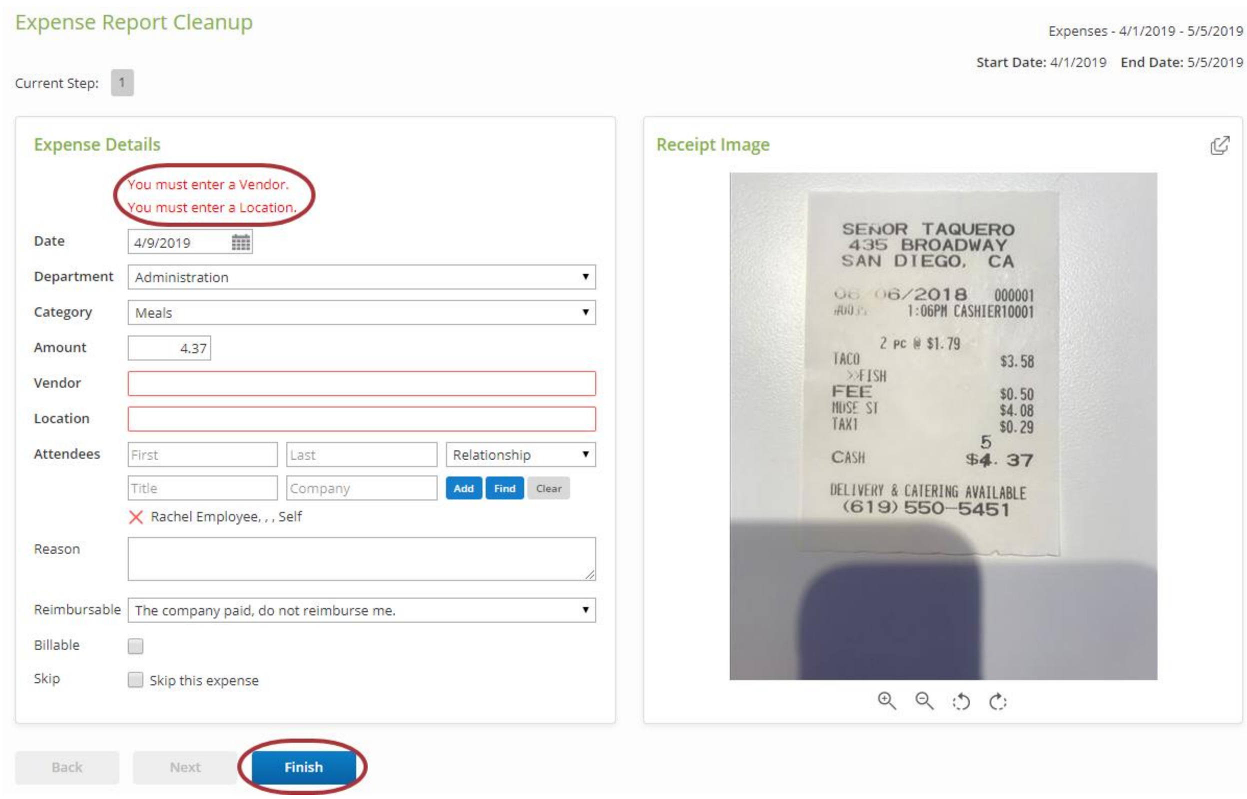
Step 5: Review and Edit your Expense Report

Here are five easy steps to review your expenses:

1. Cleanup Wizard:

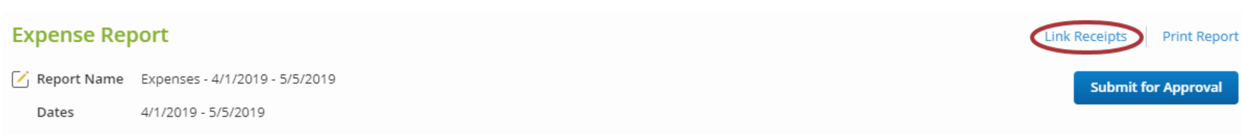
By clicking the Cleanup Wizard, you'll be able to review and edit all expenses that Need Attention.

Enter the missing details before clicking Finish.

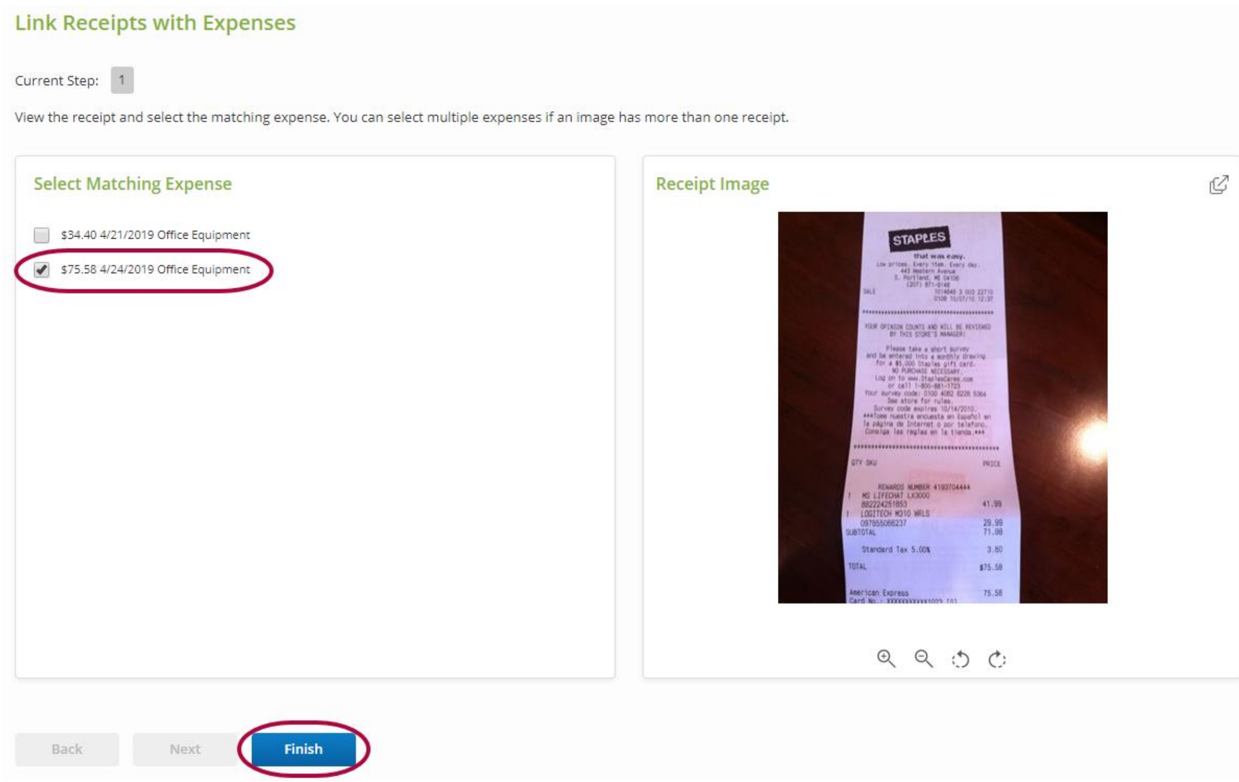


2. Link Receipts:

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

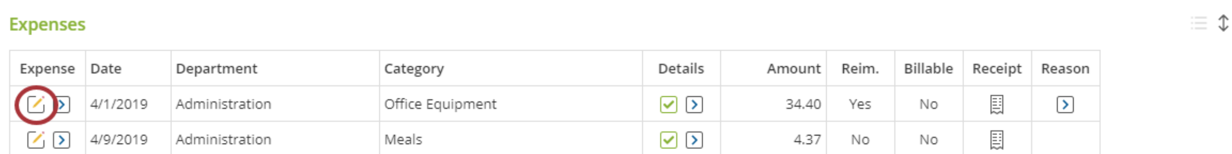


From here, you'll see the expense lines without an attached receipt, and the first receipt image in your Certify Wallet. Click the check box next to the expense line to attach the receipt to one or more of your expenses. Click Finish when complete.

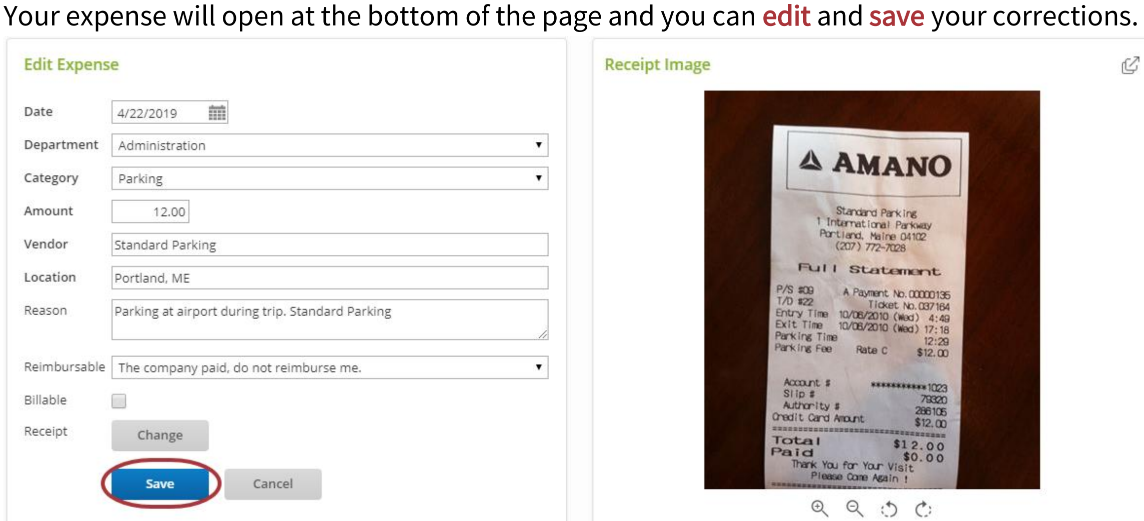


3. Individual Edit

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

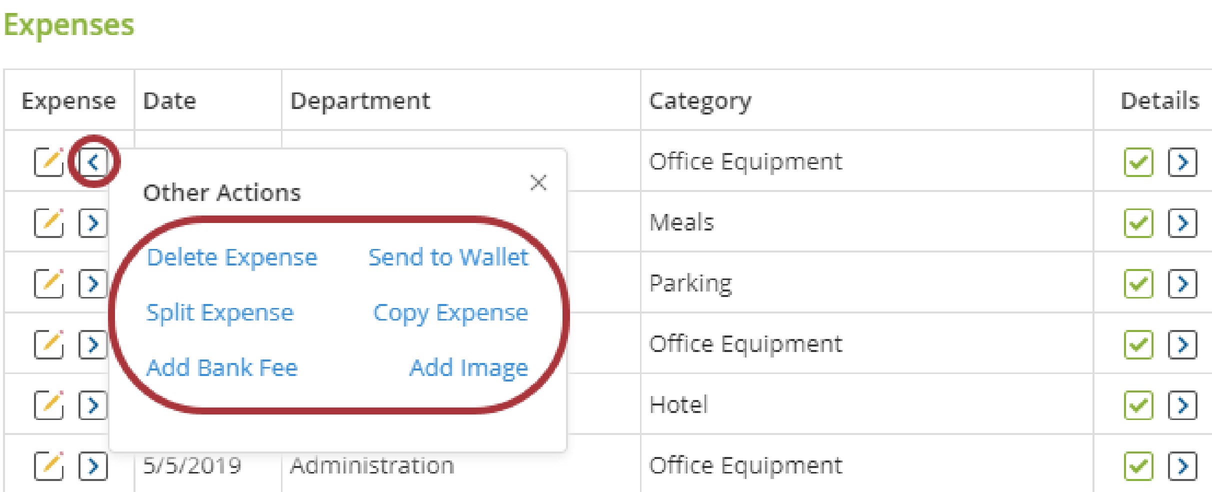


Your expense will open at the bottom of the page and you can edit and save your corrections.



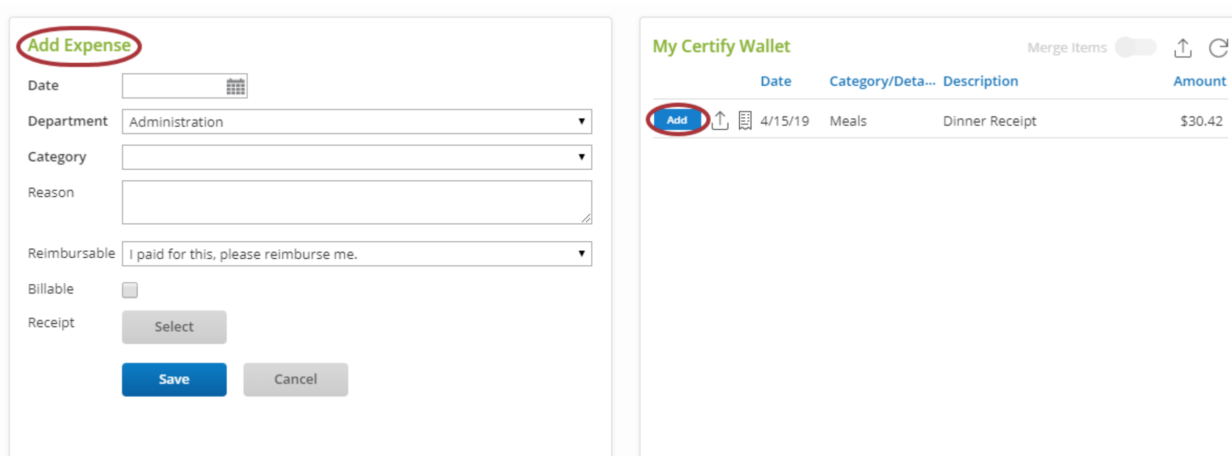
4. Other Actions:

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.



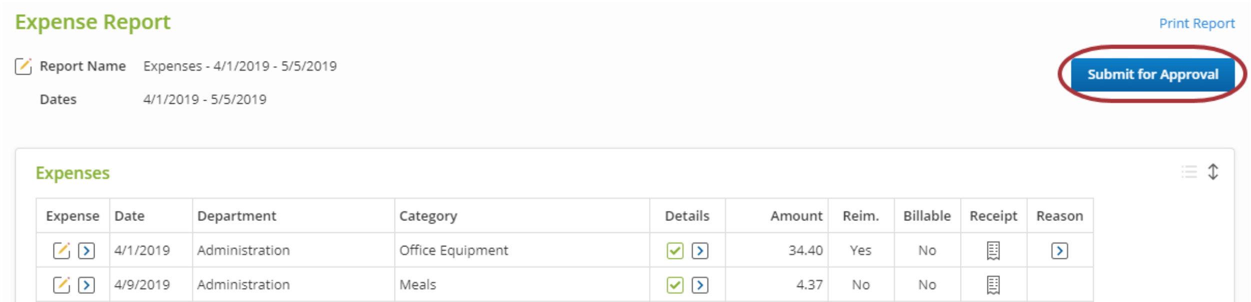
5. Manually Add Expense Line

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.



Step 5: Submit Expense Report

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



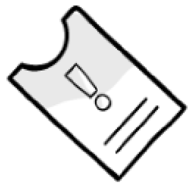
Need More Help?

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



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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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