Create and Submit an Expense Report

Follow the steps below to create and submit an expense report from the mobile app, or from the web if you prefer to work on a computer.

On Mobile

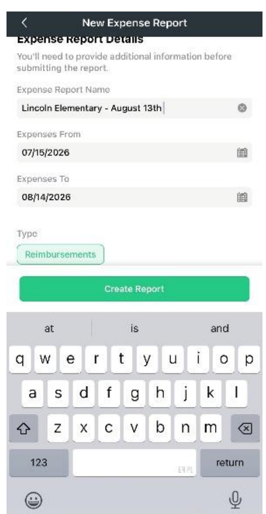
Step 1 Create a new expense report

Open the app and go to the Expenses screen from the bottom menu. Tap the blue "+" button in the bottom-right corner, then select Create Expense Report on the next screen.

Step 2 Fill in the report details

On the Expense Report Details screen, fill in the following, then tap Create Report:

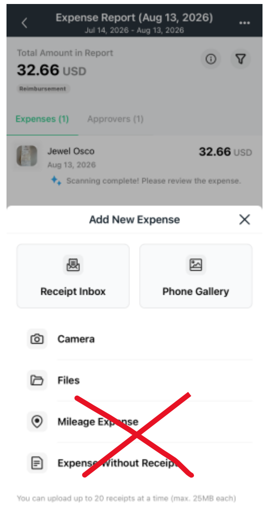
- **Expense Report Name** — school name +
- **Expenses From / Expenses To** — set the date range for the report
- **Type** — prefilled to Reimbursement; no action needed



Step 3 Add an expense

Choose how you'd like to add the expense:

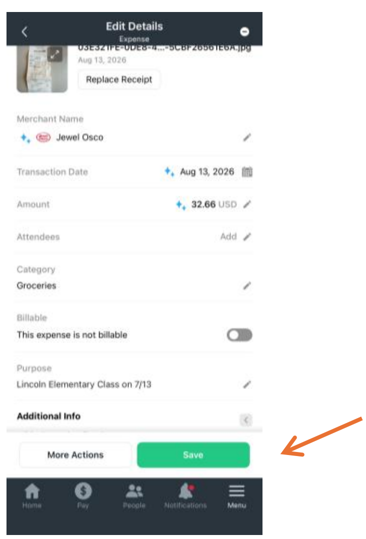
- **Receipt Inbox** — attach a receipt already saved in your inbox
- **Phone Gallery** — upload a photo of a receipt from your camera roll
- **Camera** — take a new photo of a receipt
- **Files** — upload a receipt file from your device



Step 4 Review and save the expense

Once the receipt is scanned, review the auto-filled details on the Edit Details screen and correct any fields as needed, then tap Save:

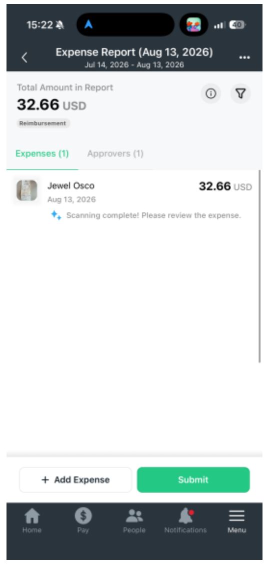
- Merchant Name – store name
- **Transaction Date** — date of purchase
- **Amount** — double-check that the prefilled amount matches the total on the receipt
- Attendees (N/A)
- **Category** — select the appropriate category (e.g., Groceries)
- Billable toggle (N/A)
- **Purpose** — name of school + date of class



Step 5 Review and submit the report

Back on the expense report, review the expense listed under Expenses.

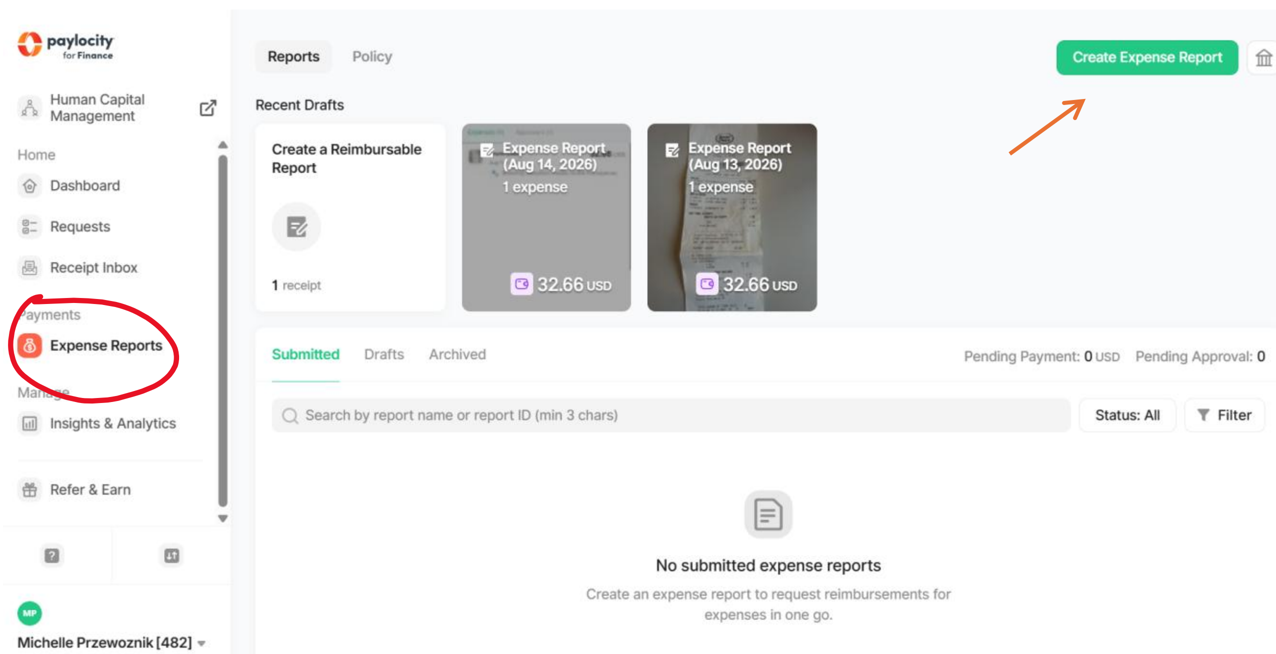
- Tap + Add Expense to add another receipt, repeating Steps 3–4 for each additional expense
- Once all expenses are added, tap Submit to send the report for approval by your program coordinator



On the Web

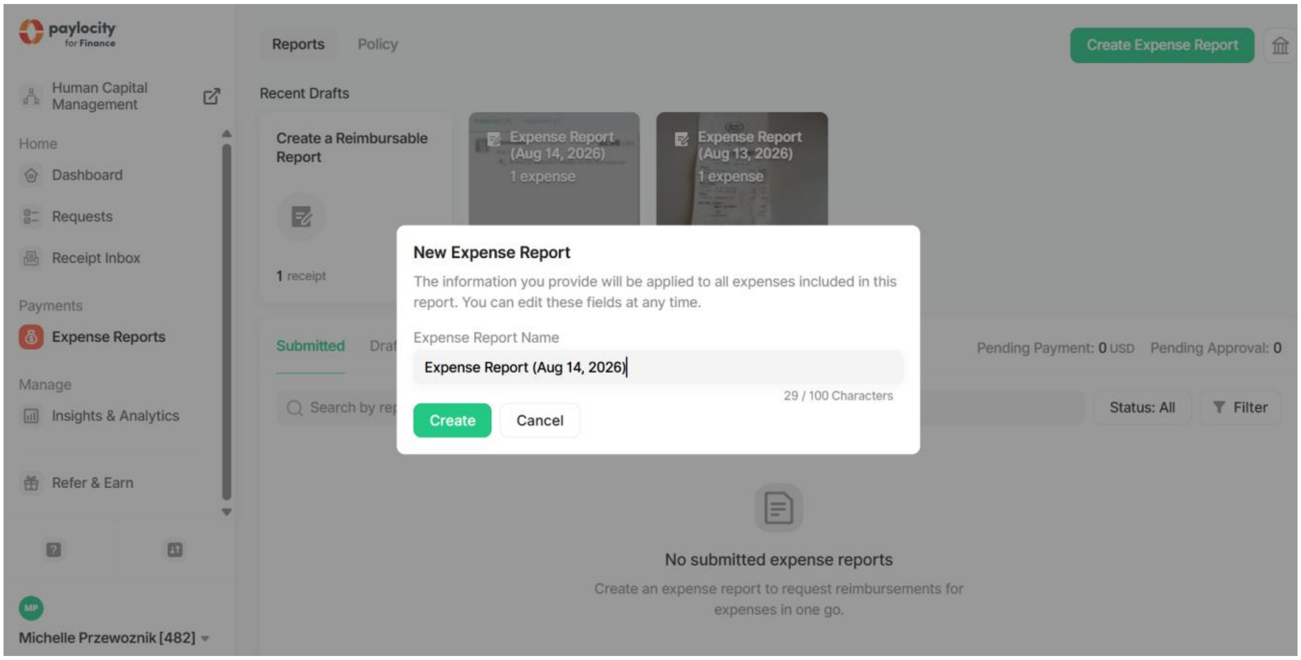
Step 1 Go to Expense Reports

From the left menu, go to Payments > Expense Reports, then select Create Expense Report in the top right.



Step 2 Name the report

In the New Expense Report window, enter an Expense Report Name (or keep the default), then select Create.



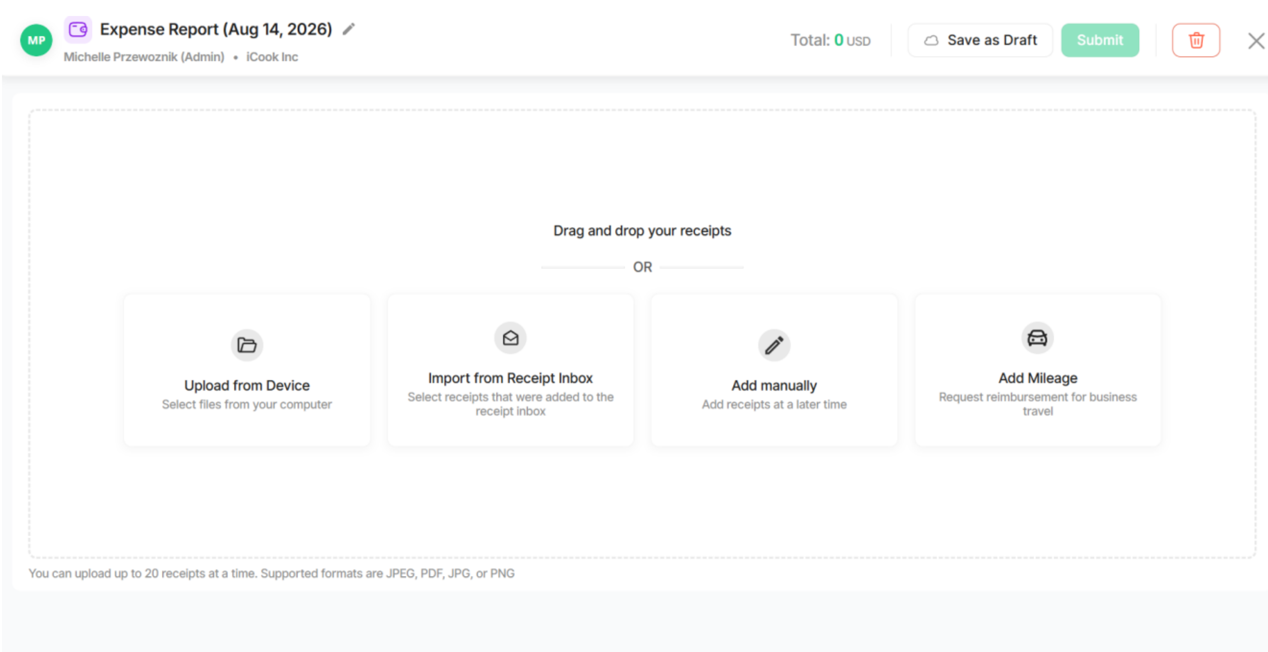
Name the report, then select Create.

Step 3 Add receipts

Add expenses to the report using one of the following:

- **Upload from Device** — select receipt files from your computer
- **Import from Receipt Inbox** — select receipts already added to the receipt inbox
- **Add manually** — add receipts at a later time

You can upload up to 20 receipts at a time. Supported formats are JPEG, PDF, JPG, or PNG.



Step 4 Review and submit the report

Review each expense's details — Merchant Name, Transaction Date, Payout Amount, Category, and Purpose — and address anything flagged Expense Requires Attention. Select + Create new expense to add more, or Submit once the report is ready for approval by your program coordinator.