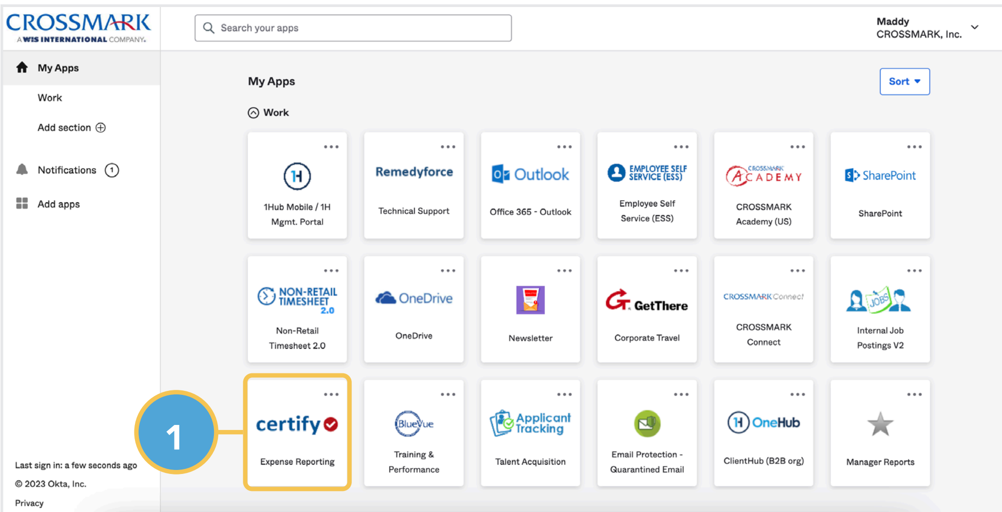
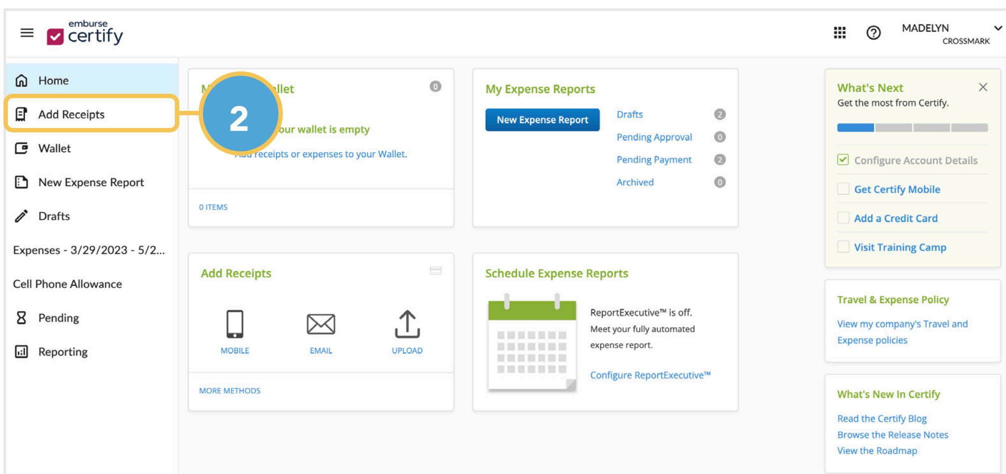
PRODUCT CONNECTIONS
SUBMITTING AN EXPENSE REPORT

When you are executing a Wet Sampling Demo, there may be times when you have to purchase items out-of-pocket. Using Certify, you can expense those purchases to get reimbursed. Follow these steps to submit an expense report using your **computer or laptop**.



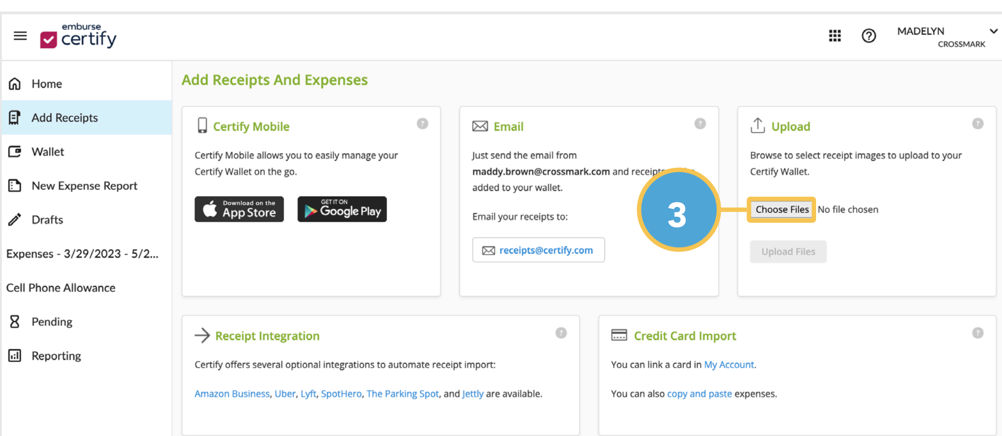
1. Select Certify

From the Okta Home page, select the **Certify Expense Reporting** tile.



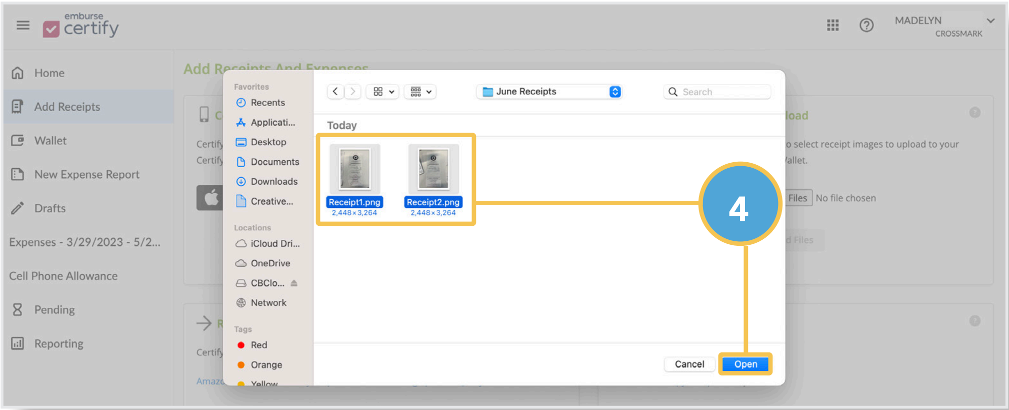
2. Add Receipts

The Certify Home screen will display. From the navigation menu, select **Add Receipts**.



3. Choose Files

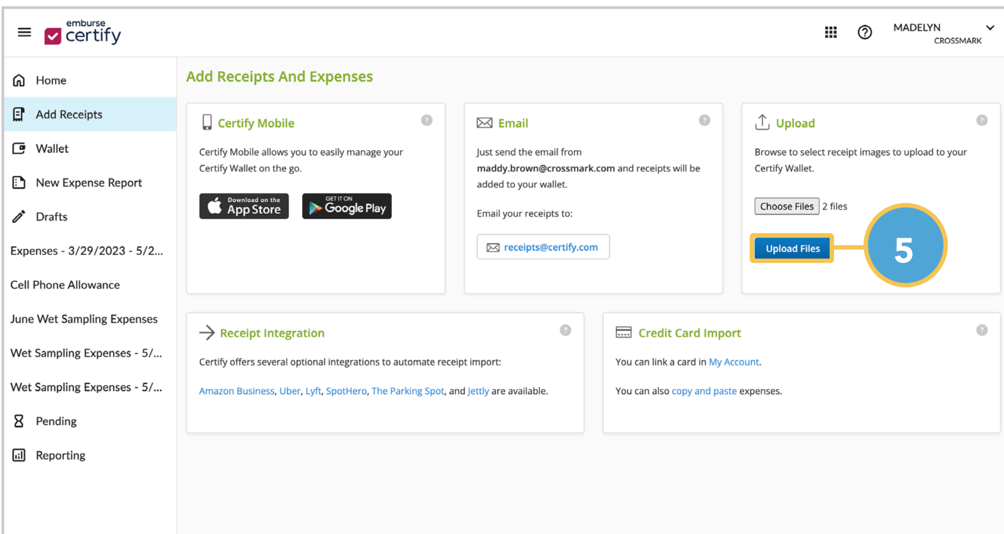
Click the **Choose Files** button in the Upload tile to select receipt images.



4. Select File(s)

Locate the receipt files on your computer. If you have multiple receipts you need to expense, you should select all files to submit in one expense report.

Select the files and click **Open**.



5. Upload Files

The Upload tile will show how many files you have selected. Click the **Upload Files** button to continue.

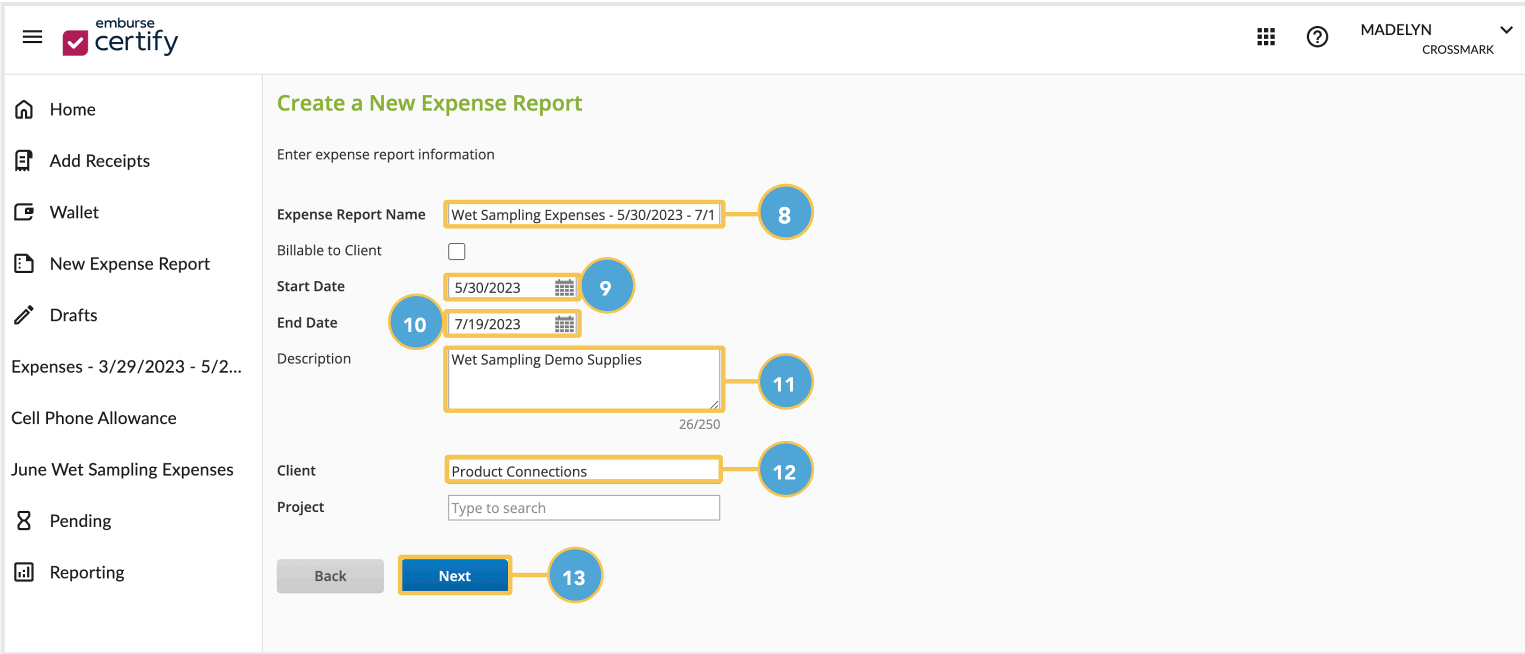
A green confirmation message will display, letting you know the file upload was successful.

6. New Expense Report

Once you have uploaded the receipt files, select **New Expense Report** from the navigation menu.

7. Add All Items

Select **Add all items to a new expense report**. This will create an expense report for all the receipts you uploaded. Click **Next** to continue.



8. Expense Report Name

Enter an **Expense Report Name** (e.g. Wet Sampling + date range or month of expense(s)).

Note: It is important that you expense your purchases as soon as possible. You can only expense items if you made the purchase within 60 days. If the 60 day time frame is over, you cannot expense your purchases.

9. Start Date

Click into the **Start Date** field and enter (or select from the calendar) the earliest date from your receipt(s).

10. End Date

Click into the **End Date** field and enter (or select from the calendar) the latest date from your receipt(s).

11. Description

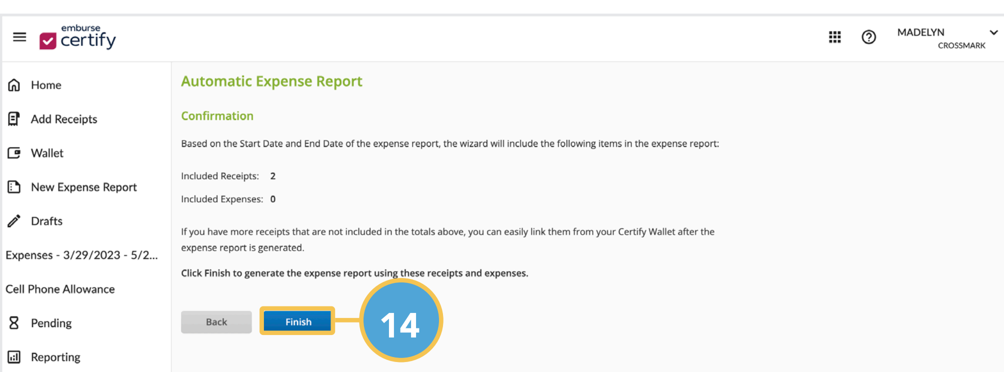
Enter a **Description** of your purchase(s) (e.g. Wet sampling demo supplies).

12. Client

Click into the **Client** field and select Product Connections from the drop-down menu.

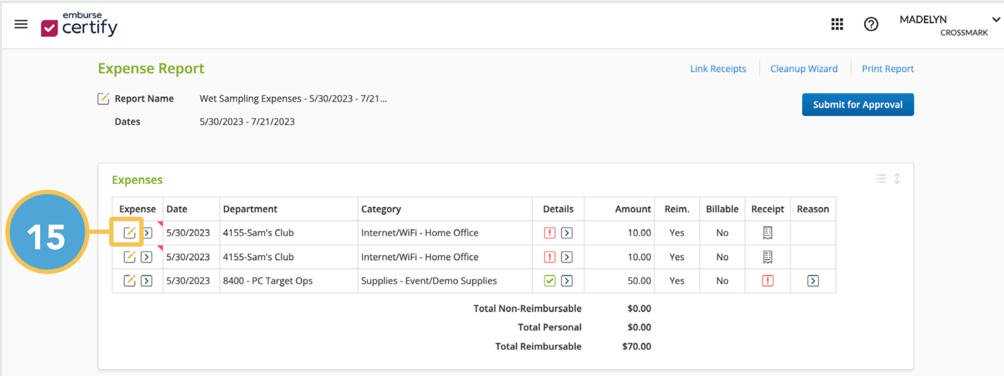
13. Click Next

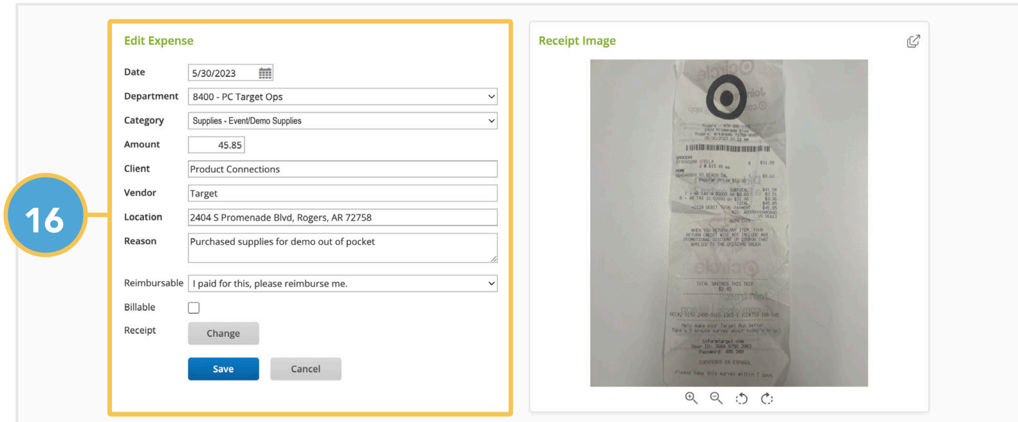
You can leave the Project field blank, then click **Next**.

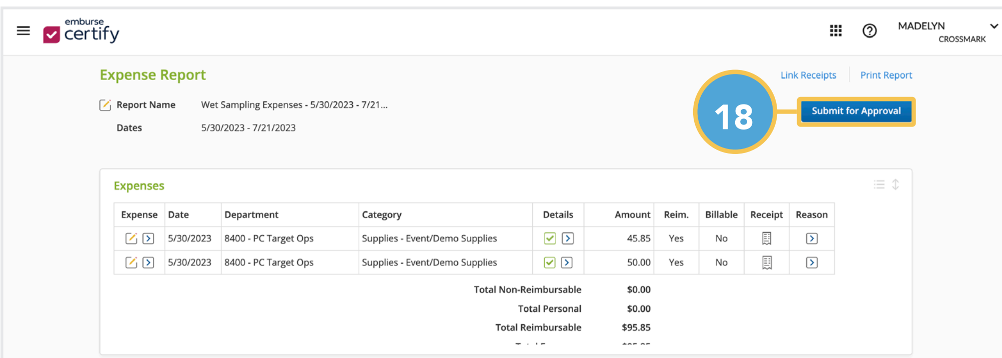


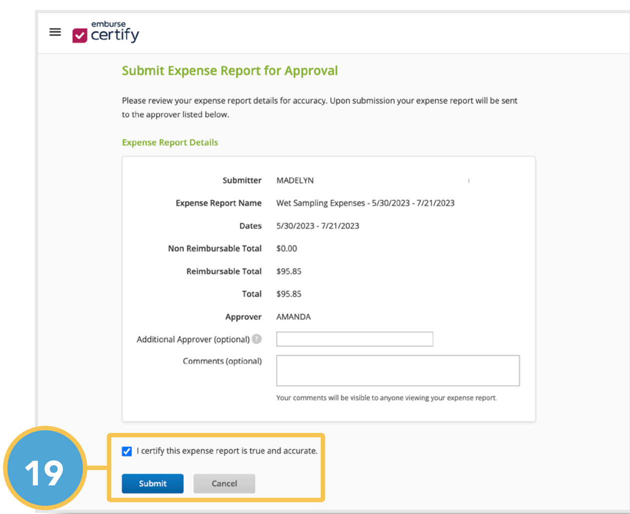
14. Click Finish

Confirm you have selected the correct number of receipts, then click **Finish** to generate the Expense Report using these receipts.









15. Edit Expense

If you receive a red exclamation point in the Details column, the expense requires attention.

Click the **pencil icon** to edit the expense.

16. Apply Edits

The Edit Expense tile will contain red boxes and text, informing you of which fields need correction. The fields should include the following:

Date: When you purchased the product
Department: 8400 - PC Target Ops
Category: Supplies - Event/Demo Supplies
Amount: Dollar amount of your total expenses
Client: Product Connections
Vendor: Target
Location: Address of the store you purchased product from
Reason: Explanation of why you need reimbursement
Reimbursable: I paid for this, please reimburse me.

Apply the necessary edits, then click **Save**.

17. Repeat Steps 15 and 16

Repeat steps 15 and 16 for every expense that contains a red exclamation point. If no other expenses need attention, continue to step 18.

18. Submit for Approval

Once all expenses have been corrected, click the **Submit for Approval** button.

19. Confirm

Confirm that all expense report details are correct.

Select the check box next to *I certify this expense report is true and accurate.* Click **Submit**.

20. Home Screen

Congratulations! You have submitted your expense report and will be directed back to the Home screen.