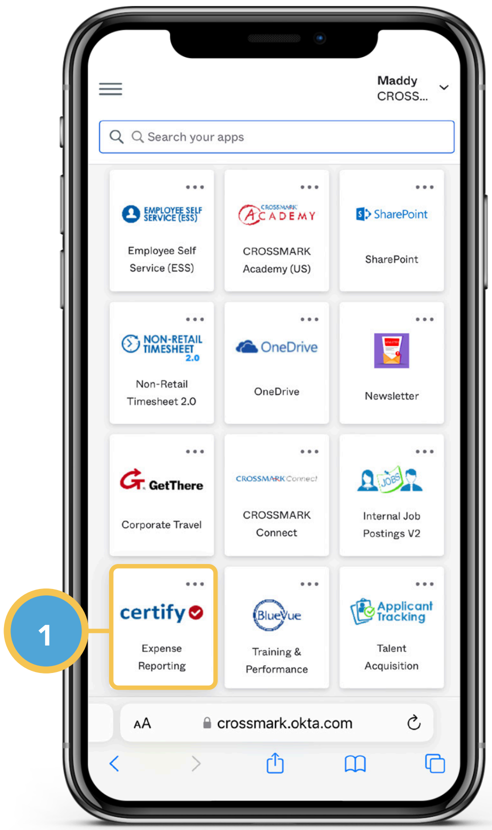
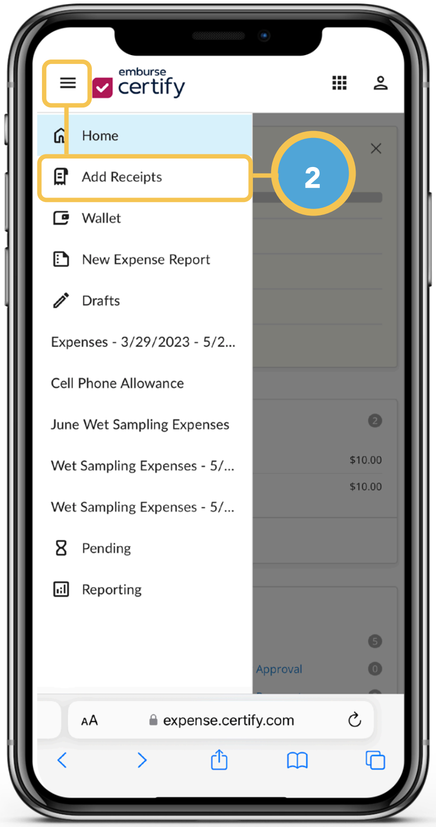
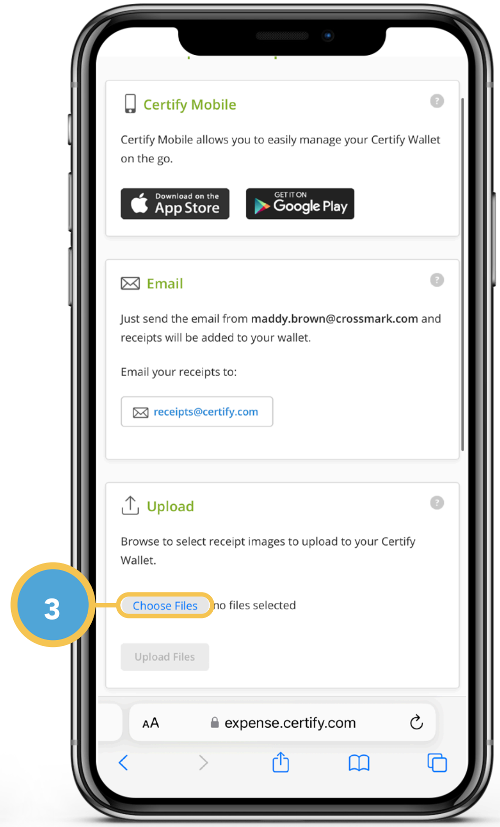
PRODUCT CONNECTIONS
SUBMITTING AN EXPENSE REPORT
Quick Reference Guide

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 **mobile device or tablet**.







1

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

Note: You will skip this step if you are using the Certify Expense Reporting mobile app.

2

The Certify Home screen will display. Tap the hamburger icon to display the navigation menu, then select **Add Receipts**.

3

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

4

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

Select the files and tap **Add**.

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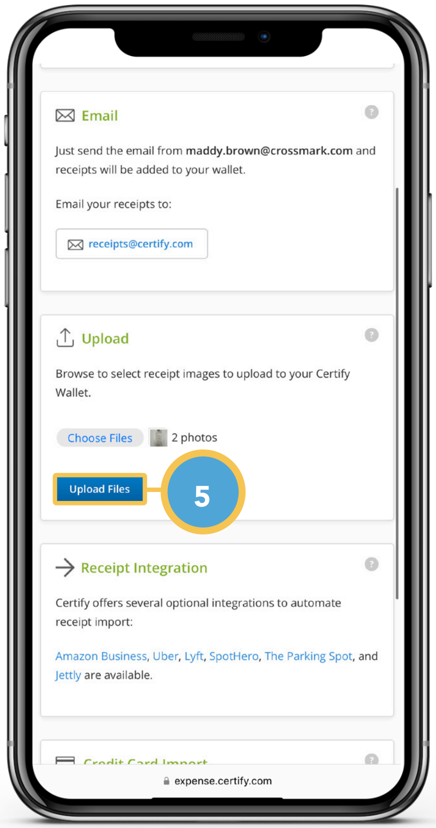

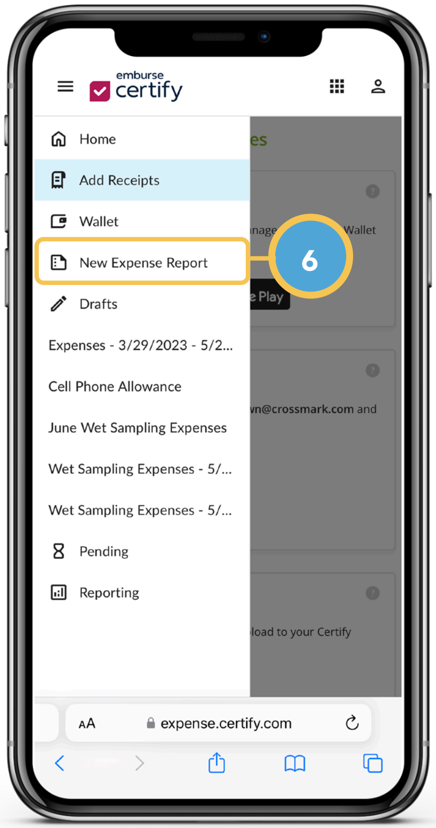

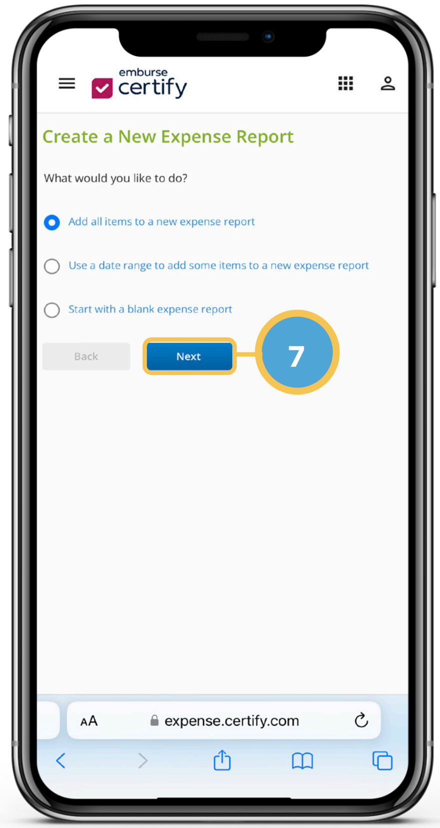

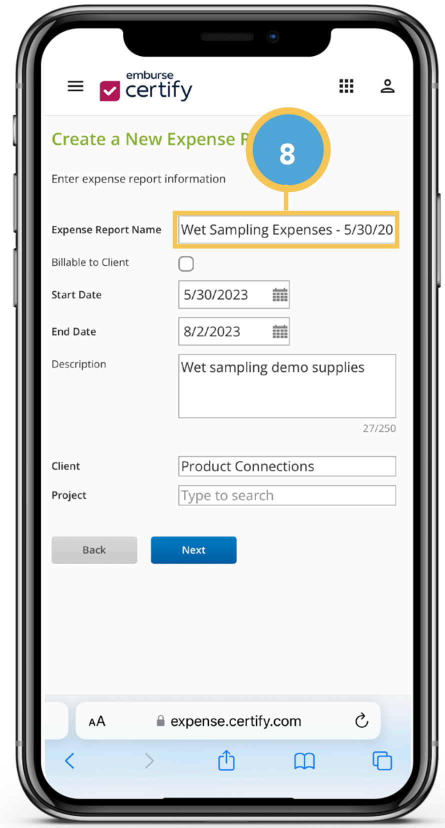

5

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

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

6

Once you have uploaded the receipt files, tap the hamburger icon to display the navigation menu, then tap **New Expense Report**.

7

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

8

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.

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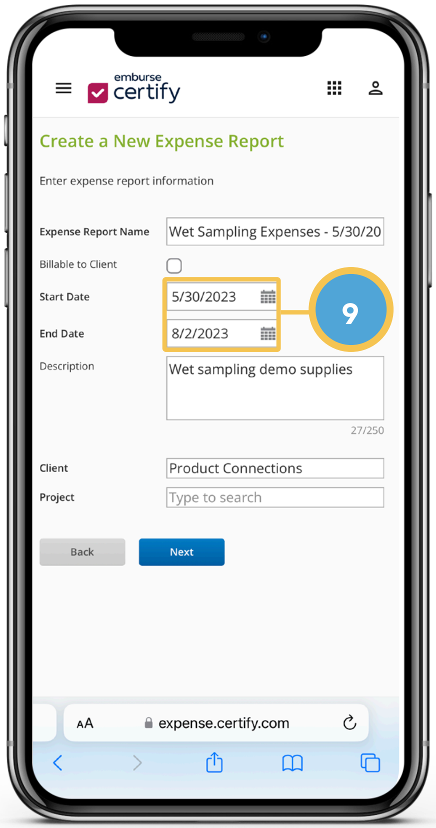

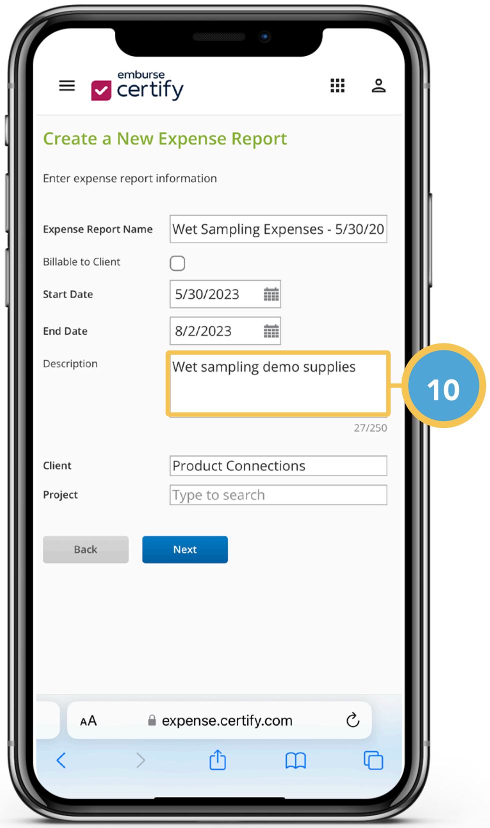

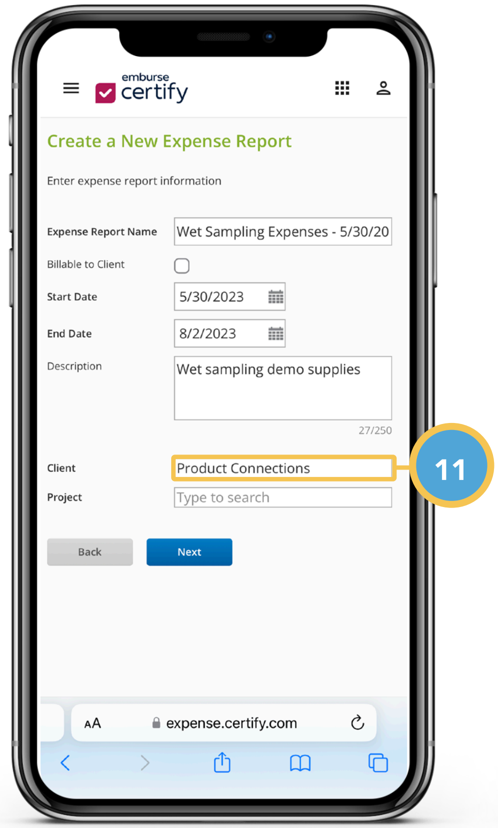

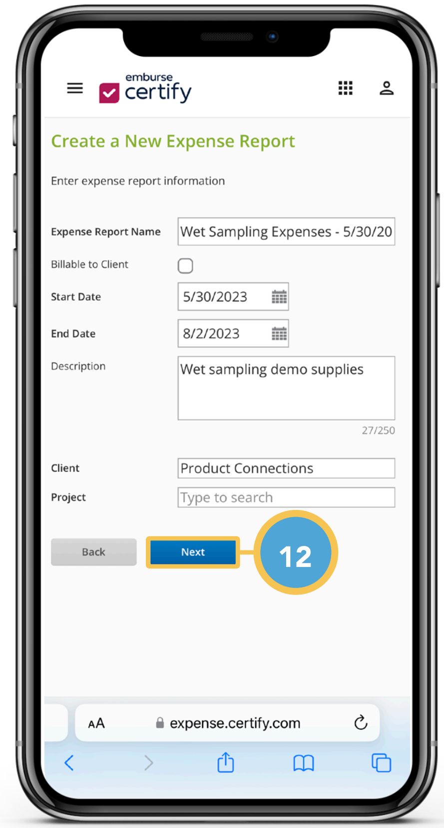

9

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

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

10

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

11

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

12

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

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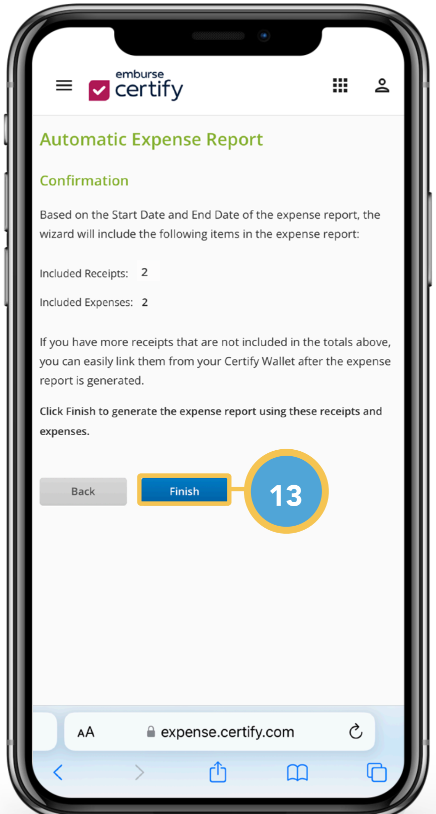

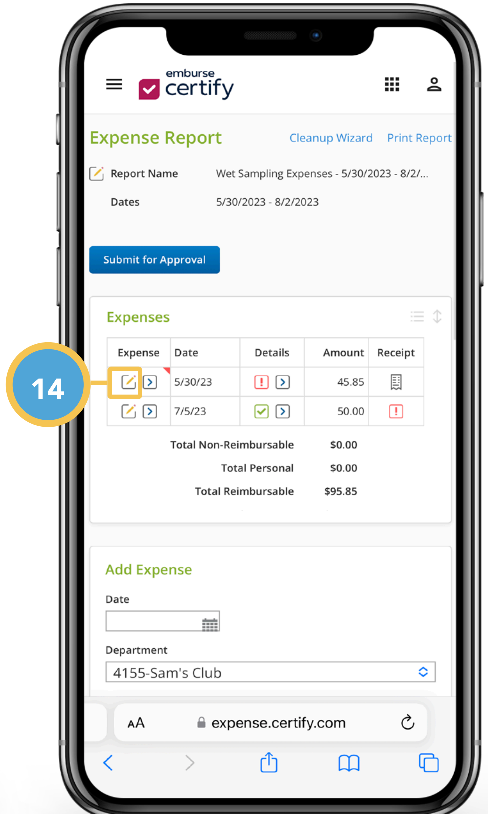

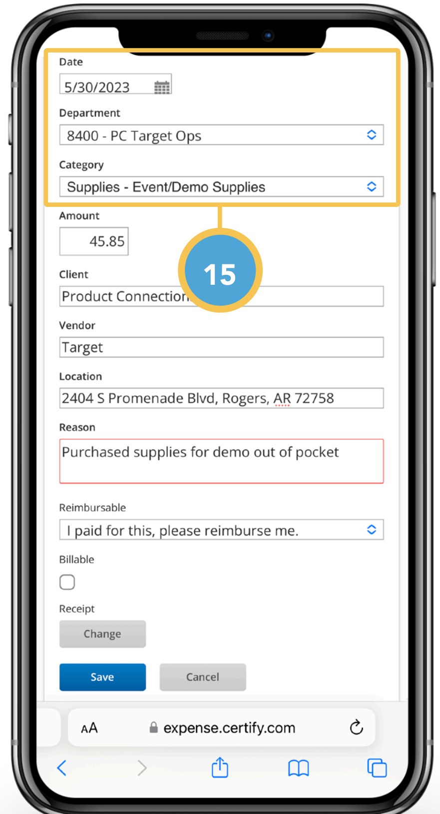

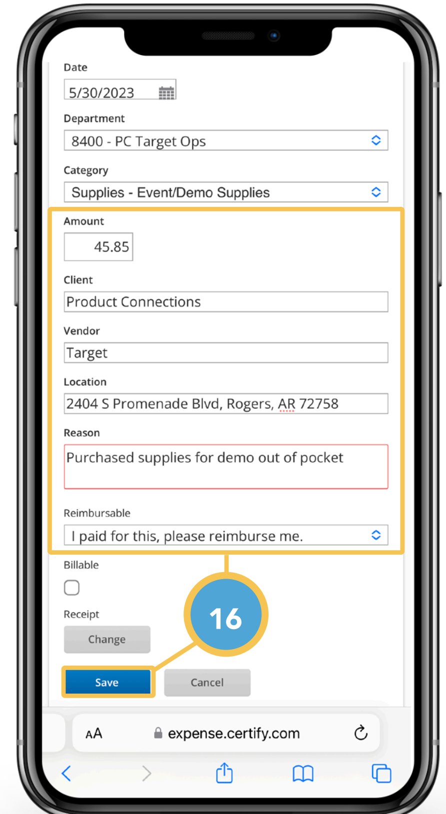

13

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

14

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

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

15

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

16

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 tap **Save**.

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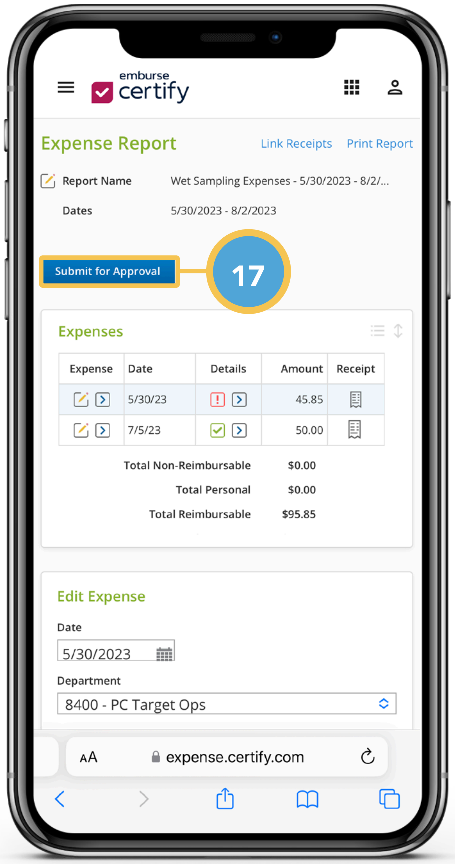

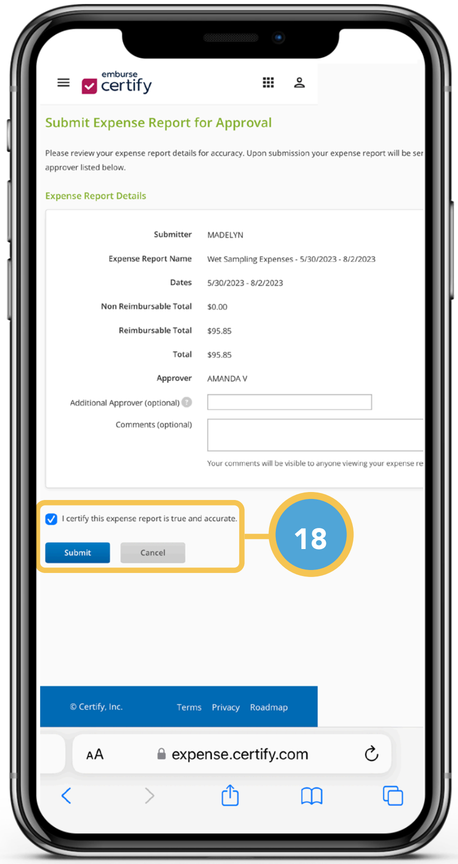

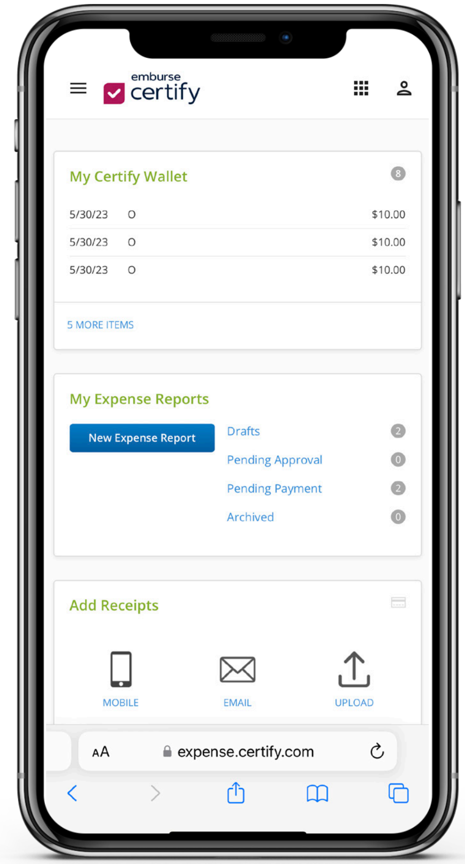

17

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

18

Confirm that all expense report details are correct.

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

19

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