

Creating an Expense Report – Adding Expenses

Once your expense report is created, there are three options to add expenses.

Choose one of three ways to add an expense:

- 1. From a Receipt
- 2. Create an Expense Manually
- 3. Select from Available Expenses

Expense Testing \$172.00

Not Submitted

Report number: G5AMV1

Report Details

Print/Share

Manage Receipts

Travel Allowance

View Alerts

Submit Report

...

Expenses (10)

View: Standard

	Alerts	Date	Receipt	Attributes	Expense Type	Vendor Details	Requested	Actions
☐	×	12/18/2026			TR-Incidentals	Dallas, Texas	\$3.75	...
☐	×	12/18/2026			TR-Meal Per Diem	Dallas, Texas	\$36.25	...

Add Expense

Edit

Delete

Duplicate

Allocate

Combine Expenses

Move

Download

Create Expense from Receipt

Manually Create Expense

Select from Available Expenses (5)

Creating an Expense Report - Create Expense from Receipt

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

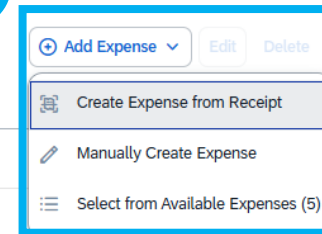
Not Submitted Report number: G5AMV1

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

View Alerts Submit Report ...

Expenses (10) View: Standard ▾									
☐	Alerts ↑↓	Date ↓↑	Receipt ↑↓	Attributes	Expense Type ↑↓	Vendor Details ↑↓			
☐	✖	12/18/2026			TR-Incidentals	Dallas, Texas		Requested ↑↓	Actions
☐	✖	12/18/2026			TR-Meal Per Diem	Dallas, Texas		\$3.75	...
☐								\$36.25	...

1



2

Add Expense to Report

[Create Expense from Receipt](#) [Manually Create Expense](#) [Select from Available Expenses \(5\)](#)



Upload Receipt

Upload or drag and drop your receipts here, and we will automatically create expense for you.

Select File

Option 1:

1. Add an Expense from a Receipt

- Click + Add Expense
- Select Create Expense from Receipt
- Upload your receipt and review the expense details before saving

2. Upload receipt by selecting the file.

Creating an Expense Report - Manually Create Expense

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

Not Submitted

Report number: G5AMV1

Report Details

Print/Share

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Submit Report

1

Expenses (10)

View: Standard

☐	Alerts $\updownarrow$	Date $\updownarrow$	Receipt $\updownarrow$	Attributes	Expense Type $\updownarrow$	Vendor Details $\updownarrow$	Requested $\updownarrow$	Actions
☐		12/18/2026			TR-Incidentals	Dallas, Texas	\$3.75	...
☐		12/18/2026			TR-Meal Per Diem	Dallas, Texas	\$36.25	...

Add Expense

Edit

Delete

Duplicate

Allocate

Combine Expenses

Move

Create Expense from Receipt

Manually Create Expense

Select from Available Expenses (5)

Option 2:

1. Manually Create Expense

- Click + Add Expense
- Select Manually Create Expense

2. Pick an Expense Type.

2

Add Expense to Report

Create Expense from Receipt

Manually Create Expense

Select from Available Expenses (5)

Select an expense type for the new expense

Search

Q

Search by expense type, category, description

Recently Used

TR-Lodging

TR-Parking

NT-Fees-Other

NT-Other Expenses

01. Travel Expenses

TR-Lodging

TR-Official Occ/Conf/Busi Mtg

TR-Travel Incidentals

02. Transportation

El Paso Airport Mileage

TR-Airfare

TR-Mileage

TR-Parking

Creating an Expense Report - Manually Create Expense

Once your expense report is created, there are two options to add expenses.

SAP

Concur

BR

Expense Testing

New Expense

Save Expense

Details

Itemizations

Allocate

Required field *

Expense Type *

TR-Transportation

Trip Type

In State

Traveler Type

Employee

Report/Trip Purpose

TRV-Attend Meeting, Conf, etc.

Transaction Date *

MM/DD/YYYY

Business Purpose *

Enter Vendor Name *

Vendor Location *

Augusta, Georgia

Payment Type *

Out of Pocket

Amount *

Currency *

US, Dollar (USD)

☐ Personal Expense (do not reimburse)

Comment

0/500

Receipt

Hide Receipt Viewer

Manually create the expense:

- Complete all required fields.
- Upload the appropriate receipt.
- Review alerts to ensure that all required information and attachments have been provided.
- Missing information and attachments may result in workflow delays.
- Click Save Expense when all fields are completed. This will also clear alerts once the required changes are made.

Creating an Expense Report - Available Expenses

Once your expense report is created, there are three options to add expenses.

Expense Testing \$172.00

Not Submitted Report number: G5AMV1

Report Details Print/Share Manage Receipts Travel Allowance

View Alerts Submit Report

Expenses (10) View: Standard									
☐	Alerts ↑↓	Date ↓↑	Receipt ↑↓	Attributes	Expense Type ↑↓	Vendor Details ↑↓		Requested ↑↓	Actions
☐	✖	12/18/2026			TR-Incidentals	Dallas, Texas		\$3.75	...
☐	✖	12/18/2026			TR-Meal Per Diem	Dallas, Texas		\$36.25	...

1

Add Expense									
Create Expense from Receipt									
Manually Create Expense									
Select from Available Expenses (5)									

2

Add Expense to Report							
Create Expense from Receipt Manually Create Expense Select from Available Expenses (5)							
☐	Payment Type ↑↓	Expense Source	Expense Type ↑↓	Vendor Details ↑↓	Date ↓↑	Amount ↑↓	Actions
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	TR-Rental Car	UTEP El Paso, Texas	08/19/2026	\$303.42	...
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	TR-Lodging	Sheraton Hotel		\$1,259.00	...
☐	Out of Pocket	ExpenseIt	Non Reimbursable/Personal Expense	Sun City Bakery El Paso, Texas	09/18/2025	\$99.59	...

Option 3:

1. Select from Available Expenses (#)

- Click + Add Expense
- Select from Available Expenses

2. Pick from the available expenses listed

- Card Transactions will appear here as well

☐	Travel Cards	Corporate Card	TR-Airfare	LAV (VENEZUELA)	03/19/2026	\$920.69	...
☐	Travel Cards	Corporate Card	Undefined	FOUR SEASONS HOTEL (AUSTRALIA)	03/19/2026	\$932.77	...