

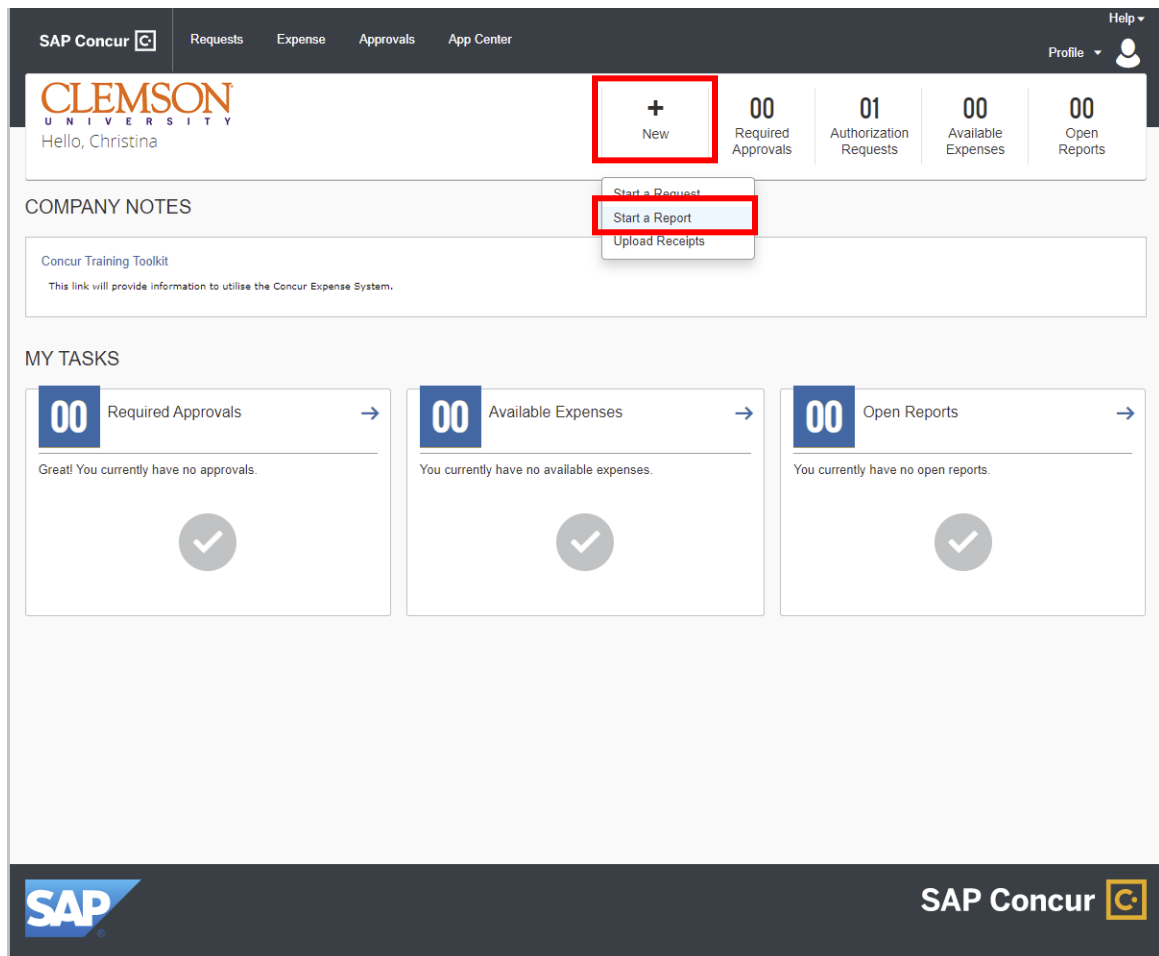
4/12/2022

Creating a New Expense Report: Business Meal Reimbursement

Creating a New Expense Report: Business Meal Reimbursement

When you need to create an expense report to be reimbursed for a business meal, you can start the report either from the **Quick Task Bar** or the **Expense** tab on the menu bar. The screen shot below reflects the **Quick Task Bar** option.

1. Place your mouse pointer over **New**, then click **Start a Report**.



2. Complete the required and optional **Report Header** fields as appropriate on the **Report Header** page (required fields are indicated by a red asterisk).
 - a. Under **Report Type**, select **CU Non-Travel**.
 - b. Under **Report Name MM/YYYY**, enter a name for your expense report, followed by the month and year the charge was incurred.
 - c. For the **Business Unit**, **Department**, **Fund**, and **Project/Grant** fields, enter the appropriate information for your charge. If the **Program** and **Class** are also known, feel free to complete those fields as well.
 - d. If you would like to provide additional notes for this reimbursement request, those notes should be included in the **Additional Information** field.

Create From an Approved Request

* Required field

Report Type *
*CU Non-Travel

Report Name MM/YYYY *
Interview Lunch 04/2022

Business Unit *
(CU) Clemson University

Department *
(5334) Lean and Process Improvement

Fund *
(14) E&G Non-State Dept/ Generated

Program
Search by Code

Class
Search by Code

Project/Grant *
(1400000) Default

Additional Information
Business lunch for potential new hire.

Cancel **Create Report**

3. Click **Create Report**.
4. On the next screen, click **Add Expense**.

Interview Lunch 04/2022 \$0.00

Not Submitted **Submit Report**

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

Add Expense Edit Delete Copy Allocate Combine Expenses Move to ▾

No Expenses
Add expenses to this report to submit for reimbursement.

5. In the pop up that appears, scroll through the list to find **Business Meals** under section **04. Meal Expenses** and click on it.

The screenshot shows the 'Add Expense' interface. At the top left, there is a box with '0 Available Expenses' and a '+ Create New Expense' button. Below this is a search bar with the placeholder text 'Search for an expense type'. A list of expense types is displayed below the search bar, including 'Lodging/Hotel - Advance Deposit', '03. Personal Car Mileage', '04. Meal Expenses', and '05. Office Expenses'. Under '04. Meal Expenses', 'Business Meals' is highlighted with a red rectangular box. Other items in the list include 'Personal Car Mileage', 'Courier/Shipping/Freight', and 'Office Supplies'. A vertical scrollbar is visible on the right side of the list.

6. Once the expense type is selected, complete the required fields for the expense type details.
 - a. Under **Transaction Date**, enter the date the meal was purchased.
 - b. Under **Vendor**, enter the location where the meal occurred.
 - c. Under **City of Purchase**, enter the City and State (or country) where the meal occurred.
 - d. Under **Payment Type**, select **Employee Paid**.
 - e. Under **Amount**, enter the amount to be reimbursed (the amount of the charge).
 - f. Under **Currency**, confirm that US, Dollar is correct (only adjust if the purchase was made outside of the United States: if so, select the correct country and currency where the purchase was made).
 - g. If desired, enter any additional comments within the **Comment** box.

Business Meals \$150.00

04/04/2022 | Rick Erwin's

Details

Itemizations



Attendees (1)



Allocate

* Required field

Expense Type *

Business Meals

Transaction Date *

04/04/2022

Vendor *

Rick Erwin's

City of Purchase *

Clemson, South Carolina

Payment Type *

Employee Paid

Amount *

150.00

Currency *

US, Dollar

Comment

Lunch provided to three employees and the candidate for the vacant position.

Save Expense

Save and Add Another

Cancel

7. Once these fields are completed, click on the **Attendees (1)** button. In the pop up, click on the Add button to add the attendees' name(s).

Attendees

Business Meals | \$150.00

Attendees: 1

Add Remove Create Group Copy from Request

Attendee Name ≡ **Attendee Title** ↑↓

Brumback, Christina

8. In the additional pop up, click on the **Attendees** button.

Add Attendees

Recent Attendees **Attendees** Attendee Groups + No Shows

Attendee Name ≡ **Attendee Title** ↑↓

Brumback, Christina

[Search All Attendee History](#)

9. Add the names of the individuals who attended the business meal.
- a. Adding Employees:
 - i. For employees, choose the **Employee** dropdown under **Attendee Type** and use the space to the right to type in the employee's name and search (you can search using either a first or a last name).

Add Attendees

Recent Attendees Attendees Attendee Groups No Shows

Attendee Type: Employee

Attendee Name: Cleveland

More Search Options

- Cleveland, Carissa
- Cleveland, Kayla
- Cleveland, Linda C
- Cleveland, Travis

- ii. Once you have found the correct employee, click on his/her name to select. A confirmation message will pop up to say that the employee has been added.

Add Attendees

Recent Attendees Attendees Attendee Groups No Shows

Attendee added: Kayla Cleveland

Attendee Type: Employee

Attendee Name: Cleveland

More Search Options

b. Adding Guests:

- i. For guests, choose the **Guest** dropdown under **Attendee Type**. If the guest is new to Clemson and the system, click the **Create New Attendee** button.

Recent Attendees Attendees Attendee Groups No Shows

Attendee Type: Guest

Last Name: [input field]

First Name: [input field]

Affiliation / School: [input field]

Job Title: [input field]

Can't find an attendee? **Create New Attendee**

Search Reset Close

ii. Enter the attendee's information and click Create Attendee.

Create New Attendee



[← Go back](#)

* Required field

Attendee Type *	Last Name *
<input type="text" value="Guest"/>	<input type="text" value="Mouse"/>
First Name *	Affiliation / School * ?
<input type="text" value="Mickey"/>	<input type="text" value="Disney"/>
Job Title	
<input type="text" value="Mascot"/>	

Cancel

Create Attendee

iii. The screen will confirm the attendee is added. Once you have created all of your new guests, click **Go back** to return to the attendees screen.

Create New Attendee



[← Go back](#)

✓ Attendee added: Mickey Mouse

* Required field

Attendee Type *	Last Name *
<input type="text" value="Guest"/>	<input type="text"/>
First Name *	Affiliation / School * ?
<input type="text"/>	<input type="text"/>
Job Title	
<input type="text"/>	

Cancel

Create Attendee

- iv. If the guest is not new/has visited before, enter the guest's last name or first name into the guest fields and click **Search**.

Add Attendees x

Recent Attendees
Attendees
Attendee Groups
+ No Shows

Attendee Type * * Required field

Last Name

First Name

Affiliation / School ?

Job Title

Can't find an attendee? [Create New Attendee](#)

Search
Reset
Close

- v. When the list of names appears, click on the box next to the attendee desired and click **Add to List**.

Add Attendees ^

Recent Attendees
Attendees
Attendee Groups
+ No Shows

Search Criteria: Guest, Mouse Can't find an attendee? [Create New Attendee](#)

Modify Search

<input checked="" type="checkbox"/>	Attendee Type ↓	Last Name ↓	First Name ↓	Affiliation / School ↓	Job Title ↓
<input type="checkbox"/>	Guest	Mouse	Mickey	Disney	Mascot
<input checked="" type="checkbox"/>	Guest	Mouse	Minnie	Disney	Mascot

Can't find an attendee? [Create New Attendee](#)

Add to List
Close

10. Once all attendees are listed, click **Save**.

Attendees x

Business Meals | \$150.00


Attendees: 4

Add
Remove
Create Group
Copy from Request


<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Brumback, Christina			Employee	1	\$37.50
<input type="checkbox"/>	Cleveland, Kayla			Employee	1	\$37.50
<input type="checkbox"/>	Haughey, Gabriel			Employee	1	\$37.50
<input type="checkbox"/>	Mouse, Mickey	Mascot	Disney	Guest	1	\$37.50



Cancel Save

11. Before saving the expense, click on the **Upload Receipt Image**.


Business Meals \$150.00  Cancel Save Expense


04/04/2022 | Rick Erwin's



Details **Itemizations** Hide Receipt 


 Attendees (4) |  Allocate

* Required field

Expense Type *
Business Meals 


Transaction Date * 04/04/2022  Vendor * Rick Erwin's

City of Purchase *  Clemson, South Carolina Payment Type * Employee Paid 

Amount * 150.00 Currency * US, Dollar 

Comment
Lunch provided to three employees and the candidate for the vacant position.

Save Expense Cancel


Upload Receipt Image

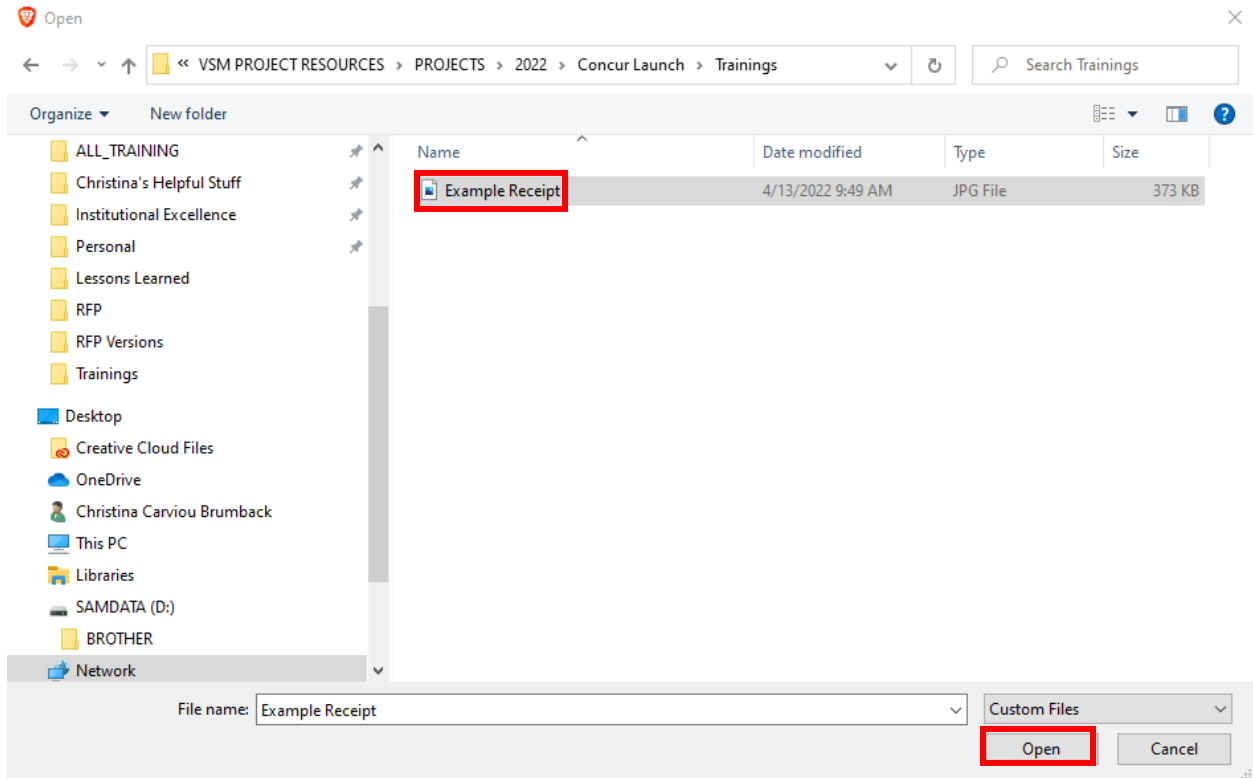
12. If you haven't already, scan and save your receipt to your computer. Within the pop up that appears, click the Upload Receipt Image box.

Attach Receipt ✕



Close

13. In the new pop up, find where your receipt is saved on your computer, select the receipt image, and click **Open**.



14. The receipt should now appear on your New Expense screen.
- If you only have one business meal expense that needs to be reimbursed or have added all expenses, click the **Save Expense** button.
 - If you have another business meal expense, click the **Save and Add Another** button, then repeat steps 5-14.

Details
Itemizations
Hide Receipt

Attendees (4) | Allocate

Expense Type * * Required field

Business Meals

Transaction Date * 04/04/2022

Vendor * Rick Erwin's

City of Purchase * Clemson, South Carolina

Payment Type * Employee Paid

Amount * 150.00

Currency * US, Dollar

Comment
Lunch provided to three employees and the candidate for the vacant position.

Save Expense
Save and Add Another
Cancel

15. Once all reimbursement expenses are included, click **Submit Report**.

Interview Lunch 04/2022 \$150.00

Copy Report
Submit Report

Not Submitted

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

Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move to

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>			Employee Paid	Business Meals Attendees (4)	Rick Erwin's Clemson, South Carolina	04/04/2022	\$150.00
							\$150.00

16. A pop up will appear to confirm accountability for these expenses. Please read through the list of certified statements, confirm their accuracy, and if correct, click **Accept & Continue**.

User Electronic Agreement



By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the University in full for those expenses.

Cancel

Accept & Continue

17. A final pop up will appear with a summary of the expenses/reimbursement you are requesting. Confirm everything is accurate, and click **Submit Report**.

Report Totals



Company Pays

\$150.00

Employee

Employee Pays

\$0.00

Company

Amount Total:
\$150.00

Due Employee:
\$150.00

Owed Company:
\$0.00

Requested Amount:
\$150.00

Total Paid By Company:
\$150.00

Total Owed By Employee:
\$0.00

Cancel

Submit Report