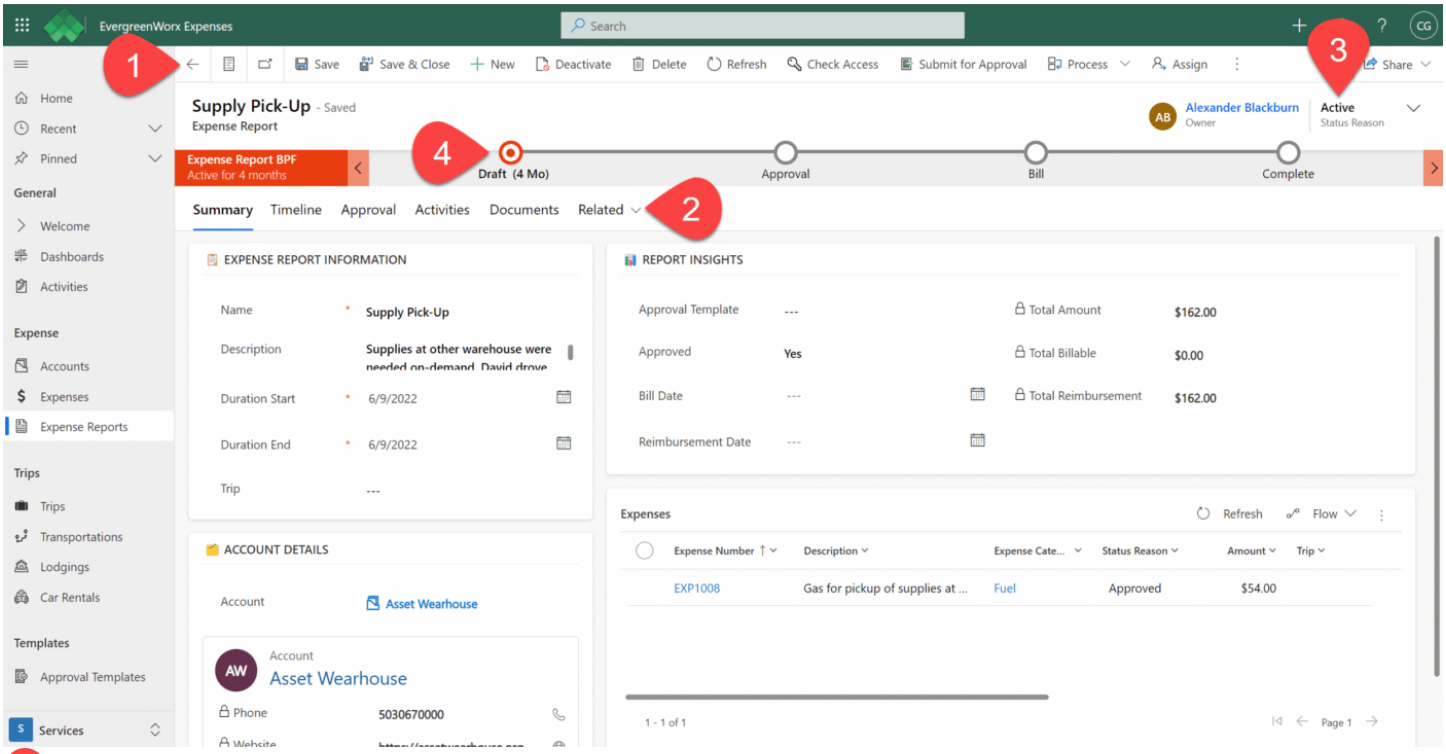
Expense Reports

Expenses · https://evergreenworx.com/docs/expense-reports/

The Expense Report record form stores information concerning business expenditures incurred by an owner, manager or employee.



1 In the ribbon, available actions are displayed for the current Expense Report record, such as deactivating the report, deleting the report, submitting the report for approval, or assigning the report to another person. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Expense Report record, you'll see the following tabs:

- Summary – Displays expense data such as the start and end dates of the report, the amounts involved, reimbursement information, and provides a list of the expenditures.
- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.

- Approval – Indicates the approval status of the Expense Report. If multiple tasks need to be done for approval, approval steps are automatically listed if an Approval Template was specified on the Summary tab, or they can be manually added and sequenced to be performed.
- Activities – Provides the capability of capturing and tracking communications related to the processing of the Expense Report.
- Documents - File attachments such as receipts, invoices, travel documents, etc.
- Related – Other related items, such as Record Audit History and Activities.

3 Status of the record shows whether an Expense Report is still in draft mode, is currently Active, or has been processed and is Closed.

4 Business Process Flow of the record shows the specific stages of an Expense Report’s processing. These include: Draft, Approval, Bill and Complete.