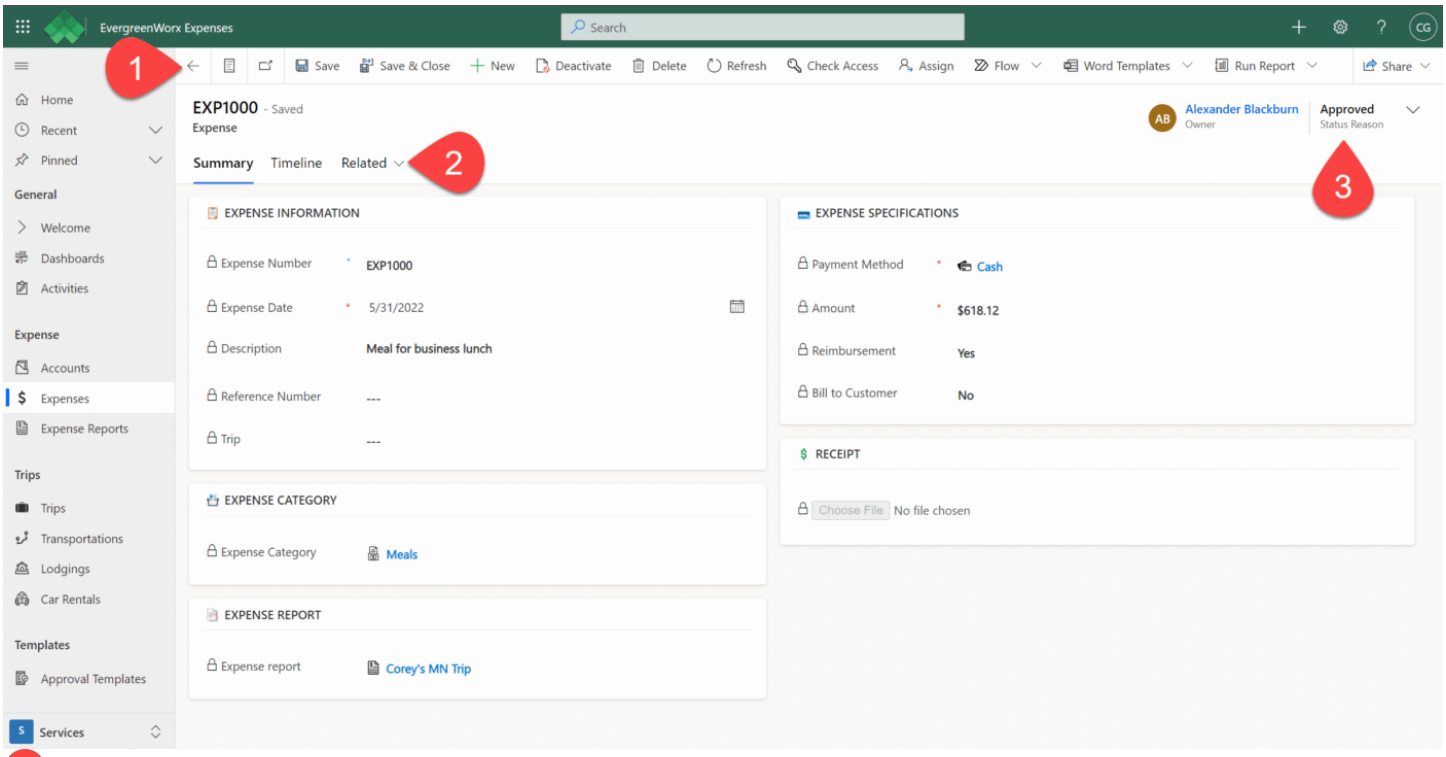
Expenses Set-Up

Expenses · https://evergreenworx.com/docs/expenses/

The Expense record form is where key information about a business expenditure is kept.



1 In the ribbon, available actions are displayed for the current Expense record, such as deactivating the record, deleting the record, or running a report. 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 record, you'll see the following tabs:

- Summary – Displays expenditure details, such as date incurred, expense category, amount, and can be flagged as reimbursable to the employee and billable to a customer. The Expense can also be tied to an Expense Report, and documents (receipts, invoices, etc.) can be appended to the record.
- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.

- Related – Other related items, such as Record Audit History and Activities.

3 Status of the record shows whether this Expense is New, Reported, Pending Approval, Approved, or Canceled.