



Certify User Guide

QUICK START



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This version is current as of January 1, 2020
For continuously updated instructions, please visit our Help Center within the Certify Support tab.

Certify is T&E expense management made easy

With thousands of users and satisfied customers worldwide, Certify is the leading fully automated travel and entertainment expense management solution for companies of every size. The easy-to-use Certify cloud-based interface and mobile application with electronic receipt capture allow organizations to book travel and complete expense reports and reimbursement quickly, easily, and cost-effectively. All while reducing overhead processing costs, increasing compliance with corporate policy and simplifying the overall T&E management process for employees, accountants and administrators.

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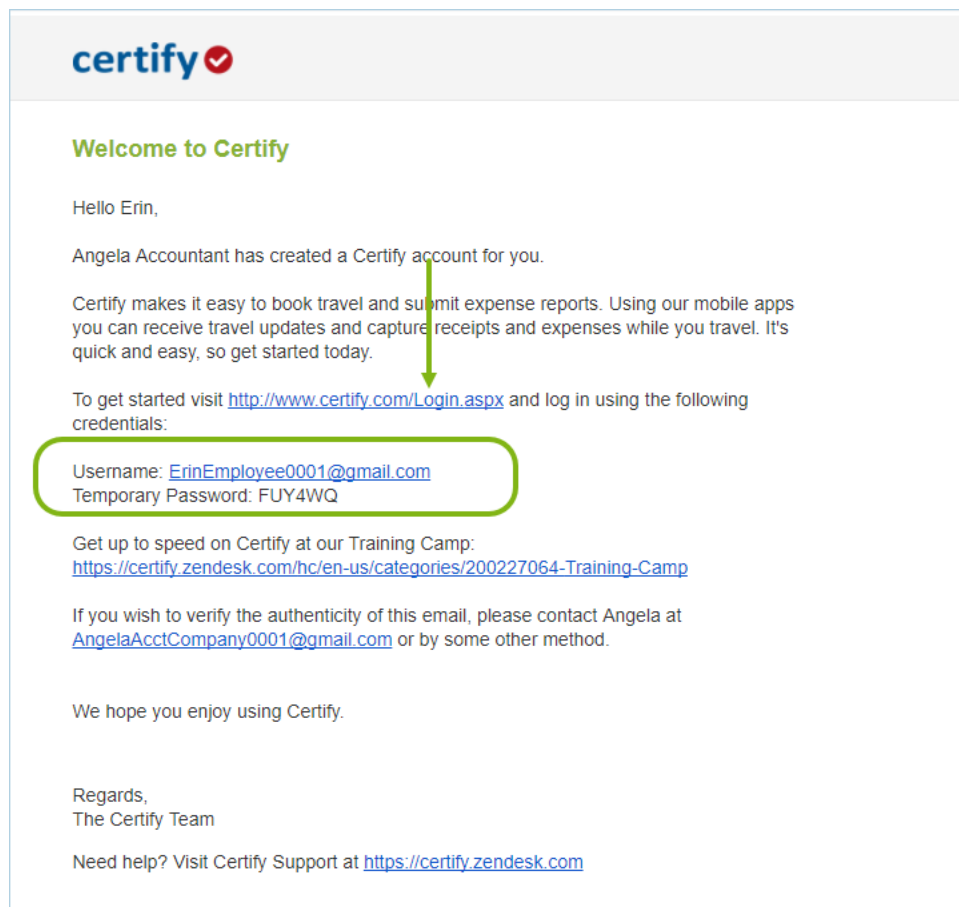
CERTIFY QUICK START GUIDE

This guide is a condensed version with the basics of how to get started in Certify. Please feel free to utilize our other User Guides for more detailed instructions, and as always, our online Help Center.

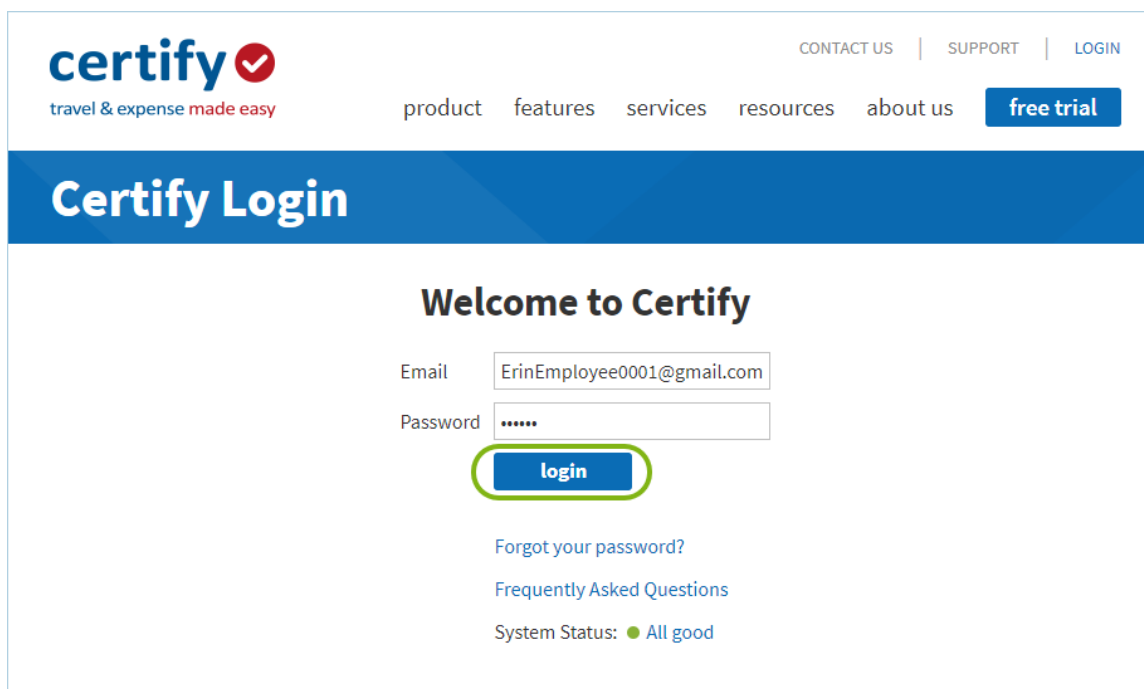
Logging into Certify for the First Time

When a company releases Certify to new users, you will receive your login instructions directly from your company. If not directed otherwise, you will be sent a **Welcome Email** with your email address and a temporary password to use for your first login. This article shows you how to login to Certify for the first time using your Welcome Email.

Step 1: To begin creating your Certify account, select the link from your email.

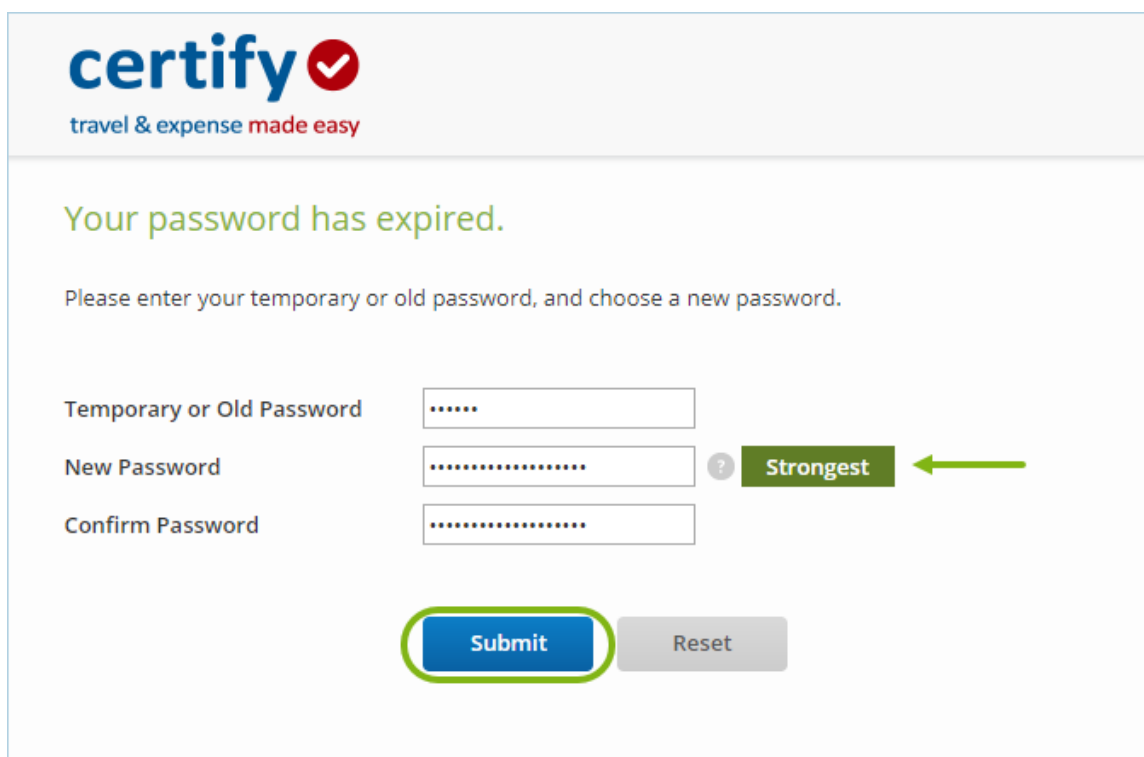


Step 2: The link takes you to the Certify website. Enter the login credentials you received in your **Welcome to Certify** email into the Email and Password fields, and click login.



The image shows the Certify login page. At the top, there is a navigation bar with the Certify logo (a red checkmark in a circle) and the tagline "travel & expense made easy". To the right of the logo are links for "CONTACT US", "SUPPORT", and "LOGIN". Below the navigation bar are links for "product", "features", "services", "resources", and "about us", followed by a blue button labeled "free trial". The main heading is "Certify Login". Below this is a "Welcome to Certify" message. There are two input fields: "Email" with the value "ErinEmployee0001@gmail.com" and "Password" with masked characters "*****". A blue "login" button is highlighted with a green circle. Below the login button are links for "Forgot your password?", "Frequently Asked Questions", and "System Status: ● All good".

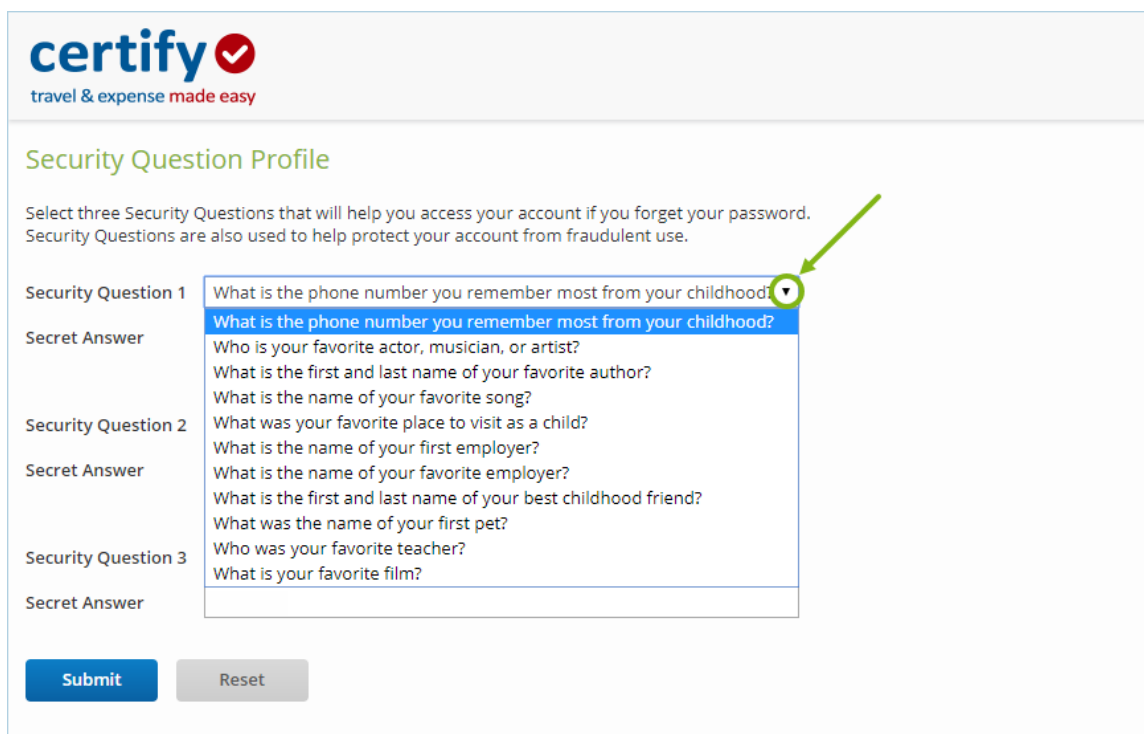
Step 3: On the next page, you are prompted to create a new password. The strength of your new password is evaluated as you type it. Click **Submit**.



The image shows the password creation page. At the top, there is a navigation bar with the Certify logo (a red checkmark in a circle) and the tagline "travel & expense made easy". Below the navigation bar is a green heading "Your password has expired." followed by the instruction "Please enter your temporary or old password, and choose a new password." There are three input fields: "Temporary or Old Password" with masked characters "*****", "New Password" with masked characters "*****", and "Confirm Password" with masked characters "*****". To the right of the "New Password" field is a green button labeled "Strongest" with a green arrow pointing to it. Below the input fields are two buttons: a blue "Submit" button highlighted with a green circle and a grey "Reset" button.

Step 4: On the **Security Question Profile** page, you are prompted to provide answers to three security questions. These questions provide an extra security layer when you log into your Certify account.

Logging into Certify for the First Time



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Security Question Profile

Select three Security Questions that will help you access your account if you forget your password. Security Questions are also used to help protect your account from fraudulent use.

Security Question 1: What is the phone number you remember most from your childhood? ▼

Secret Answer: What is the phone number you remember most from your childhood?

Security Question 2: Who is your favorite actor, musician, or artist?

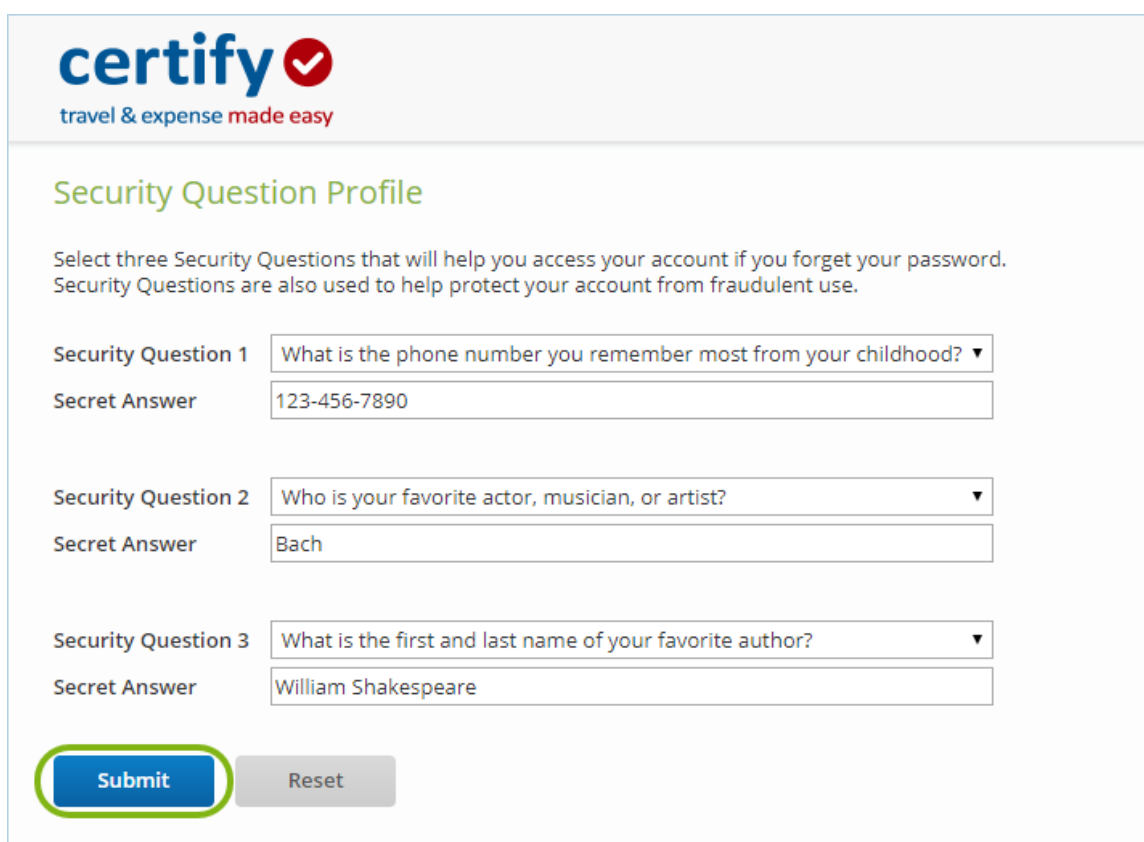
Secret Answer: What is the first and last name of your favorite author?

Security Question 3: What is the first and last name of your favorite author?

Secret Answer: What is the name of your favorite song?

Submit Reset

Step 5: Click **Submit** after you have entered answers to the security questions in the fields provided.



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Security Question Profile

Select three Security Questions that will help you access your account if you forget your password. Security Questions are also used to help protect your account from fraudulent use.

Security Question 1: What is the phone number you remember most from your childhood? ▼

Secret Answer: 123-456-7890

Security Question 2: Who is your favorite actor, musician, or artist? ▼

Secret Answer: Bach

Security Question 3: What is the first and last name of your favorite author? ▼

Secret Answer: William Shakespeare

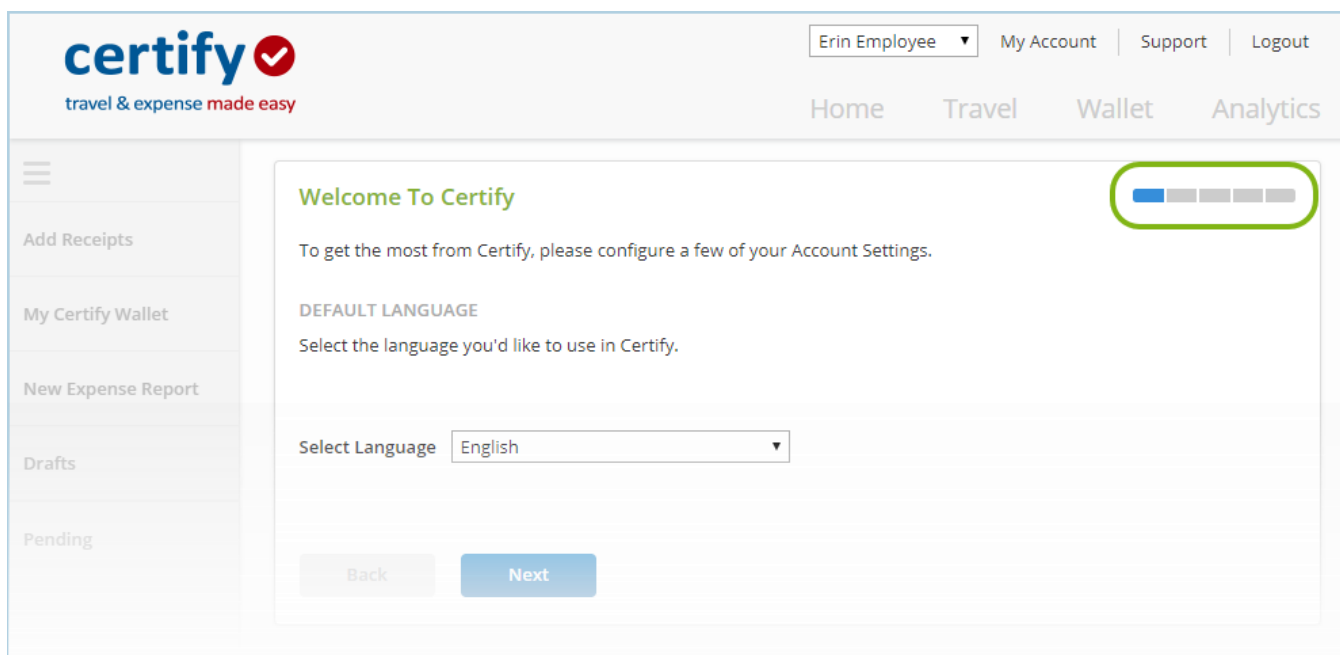
Submit Reset

Once you click **Submit**, you will begin the **New User Setup Wizard**.

New User Setup Wizard


The first time you log into your Certify account, you will be prompted to complete the **New User Setup Wizard**. This article shows you how to navigate through the **New User Setup Wizard** to complete the setup of your Certify Account.

As a new user to Certify, the **Welcome to Certify** page displays and you are prompted to personalize your account settings. The **Progress Bar** in the upper right-hand corner will detail your setup progress.



Step 1: If your company uses Certify's Multiple Languages feature, the **DEFAULT LANGUAGE** section appears. Click the arrow next to the **Select Language** field to open a drop-down menu and choose a language to use in your Certify account. Click **Next**.

New User Setup Wizard

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Erin Employee My Account Support Logout

Home Travel Wallet Analytics

Welcome To Certify


To get the most from Certify, please configure a few of your Account Settings.

DEFAULT LANGUAGE
Select the language you'd like to use in Certify.

Select Language English

Back Next

Step 2: Select your **Default Currency** from the drop-down menu provided. Click **Next**.

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Home Travel Wallet Analytics

Welcome To Certify

DEFAULT CURRENCY
Select the currency you will use most often, and for reimbursement.

Default Currency United States Dollars

Back Next

Step 3: On the next page, enter your **Mobile Phone** number (optional). Select your country code from the drop-down menu provided, and enter the remaining numbers in the field provided. Click **Next**.

New User Setup Wizard

The screenshot shows the 'Welcome To Certify' page with a progress bar at the top right. The left sidebar contains links: Add Receipts, My Certify Wallet, New Expense Report, Drafts, and Pending. The main content area is titled 'MOBILE PHONE' and includes the text: 'You can add your mobile phone number for added security and important workflow alerts.' Below this is a form with a 'Mobile Phone' label, a dropdown menu for country codes (showing '+1' selected), and a text input field containing '(201) 555-0123'. A dropdown menu is open below the country code, listing various countries and their codes: United States +1, United Kingdom +44, Afghanistan +93, Albania +355, Algeria +213, and American Samoa +1. A 'Back' button is located at the bottom left of the form.

Step 4: The **ADDITIONAL EMAIL ADDRESS** page displays. If needed, use the **Add Email Address** field to set a secondary email address. This address can be used to email receipts to your **My Certify Wallet**. Click **Next**.

The screenshot shows the 'Welcome To Certify' page with a progress bar at the top right. The left sidebar contains links: Add Receipts, My Certify Wallet, New Expense Report, Drafts, and Pending. The main content area is titled 'ADDITIONAL EMAIL ADDRESS' and includes the text: 'You can enter a personal email address, if desired. This allows you to forward receipts from that account to your Certify Wallet.' Below this is a form with an 'Add Email Address' label and a text input field containing 'ErinsOtherEmail@gmail.com'. A green oval highlights the input field. At the bottom of the form are 'Back' and 'Next' buttons. A green arrow points to the 'Next' button.

Step 5: From the **ACCOUNT DETAILS** section, confirm your account information is correct. To make changes, click **Back**. If the information listed is correct, click **Finish**.

New User Setup Wizard

The screenshot shows the 'Welcome To Certify' page. At the top, there's a navigation bar with the Certify logo, a user dropdown (Erin Employee), and links for My Account, Support, and Logout. Below this is a secondary navigation bar with Home, Travel, Wallet, and Analytics. On the left is a sidebar with links: Add Receipts, My Certify Wallet, New Expense Report, Drafts, and Pending. The main content area is titled 'Welcome To Certify' and contains 'ACCOUNT DETAILS' with a message: 'Click Finish to save your changes. You can view and edit additional settings in My Account.' Below this, there's a table of account details:

Default Language	English
Default Currency	United States Dollars
Mobile Phone	+1 123 456 7890
Login Email	ErinEmployee0001@gmail.com
Additional Email	ErinsOtherEmail@gmail.com

At the bottom of the details section are two buttons: 'Back' and 'Finish'. The 'Finish' button is highlighted with a green circle.

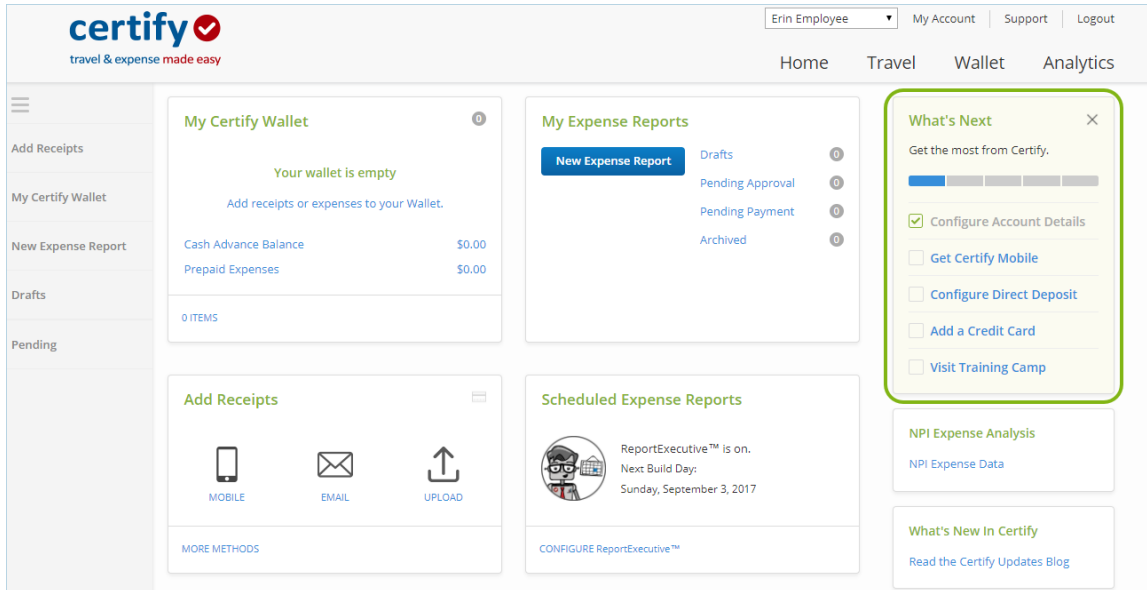
You can make changes to your account at any time by selecting **My Account** from your Certify account homepage.

Please Note: Some changes require your Certify Administrator.

The screenshot shows the 'My Account' page. At the top, there's a navigation bar with the Certify logo, a user dropdown (Erin Employee), and links for My Account, Support, and Logout. Below this is a secondary navigation bar with Home, Travel, Wallet, and Analytics. On the left is a sidebar with links: Add Receipts, My Certify Wallet, New Expense Report, Drafts, and Pending. The main content area is titled 'My Account' and contains several tabs: Account Settings, Email Notifications, ReportExecutive, and Ratings Profile. Below the tabs, there's a message: 'Use this page to make changes to your account settings and preferences.' The page is divided into two main sections: 'User Information' and 'Account Settings'. The 'User Information' section contains fields for Name, Email Address, Employee ID, Mobile Phone, Department, and Certify Role. The 'Account Settings' section contains fields for Language, Default Currency, Use Multiple Currencies, Use VAT/GST, Use PST/QST, Use HST, Commute Distance, Add Email Address, Add Credit Card, and Direct Deposit Account. The 'Save' button is highlighted with a green circle.

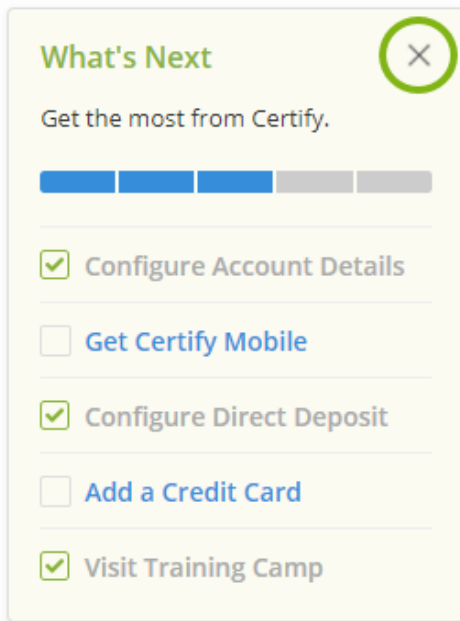
After completing the **New User Setup Wizard**, the **What's Next** panel appears on your Certify homepage for five consecutive logins. Only extra features selected by your company will be available within the panel.

New User Setup Wizard



- **Get Certify Mobile** takes you to the Add Receipts and Expenses Screen for instructions on how to download the Certify Mobile app.
- **Configure Direct Deposit** (if available) brings you to your My Account page to enter your bank account details.
- **Add a Credit Card** (if available) brings you to your My Account page to enter your credit card number(s), for credit cards selected by your company.
- **Visit Training Camp** takes you to the Certify Support Help Center to register for live trainings, view tutorial videos, and browse help articles.

You can close **What's Next** at any time by clicking the **X** in the upper right corner.



Getting Started with Certify Expense

Is it your first time using Certify or maybe you need a refresher? This article will lead you through Certify's best practices for creating and submitting expense reports.

Add Receipts using the Certify Mobile App

Step 1: Download the Certify Mobile app on your **iPhone, Android or Windows** mobile device.

Step 2: Login to the app with your Certify username and password.

Step 3: Tap the yellow **Add Receipt** button and take a photo of your receipt.

Step 4: Tap the **Autofill** button, and then enter the remaining expense details. Tap **Save**.

Step 5: Tap the **Sync** button in the upper left-hand corner of the homepage. Receipts will now be available in your **Certify Wallet**.



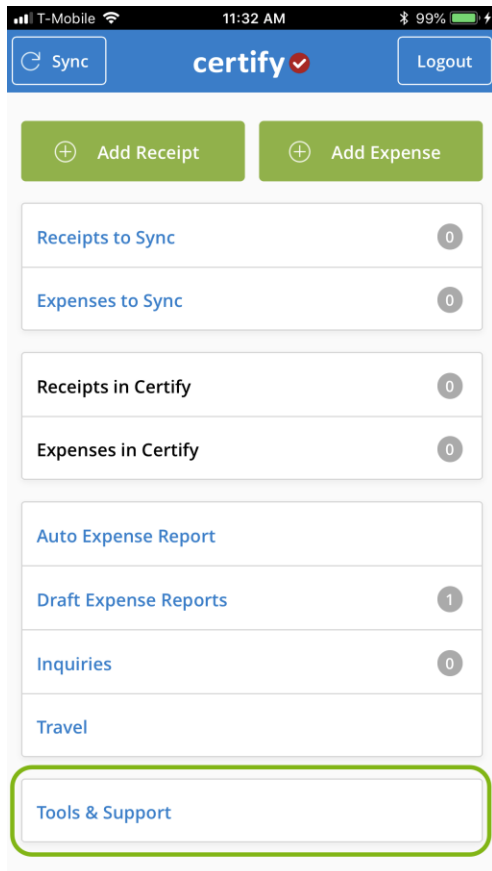
For a more in-depth guide on using the Certify Mobile app, please see our article **Adding Receipts Using Certify Mobile**

Mobile Tools and Support

If you experience difficulty using the Certify Mobile app, you may want to access Certify's **Tools & Support** page. This article shows you how to use the **Tools and Support** menu in the Certify Mobile App.

Step 1: On the Certify Mobile homescreen, tap **Tools & Support**.

Getting Started with Certify Expense



Step 2: On the **Tools & Support** page, you have several options:

Getting Started with Certify Expense

Tools


Photo Method: Normal

Receipt Resolution: Ask me every time

Tip Assist: Automatic

Sync Method: Automatic

Integrations

 UBER for Business

Support

Most problems can be resolved by deleting local files on your device. Deleting local receipts and expenses will not remove items from your Certify account.

[Delete local receipts](#)

[Delete local expenses](#)

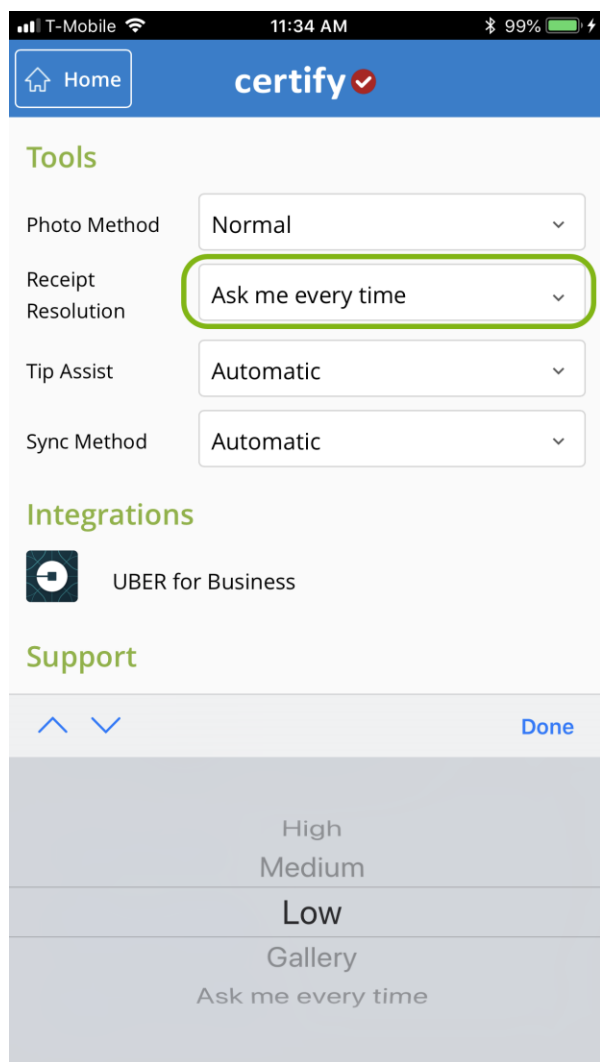
[Delete all and initialize](#)

[Report a Problem](#)

Photo Method – Normal, the recommended setting, allows you to take a normal photo and save it at the selected resolution. **Compatible** gives you the same result as **Normal**, but encodes the image differently. **High Compression** compresses the image's file size and **Small Images** scales the image to half of its normal size. While the last three options aren't recommended, they are helpful if you have trouble taking photos, a slow device, or have little available storage left on your device.

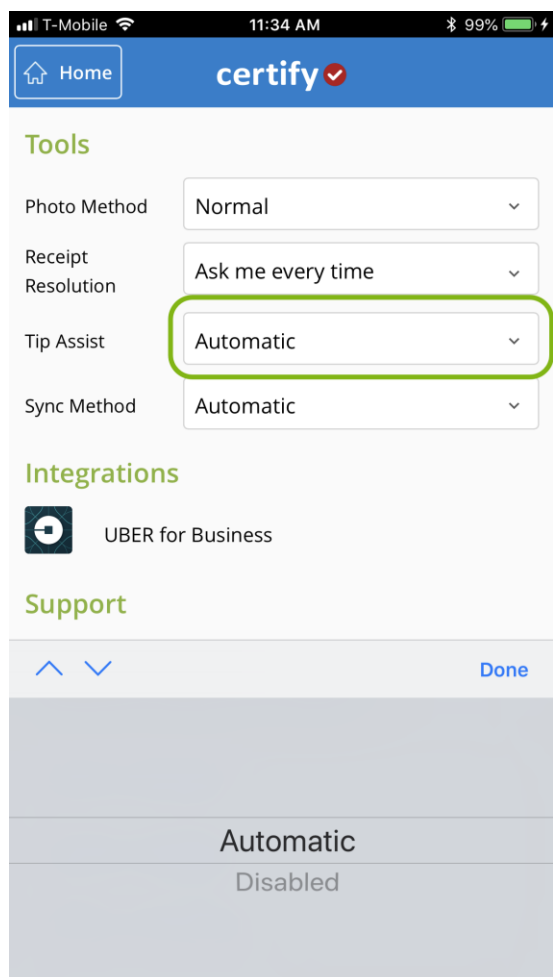
Receipt Resolution – Select a preferred photo resolution instead of being prompted each time; you may select **High**, **Medium**, **Low**, **Gallery**, or **Ask me every time**; for the best Autofill results, we recommend using **High** resolution.

Getting Started with Certify Expense



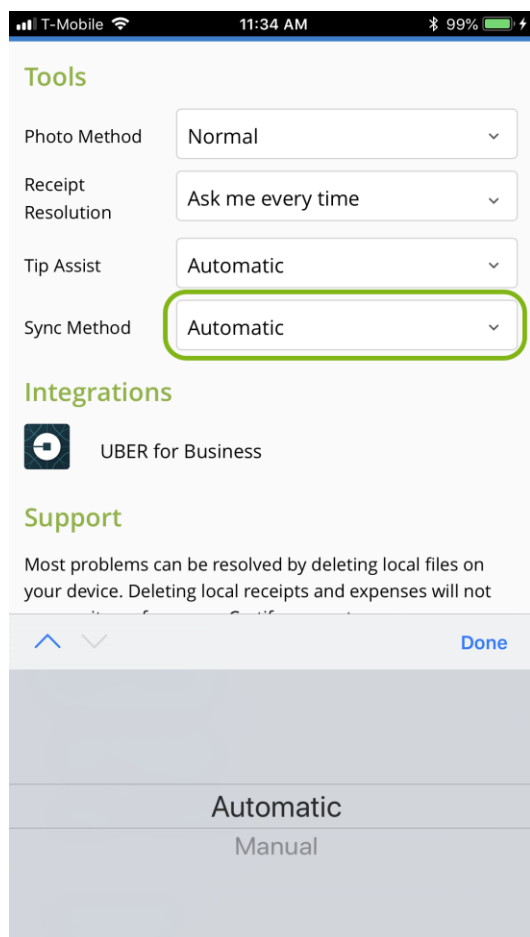
Tip Assist – Enable **Tip Assist** for easy entry of receipts containing an hand-written tip and amount; anytime Autofill identifies **Tip** or **Grautity** text, **Tip Assist** will be prompted.

Getting Started with Certify Expense



Sync Method – Allow Certify Mobile to automatically sync in the background, this helps ensure all account settings are up to date.

Getting Started with Certify Expense

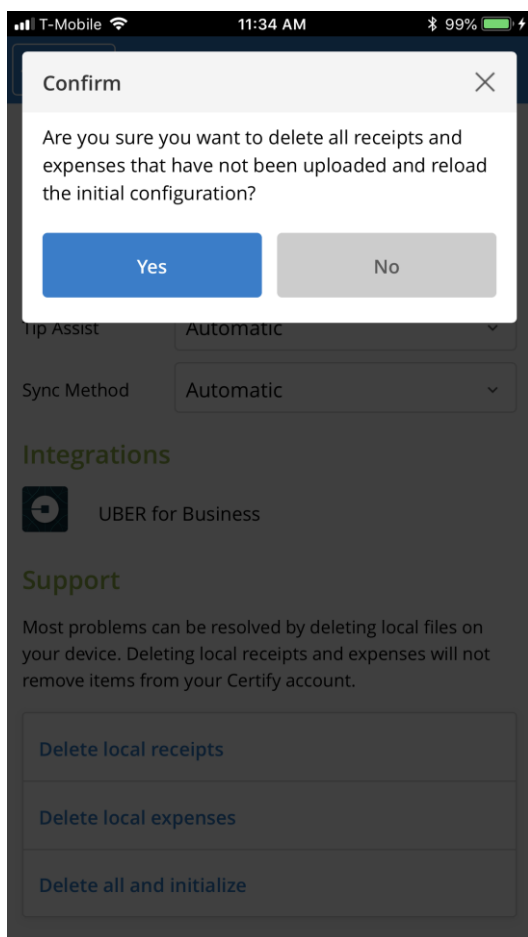


Delete Local Receipts – Deletes all receipts on your device that have not yet been synced.

Delete Local Expenses – Deletes all expenses on your device that have not yet been synced.

Delete All and Initialize – Deletes all receipts and expenses that have not been synced, and resets your account settings; on the next screen, select **Yes** to confirm the deletion.

Getting Started with Certify Expense

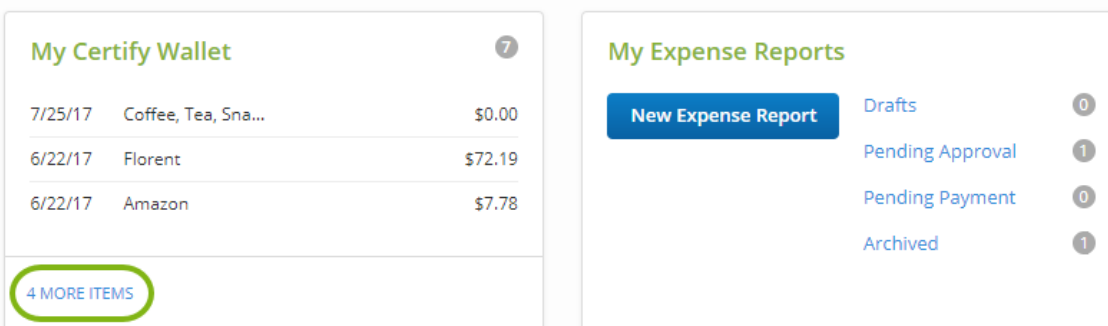


Please Note: Once receipts or expenses are deleted from Certify Mobile, they cannot be recovered.

Report a Problem – If you are having difficulty with the Certify Mobile app, complete each field in the form to submit a report to the Certify Support Team. Please include as much detail as possible. Your description, along with some diagnostic information, will be sent to our Support Experts, who will follow up with you shortly.

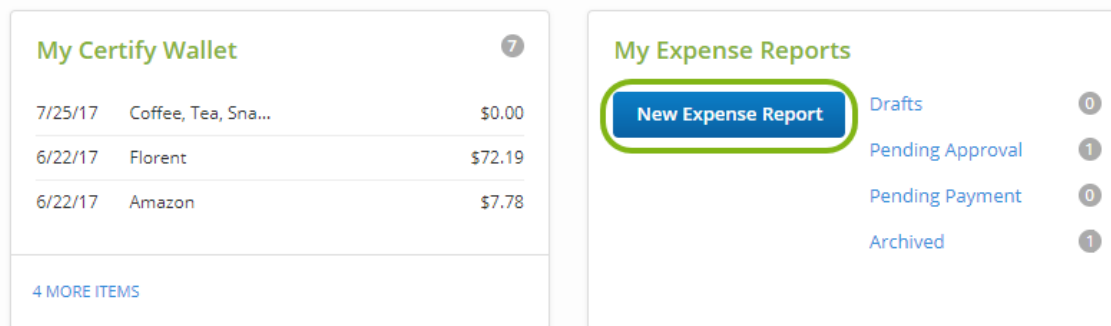
Create your Expense Report

Step 1: In your Certify account on the web, view your Receipts and Expenses in your **Certify Wallet**.



Getting Started with Certify Expense

Step 2: On the Certify homepage, click the **New Expense Report** button.



Step 3: Select the option to **Add all items to a new expense report**.

Step 4: Enter an expense report name and date range. Click **Next**.

Step 5: On the next page, click **Finish** to see your new draft expense report. Certify will automatically merge receipts and credit card expenses with the same date and amount.

Expense Report [Link Receipts](#) [Cleanup Wizard](#) [Print Report](#)

Report Name Expenses - 6/1/2017 - 6/30/2017 [Submit for Approval](#)

Dates 6/1/2017 - 6/30/2017

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
	6/8/2017	Operations	Unknown		144.00	Yes	144.00	No		
	6/16/2017	Operations	Miscellaneous		32.40	No	0.00	No		
	6/22/2017	Operations	Meals - Breakfast		7.78	No	0.00	No		
	6/22/2017	Operations	Meals - Dinner		72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Edit your Expense Report

Step 1: Use the Link Receipts Wizard to attach receipts in your **Certify Wallet** to expense lines.

Getting Started with Certify Expense

Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

☒ Report Name Expenses - 6/1/2017 - 6/30/2017

Dates 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>	6/8/2017	Operations	Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/>	6/16/2017	Operations	Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		

Total Non-Reimbursable \$112.37

Total Personal \$0.00

Total Reimbursable \$144.00

Step 2: Use the Clean Up Wizard to edit receipts that need attention, indicated by the red triangle in the Expense column.

Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

☒ Report Name Expenses - 6/1/2017 - 6/30/2017

Dates 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>	6/8/2017	Operations	Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/>	6/16/2017	Operations	Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		

Total Non-Reimbursable \$112.37

Total Personal \$0.00

Total Reimbursable \$144.00

Step 3: Edit individual expense lines by clicking the pencil icon.

Expense Report

[Link Receipts](#)[Cleanup Wizard](#)[Print Report](#)

☒ Report Name Expenses - 6/1/2017 - 6/30/2017

Dates 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
	6/8/2017	Operations	Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/>	6/16/2017	Operations	Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input checked="" type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		

Total Non-Reimbursable \$112.37

Total Personal \$0.00

Total Reimbursable \$144.00

Step 4: Add mileage expenses in the Add Expense box.

Getting Started with Certify Expense

Add Expense

Date: 6/22/2017

Department: Operations

Category: Mileage

From: 20 York Street, Portland, Maine

To: 1 Monument Square, Portland, Maine

Miles: 1.8 [MapIt!](#)

Round Trip: ☒

Reason:

Reimbursable: I paid for this, please reimburse me.

Billable: ☐

Receipt: [Change](#)

[Save](#) [Cancel](#)

Receipt Image

One-Way Distance: 0.9 mi

Step 5: Use the Other Actions menu to split expenses (itemize).

Expense Report

[Link Receipts](#) | [Cleanup Wizard](#) | [Print Report](#)

☒ Report Name: Expenses - 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Dates: 6/1/2017 - 6/30/2017

Expenses										
Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/> Other Actions			Unknown	<input checked="" type="checkbox"/> Details	144.00	Yes	144.00	No		
<input checked="" type="checkbox"/> Delete Expense			Miscellaneous	<input checked="" type="checkbox"/> Details	32.40	No	0.00	No		Details
<input checked="" type="checkbox"/> Split Expense			Meals - Breakfast	<input checked="" type="checkbox"/> Details	7.78	No	0.00	No		
<input checked="" type="checkbox"/> Add Bank Fee			Meals - Dinner	<input checked="" type="checkbox"/> Details	72.19	No	0.00	No		Details
<input checked="" type="checkbox"/> Add Image										
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

Submit for Approval

Step 1: Verify that everything on your expense report is accurate.

Step 2: Click **Submit for Approval**.

Getting Started with Certify Expense

Expense Report























[Print Report](#)

 **Report Name** Expenses - 6/1/2017 - 6/30/2017

Dates 6/1/2017 - 6/30/2017

[Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Parking	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Gifts and Promotions	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		

Total Non-Reimbursable \$112.37

Total Personal \$0.00

Total Reimbursable \$144.00

Step 3: Enter optional comments for your Approver, and click **Submit**.

Submit Expense Report for Approval

This is a preview of the message that will be used to submit the expense report. You may add your own comments if you like.

To Miley Manager (Molly.Mgr.Test@gmail.com)
Subject Expense Report Approval Request From Eric Employee (Eric.Emp.Test@gmail.com)
Body Hello Miley,

Eric Employee (Eric.Emp.Test@gmail.com) has sent an expense report for your approval.

Enter your comments:

Additional Approver (optional):

Expense Report Summary

Employee: Eric Employee (Eric.Emp.Test@gmail.com)
Expense Report Name: Expenses - 6/1/2017 - 6/30/2017
Dates: 6/1/2017 - 6/30/2017

Non Reimbursable Total: \$112.37

Reimbursable Total: \$144.00

Total: \$256.37

Login to Certify to view this report.

Login at: <https://www.certify.com/Login.aspx>

Submit

Cancel

Step 4: Review your expense report status in the **Pending Approval** folder.

My Certify Wallet

0

Your wallet is empty

Add receipts or expenses to your Wallet.

0 ITEMS

My Expense Reports

New Expense Report

Drafts

0

Pending Approval

1

Pending Payment

0

Archived

148

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