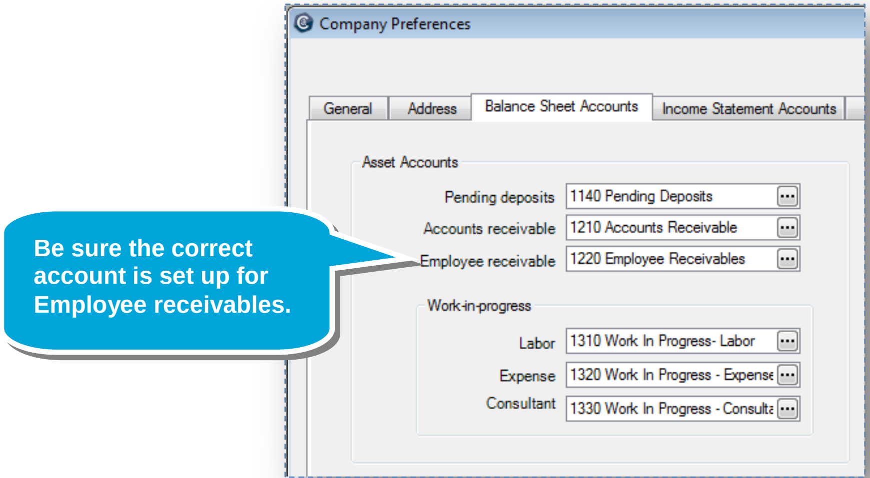
Setting up expense reports

Goal: Set up Ajera to process expense reports.

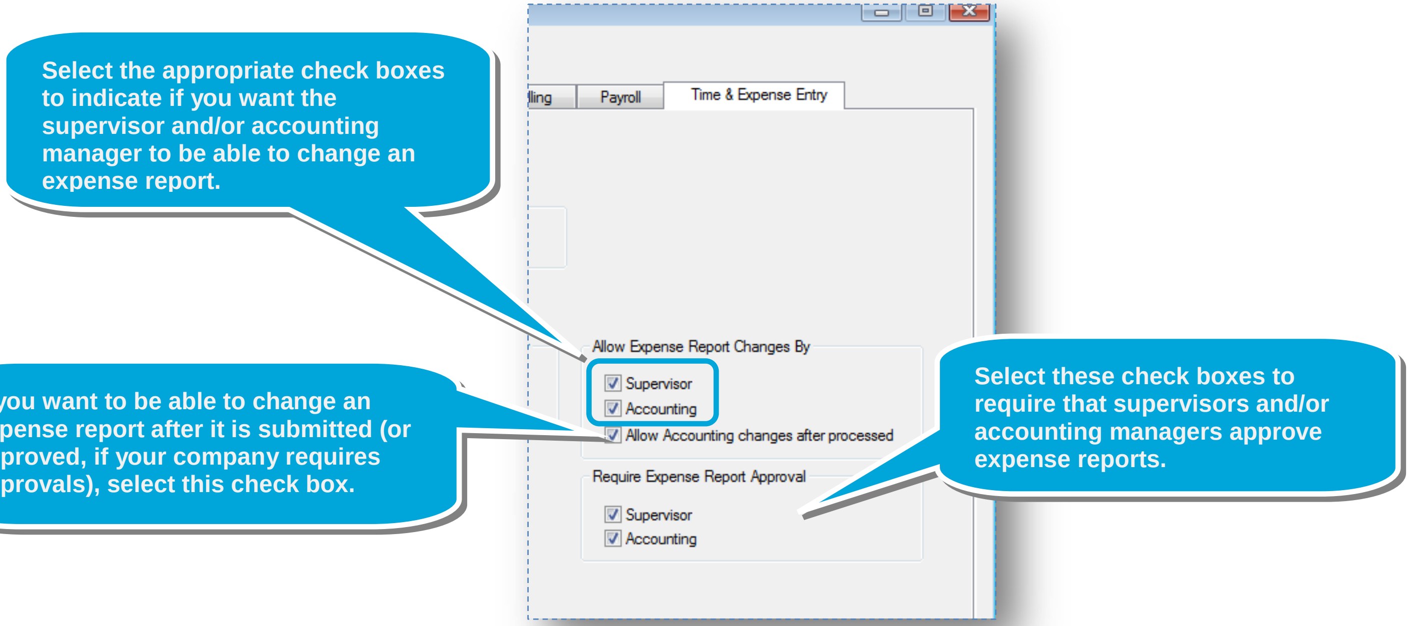
In this quick lesson

Step 1: Review preferences for expense reports

1. Click **Company** > **Preferences**.
2. Click the **Balance Sheet Accounts** tab.



3. Click the **Time & Expense Entry** tab.

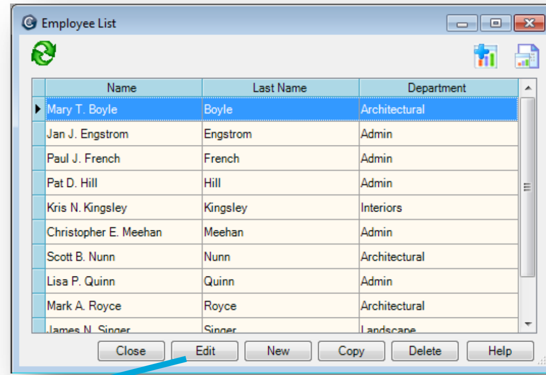


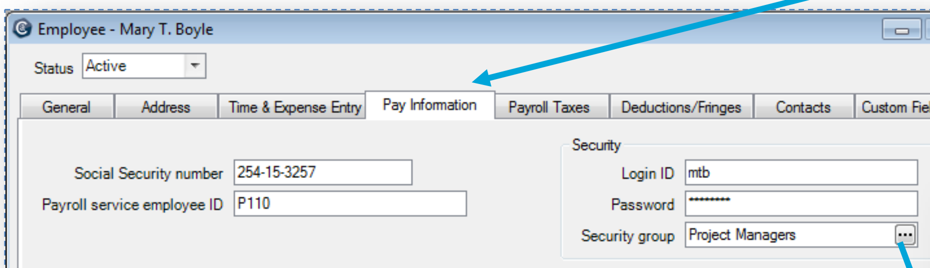
Step 2: Review options for employees

For each employee who will use expense reports, verify that the employee's security group has access to expense reports and that the employee is allowed to use expense reports.

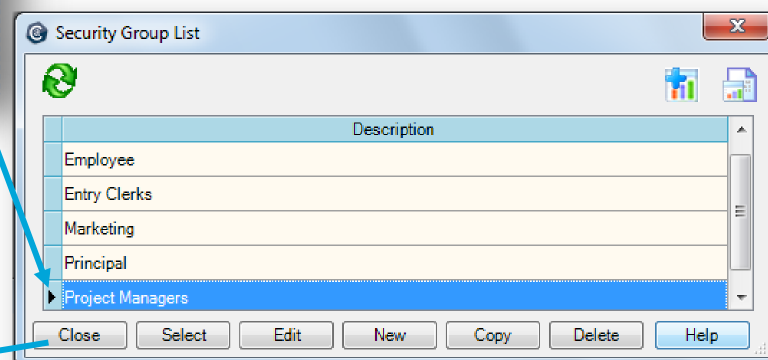
1. Click **Setup** > **Employees**.
2. An employee who uses expense reports must belong to a security group with access to Time & Expenses.

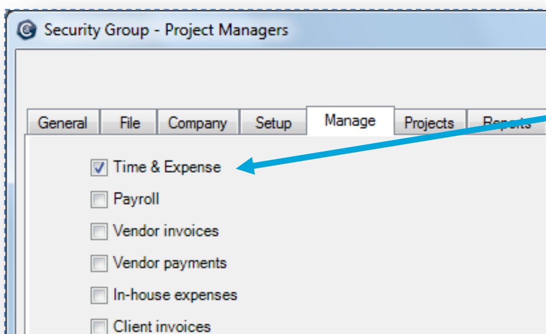
   Select the employee who uses expense reports, and click **Edit**.
3. Click the **Pay Information** tab.
4. Click the button in the Security Group field.





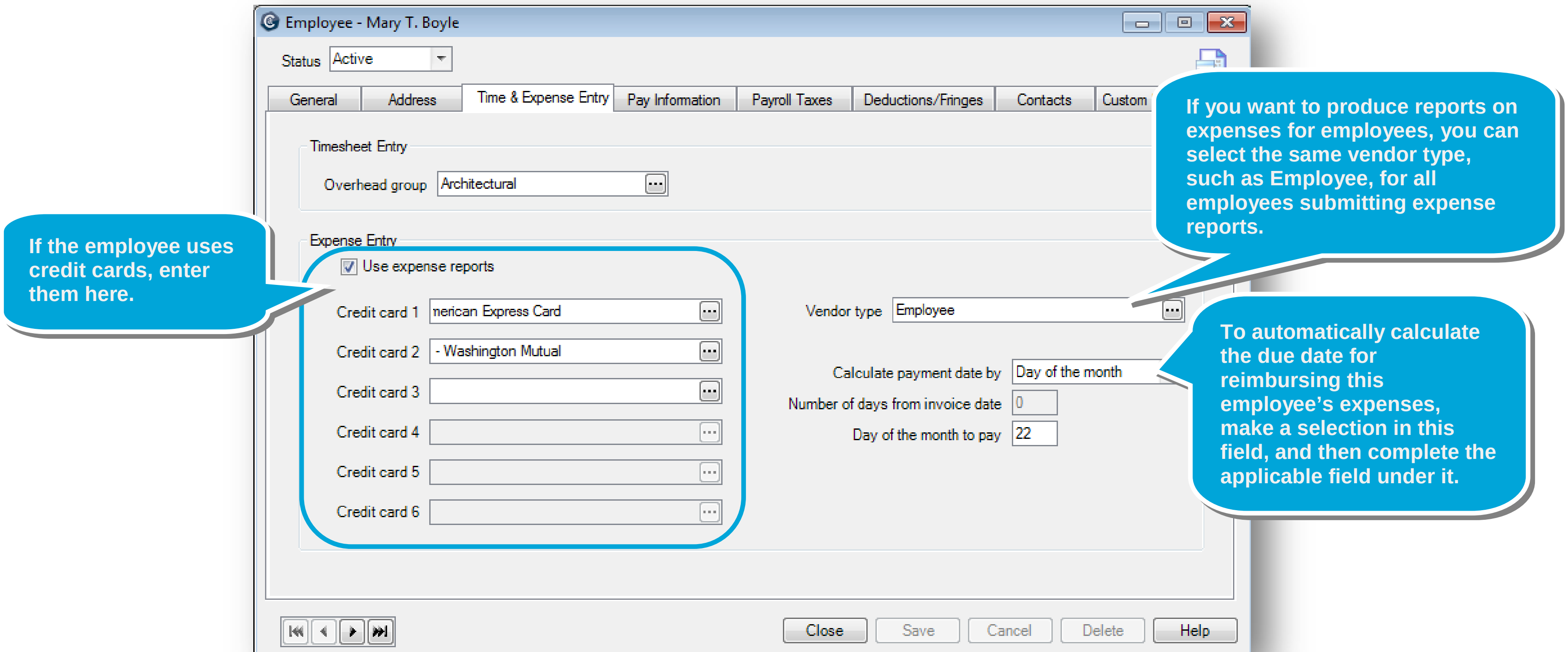
5. On the Security Group List window, double-click the employee's security group.
6. On the Security Group window, click the **Manage** tab, and ensure that the **Time & Expense** check box is selected.





Step 2: Review options for employees (continued)

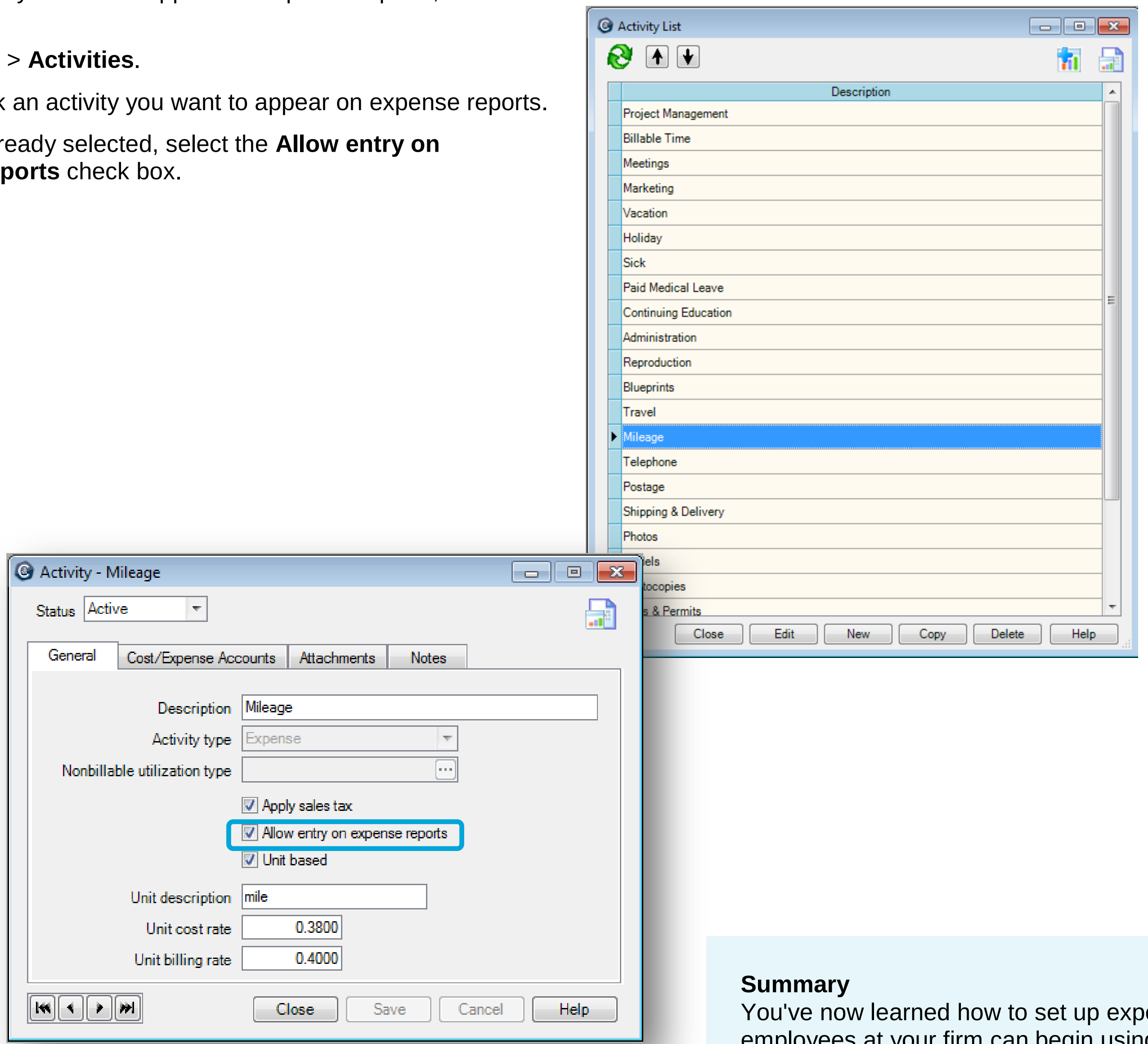
7. After saving your work and returning to the Employee window, click the **Time & Expense Entry** tab.
8. If it is not already selected, select the **Use expense reports** check box.
9. Review and change the settings in the other fields, if needed.



Step 3: Identify activities for expense reports

For each activity that you want to appear on expense reports, do the following.

1. Click **Setup** > **Activities**.
2. Double-click an activity you want to appear on expense reports.
3. If it is not already selected, select the **Allow entry on expense reports** check box.



Summary
You've now learned how to set up expense reports so employees at your firm can begin using expense reports.