

Meals Expense Report *Desktop*



This guide is essential for anyone expensing meals purchased out of pocket. It provides clear, step-by-step instructions to ensure compliance with spending limits for meals, helping users avoid errors during submission. By following the outlined steps, you can efficiently create and manage your expense report while ensuring that all necessary receipts and conference details are included.

1 Select "Expense Hub"

Good Morning, RYAN CONNELL It's Friday, May 23, 2025

Waiting Your Action

- ✉ **Integration: GL Conversion Journals** - 05/22/2025, 1:15:13.995 PM
My Tasks - 15 hour(s) ago
- ✉ **Supplier Invoice: SINV-10001297**, PHILADELPHIA GAS WORKS on 07/23/2024 for \$33.75
My Tasks - 1 day(s) ago
DUE 05/27/2025
- ✉ **Expense Report: 10000101, RYAN CONNELL (31503)** on 05/14/2025 for \$459.11
My Tasks - 3 day(s) ago
DUE 05/26/2025

Recently Suggestions

Here's where you'll get updates on your active items.

Quick Tasks

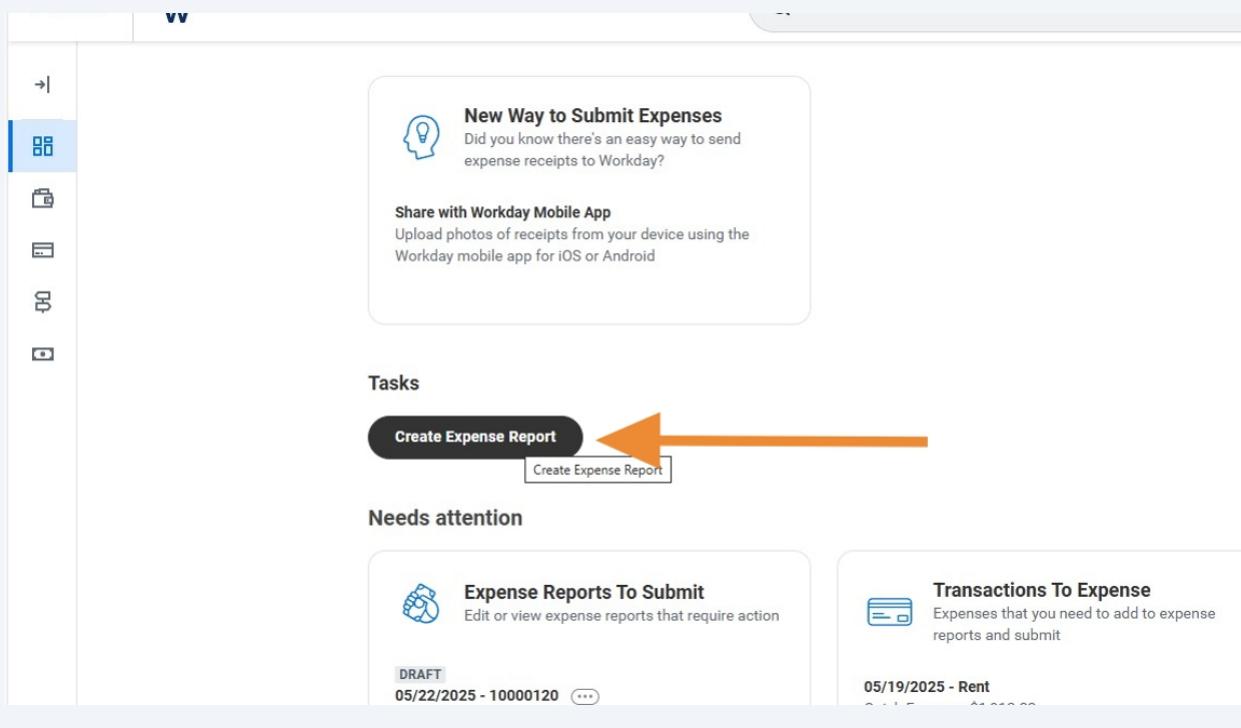
- My Payslips
- Time Off Balance
- My Goals

Your Top Apps

- 📝 Supplier Accounts
- 🌐 Jobs Hub
- 📅 Absence
- 💳 Expenses Hub



2 Click "Create Expense Report"



3 Under instructions you will find the spending limits for meals, broken out by Breakfast, Lunch and Dinner.

Instructions

EXPENSE REPORT INSTRUCTIONS

Please review our [Expense Report Policy](#) if you have questions or need additional assistance, please conta

Top Tips for successfully submitting your expense report and avoiding reimbursement delays:

Payment Elections must be made before submitting an expense report.

• An **itemized** receipt is required for all expenses except Mileage.

• **Hotel expense** (rate plus taxes) must be reported **@ Amount (Nightly Rate)**. Additional expenses on the h should be itemized.

Hotels - choose low to mid-range choices; no luxury hotels
Exclusion will be for conferences.

• **Meals** are to be listed separately. Meals (spending limits, excluding tips):

Breakfast \$15

Lunch \$20

Dinner \$30

4 After reading over the specifications for meal spending limits, Select "OK" to create your expense report.

Company

Expense Report Date

Company on Expense Line

Cost Center

Additional Worktags

- An **itemized** receipt is required.
- **Hotel expense** (rate plus tax) should be itemized.
- Hotels** - choose low to mid-range. Exclusion will be for conference.
- **Meals** are to be listed separately.
 - Breakfast \$15
 - Lunch \$20
 - Dinner \$30
- Transportation** - Reimbursement for rentals, tolls and gas will be itemized.
- Mileage**: See Operating Standard guidelines.

Credit Card Transactions Quick Expenses

Select All

6 items

Include?	Transaction	Date	Expense Item	Merchant	Charge Description/Memo
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

5 Select "Add"

Create Expense Report 10000121

Pay To Employee: RYAN CONNELL (31503)	Status Draft	Personal 0.00 USD	Company Paid 0.00 USD	Reimbursement 0.00 USD	Total 0.00 USD
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Header Attachments **Expense Lines**

←

There's nothing here

enter your comment

6 Click "New Expense"

Create Expense Report 10000121 

Pay To Employee: RYAN CONNELL (31503)	Status Draft	Personal 0.00 USD	Company Paid 0.00 USD	Reimbursement 0.00 USD	Total 0.00 USD
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Header Attachments **Expense Lines**

Add

Credit Card Transactions

Quick Expenses

New Expense



There's nothin'

7 Click "Select files" to add a receipt for the purchase, that you have scanned to yourself.

Expense Line

Drop files here

or

Select files

Receipt Included

Linked Quick Expense 

Expense Date * 05/23/2025 

Expense Item * 

Total Amount * 0.00 

Currency *  USD 



8 You will notice after selecting "Lunch" as your expense item, it will prompt you to input the name of the conference you are attending.

[https://kencrest3.d/task/2997\\$995.html?maskContext=43723\\$1](https://kencrest3.d/task/2997$995.html?maskContext=43723$1)

Expense Line

PDF No Receipt.pdf ✓ Successfully Uploaded!

Comment

Upload

Linked Quick Expense

Expense Date * 05/23/2025

Expense Item * Search **Lunch**

Total Amount * 0.00

Item Details

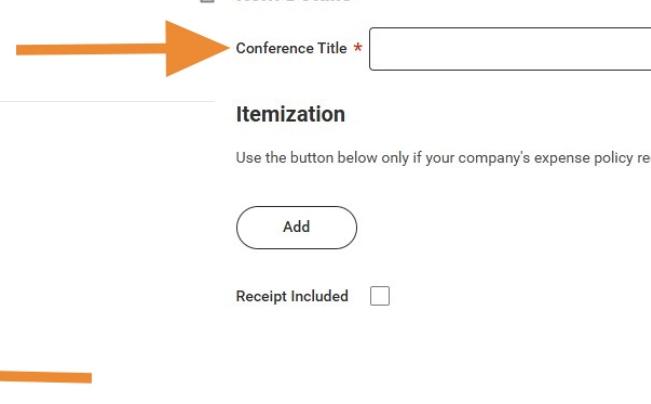
Conference Title *

Itemization

Use the button below only if your company's expense policy requires it

Add

Receipt Included



9 After putting in the conference title were attending, you will do the normal to complete an expense report, and either submit or save the report for later.

Expense Line

PDF No Receipt.pdf ✓ Successfully Uploaded!

Comment

Upload

Linked Quick Expense

Expense Date * 05/23/2025

Expense Item * **X Lunch**

Total Amount * 5.00

Currency * **X USD**

Memo * **Burger**

Company **X KCS KenCrest Services**

Cost Center **X 99104 Accounting**

Item Details

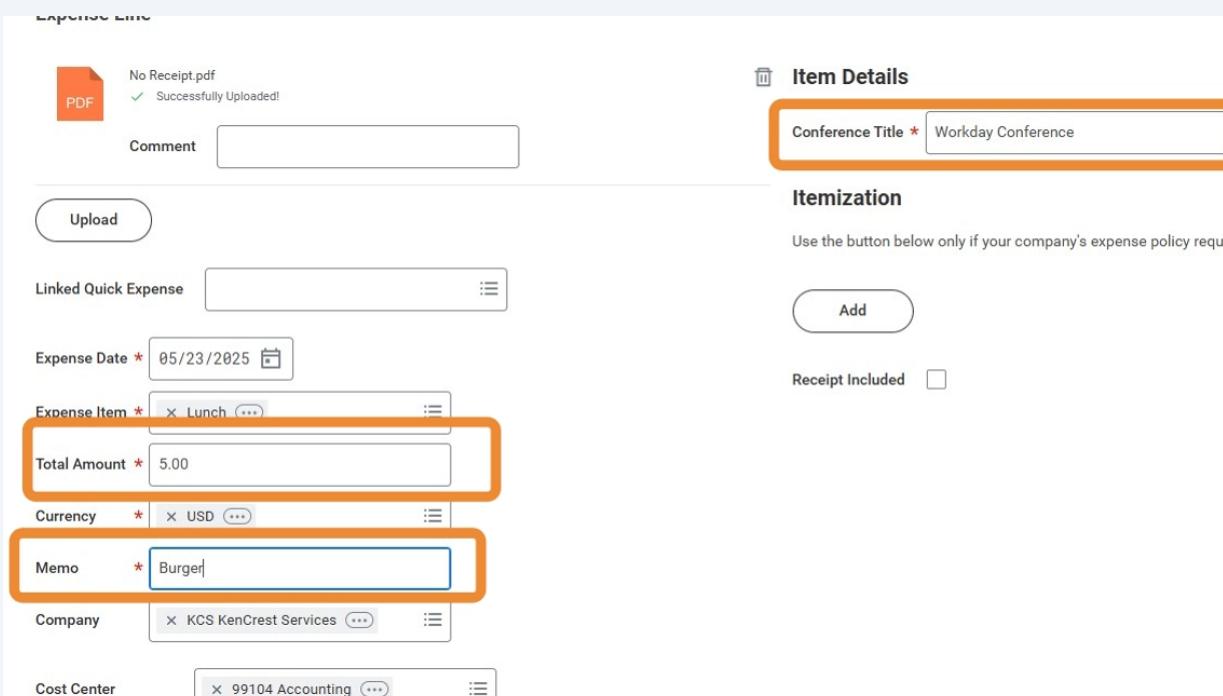
Conference Title * **Workday Conference**

Itemization

Use the button below only if your company's expense policy requires it

Add

Receipt Included



10

The below example is what happens when you try and submit an amount that is over the allocated spending limit for meals. An error will appear in the top right corner.

A screenshot of a web-based expense report application. At the top, there is a header with the number '10000121' and a 'More' button. Below the header, a summary table shows:

Personal	0.00 USD	Company Paid	0.00 USD	Reimbursement	30.00 USD	Total	30.00 USD
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In the top right corner of the main content area, there is a red box with a white exclamation mark icon and the text '1 Error'. An orange arrow points from this error box to the 'Total Amount' field, which is highlighted in red. The 'Total Amount' field contains the value '30.00'. The rest of the page shows the expense line details, including a PDF file named 'No Receipt.pdf' uploaded by 'RYAN CONNELL (31503)', and the item details for a 'Lunch' expense.

11

In order to proceed with submitting your expense report, the amount needs to be changed.

A screenshot of the same expense report application, but now in a dark mode theme. The top header shows '10000121' and a 'More' button. Below the header, a summary table is identical to the previous screenshot.

The main content area features a prominent 'Error' dialog box. The dialog title is 'Error' and it contains a single item: '1. Page Error'. The error message states: 'Enter an amount for Lunch on 05/23/2025 that's less than or equal to 20.00 USD. Maximum Daily Amount exceeded by 10.00 USD. These expense reports include expenses for 05/23/2025: 10000121'. An orange arrow points from this error message to the 'Total Amount' field in the expense line details, which is still set to '30.00'.

The expense line details are identical to the previous screenshot, including the PDF file and item details.

Meals Expense Report *Mobile*



This guide is essential for anyone expensing meals purchased Out Of Pocket. It provides clear, step-by-step instructions to ensure compliance, helping users avoid errors during submission. By following the outlined steps, you can efficiently create and manage your expense report while ensuring that all necessary receipts and conference details are included.

- 1 Tap "Apps", at the bottom of your screen.

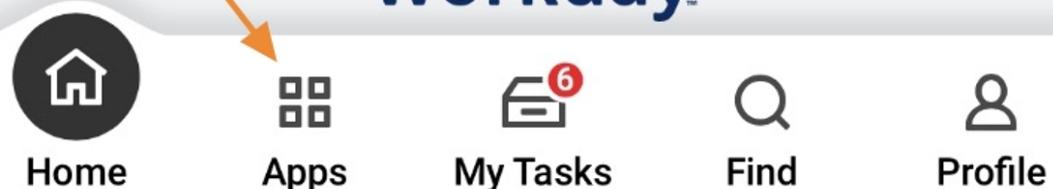
Recommended for You

Showcase Your Best Self with Your Profile

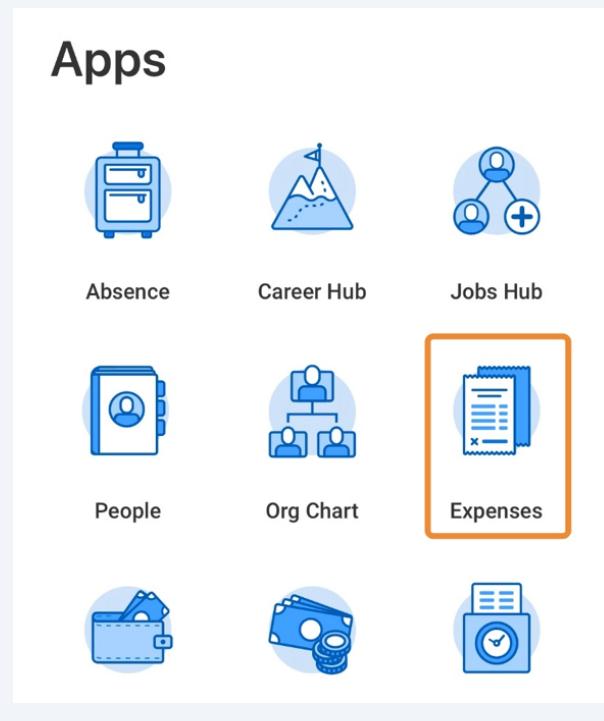
[Manage Profile](#)

Understand Your People Network

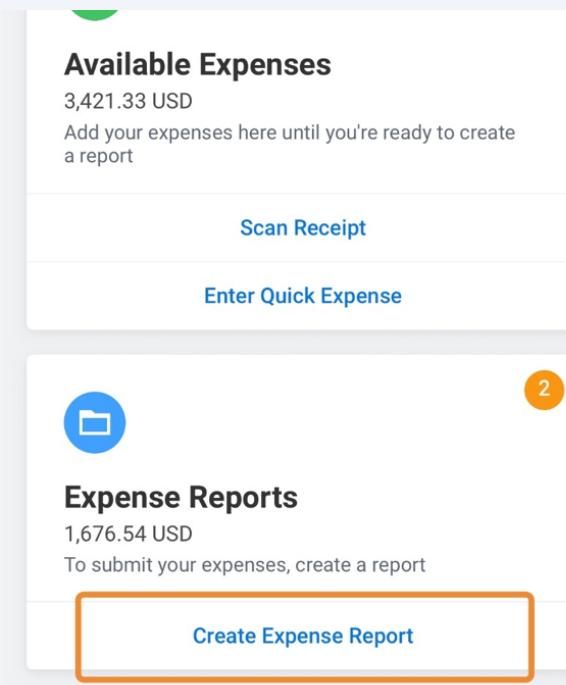
[View Org Chart](#)



2 Select "Expenses".

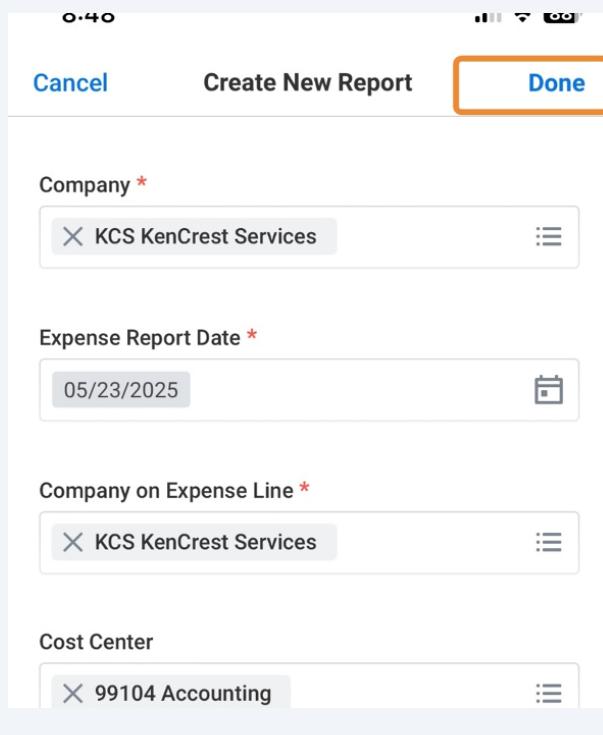


3 Select "Create Expense Report"



4

Review the Expense Header to insure all the information is correct. If no changes need to be made, tap "Done"



0.40

Cancel Create New Report Done

Company *

X KCS KenCrest Services

Expense Report Date *

05/23/2025

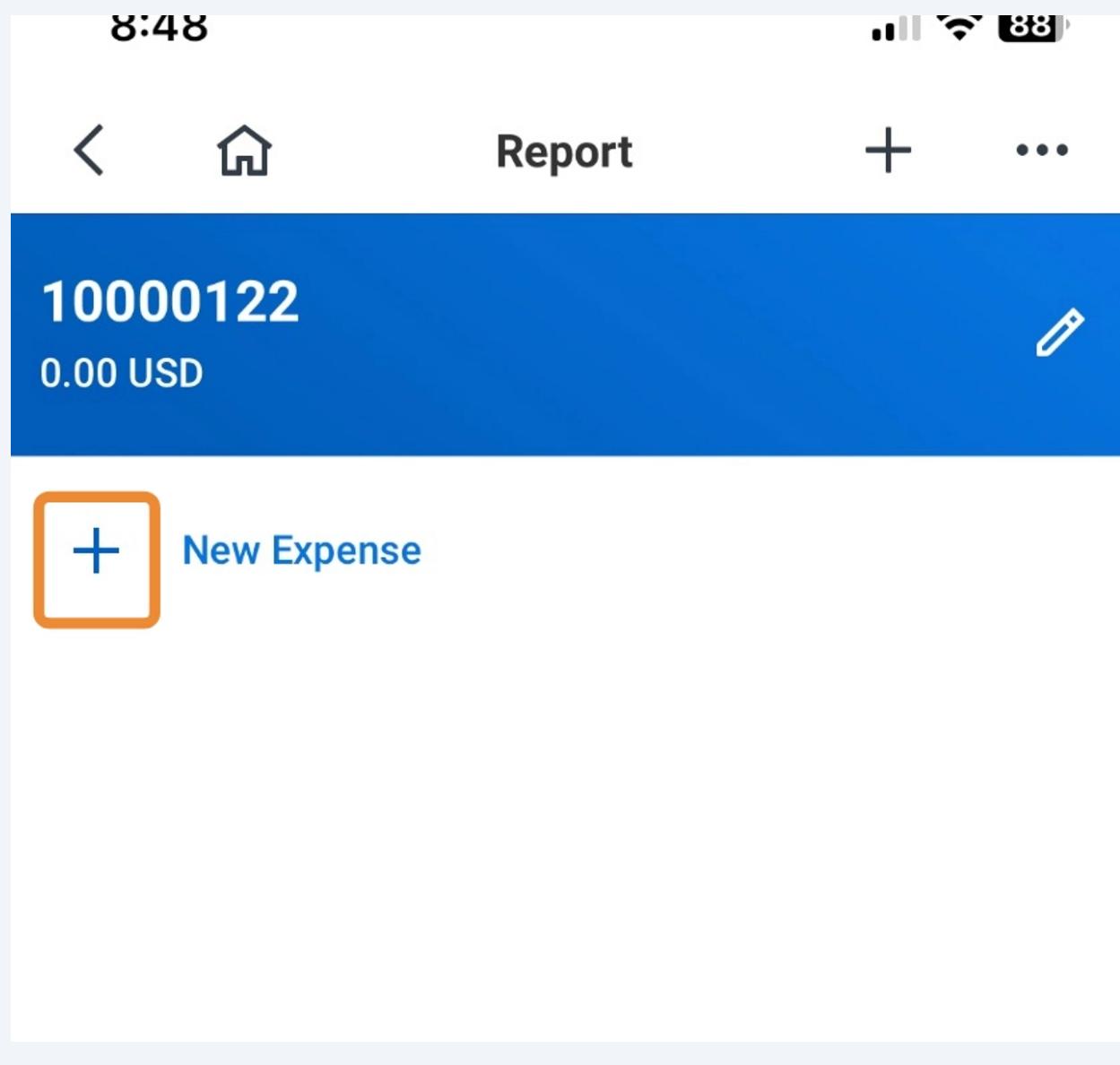
Company on Expense Line *

X KCS KenCrest Services

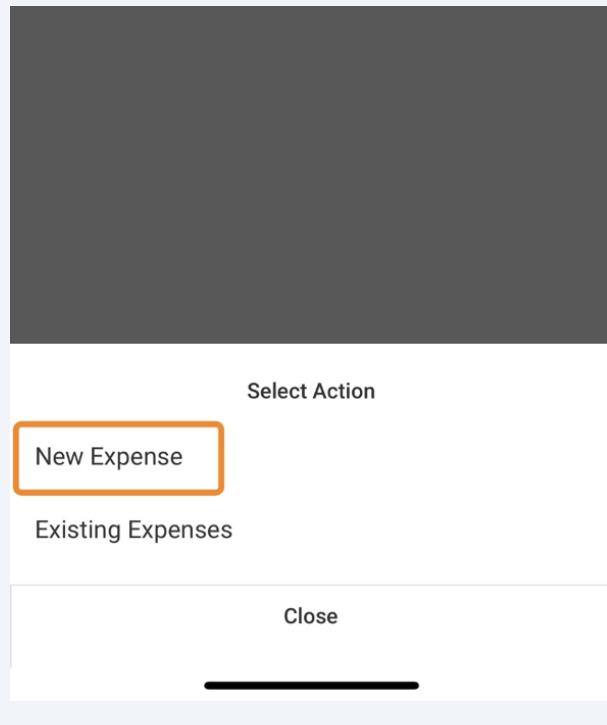
Cost Center

X 99104 Accounting

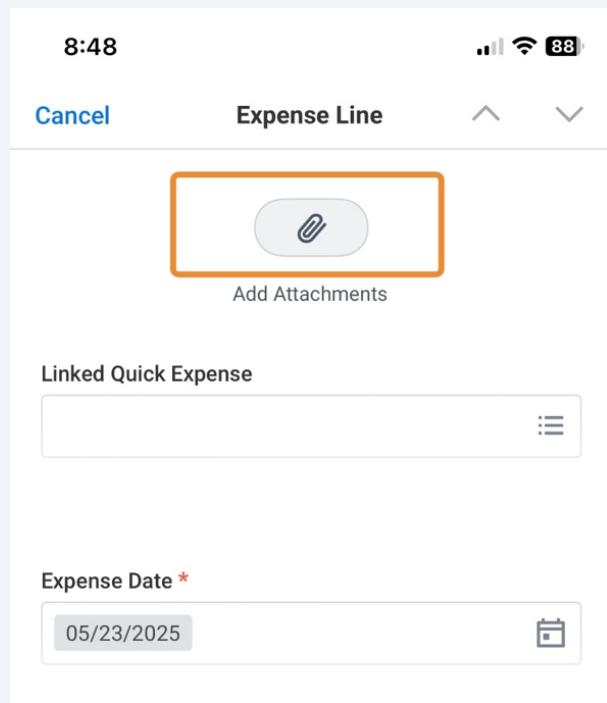
5 Tap "+" to the left of New Expense.



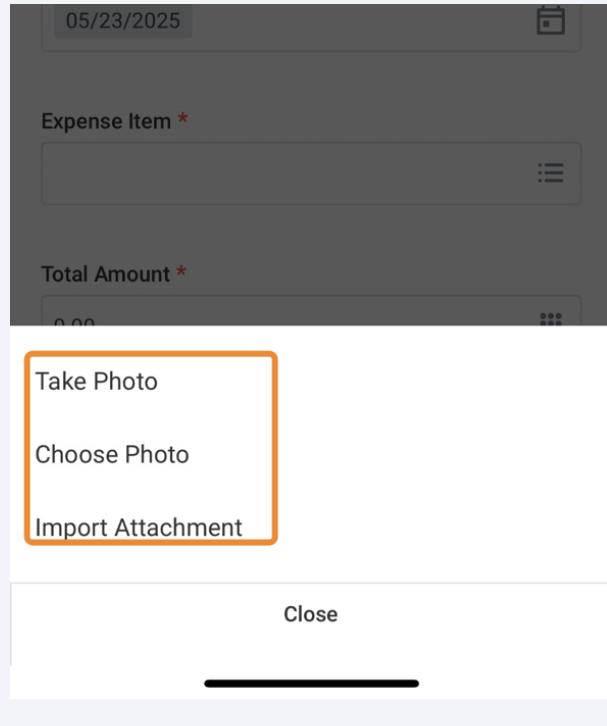
6 Select "New Expense"



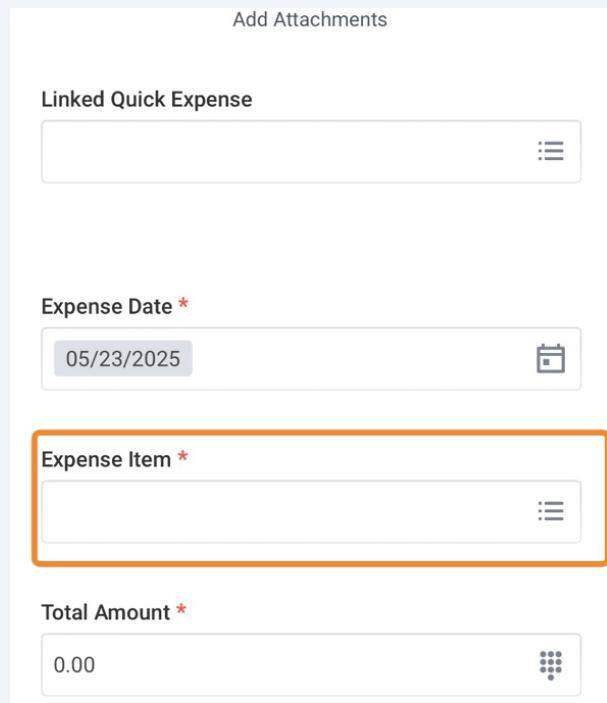
7 Tap the paperclip above "Add Attachment" to select the receipt.



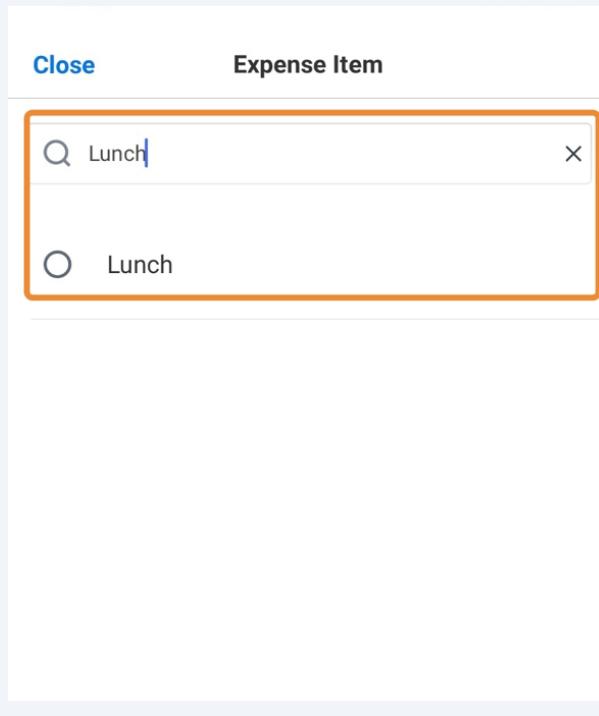
8 You have the option to select either "Take Photo" "Choose Photo" or "Import Attachment".



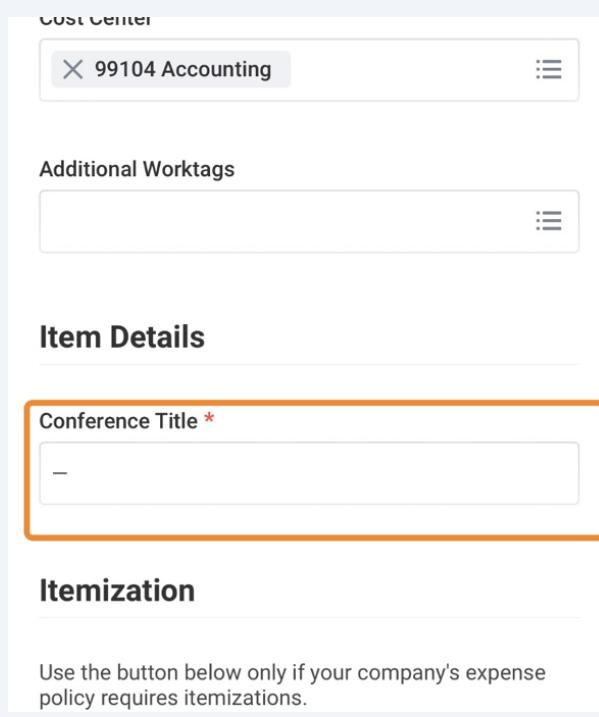
9 After receipt has been attached, enter the expense item.



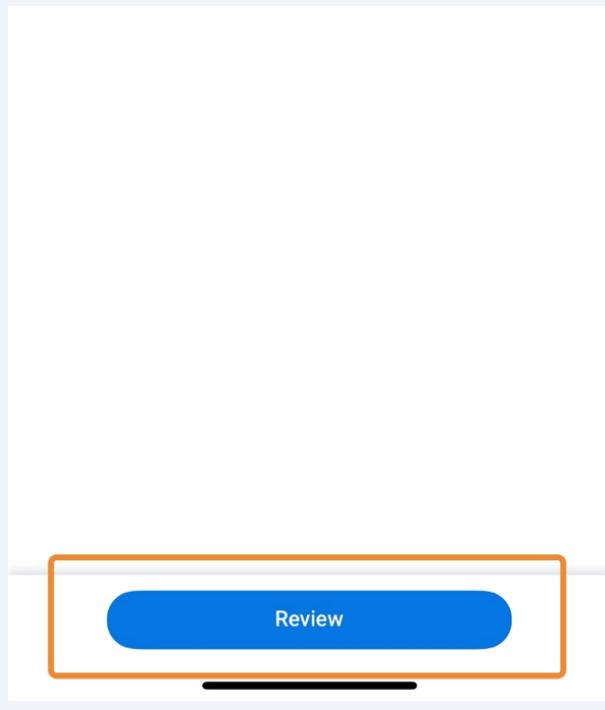
10 For meals on a trip you can type in either "Breakfast", "Lunch" or "Dinner".



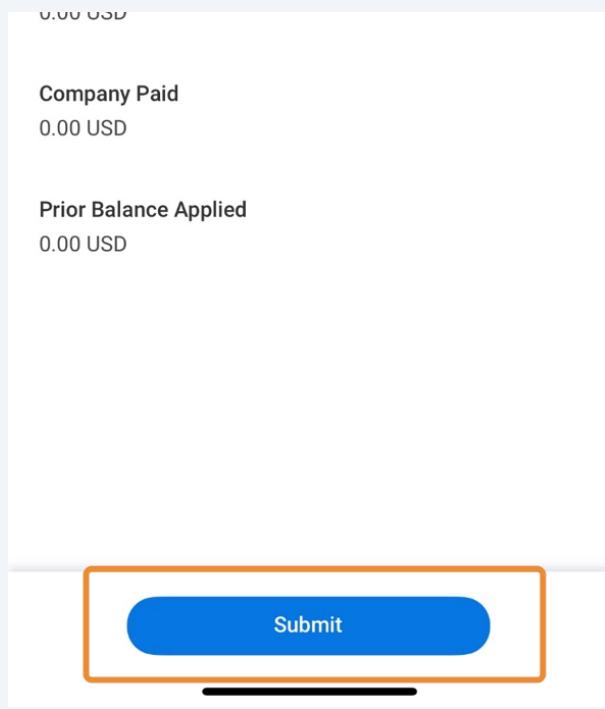
11 You will notice after selecting either of the three meal options, it will prompt you to put in the "Conference Title" you attended. Input the name of the conference. Select down, if there is nothing else you need to add.



12 Select "Review"

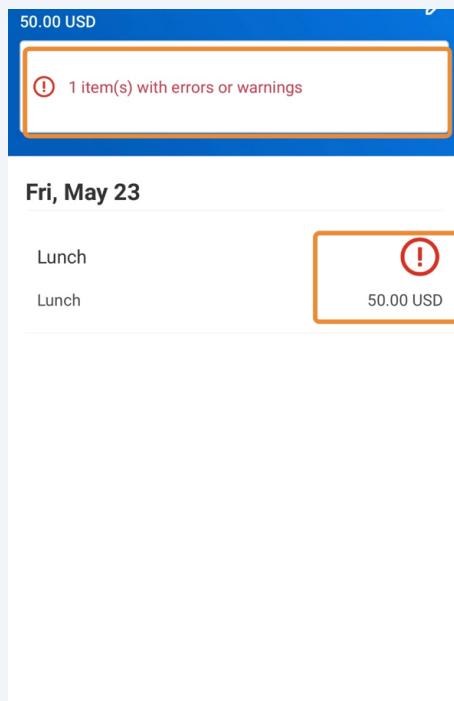


13 If the information looks correct, you can select "Submit"

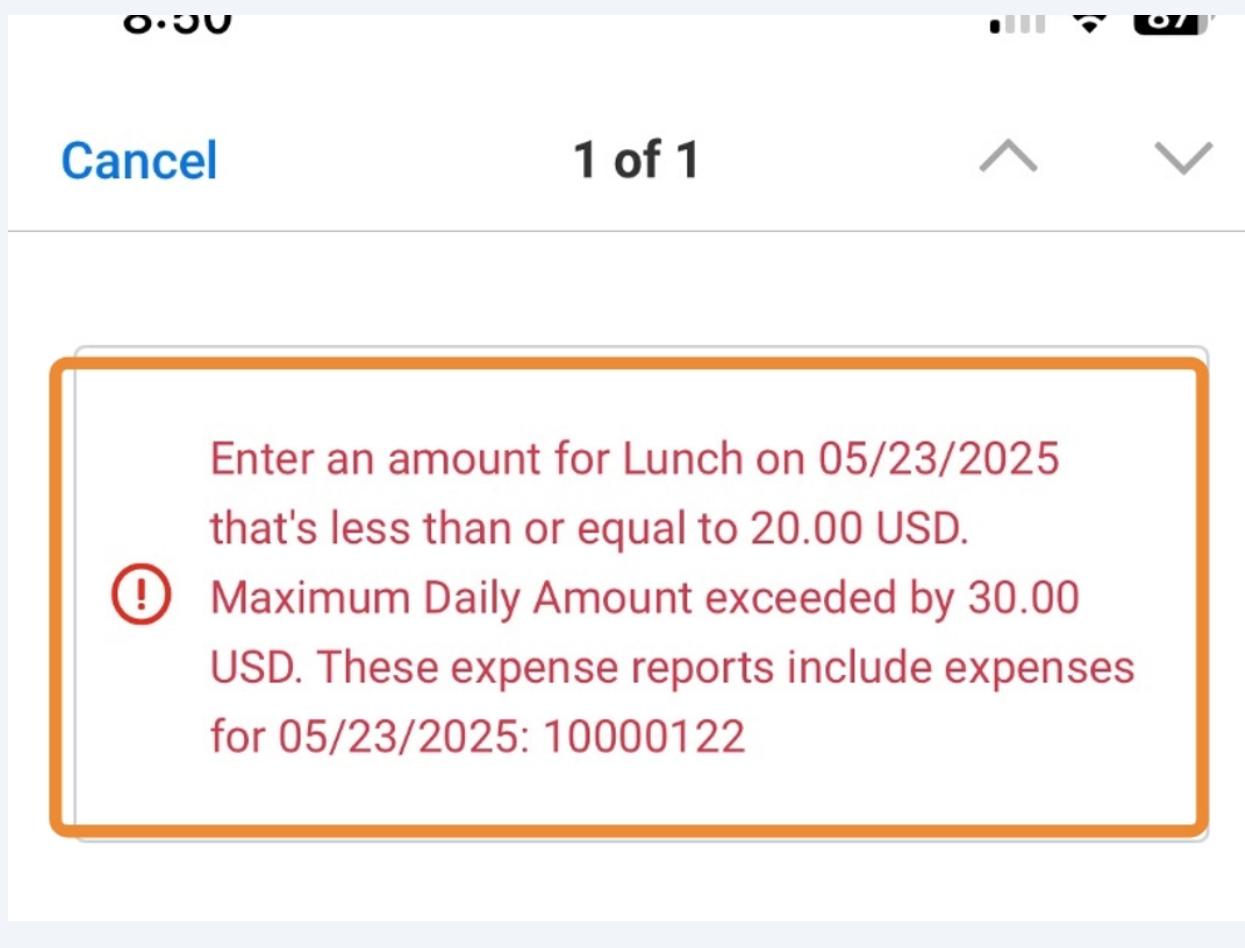


14

If you were to input an amount that is over the allotted spending limit for meals, an Error message will appear stating what needs to be fixed in order to submit your report.



15 Review the and fix the error.



 Tip! The Expense Report Instructions and Expense Report Policy can be found when entering an expense report on your desktop.