

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

Awaiting 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](#)

[Go to My Tasks \(6\)](#)

Quick Tasks

[My Payslips](#)

[Time Off Balance](#)

[My Goals](#)

Your Top Apps



Supplier Accounts



Jobs Hub



Absence



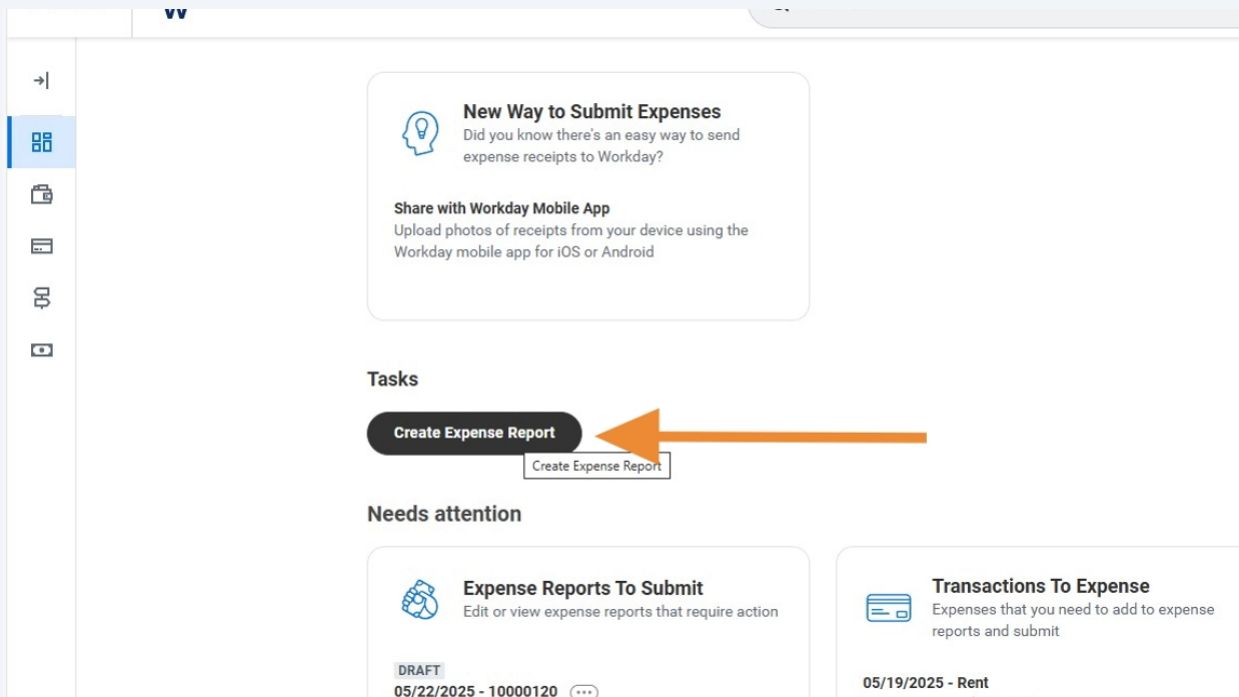
Expenses Hub

Recently Suggestions

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



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 contact your manager.

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 hotel 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 *

×

KCS KenCrest Services

...

:

:

:

Expense Report Date *

05/23/2025

Company on Expense Line *

×

KCS KenCrest Services

...

:

:

:

Cost Center

×

99104 Accounting

...

:

:

:

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 based on guidelines.

Mileage: See Operating Standard guidelines.

Credit Card Transactions

Quick Expenses

Select All

☐

6 items

Include?	Transaction	Date	Expense Item	Merchant	Charge Description/Memo	

OK

OK

Cancel

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

Header

Attachments

Expense Lines

Add

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 nothir

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 *

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.

n/kencrest3/d/task/29975995.html?maskContext=4372351

The screenshot shows the 'Expense Line' form. On the left, there's a section for uploading a receipt (No Receipt.pdf, Successfully Uploaded!). Below that is a 'Comment' field. To the right, the 'Item Details' section is visible, with the 'Conference Title' field highlighted by an orange arrow. The 'Expense Item' dropdown is also highlighted, showing 'Lunch' selected. The 'Total Amount' is 0.00.

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.

The screenshot shows the 'Expense Line' form with the 'Conference Title' field filled with 'Workday Conference'. The 'Expense Item' is 'Lunch', and the 'Total Amount' is 5.00. The 'Currency' is 'USD', and the 'Memo' is 'Burger'. The 'Company' is 'KCS KenCrest Services' and the 'Cost Center' is '99104 Accounting'. The 'Item Details' section is highlighted with an orange box, and the 'Expense Item', 'Total Amount', 'Currency', 'Memo', and 'Company' fields are also highlighted with orange boxes.

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.

The screenshot shows an expense report form for ID 10000121. At the top, a summary table displays: Personal (0.00 USD), Company Paid (0.00 USD), Reimbursement (30.00 USD), and Total (30.00 USD). In the top right corner, a red notification bar contains an error icon and the text "1 Error". An orange arrow points to this bar. Below the summary, the "Expense Line" section shows details for a "Lunch" expense on 05/23/2025, with a "Total Amount" of 30.00 USD. Another orange arrow points to the "Total Amount" field. The "Item Details" section shows "Conference Title" as "Workday Conference" and "Receipt Included" as "Yes".

Personal	Company Paid	Reimbursement	Total
0.00 USD	0.00 USD	30.00 USD	30.00 USD

Expense Line

Expense Date * 05/23/2025

Expense Item * Lunch

Total Amount * 30.00

Currency * USD

Memo * Burger

Company KCS KenCrest Services

Cost Center 99104 Accounting

Item Details

Conference Title * Workday Conference

Receipt Included Yes

11

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

The screenshot shows the same expense report form as in step 10, but with a modal error dialog box overlaying the bottom half. The dialog box has a title "Error" and a message: "1. Page Error: 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". The background form is dimmed, showing the same expense details as before.

Expense Date * 05/23/2025

Expense Item * Lunch

Total Amount * 30.00

Currency * USD

Memo * Burger

Company KCS KenCrest Services

Cost Center 99104 Accounting

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](#)



Home



Apps



My Tasks

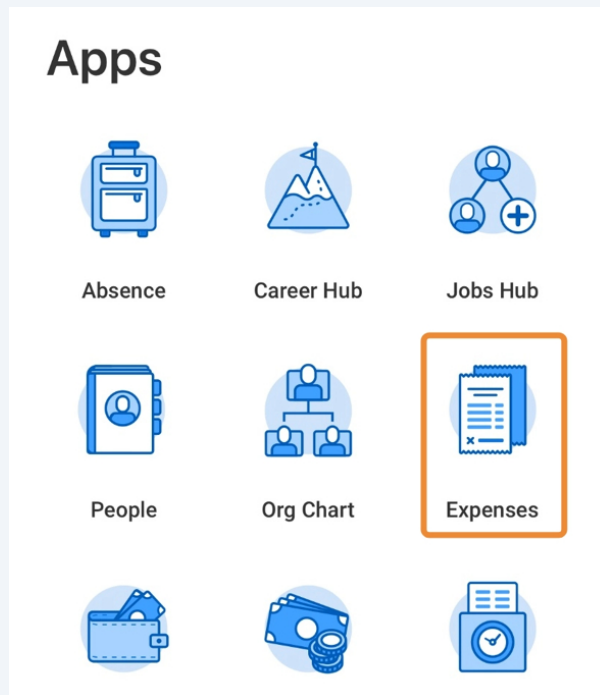


Find

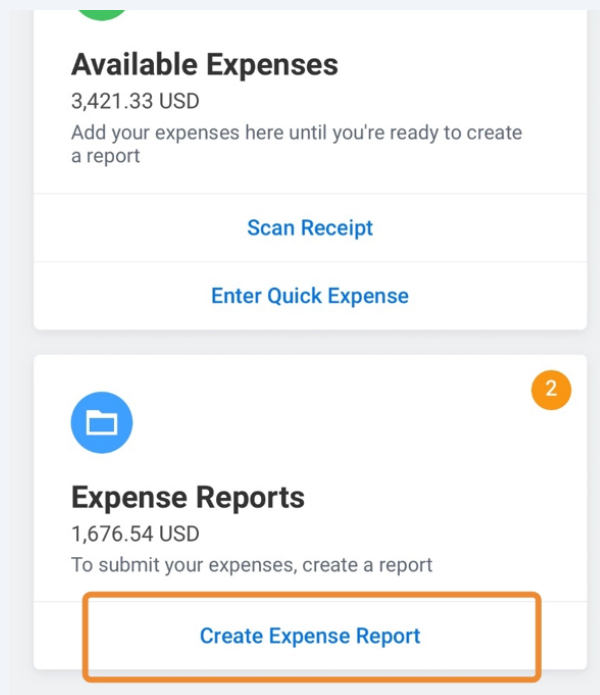


Profile

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

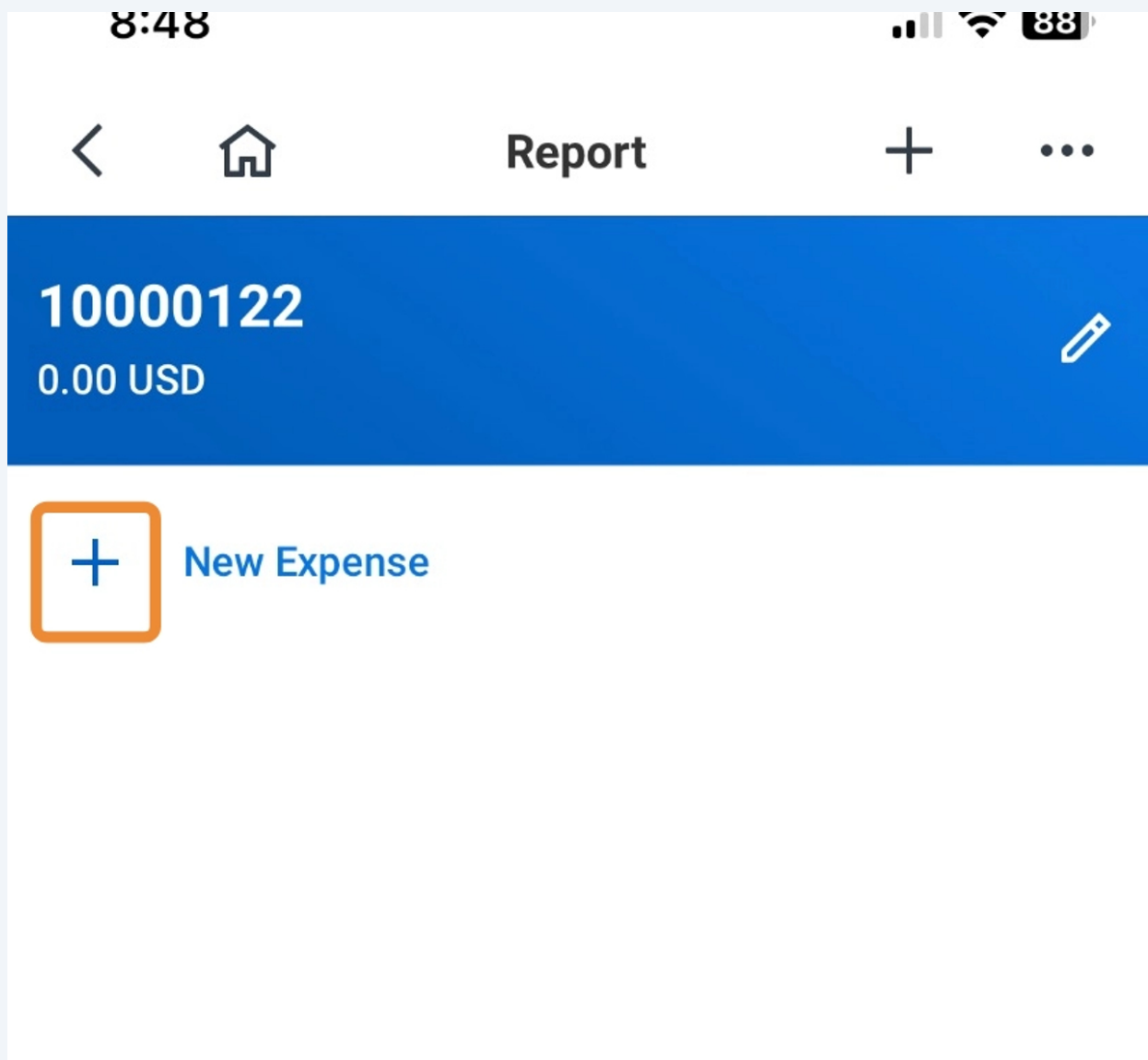
Company on Expense Line *

X KCS KenCrest Services

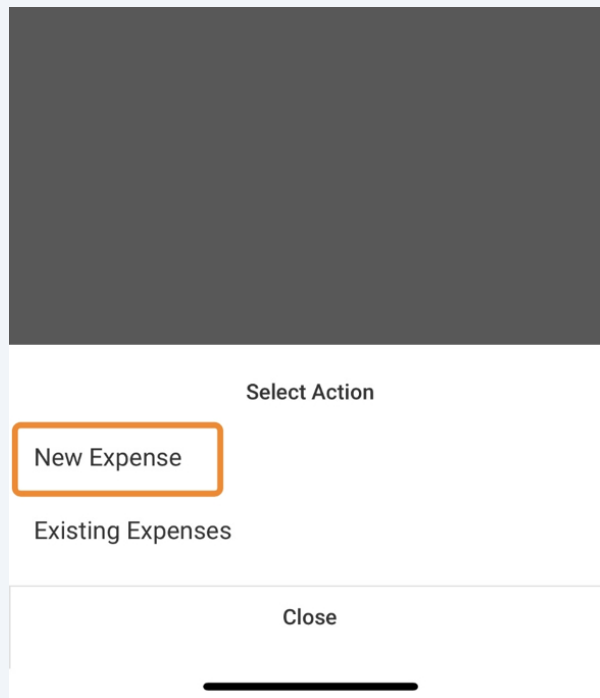
Cost Center

X 99104 Accounting

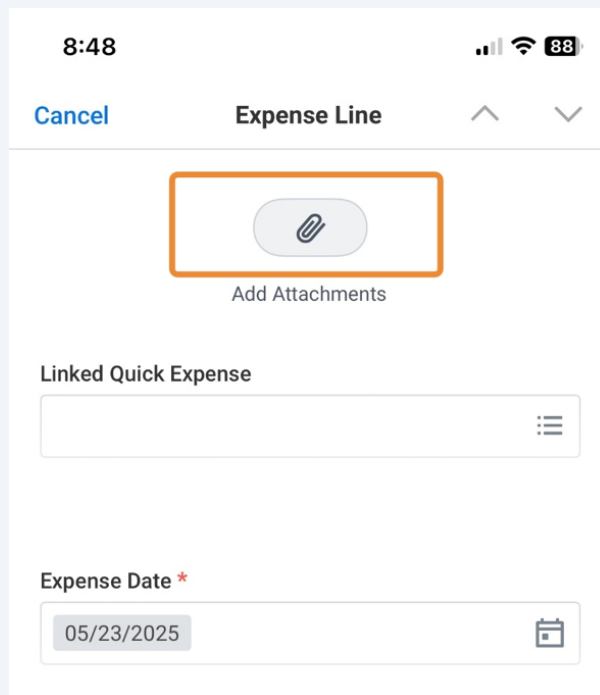
5 Tap "+" to the left of New Expense.



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".

05/23/2025

Expense Item *

Total Amount *

0.00

Take Photo

Choose Photo

Import Attachment

Close

9

After receipt has been attached, enter the expense item.

Add Attachments

Linked Quick Expense

Expense Date *

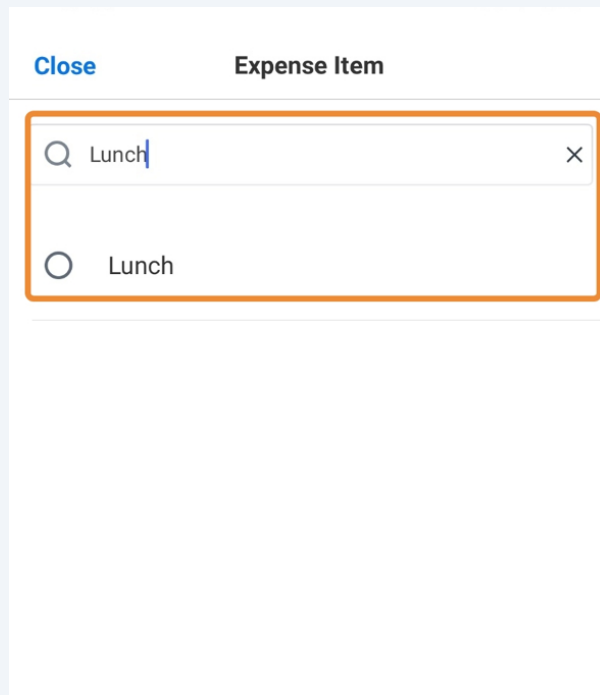
05/23/2025

Expense Item *

Total Amount *

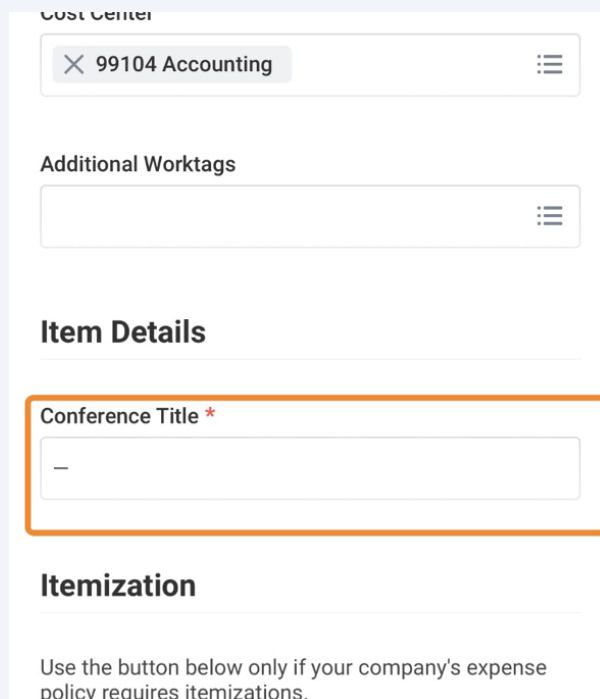
0.00

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



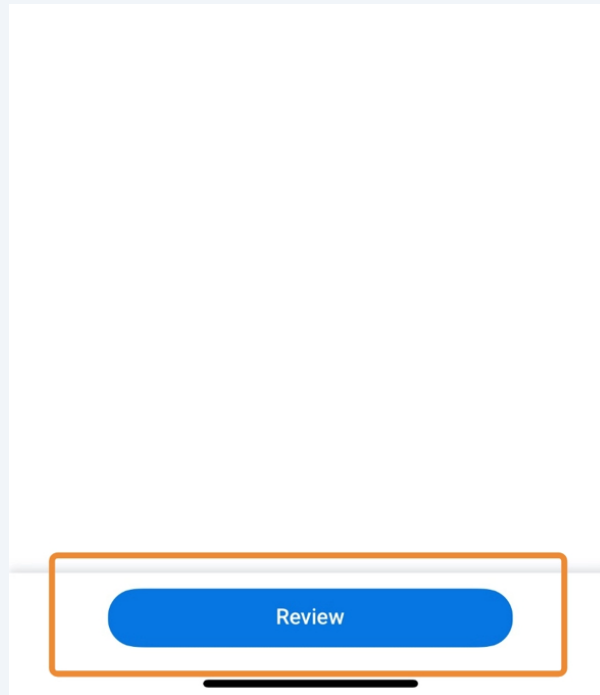
The image shows a mobile application interface for adding an expense item. At the top, there is a header with a blue "Close" button on the left and the title "Expense Item" in the center. Below the header is a search bar containing the text "Lunch" with a magnifying glass icon on the left and a close "X" icon on the right. Below the search bar, a list of search results is displayed, with "Lunch" being the only visible option, preceded by a radio button. The entire search bar and the first result are enclosed in an orange rectangular box.

- 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.

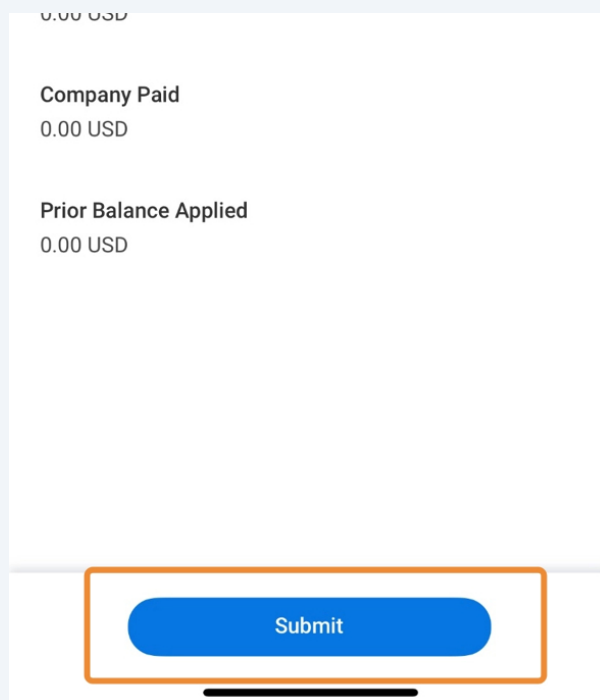


The image shows a mobile application interface for adding an expense item. It includes several sections: "Cost Center" with a dropdown menu showing "99104 Accounting"; "Additional Worktags" with an empty dropdown menu; "Item Details" which contains a "Conference Title" field with a red asterisk indicating it is required; and "Itemization" with a note about company policy. The "Conference Title" field, which contains a hyphen, is highlighted with an orange rectangular box.

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.

The screenshot shows a mobile application interface with a blue header bar. At the top left of the header, it says "50.00 USD". Below the header, there is a white rectangular box with a red border containing a red warning icon (an exclamation mark inside a circle) and the text "1 item(s) with errors or warnings". Below this box, the date "Fri, May 23" is displayed. Under the date, there is a list of items. The first item is "Lunch" and the second is "Lunch". To the right of the second "Lunch" item, there is a red warning icon and the text "50.00 USD".


15 Review the and fix the error.

0.30

Cancel 1 of 1

Enter an amount for Lunch on 05/23/2025 that's less than or equal to 20.00 USD.

❗ Maximum Daily Amount exceeded by 30.00 USD. These expense reports include expenses for 05/23/2025: 10000122

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