



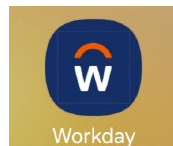
Create Quick Expenses in Workday Mobile

This How-To Guide covers how to create **Quick Expenses** in the Workday mobile app. **Quick Expenses** provide the ability to upload receipts from your phone with all the information that will facilitate expense report creation. They can be used for personal reimbursements and College Credit Card purchases.

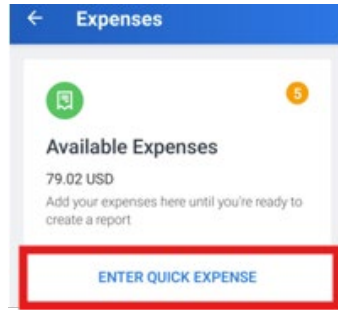
- A Quick Expense **does not** replace or duplicate a College Credit Card transaction. It is simply a way to **organize** and **store** your receipts while traveling and utilizing the BMC Credit Card. You will be able to link a Quick Expense (receipt) with the corresponding College Credit Card transaction if you use mobile expense reporting.
- With Quick Expense, there is no longer a need to keep paper receipts that need to be scanned. This is a beneficial feature because it allows your **delegate** to find your receipts and link them to your credit card transactions.
 - For example, if you were using a College Credit Card for a meal, you can create a Quick Expense on the go. A delegate creating an expense report on your behalf, would then be able to find and link this Quick Expense (receipt) with the College Credit Card transaction.

Start Here-

1. On your mobile device, log into your **Workday mobile app**.



2. Under **Apps**, select **Expenses** (can be found under **Most Used**, if you use Expenses often).
3. You will see two options: **Available Expenses** and **Expense Report**. Use the Available Expenses tile to find the link **Enter Quick Expense**.



4. Enter the **receipt date**.

Date *

Expense Item

5. Select an **expense item**.

- Scroll through and choose by **expense item group**, **spend category**, or **ABC order**, or use the **magnifying glass** to search by name. Once you make a selection, it will populate in the **Expense Item** field.

Date *

Expense Item

6. For **Merchant**, enter the supplier's name.

7. For **Amount**, enter the total amount of the receipt.

Merchant

Amount Currency

 USD

8. In the **Memo** field, enter a detailed description of the **purpose** of the expenses. Include the **date/date range**, **details**, **participants** (name and/or



count), and **location**. This will also help with **matching** the Quick Expense to a credit card transaction.

Memo

Pens and notebook

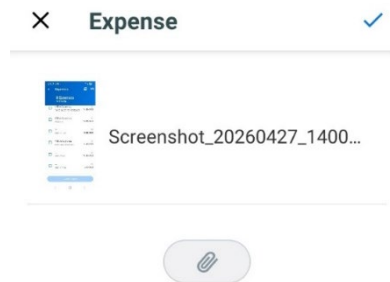
Remaster

9. Select the **paperclip** at the top of your screen to attach receipts. Select from the following options:

- **Take Photo** (iPhone) or **Camera** (Android)
- **Choose Photo** (iPhone) or **Gallery** (Android)
 - Select photo of the receipt in your library.
- **Import Attachment** (iPhone) or **File Browser** (Android)
 - Select if receipt is a file on your phone, such as from an iCloud drive.

10. Select your **photo/file**. Once selected, you will see your image at the **top** of your screen.

- Use the **paperclip** to add more files, if needed.
- Click on attachments to **delete** them as needed.

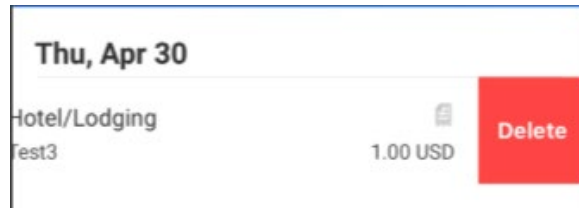


11. In the top right, select **Done** (iPhone) or **blue check mark** (Android) to **save** your Quick Expense.

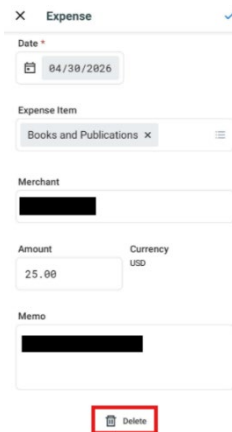
12. You will be taken to a **list** of your saved expenses. Please note, if you are a BMC Cardholder, that these Existing Expenses include **both** your College Credit Card transactions and any created Quick Expenses.



- When logging into Workday on a computer, you will see your credit card transactions **listed separately** from your Quick Expenses, but on the mobile app, they will be listed together.
13. You can select the **(+)** button (iPhone) or **Enter Expense** (Android) to create more Quick Expenses.
14. If you need to delete an expense, follow steps below based on your device:
- **iPhone:** slide the expense to the left and select **Delete**.



- **iPhone & Android:** select an expense from the list and select **Delete** at the bottom of the screen.



Note: Creating Quick Expenses **does not** create your expense report. See the Mobile Expense Reporting guide for more information on how to Create an Expense Report and use these saved Quick Expenses.