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Introduction

Chrome River enables you to easily create Expense Reports and attach receipts through the desktop or mobile applications. Once you have logged in, the steps are the same in both applications.

CR SNAP is a mobile app you can use to quickly capture/store receipts and upload them to your report.

NOTE: You must download the Chrome River and SNAP apps and create an account before creating expenses and attaching receipts on your mobile device.

Apps		Links
	Chrome River	iOS Android
	Chrome River SNAP	iOS Android

Review the job aid, Capture Expense Receipts for more details about using CR SNAP.

Overview

Reports can be created and submitted all at once or in stages as you incur expenses. When you add an Expense to a report, you must attach the corresponding receipt at the same time. You are encouraged to upload receipts to your Receipt Gallery as they are incurred via the CR SNAP app.

Expense Reports remain in Draft mode until submitted. Recently Submitted and Returned reports can be recalled for further editing. Recalling a report reverts it to Draft mode until re-submitted.

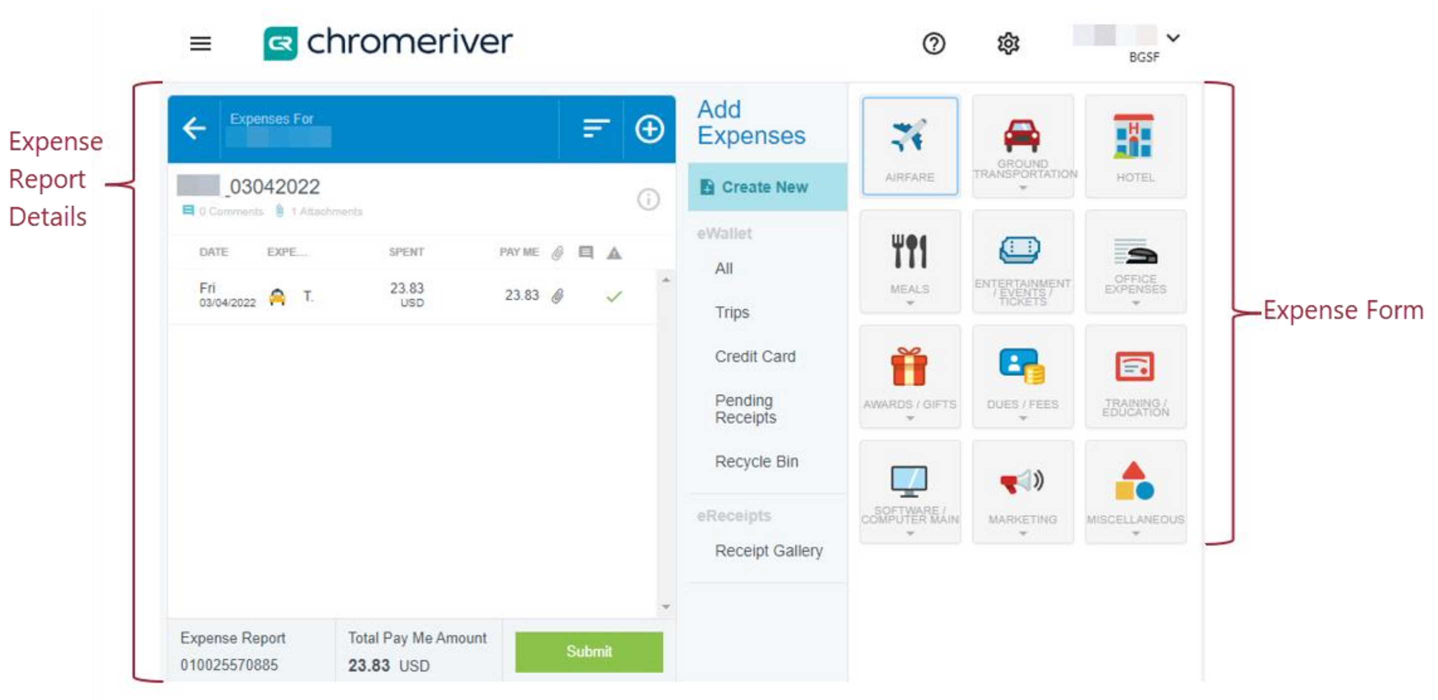
Notifications

You and your approver will receive email notifications when the status of an Expense Report has changed. For instance, your approver will receive an email when you have submitted a report for approval. Likewise, you will receive an email when your report has been approved or returned. Review the QRT, View & Track your Expense Reports for details about tracking the status of a report.

The Expense Form

Each Expense Report has a corresponding Expense Form that displays in a panel to the right of the report to collect individual expenses and supporting details. Selecting an Expense types opens the form where types are organized into tiles. Click the arrow to select a more refined expense item. For example, "Meals" is a parent tile which displays "Breakfast", "Lunch", and "Dinner" options.

Expense Line items appear on the Expense Report once you have entered the details and attached a supporting receipt.

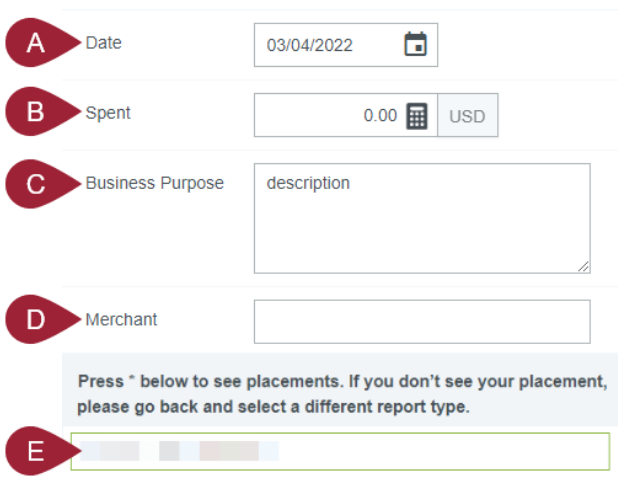


Form Fields & Requirements

The form for each expense type will vary, depending on the type of expense. For instance, a mileage expense will require a mileage entry. Meals contain a field for gratuities. However, the fields shown below are required of every expense item:

A. Date (of the expenditure)
B. Spent
C. Business Purpose
D. Merchant
E. Placement

NOTE: Type an asterisk in the Placement field to expand your Placements and make the appropriate selection.

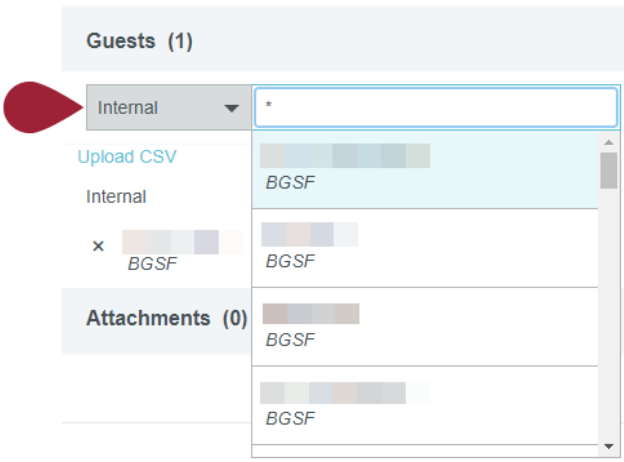


Guest Expenses

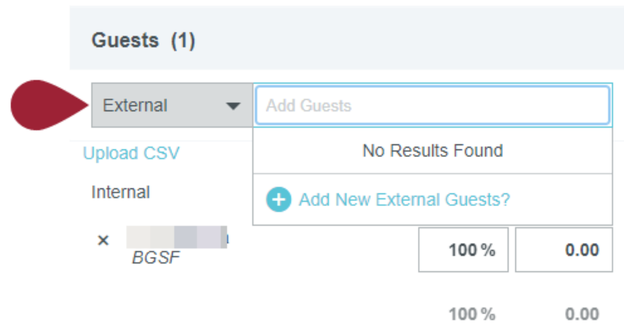
Expenses involving third parties must specify who they applied to. For instance, if you took a Client to dinner, you must indicate the Client's name on the Expense item.

Chrome River will automatically add you as a guest. Use the dropdown to select and identify according to whether they are Internal (BGSF employee) or External (Client). Begin typing the guest's name to display a list of Clients and BGSF employees. If necessary, External Guests can be added by clicking the plus sign. Alternatively, you can type an asterisk in the field to select from a list of previously entered guests or employees.

Internal Guest:



External Guest:



NOTE: Type an asterisk in the field to display a list of all employees and/or previously entered External contacts.

Editing Submitted and Returned Reports

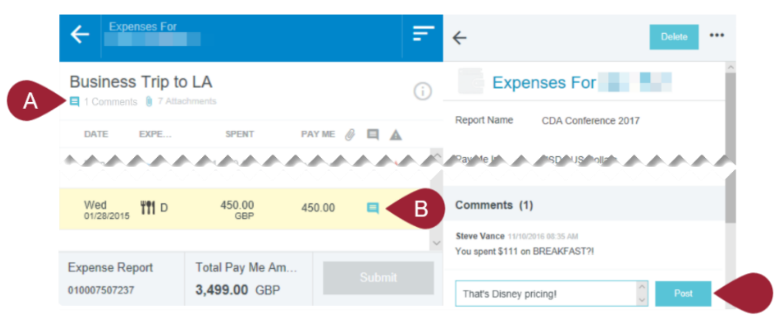
You can re-open a recently submitted Expense Report for editing as long as it has not yet been approved. For example, if you forgot an expense, you can re-open the report and add it if the status is "Pending". If the report has already been approved, you will have to submit a new Expense Report for the missed item.

Returned Reports

Reports you approver returned are stored in your Returned folder. Comments are added depending on the type of rejection, as outlined below.

A. Header-level (the entire report has been returned)
B. Line Item (individual expense entries have been returned)

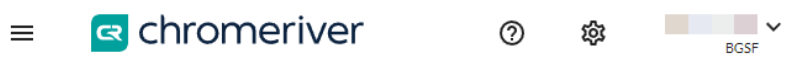
Type your reply in the comments box and click Post to respond.



Only those Line Items that have been returned may be edited before re-submitting your report. For instance, if you entered four Line Items and only two were returned, you may only modify the two returned Line Items.

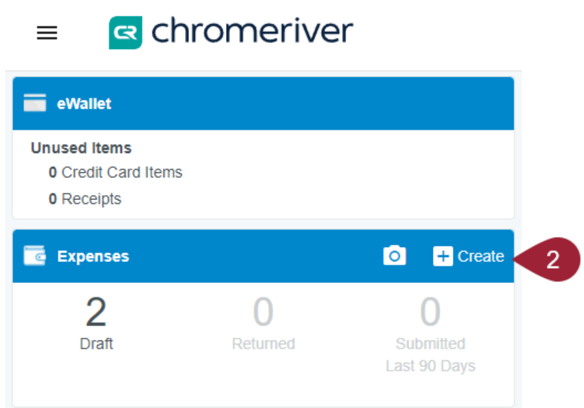
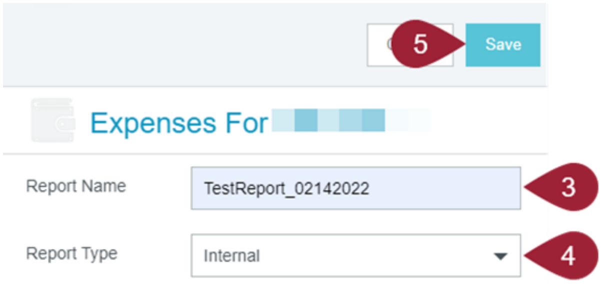
QUICK TIPS!

Did you lose your way? Just click the Chrome River logo to refresh your page.



Procedure Steps

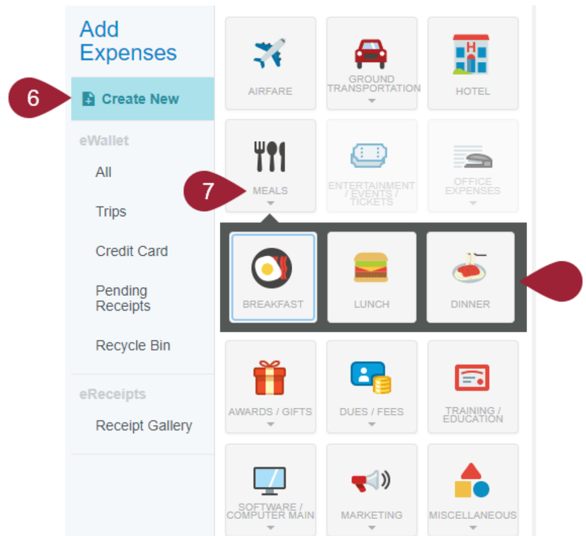
Create & Submit an Expense Report

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">Create a Report (steps 1 - 5):</td></tr>
<tr><td>1</td><td>Log into Chrome River on your desktop or mobile app.</td></tr>
<tr><td>2</td><td>Click/tap Create. This will open the Report Header which captures basic information that applies to every expense listed in the report.

</td></tr>
<tr><td>3</td><td>Enter a descriptive Report Name.
NOTE: Report Names cannot be duplicated.</td></tr>
<tr><td>4</td><td>Select the Report Type (Internal or Professional).</td></tr>
<tr><td>5</td><td>Click Save. Your report will be saved.</td></tr>
<tr><td colspan="2">
</td></tr>
</table>

Create & Submit an Expense Report (cont.)

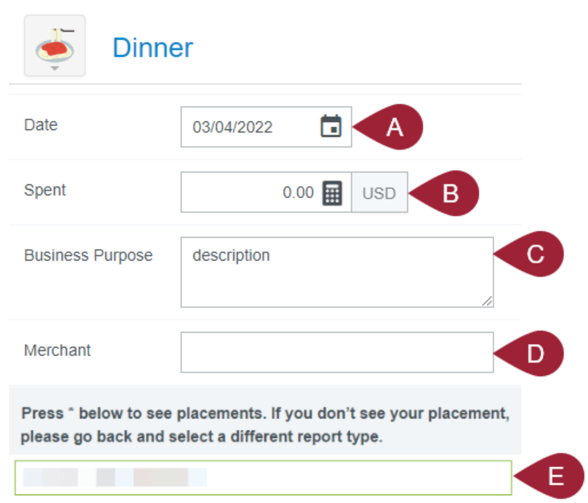
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">Add Expense Items (steps 6 – 9):</td></tr>
<tr><td>6</td><td>Click Create New. The types of expenses will appear.</td></tr>
<tr><td>7</td><td>Select the tile for the Expense you are adding.

REMINDER: Tiles that contain a down arrow are parent expense types. Click the down arrow to display the children tiles. The example below shows the expanded selections for Ground Transportation.</td></tr>
<tr><td colspan="2">



</td></tr>
<tr><td>8</td><td>Enter the following fields (common for all Expense types):

A. Date
B. Spent
C. Business Purpose
D. Merchant
E. Placement



</td></tr>
</table>

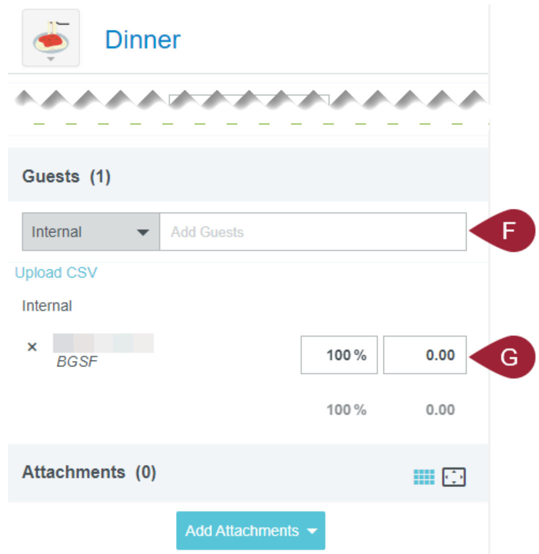
Create & Submit an Expense Report (cont.)

Step	Action

9

Fill in any fields that are specific to the **Expense Type** (i.e. – Guests). Review Form Fields & Requirements if you need help with this step.

The example below outlines the following Guests (F) and Gratuities (G).



Attach Receipts (steps 10 - 12):

10

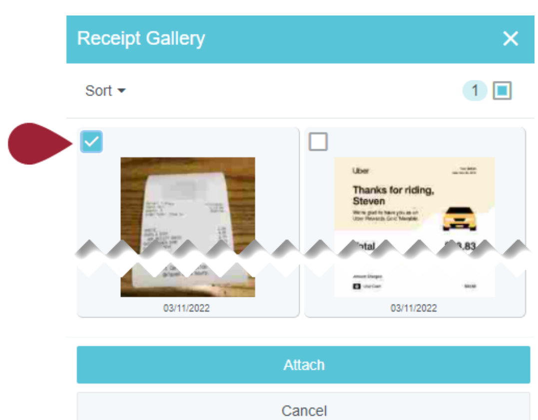
Click **Add Attachments**.

11

Select the **receipt** according to the type of device you are using and where the receipt is stored:

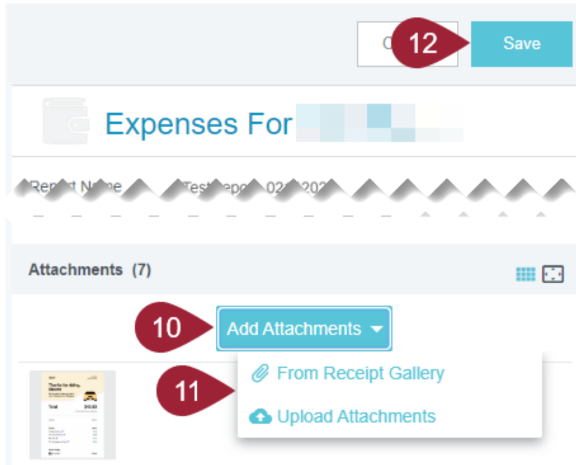
Device	Action
Mobile App	Select Receipt Gallery or Photo Gallery
Desktop	Select Receipt Gallery or desktop Directory

NOTE: When attaching from the Receipt Gallery, check the box in the upper, left-hand corner of the thumbnail of each image to be attached to a Line Item and click Attach.

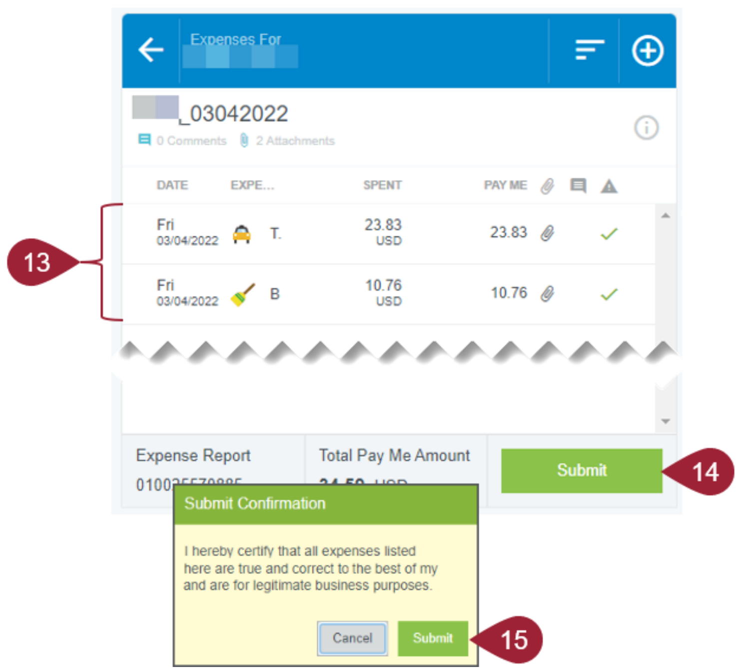


Create & Submit an Expense Report (cont.)

Step	Action
12	Click **Save** at the top of the window. Your Expense Report will close but will be saved to Drafts until you Submit it.



Step	Action
	Submit your Expense Report (steps 13 - 15):
13	Review your report to ensure you have entered all **expenses** and attached **receipts**.
14	Scroll to the bottom of the Expense Report and click **Submit**.
15	Click **Submit** in the confirmation box. You will receive confirmation upon completion. Your report will be moved to your Recently Submitted folder.



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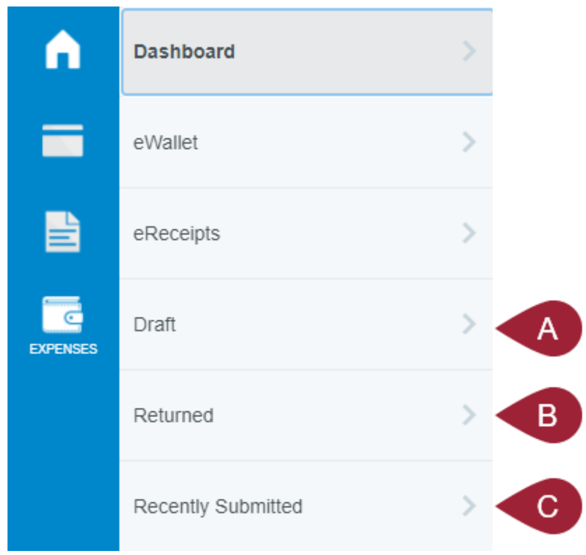
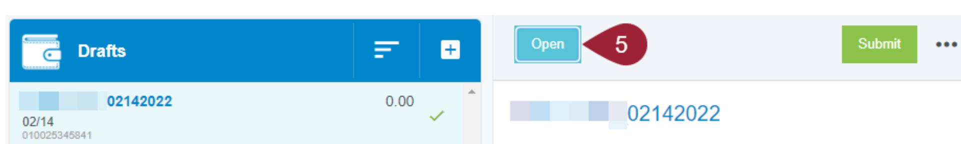
Modify an Expense Report

Step	Action
Locate an Expense Report (steps 1 – 3):	
1	Log into Chrome River on your desktop or mobile app.
2	Expand the menu and select **Expenses**.
3	Select a folder according to the Status of your report: A. Draft (created but not submitted) B. Returned (returned for required revisions) C. Recently Submitted (submitted and pending approval)



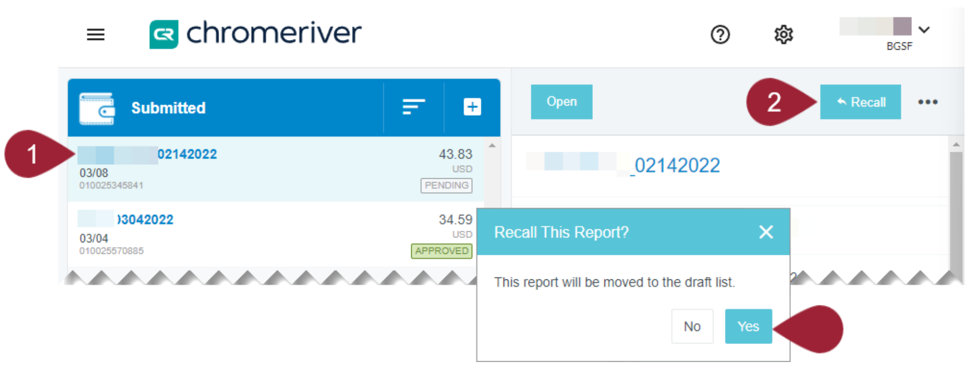
Step	Action
Add Expenses to a Report in Draft Mode (steps 4 - 6):	
4	Select an **Expense Report** to edit it, attach receipts, submit it, or view its status. Draft Expense Reports are found in the Draft folder (Review "A" in step 3).
5	Click **Open**.



Step	Action
6	Click the **+** sign to add expenses. Add expenses and submit your report. Review Create & Submit an Expense Report if you need help with this step.

Modify an Expense Report (cont.)

Step	Action
Reopen a Submitted or Returned Expense Report (steps 7 - 11):	
7	Open the **Submitted** or **Returned** folder, as appropriate. Review step 3 if you need help with this step.
8	Select the **Expense Report** to be modified.
9	Click **Recall**. Select **Yes** in the confirmation box. The report will be moved to your Drafts folder.



Step	Action
10	Open your **Drafts** folder and select the **report**.
11	Click **Open** and follow the steps to Add Expenses. **Submit** the report once you have added all expenses and receipts.

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Resources

Title	Type	Location
Create & Submit an Expense Report	Job Aid	BGSF Technology Updates > Training Content > Chrome River > Employees & Contractors
View & Track your Expense Reports	QRT	BGSF Technology Updates > Training Content > Chrome River > Employees & Contractors

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