

# Create an Expense

Enter the date, payee, payment method, amount, register funding, receipt preference, attachments, and additional details.

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# How to Create an Expense

1. Open **Expense** and choose **New**.
2. Confirm the expense date and time.
3. Select the payee, or add a new payee.
4. Select the payment method.
5. Enter the expense amount.
6. Choose whether to **Pay From Register**.
7. Choose whether to print an expense receipt.
8. Attach a bill or proof of payment if available.
9. Expand **Other Options** to add a reference number, category, and description.
10. Review the record and select **Save**, or **Pay and Save** when using the register.

# How to Select a Payee and Payment Method

Select the person or organization receiving the payment, then choose how the business paid.

1. Open the Payee list and select the correct record.
2. If the payee is missing, choose **Add New Payee**, save it, and then select it.
3. Choose the actual payment method used for the expense.
4. Enter the amount and review the details before saving.

The payee is required. Accurate payment-method selection makes register activity and financial review easier to reconcile.

# How to Pay an Expense From the Register

Use **Pay From Register** when the expense is paid through the active register workflow and should be reflected in its cash or payment activity.

1. Create the expense normally.
2. Select the payee, payment method, and amount.
3. Turn on **Pay From Register**.
4. Choose **Pay and Save**.
5. Complete any employee authorization or payment prompt shown.
6. Confirm the expense appears in history and the applicable shift/register activity.

Leave this option off when the expense was paid independently and should only be recorded as an expense.

# How to Print an Expense Receipt

1. Begin creating the expense.
2. Turn on **Print Receipt**.
3. Complete and save the expense.
4. Review the expense receipt and use the available print action.

The expense receipt provides an internal record of the entered transaction. It is separate from a vendor's invoice or receipt, which should be attached to the expense when available.

You can also open a saved expense from Expense History and choose **View Receipt**.

# How to Attach a Bill or Proof of Payment

1. While creating the expense, find **Attachment**.
2. Select **Attach File**.
3. Choose the image or supported document representing the bill, invoice, or payment proof.
4. Review the attachment entry.
5. Remove an incorrect file before saving if necessary.
6. Save the expense.

Attachments keep the source document connected to the transaction. Use clear files that show the vendor, date, amount, and purpose whenever possible.

# How to Add a Reference, Category, and Description

1. On the expense form, expand **Other Options**.
2. Enter a **Reference Number**, such as a vendor invoice, check number, bank confirmation, or transaction ID.
3. Select the expense category, or add a new category.
4. Enter a useful description.
5. Save the expense.

A strong description explains what was purchased and why. Do not repeat only the payee name; include enough context for a manager reviewing the record later.