

Expense Reimbursement - Zoho

With Zoho, submitting expenses to TargetCW for reimbursement is simple, with the option to submit online or through the Zoho mobile app! To submit an expense for reimbursement:



Below is a more detailed breakdown of each step, walking you through submitting expenses online or in app.

Step 1: Log into Zoho online <u>https://expense.zoho.com/</u> or sign into the Zoho app

- If you are creating an account for the first time:
 - Select the invite link in the email invitation from <u>no-reply@zohoexpense.com</u>
 - Create your log in (username is your email, create your own password)
 - $\circ~$ Zoho will send you an email to verify your account with a verification code

Step 2: Create a new expense report and add all expenses. There are a couple ways you can do this in Zoho, but below is the simplest approach:

- Select **Reports** from the left navigation and select + to create a new report
- Select New Expense at the bottom of the report to enter expenses or mileage. Create a separate expense for each item and include receipts. Note, expenses and mileage must be created as separate line items on the report

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Ø	Receipt Inbox		Report Title					
(\$)	Expenses		This field will be auto-generated.					
D		+						
	Cards							
\$	Advance Payments		DATE	RECEIPT CATEGORY	AMOUNT	AMOUNT (USD)		
Ŀø	Reports Approval							
C	Analytics			You can create a new expense or a	add existing ones to this report			
83	Admin	*		New Exp	ense			



Example Expense – complete all required fields and attach images of any receipts.

• For documentation of miles traveled, upload a map showing distance traveled or list the start/end locations in the description field

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🕼 Attach More Receipts 🖌 🗍	Save and Include	Cancel		Save and Include	ancel

Step 3: Submit for approval

Click **Save and Submit** on the report once all expenses have been added. The report will be reviewed by your manager and if you have notifications enabled, you'll be notified once your expense is approved and processed for payment.

Please see TargetCW's Worker Handbook for additional information about expenses.

If you have any questions or need help with your expenses, please contact your Account Manager, email support@targetcw.com, or call (858)-810-3000. Our team is happy to assist you!