

FRONTIER

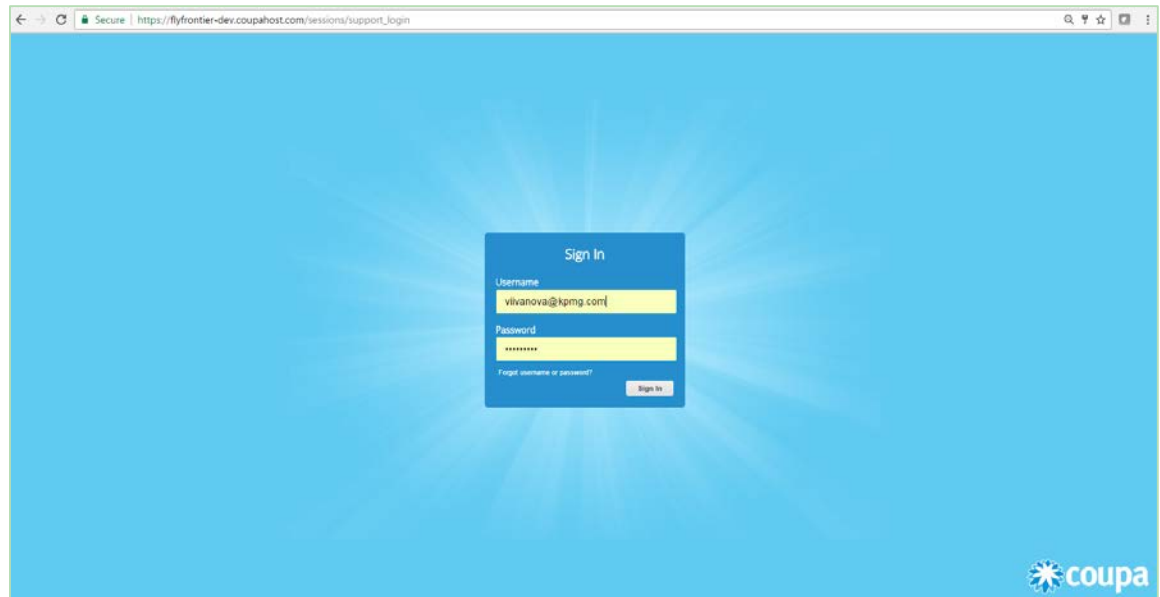
Creating an Expense Report in Coupa in 10 Steps



Step 1

FRONTIER

Log into Coupa. Type in **flyfrontier.coupa.com** into your internet browser.



Step 2

Find the **Expenses** section and click on the **Create** option. If you are an expense delegate for someone, you can select their name from the **Select on behalf of** field.

The screenshot shows the 'Expenses' section of an application. On the left, there is a list of reports categorized into Draft, Pending, and Approved. The 'Draft' category is active, showing 'Expense Report (#54)' with a value of 0.00 USD. A green box highlights the 'Create' button. The main area displays the 'Expense Report (#54)' form with fields for Description, Expense Date, Expense Category, Total (0.00 USD), Reason, and Merchant. A 'Select on behalf of' dropdown is visible at the top right of the form area. The total at the bottom right is 0.00 USD.

This screenshot shows the 'Expense Report (#59)' form. At the top right, a dropdown menu is labeled 'Select on behalf of'. Below the form title, there are controls for sorting by 'Date Created', view options, and a 'Move' button. A table lists expense lines with columns for date, category, merchant, and amount.

Date	Category	Merchant	Amount
01/31/17	Lodging	Village Inn	450.00 USD

Step 3

Click on **Edit Name** to edit the name of your expense report. Enter a detailed name for your expense report.

Expense Report for 1/30/2017 (#54) [edit name](#)

Sort by View Move

* Description
* Expense Date

* Expense Category

* Total

Reason Merchant

Total **0.00 USD**

Step 4

Complete the expense line details:

- A. **Description:** description of the expense
- B. **Expense Date:** date the expense was incurred
- C. **Expense Category:** category for the expense
- D. **Total:** total of the expense
- E. **Currency:** currency of the expense
- F. **Reason:** justification for the expense
- G. **Merchant:** supplier for the expense
- H. **Browse:** allows you to attach a receipt
- I. **Itemize:** allows you to itemize a receipt (i.e. itemize the internet charges for a hotel bill)

The screenshot shows an expense entry form with the following fields and annotations:

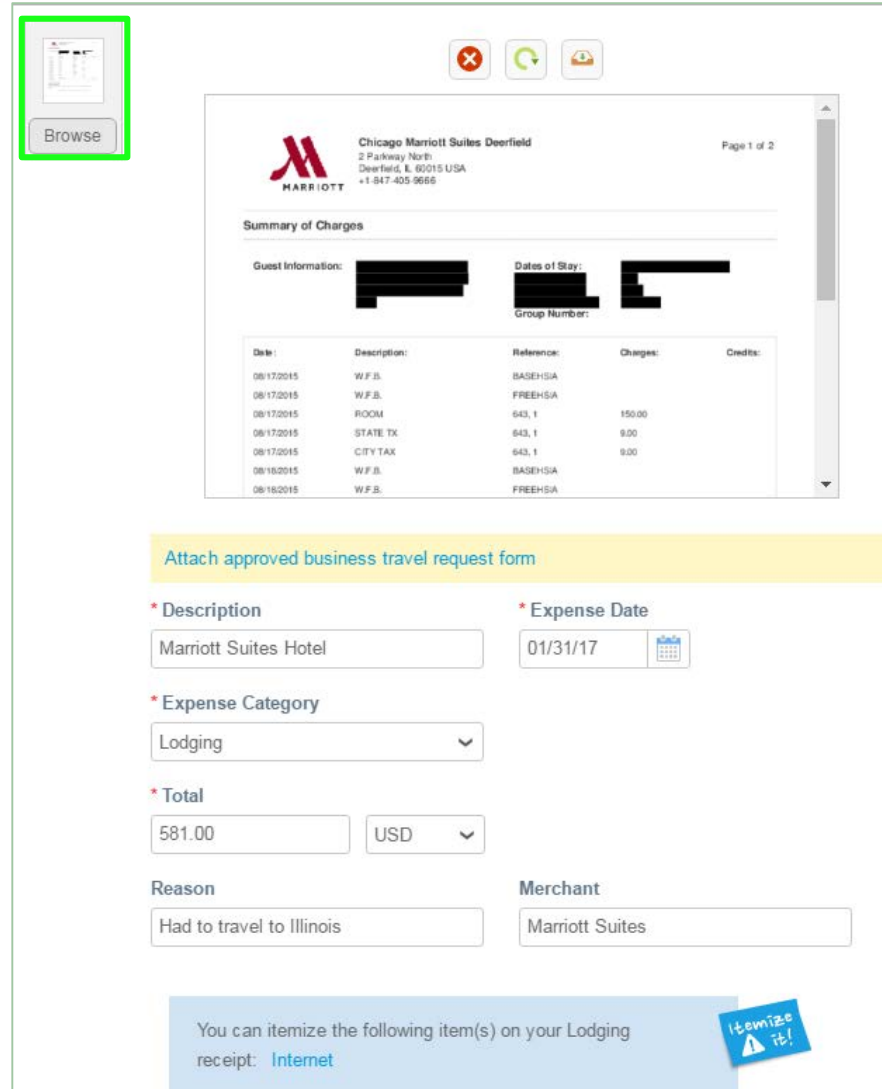
- Sort by:** Date Created
- View:** List view icon
- Move:** Move icon
- Attach approved business travel request form:** Yellow banner with annotation **B**
- * Description:** Marriott Suites Hotel (Annotation **A**)
- * Expense Date:** 01/31/17 (Annotation **B**)
- * Expense Category:** Lodging (Annotation **C**)
- * Total:** 581.00 (Annotation **D**), USD (Annotation **E**)
- Reason:** Had to travel to Illinois (Annotation **F**)
- Merchant:** Marriott Suites (Annotation **G**)
- Required:** Red banner with annotation **H**
- Browse:** Button with annotation **H**
- Itemize:** Blue banner with annotation **I** and "Itemize It!" icon

Buttons at the bottom: Cancel, Save & Add Itemized Line, Save

Step 5

Add the needed receipts to your expense report by clicking on the **Browse** icon and uploading the receipts. If a receipt is required, you will see **Required** in the **Browse** box.


All expense reports will be coded to your cost center and appropriate GL account. If you need to charge an expense report to a different cost center, you will need to re-classify it at month's end.



The screenshot displays a web interface for an expense report. On the left, a 'Browse' button is highlighted with a green box. The main area shows a receipt for 'Chicago Marriott Suites Deerfield' with a 'Summary of Charges' table. Below the receipt is a form to 'Attach approved business travel request form' with fields for Description, Expense Date, Expense Category, Total, Reason, and Merchant. A blue callout box at the bottom indicates that the 'Internet' item can be itemized.

Date	Description	Reference	Charges	Credits
08/17/2015	W.F.B.	BASEHSA		
08/17/2015	W.F.B.	FREEHSA		
08/17/2015	ROOM	643, 1	150.00	
08/17/2015	STATE TX	643, 1	9.00	
08/17/2015	CITY TAX	643, 1	9.00	
08/18/2015	W.F.B.	BASEHSA		
08/18/2015	W.F.B.	FREEHSA		


Attach approved business travel request form

* Description: * Expense Date: 

* Expense Category:

* Total:

Reason: Merchant:

You can itemize the following item(s) on your Lodging receipt: [Internet](#) 

Step 6



Itemize any needed receipts by clicking on **Save & Add Itemized Line** and completing a second expense line

DATE	W.F.B.	DESCRIPTION	
08/17/2015	W.F.B.	FREH5A	
08/17/2015	ROOM	643, 1	150.00
08/17/2015	STATE TX	643, 1	9.00
08/17/2015	CITY TAX	643, 1	9.00
08/18/2015	W.F.B.	BASEH5A	
08/18/2015	W.F.B.	FREH5A	

Attach approved business travel request form Per the expense reimbursement policy, any request for reimbursement of lodging requires an authorized business travel request form.

* Description: Marriott Suites Hotel
* Expense Date: 01/31/17
* Expense Category: Lodging
* Total: 581.00 USD
Reason: Had to travel to Illinois
Merchant: Marriott Suites

You can itemize the following item(s) on your Lodging receipt: [Internet](#)

Itemize it!

Buttons: Cancel, **Save & Add Itemized Line**, Save

Chicago Marriott Suites Deerfield
2 Parkway North
Deerfield, IL 60015 USA
+1 847 433 9666

Page 1 of 2

Date of Stay: [Redacted]
Group Number: [Redacted]

Description	Reference	Charges	Credits
W.F.B.	BASEH5A		
08/17/2015	W.F.B.	FREH5A	
08/17/2015	ROOM	643, 1	150.00
08/17/2015	STATE TX	643, 1	9.00
08/17/2015	CITY TAX	643, 1	9.00
08/18/2015	W.F.B.	BASEH5A	
08/18/2015	W.F.B.	FREH5A	

* Description: Internet
* Expense Date: 01/30/17
* Expense Category: Internet
* Total: 5.95 USD
Reason: Had to travel to Illinois
Merchant: Marriott Suites

Step 7

DATE	W.F.B.	DESCRIPTION	AMOUNT
08/17/2015	W.F.B.	FREEHSA	
08/17/2015	ROOM	643, 1	150.00
08/17/2015	STATE TX	643, 1	9.00
08/17/2015	CITY TAX	643, 1	9.00
08/18/2015	W.F.B.	BASEHSA	
08/18/2015	W.F.B.	FREEHSA	

Attach approved business travel request form Per the expense reimbursement policy, any request for reimbursement of lodging requires an authorized business travel request form.

* Description: Marriott Suites Hotel

* Expense Date: 01/31/17

* Expense Category: Lodging

* Total: 581.00 USD

Reason: Had to travel to Illinois

Merchant: Marriott Suites

You can itemize the following item(s) on your Lodging receipt: [Internet](#)

Itemize it!

Cancel Save & Add Itemized Line **Save**

Click on **Save** to save each expense line

Step 8

When you are ready to submit the expense report, click on **Submit for Approval**

Expense Report for 1/30/2017 (#54) [edit name](#)

Sort by View Move

01/31/17	Lodging	Marriott Suites Hotel	581.00 USD	
01/30/17	Internet	Internet	5.95 USD	

[Add Another Itemized Line](#)

Total 581.00 USD

Approvals

Requester Frontier Teresa Miller Jacalyn Peter Accounting Review

Payment

Comments

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Step 9

flyfrontier-dev.coupa.com says:
Are you sure you want to submit this report for approval?

OK Cancel

View [List Icon] [Grid Icon] Move [Print Icon]

581.00 USD	
5.95 USD	

[Add Another Itemized Line](#)

Add Expense Line

Total 581.00 USD

Delete Report **Submit for Approval**

Approvals

Requester Frontier Teresa Miller Jacalyn Peter Accounting Review

— — —

Payment

Confirm the submission by clicking on OK

Step 10

Expenses

Reports Create

Draft

Expense Report (#56) 0.00 USD

Expense Report (#18) 450.00 USD

Pending

January 30 expense report (#55)
Submitted 3 hours ago 10.00 USD

Expense Report (#32)
Submitted 3 hours ago 400.00 USD

Expense Report for 1/30/2017 (#54)
Submitted 3 hours ago 581.00 USD

Duran Duran is the greatest band...
Submitted 18 days ago 260.00 USD

Expense Report (#29)
Submitted 18 days ago 300.00 USD

Approved

Expense Report (#36)
Submitted 17 days ago 8.98 USD

Expense Report (#37)
Submitted 17 days ago 0.09 USD

Expense Report (#35)
Submitted 17 days ago 9.99 USD

[View all](#)

The expense report will now be sent for approvals. It will show up under the **Expenses** section on your homepage and in your **Spend History**

Spend History

[Expense Reports](#) [Invoices](#) [Forms](#)

Exp #	Expensed By	Total	Submitted At	Status	Title	Actions
56	Requester Frontier	0.00	None	Draft	None	
55	Requester Frontier	10.00	01/30/17	Pending Approval	January 30 expense report	
54	Requester Frontier	581.00	01/30/17	Pending Approval	Expense Report for 1/30/2017	
37	Requester Frontier	0.09	01/13/17	Approved for Payment	None	
36	Requester Frontier	8.98	01/13/17	Paid	None	
35	Requester Frontier	9.99	01/13/17	Approved for Payment	None	
34	Requester Frontier	14.97	01/13/17	Approved for Payment	None	
33	Requester Frontier	1.99	01/13/17	Approved for Payment	None	
32	Requester Frontier	400.00	01/30/17	Pending Approval	None	
30	Requester Frontier	260.00	01/12/17	Pending Approval	Duran Duran is the greatest band in the world	
29	Requester Frontier	300.00	01/12/17	Pending Approval	None	
27	Requester Frontier	1,000.00	01/12/17	Approved for Payment	None	
22	Requester Frontier	212.27	12/15/16	Approved for Payment	None	
21	Requester Frontier	4,894.43	12/13/16	Approved for Payment	None	
18	Requester Frontier	450.00	12/08/16	Pending Info	None	

Per page: 15 | 45 | 90 Prev 1 2 Next