Create a draft expense report on the web app

What is an expense report? How can I create a draft expense report?
To create a report:

- Click on **Expenses** from the left panel.
- **Create Report:** Select an expense or multiple expenses and click on the **Create Report** button

- Select the **Report Type.**

- **Basic Report**: Select this if you want to create a report out of all the basic expenses that you have incurred.
- **Trip Report**: Select if you want to create a report out of all expenses that you have made on a recent official trip. For more information on Trip Reports, please refer to this article.
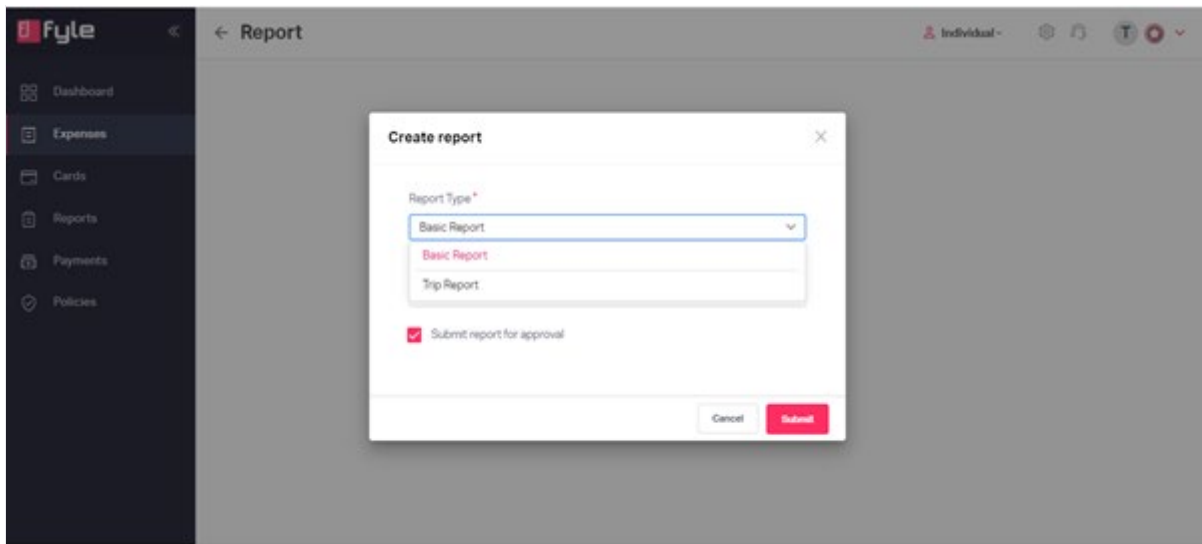
- After selecting the relevant report type, if you would prefer to save the report as a draft, you could click on the checkbox present beside the **Submit report for approval** and unmark the same. Once you have unmarked it, the report will be saved as a **draft** report and the user can keep adding expenses, until the submission of the report.

  Note: No action can be taken by an Approver or the Finance team for reports which are in **draft** state.
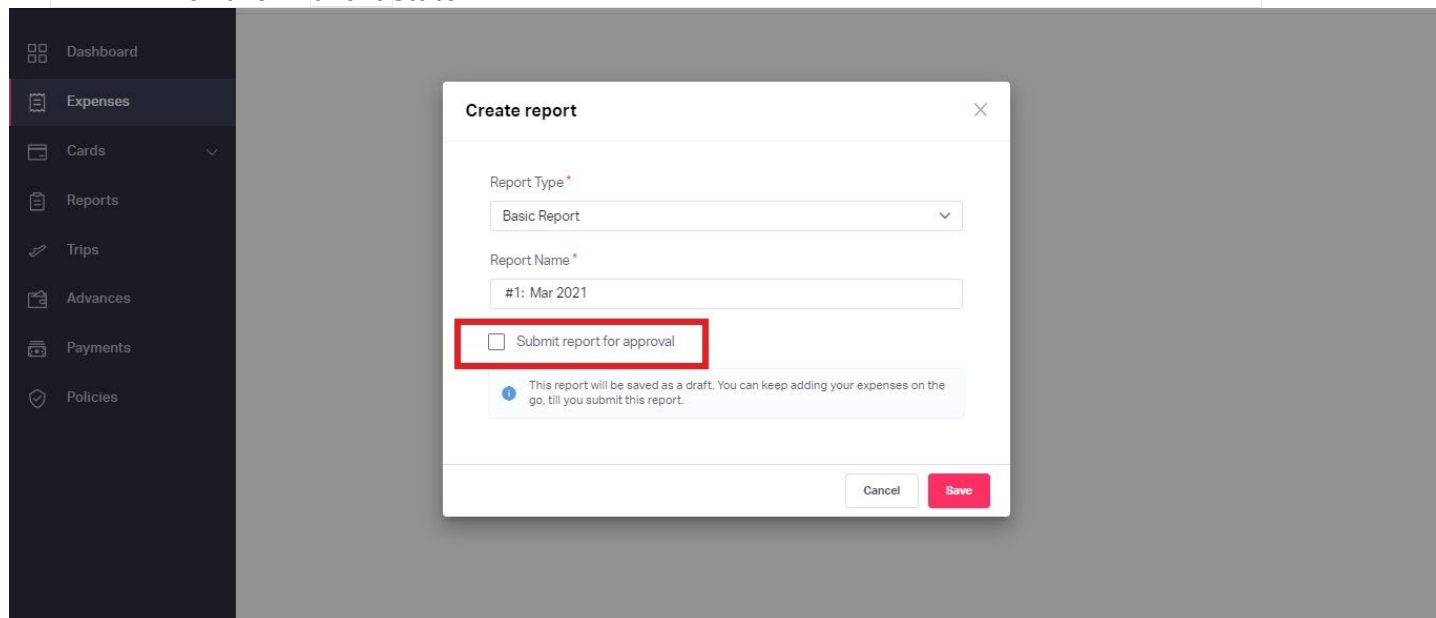

- Recommending **Ready to Report** Expenses :

Once the draft report is created, it gives you the recommendation to add expenses that are currently present under the **Ready to Report** page and the total value it amounts to. Click on **Add Expenses** to add them to the draft report if required else click on **Skip**.
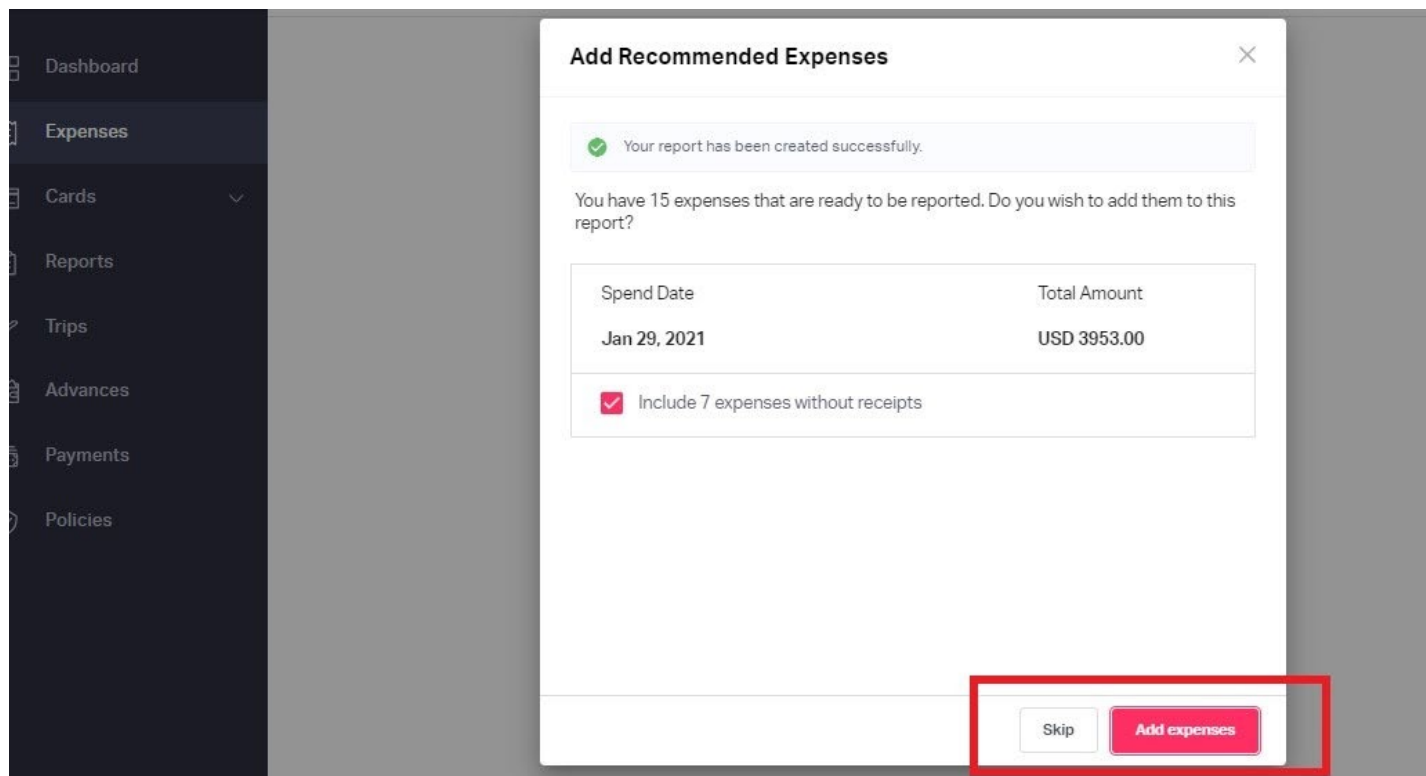
- Review all the details and make any edits to the details if necessary. To get an overview of how to edit details, you can refer to this [article](#).
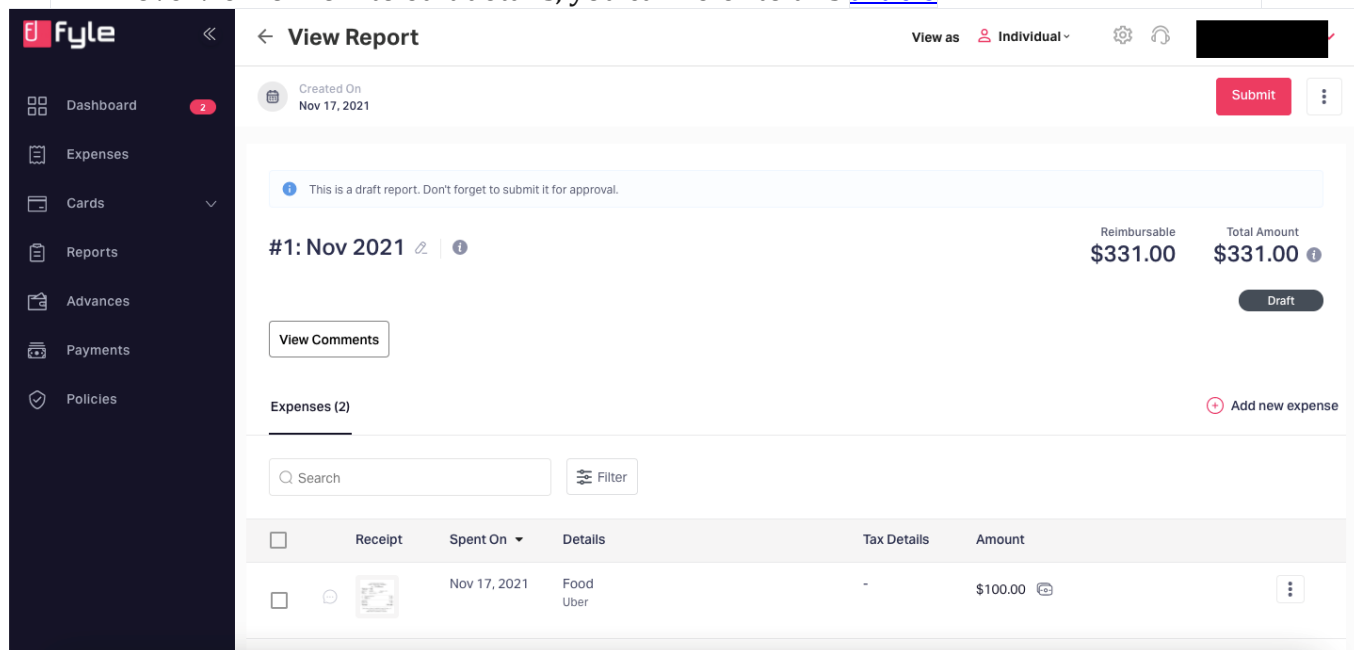
- **Add to Report:** In order to add expenses to an existing report which is either in the **Draft** or **Reported** State. Go to the **Expenses** tab **>** Select the expenses that you would want to include in the report **>** Click on **Add to Report** option.

• Select the report and expenses will be added to the selected Report.

• Once you have reviewed all your expenses, just click on the **Submit** button if you would like to submit the report for your manager's approval.