

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

The screenshot shows the Fyle web app interface. The left sidebar contains navigation options: Dashboard, Expenses (selected), Reports, Trips, Advances, Payments, Corporate Cards, Receipts, Team, and Policies. The main content area shows a list of expenses with columns for date, amount, and description. A red box highlights the 'Create Report' button in the top action bar and the checkboxes for selecting expenses. The 'Create Report' button is also highlighted with a red box.

Expenses	Total Amount	Non-Reimbursable
5	₹1,118.77	₹0.00

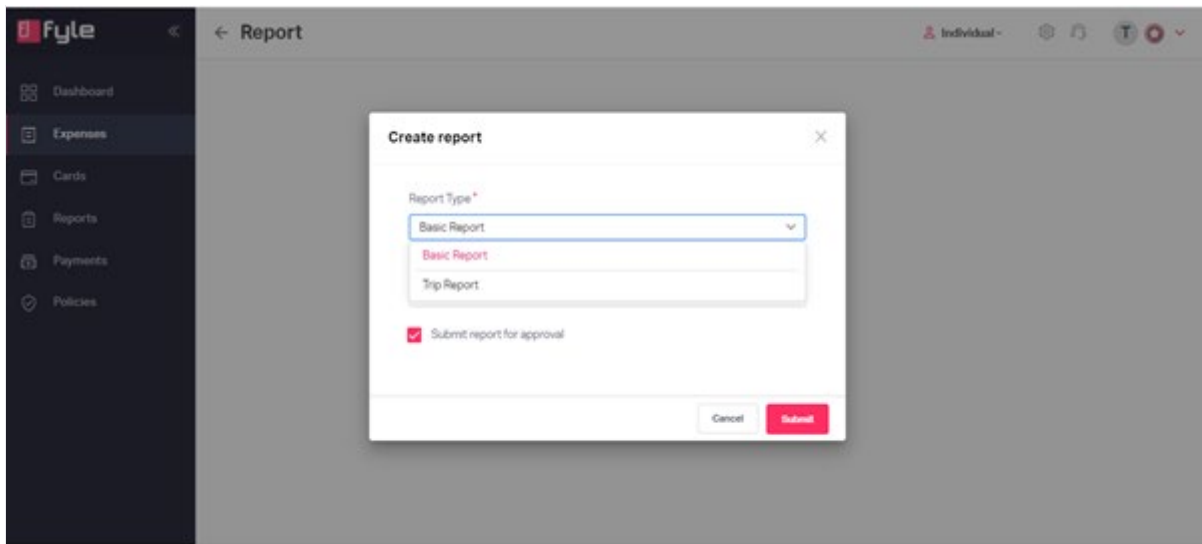
Expenses	Total Amount	Non-Reimbursable
5	₹1,118.77	₹0.00

Expenses	Total Amount	Non-Reimbursable
5	₹1,118.77	₹0.00

- Select the **Report Type**.

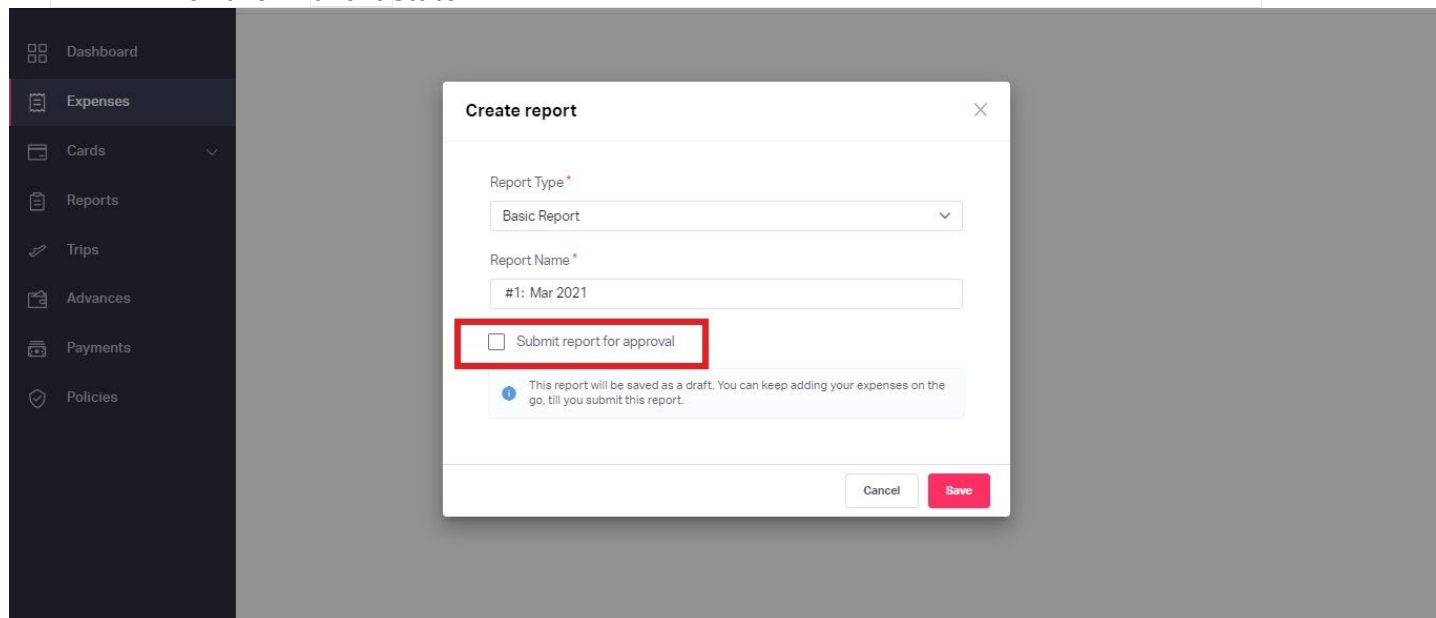
- **Basic Report:** Select this if you want to create a report out of all the basic expenses that you have incurred.

- **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](#).



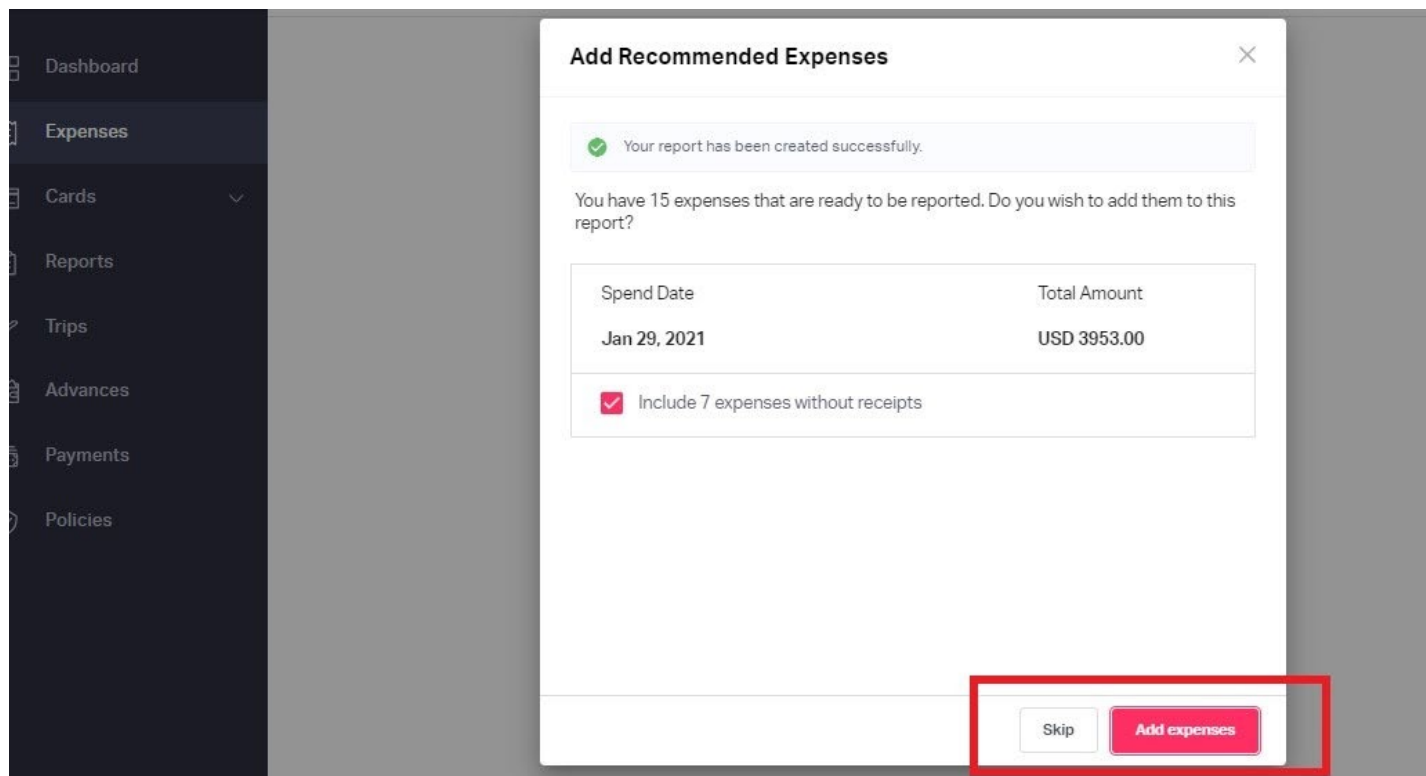
- After selecting the relevant report type, if you would prefer to save the report as a draft, you could click on the checkbox present beside the **Submit report for approval** and unmark the same. Once you have unmarked it, the report will be saved as a **draft** report and the user can keep adding 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.

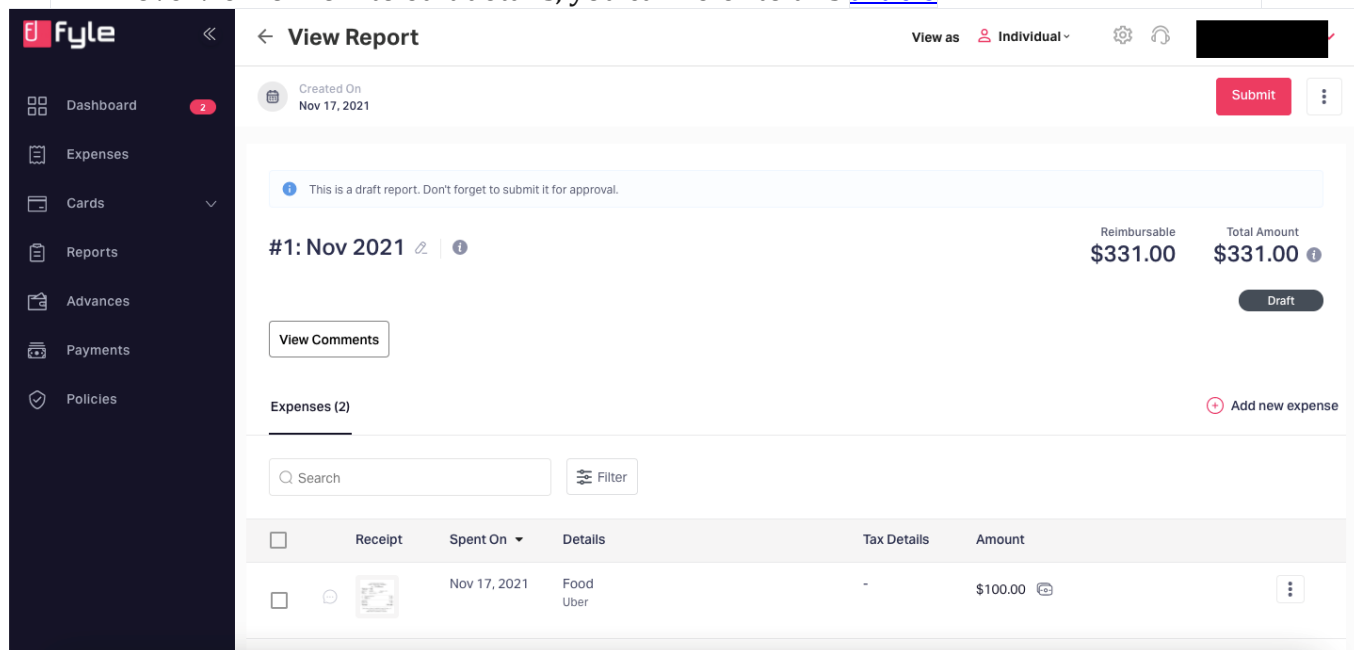


- Recommending **Ready to Report** Expenses :

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.

Dashboard

Expenses

Cards

Reports

Trips

Advances

Payments

Policies

Ready To Report (15) Needs Review (0) Flagged (0) Cannot Report (1) All (42)

Add Expense

Filters

Expenses 3 Amount \$122.00 Reimbursable \$0.00 Search Manage columns

Start Review Create Report Delete Add to Report Export

<input checked="" type="checkbox"/>		Mar 25, 2021	Feb 7, 2021	\$200.00 (Non Reimbursable)	STEAK-N-SHAKE#0...	Unspecified DAIRY QUEEN		
<input checked="" type="checkbox"/>		Mar 25, 2021	Feb 7, 2021	-\$210.00 (Non Reimbursable)	TARGET ...	Unspecified WM SUPERCENTER		
<input checked="" type="checkbox"/>		Mar 25, 2021	Feb 4, 2021	\$132.00 (Non Reimbursable)	RITAS (Card...	Unspecified STEAK-N-SHAKE#0664		
<input type="checkbox"/>		Mar 25, 2021	Feb 2, 2021	-\$38.00 (Non Reimbursable)	WM SUPERCENTER...	Unspecified AMAZON.COM		

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

Fyle

Dashboard

Expenses

Cards

Reports

Payments

Policies

My Expenses

Ready To Report (25) Needs Review (0) Flagged (7) Cannot Report (0) All (32)

Add Expense

Filters

Expenses 4 Amount \$425.00 Search Manage columns

Start Review Create Report Delete Add to Report Export

<input checked="" type="checkbox"/>		Mar 15, 2021	Jan 24, 2021	\$252.00 (Non Reimbursable)	MY LIFE Card...	Unspecified THE FLAME BROTHER		
<input checked="" type="checkbox"/>		Mar 15, 2021	Jan 24, 2021	-\$39.00 (Non Reimbursable)	STEAK-N-SHAKE#0...	Unspecified GNC #		

Add expense to report

Add to existing report *

Select Report

#9: Mar 2021 (Draft)

ccc report (Reported)

#2: May 2020 (Reported)

Cancel Add

- 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.

<<

Dashboard

2

Expenses

Cards

Reports

Advances

Payments

Policies

<

View Report

View as Individual

Created On

Nov 17, 2021

Submit

This is a draft report. Don't forget to submit it for approval.

#1: Nov 2021

Reimbursable

\$331.00

Total Amount

\$331.00

Draft

View Comments

Expenses (2)

Add new expense

Filter

<input type="checkbox"/>	Receipt	Spent On	Details	Tax Details	Amount	
<input type="checkbox"/>		Nov 17, 2021	Food Uber	-	\$100.00	