Approving expense reports - Users

Expense Management.
Simplified. For you.

Approving expense reports

How you approve expense reports can vary in Findity Expense. Your organization's administrator configures and manages approval process settings. See our separate guide for information on approval settings if you would like to know more

If you are the default approver and there are no other approval settings configured in your organization, then all submitted reports will go to you for approval. However, Findity Expense also makes it possible to approve expenses based on organizational structure, cost center, or other dimensions. And there can be more than one approver in an approval process.

Regardless of how it has been configured, actually approving expenses works in the same way. When a user submits a report, you as an approver will receive an app notification and an email.

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In our app or a web browser, when you have expense reports to approve, there will be a note next to Todo. Click Todo to view the reports.

Click on the notification and then click View report to check that everything is correct. If you are happy with it, click Back and then click Approve.

Reject expense reports

If the report is incorrect, you can reject it.

You reject incorrect expenses by sliding the button next to the expense to Reject. You can add an explanation so the user knows why you have rejected their report.

When you reject a report, it is sent back to the user as unapproved and the reason for rejection is shown in red text.