Adding Expenses

In this article:

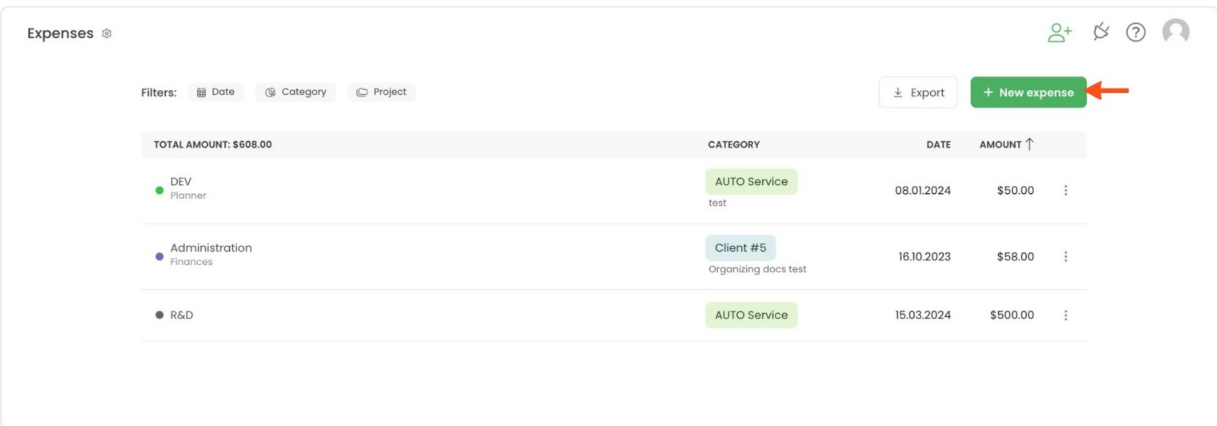
Expenses will allow you to keep a detailed record of all your transactions and spending. Alls users on the account will be able to add their own expenses and assign them to predefined categories and projects.

> Expenses are not counted in your tasks' budget.

Add Expense

> Each User can add their own expenses. Administrators and Supervisors will be able to view expenses added by users from their team.

To start with adding expenses click on the green **Next Expense** button.



A new window will appear when you can fill in the following data:

Category - choose one of the predefined categories. Categories can be created and edited in the Expenses settings;

Amount/Unit - depending on the "Unit price and name" defined for the category, here you can input the amount you spent on an expense;

Description - an optional field where you can describe your expense;

Project - choose one of the projects or tasks on your account that the expense should be assigned to. Each expense requires the Project field;

Team member - the field represents the user who owns this specific expense;

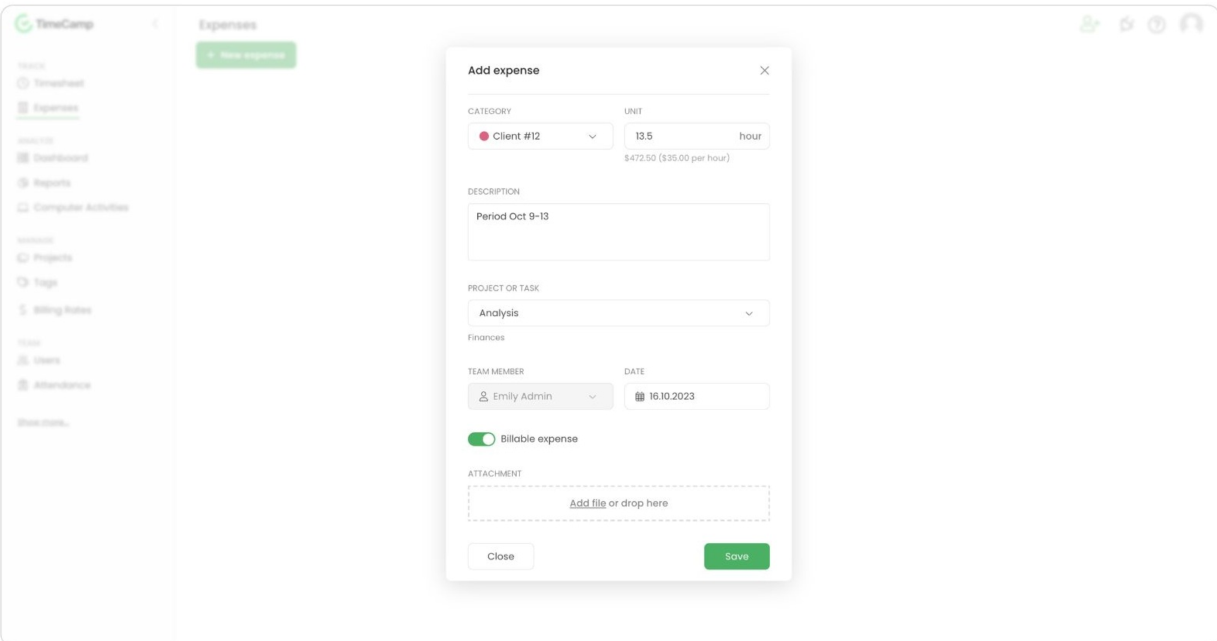
Date - choose a date the expense should be added to. It is possible to set only present or past days.

> We don't provide an option to add expenses to the future.

Billable - if you enable the "Billable expense" status, you can later add this expense to an invoice. If the "Billable expense" status stays disabled it won't be possible to invoice this expense;

Attachment - allows to attach one file to your expense. It can be for example an invoice, a check, a note, etc. Later you can view and download this file from the Expenses section;

> The maximum size of the attached file is 10 MB. We support only PDF, JPG and PNG formats.

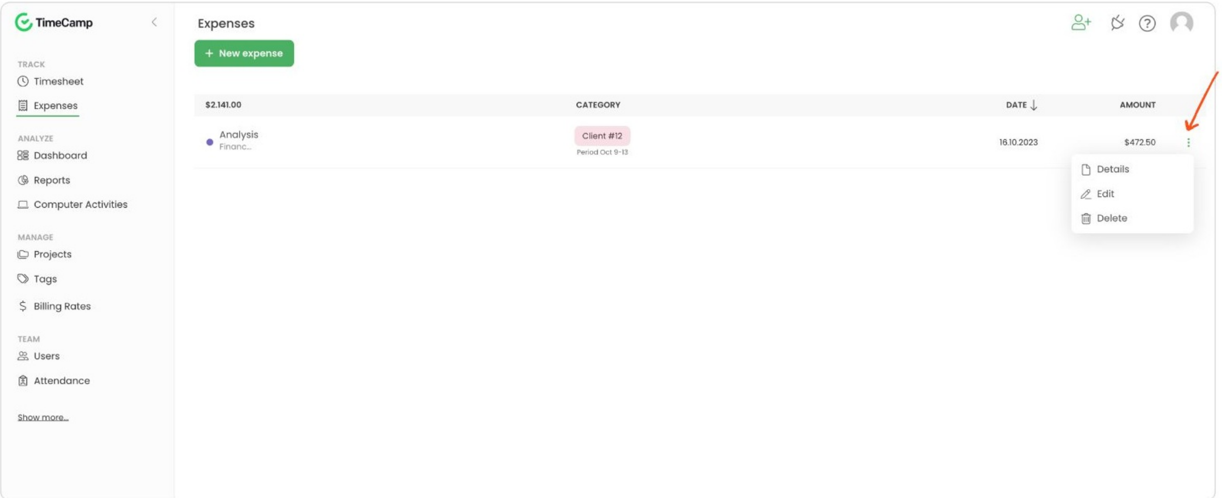


After filling in all of the required fields click on the green **Save** button. That's it, now your expense is added to the list and if you enabled the Billable status you can invoice your expenses.

Edit Expense

> Each User can edit their own expenses. Administrators and Supervisors will be able to view and edit expenses added by users from their team.

Expenses can be edited at any time. Click on the "**3 vertical dots**" button next to a specific expense to open an additional menu.



Here you can find such options:

- **Details**
- **Edit**
- **Delete**

Details option will allow you to open a preview of an expense. Here you can check all of its details and download the attachment.

> The Details window doesn't allow to edit an expense. You update an expense click on the Edit expense button.

Edit option will allow you to change and update any of the expense details. After editing the details of an expense don't forget to save changes.

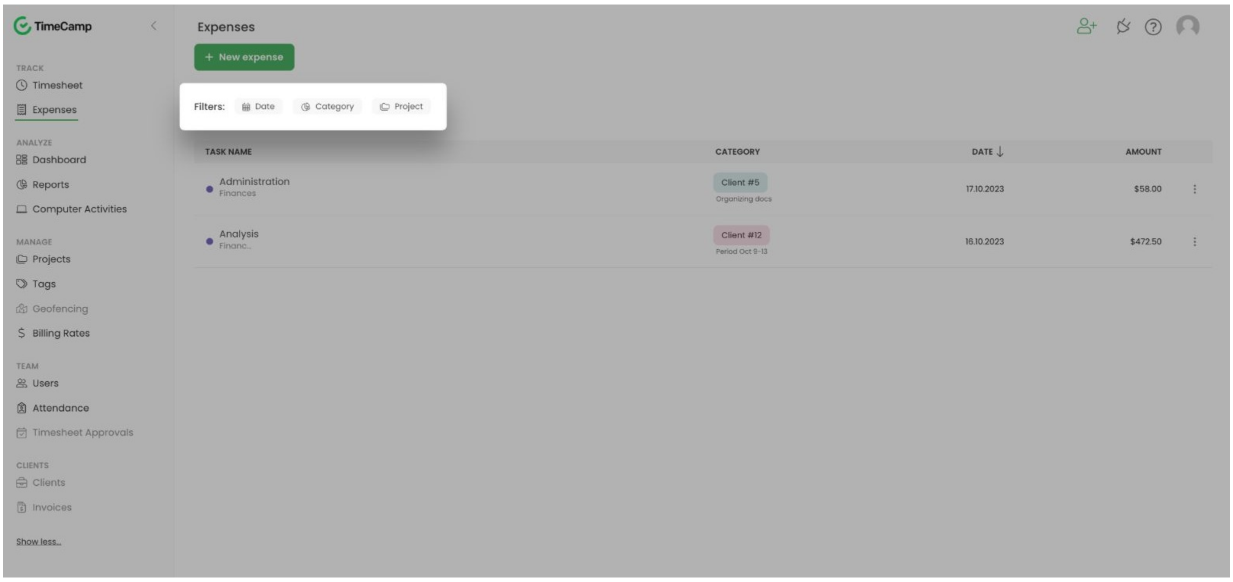
Delete option will allow you to remove an expense from the list.

It is not possible to restore deleted expenses.

Filters & Export

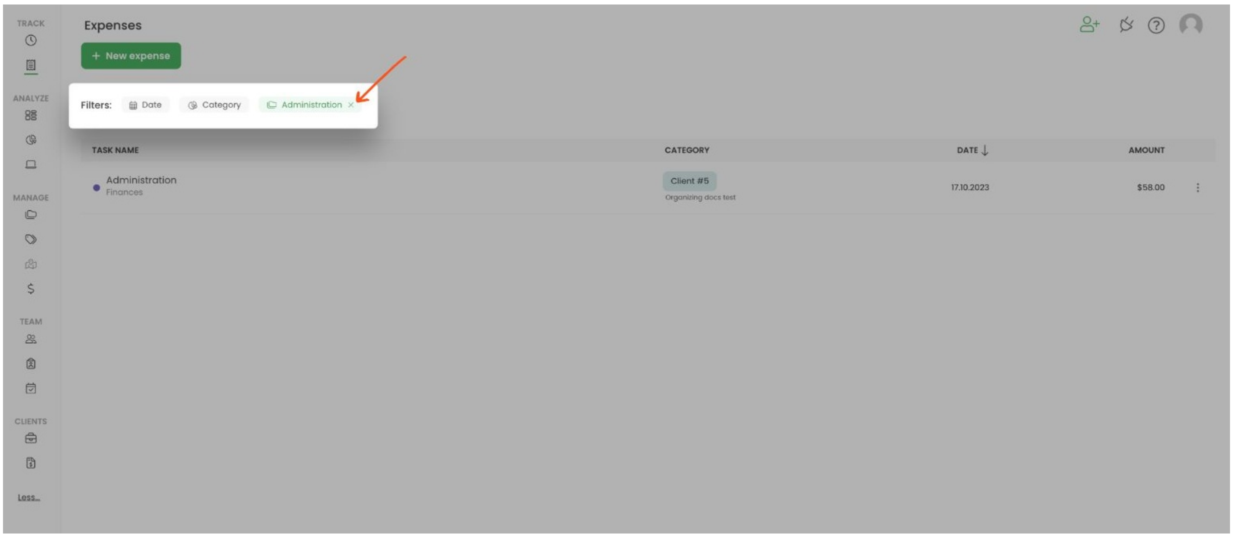
You can filter the Expenses view by using such filters:

- **Date**
- **Category**
- **Project**

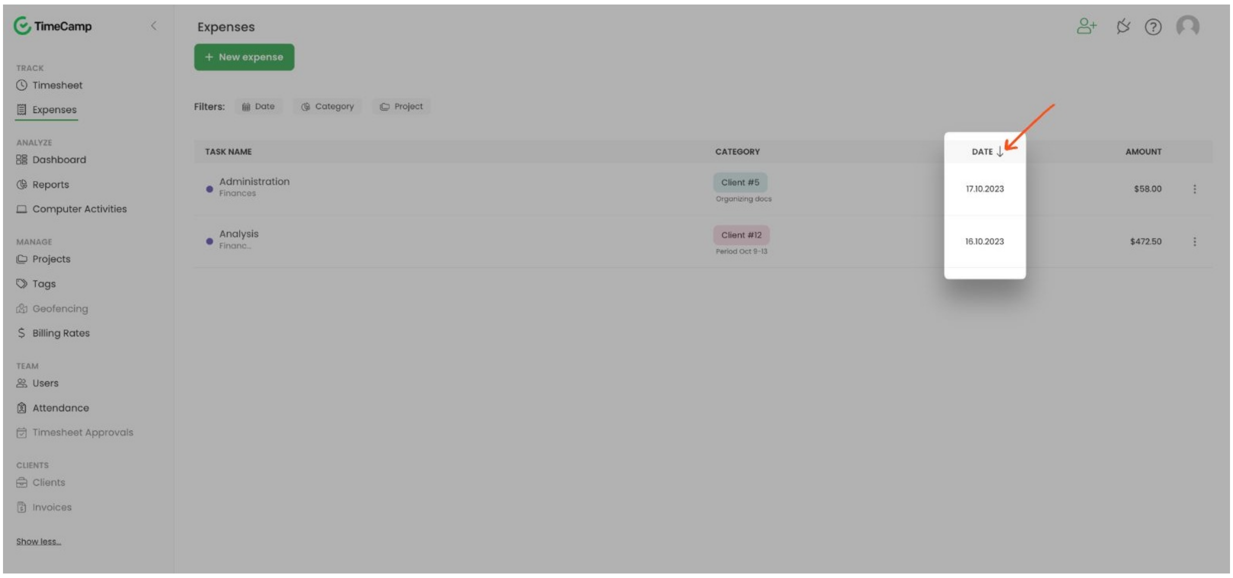


This way you can select a specific date or period when expenses were created, category and projects they belong to in order to filter the report.

If you want to clear filters click on the "**x**" button next to selected ones.



The additional functionality available here is to **sort expenses** by the Date column and Amount column. Just click on the **Date** or **Amount** column and then use the arrow to sort expenses ascending or descending.



To export the list of expenses you created and filtered, click on the **Export** button in the upper right corner. The expenses report will be downloaded as a CSV file.