

# Welcome to TimeCamp Help!

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## Adding Expenses

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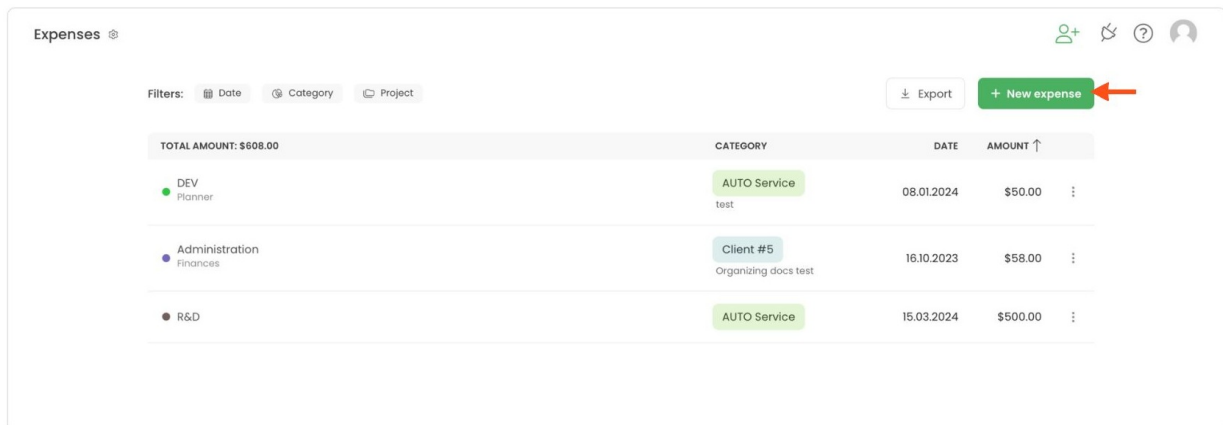
Expenses will allow you to keep a detailed record of all your transactions and spending. All users on the account will be able to add their own expenses and assign them to predefined categories and projects.

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.



The screenshot shows the 'Expenses' page in TimeCamp. At the top right, there are icons for user management, refresh, help, and refresh. Below these are filters for 'Date', 'Category', and 'Project'. An 'Export' button is visible next to a '+ New expense' button, which is highlighted with a red arrow. The main content is a table with columns for 'TOTAL AMOUNT: \$608.00', 'CATEGORY', 'DATE', and 'AMOUNT ↑'. The table lists three expenses:

TOTAL AMOUNT: \$608.00	CATEGORY	DATE	AMOUNT ↑
DEV Planner	AUTO Service test	08.01.2024	\$50.00
Administration Finances	Client #5 Organizing docs test	16.10.2023	\$58.00
R&D	AUTO Service	15.03.2024	\$500.00

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.

The screenshot shows the 'Add expense' form in the TimeCamp application. The form is displayed in a modal window over the 'Expenses' section of the dashboard. The form fields include: CATEGORY (Client #12), UNIT (13.5 hour, \$472.50 (\$35.00 per hour)), DESCRIPTION (Period Oct 9-13), PROJECT OR TASK (Analysis), TEAM MEMBER (Emily Admin), DATE (16.10.2023), a checked 'Billable expense' toggle, and an ATTACHMENT field with a dashed border and the text 'Add file or drop here'. At the bottom of the form are 'Close' and 'Save' buttons.

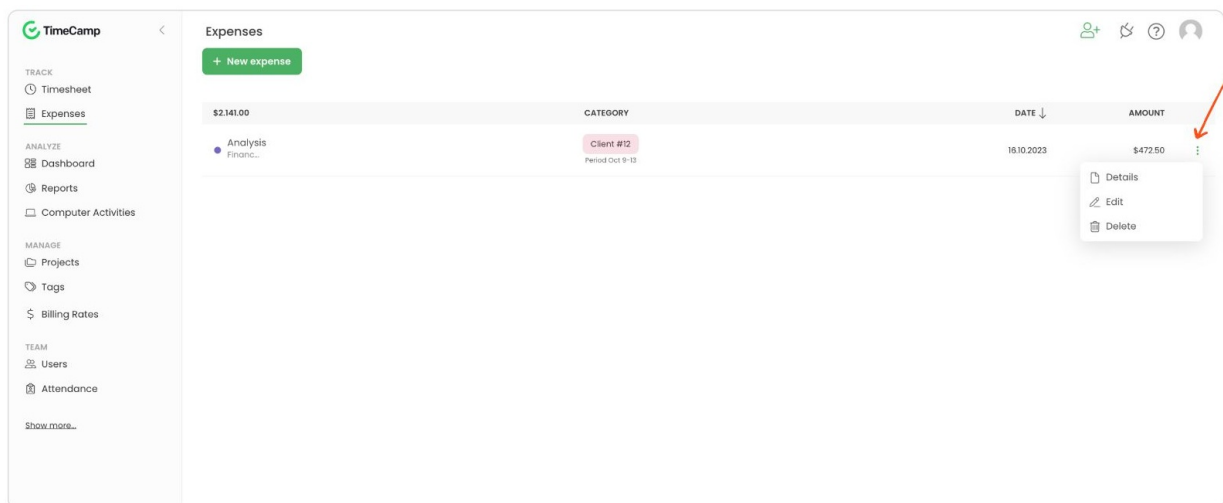
After filling in all of the required fields click on the green **Save** button. That's it, now your expense is added to

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.

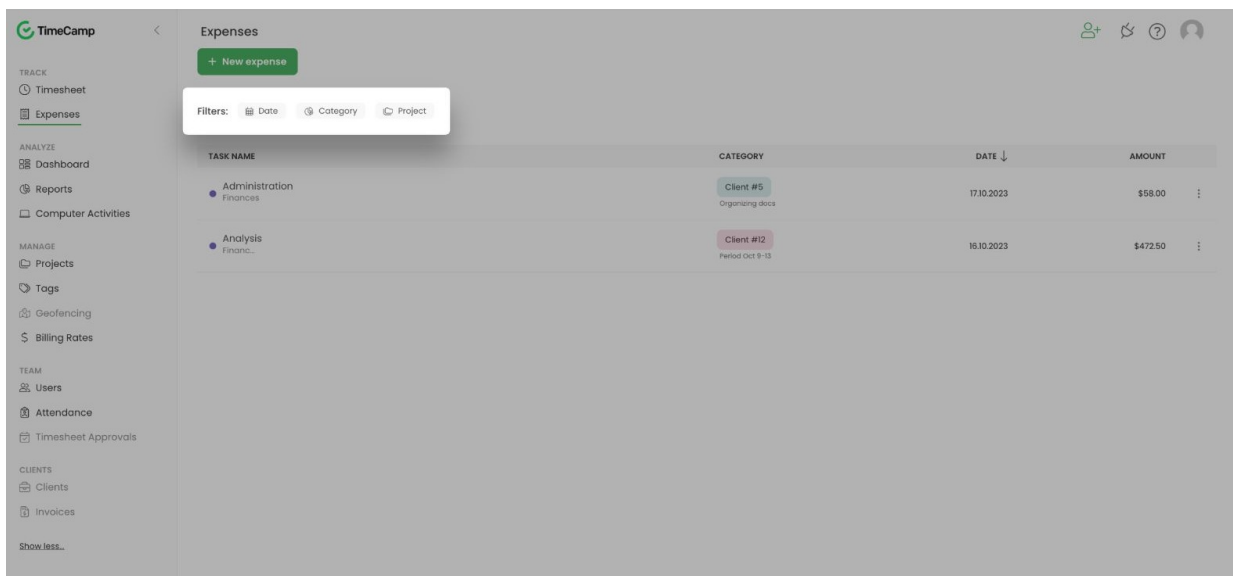
**Delete** option will allow you to remove an expense from the list.

It is not possible to restore deleted expenses.

## Filters & Export

You can filter the Expenses view by using such filters:

- Date
- Category
- Project

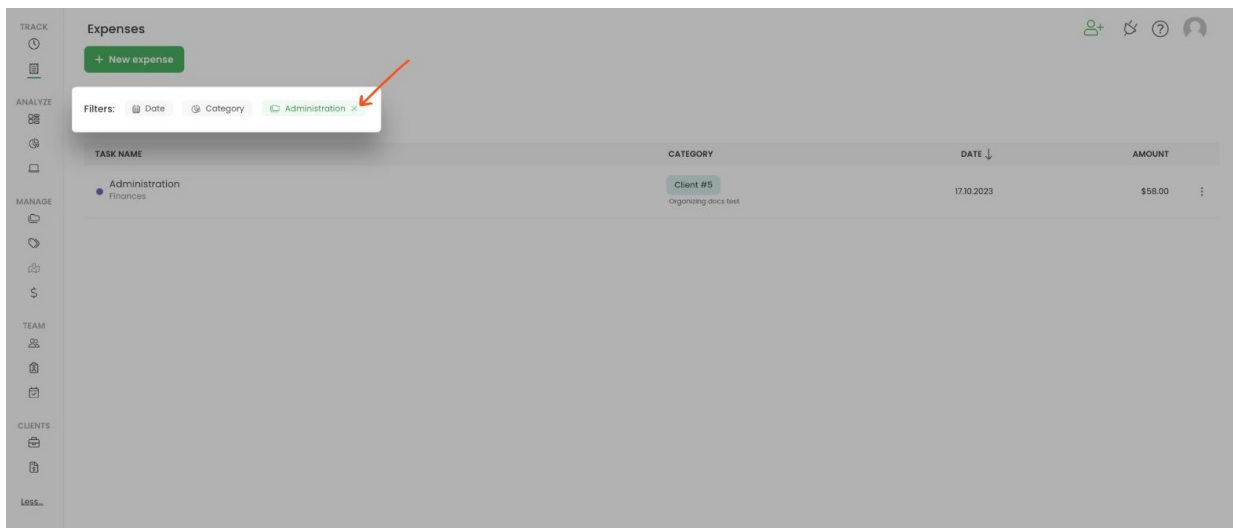


The screenshot shows the TimeCamp interface with the 'Expenses' view selected. A filter overlay is visible, allowing selection of filters: Date, Category, and Project. The main table displays two expense entries:

TASK NAME	CATEGORY	DATE ↓	AMOUNT
Administration Finances	Client #5 Organizing docs	17.10.2023	\$58.00
Analysis Financ...	Client #12 Period Oct 9-13	16.10.2023	\$472.50

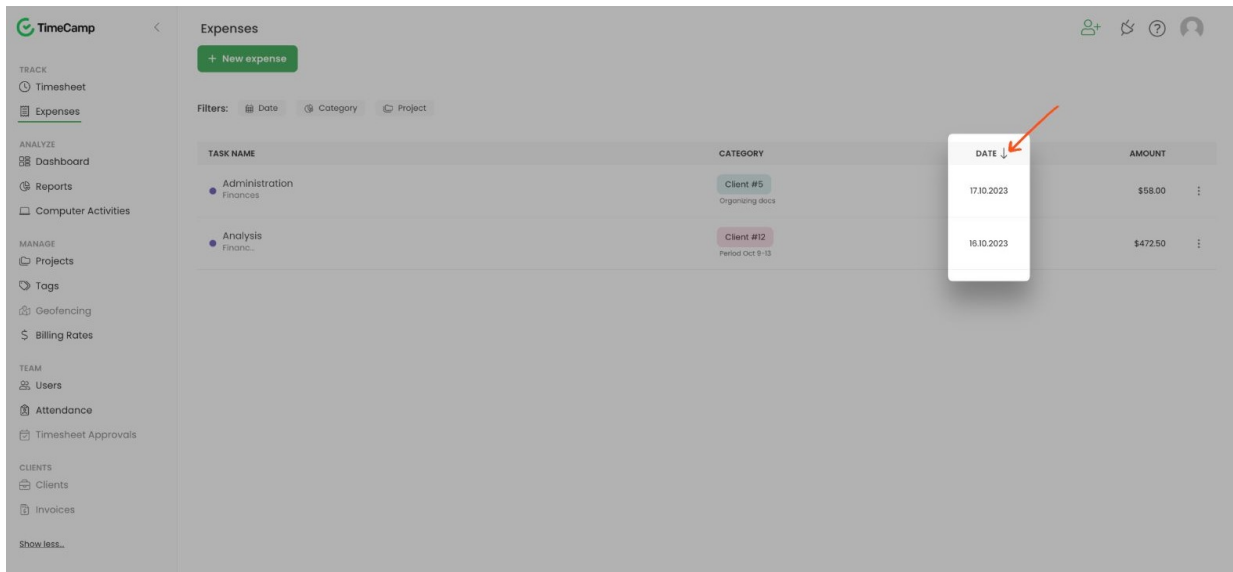
This way you can select a specific date or period when expenses were created, category and projects they belong to in order to filter the report.

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



The screenshot shows the TimeCamp interface with the 'Expenses' view selected. A filter overlay is visible, showing the 'Administration' filter selected. A red arrow points to the 'x' button next to the 'Administration' filter, indicating how to clear the filter.

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.

