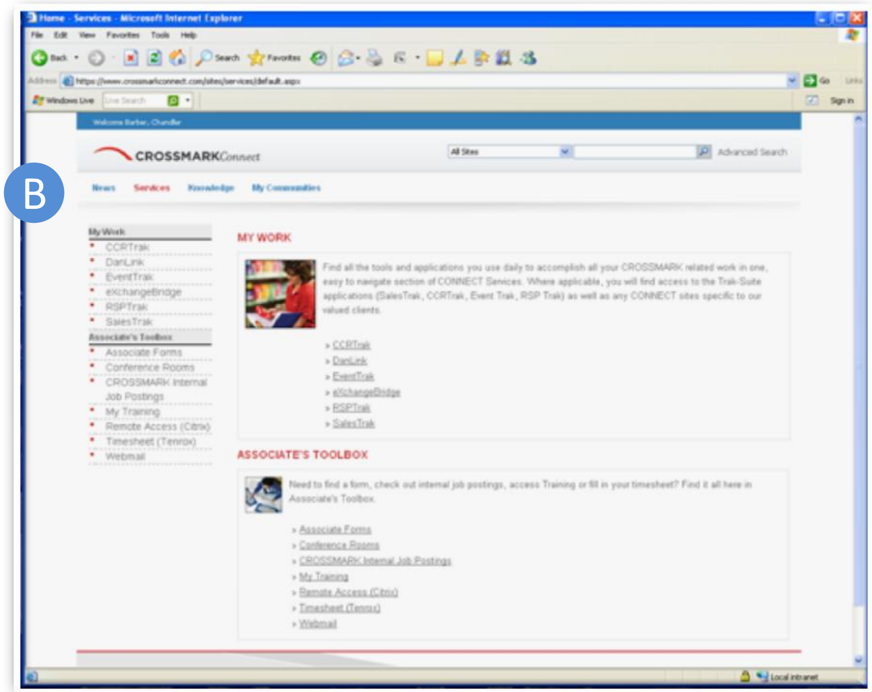
Navigating to CROSSMARK Web Expense Using CROSSMARK*Connect*.com

CROSSMARK Web Expense (CWE) is a web-based expense reporting system used for completing, submitting and approving expense reports electronically. Let's learn how to navigate to Web Expense using CROSSMARK*Connect*.com.

A

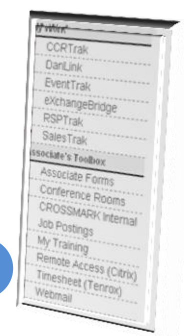
B



A To get to Web Expense you begin at CROSSMARK*Connect*.com. Of the four navigation tabs in the top left corner: News, Services, Knowledge and My Communities, click Services.

B This is the Services screen. Notice Services is highlighted in red. In the Associate's Toolbox. Click **Remote Access (Citrix)**.

What's Citrix?
Citrix is the remote access software that allows you to access CROSSMARK applications from your home computer. With Citrix you can also access: Timesheet, MyInfo and SharePoint.



B

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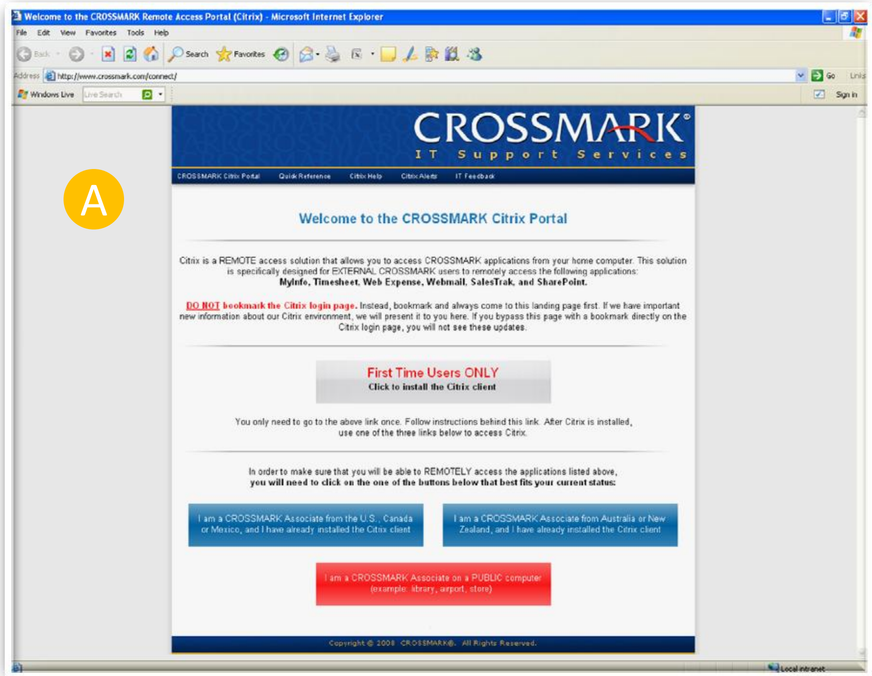
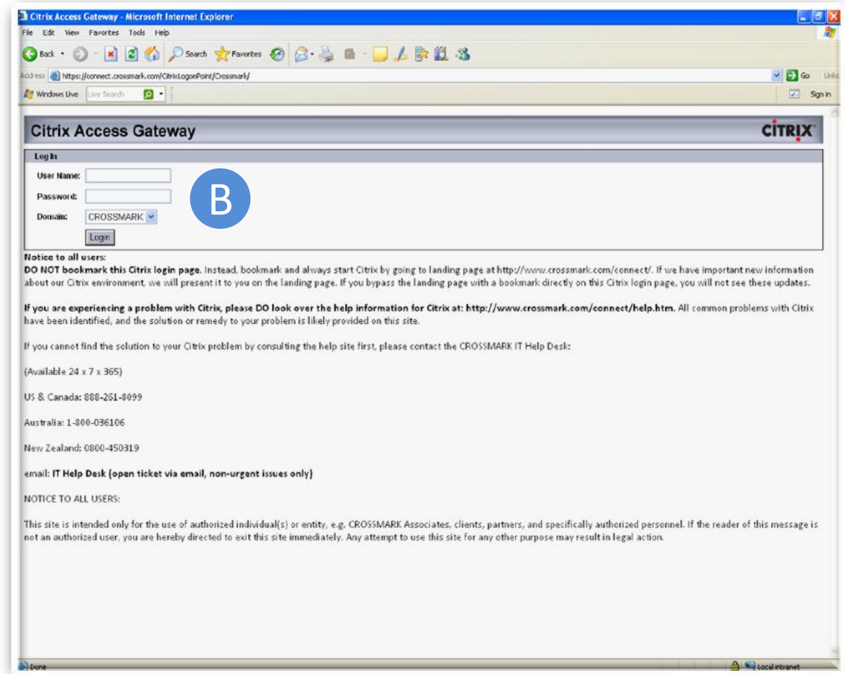
Web Expense: The Citrix Portal and Citrix Access Gateway





A Next, you're taken to the CROSSMARK Citrix Portal. This page is very self-explanatory. Select one of the four buttons that applies to you. Bookmark this page for future use.

B Next, this Citrix Access Gateway screen opens. Login using your CROSSMARK User Name (*FirstName.LastName*) and your CROSSMARK Password and then click Login.

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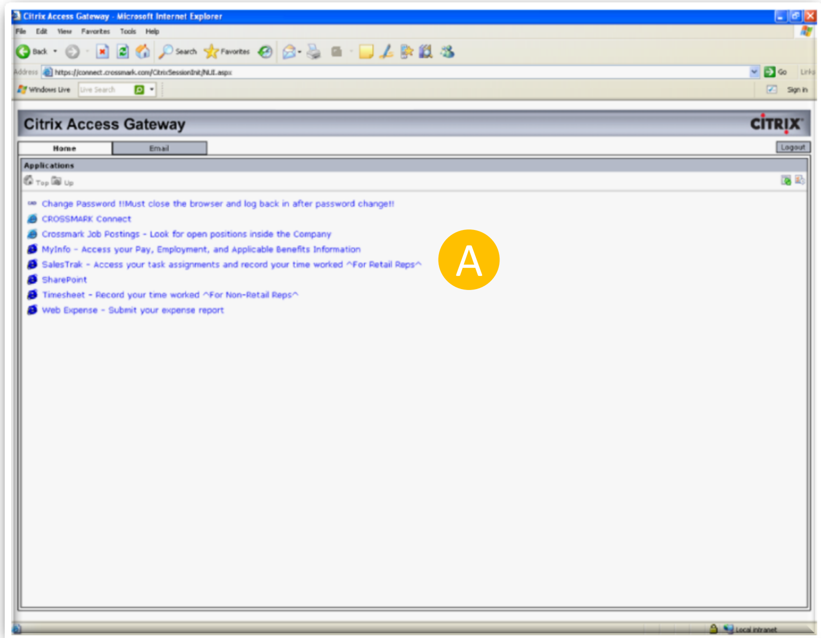
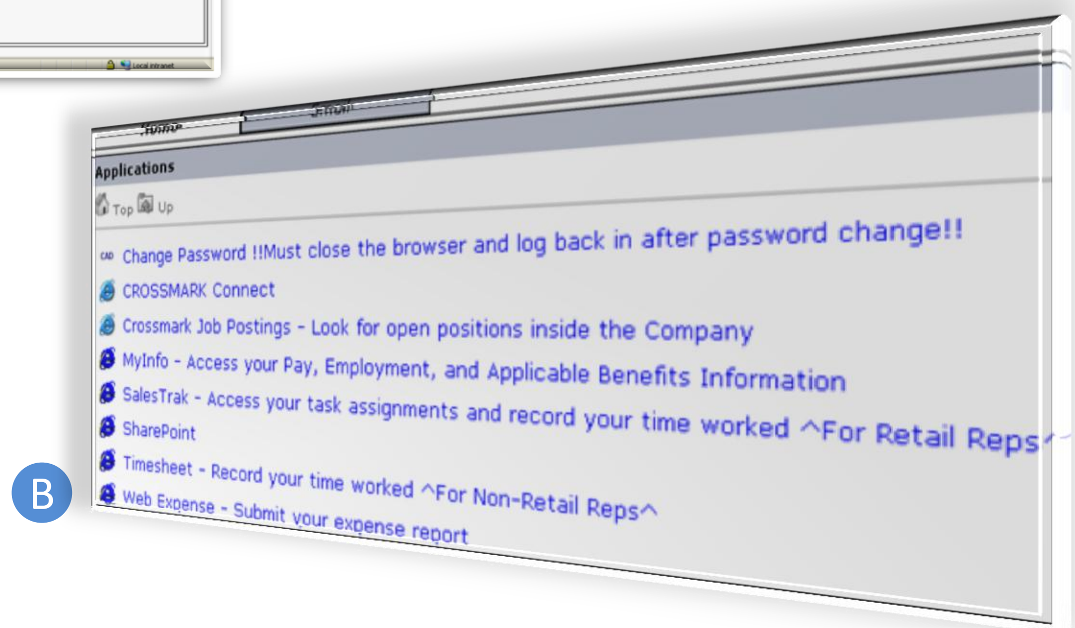
Web Expense: Inside Web Expense

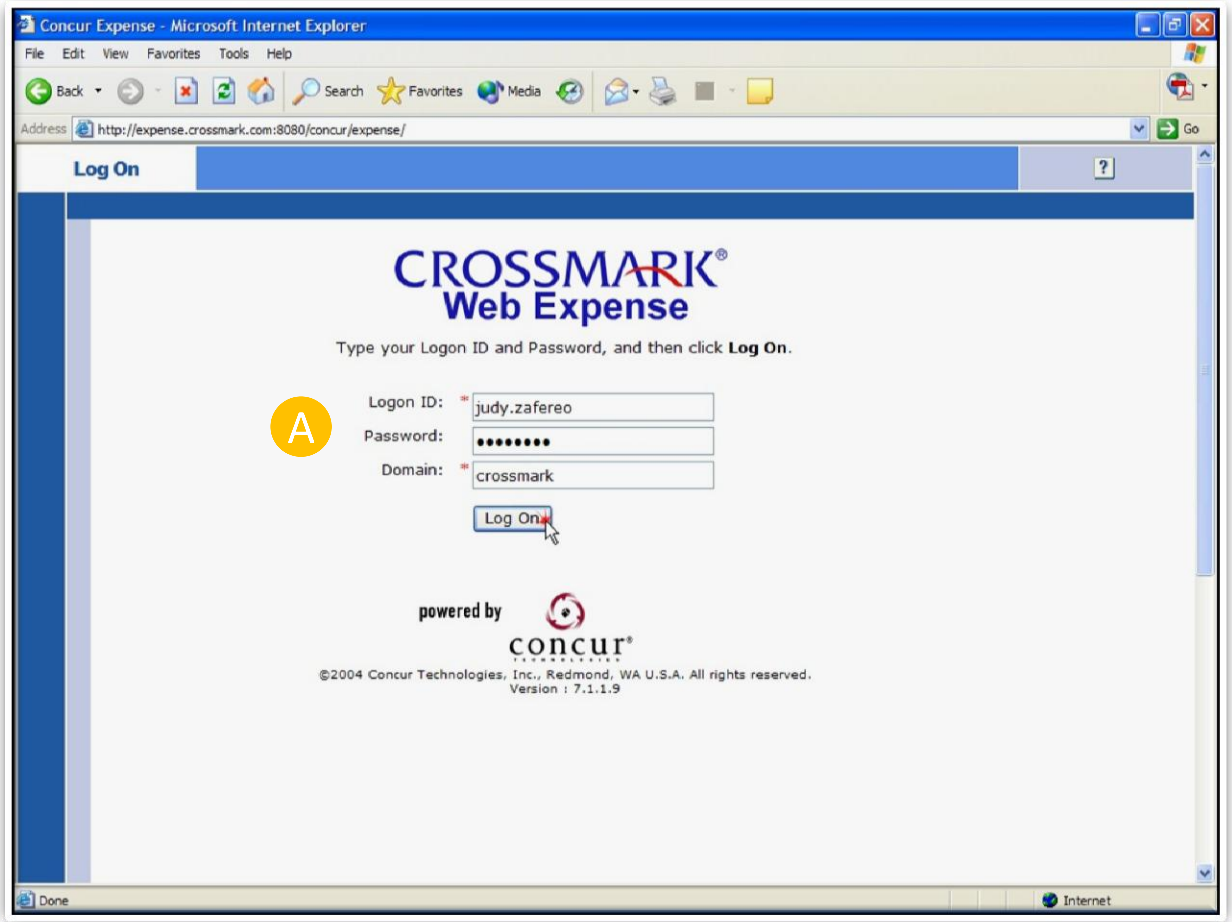


A **Congratulations. You're in Citrix**. Now you have access to login to Web Expense – or access other CROSSMARK applications right from your home computer. Remember, once inside Citrix you can also gain access to SharePoint, Timesheet and Web Expense.

B Click the Web Expense link to login to Web Expense.



Web Expense: Logging In



A

Enter your information in the Logon ID and Password fields. **NOTE: This screen is case sensitive.** In the Logon ID field, type in your CROSSMARK User ID this way: firstname.lastname. In the Password field, type in your CROSSMARK network Password. In the Domain field, type crossmark in lowercase.

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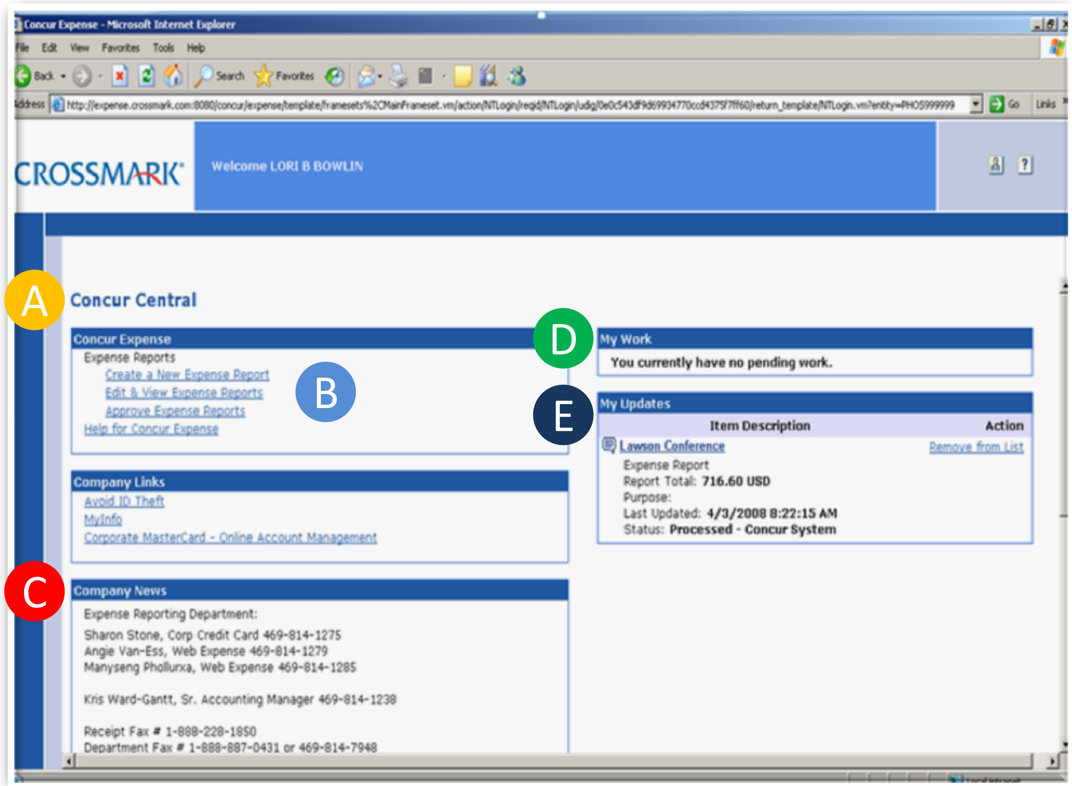
CROSSMARK Web Expense: The Concur Central Page



A Once you are logged in, the Concur Central page will appear. This is your “main screen” in CROSSMARK Web Expense.

B Concur Expense, where you create, edit/view, approve expense reports, and get help. This help link assists you when preparing a CROSSMARK expense report.

C The Company News section has contact information for CROSSMARK Web Expense personnel.

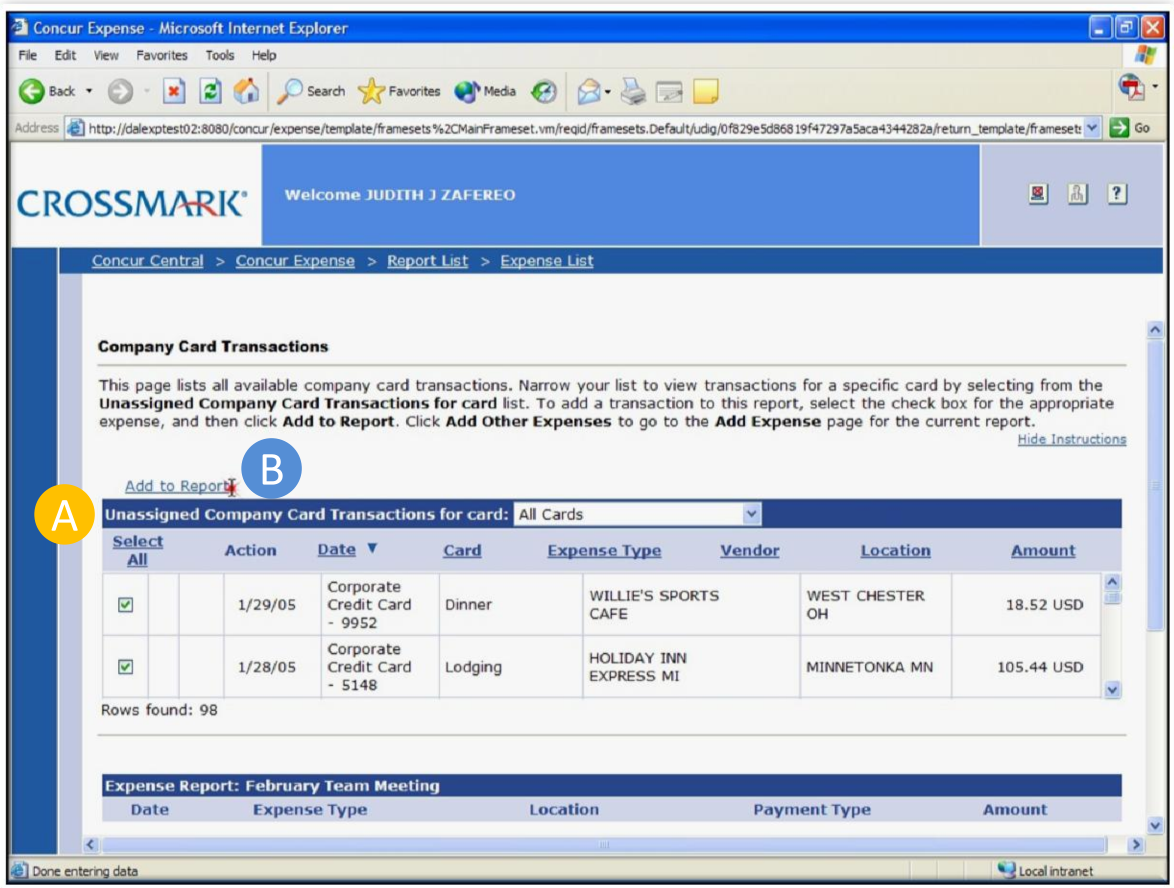
D The My Work section displays expense reports for you to review or approve. The My Updates section shows the status on your expense reports.

E The My Updates shows the status on your expense reports.

CROSSMARK Web Expense: Corporate Credit Card Transactions

This is the Company Card Transactions page. Here, you see new transactions appear in Web Expense 3 to 4 days after the transaction posts to your corporate credit card account. E-mail notification are sent when new transactions have been added in Web Expense. Online account information is available at www.netserviceaccess.com.

Corporate credit card transactions should not be included in an expense report as out-of-pocket or cash expenses. Wait until they appear as Unassigned Company Card Transactions. Reimbursement for out-of-pocket (cash) expenses will be included on your paycheck.



A View of Unassigned Company Card Transactions

B To Add ad Unassigned Company Card Transactions to your expense report, check mark the box and click **Add to Report**.

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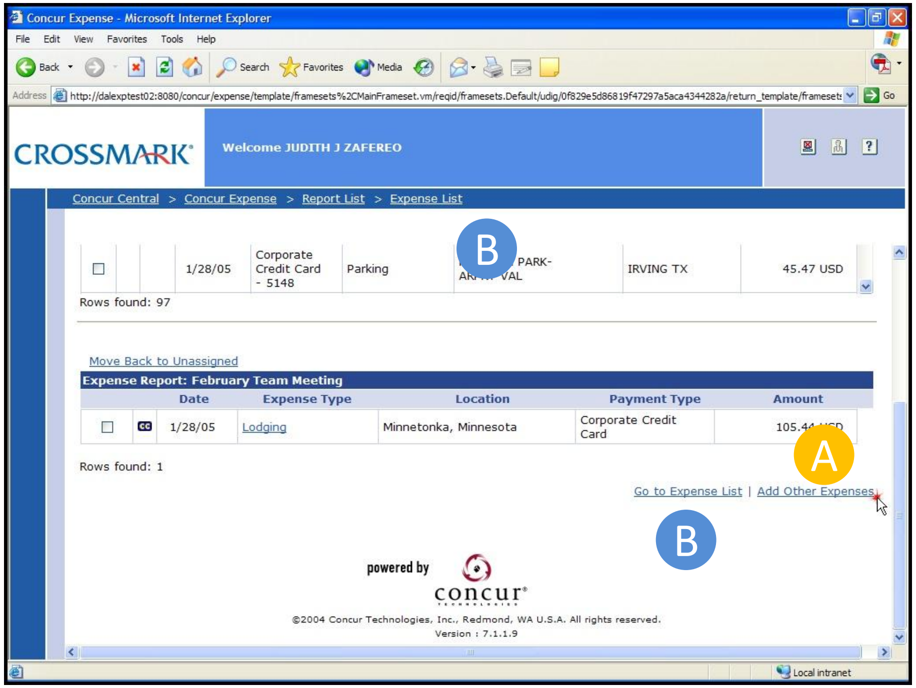
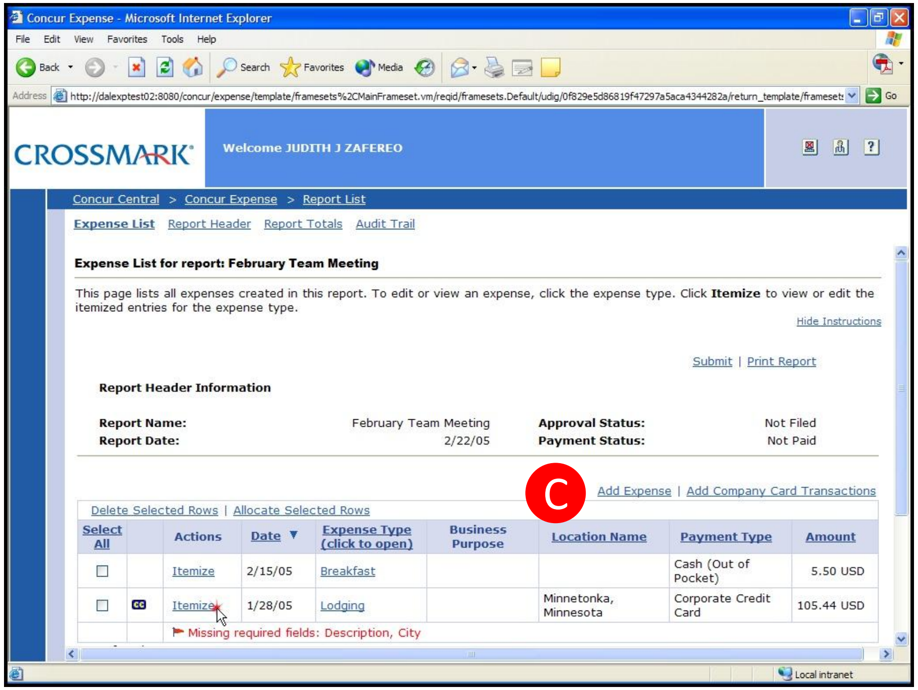
CROSSMARK Web Expense: Adding Out-of-Pocket Expenses

Out-of-Pocket Expenses occur when you use cash or a personal credit card. Because CROSSMARK company card transactions automatically populate in CROSSMARK Web Expense, any expense you add in the web interface will be an out-of-pocket expense.





A On the same Company Card Transactions page, click **Add Other Expenses**.

B If you're not on the Credit Card Transactions page, click **Expense List** (at the top of the page) or **Go to Expense List** (at the bottom of the page).

C Click **Add Expense**.

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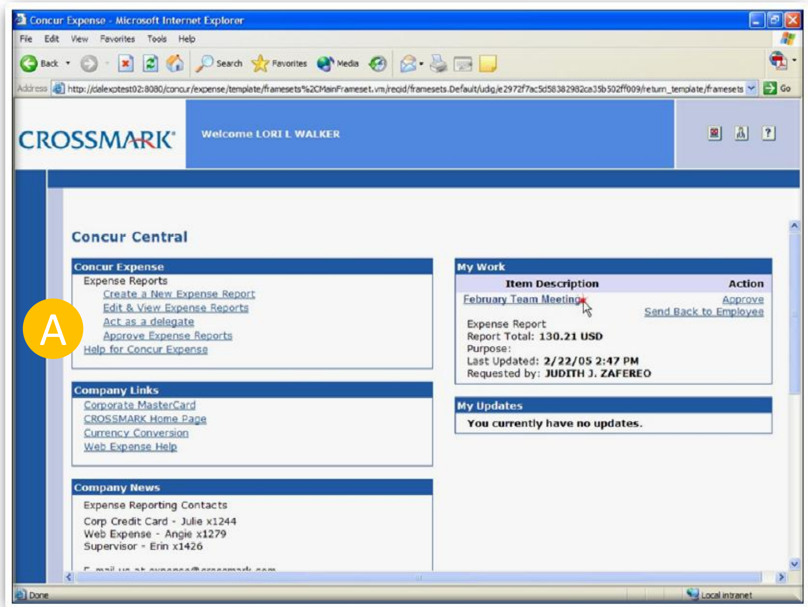
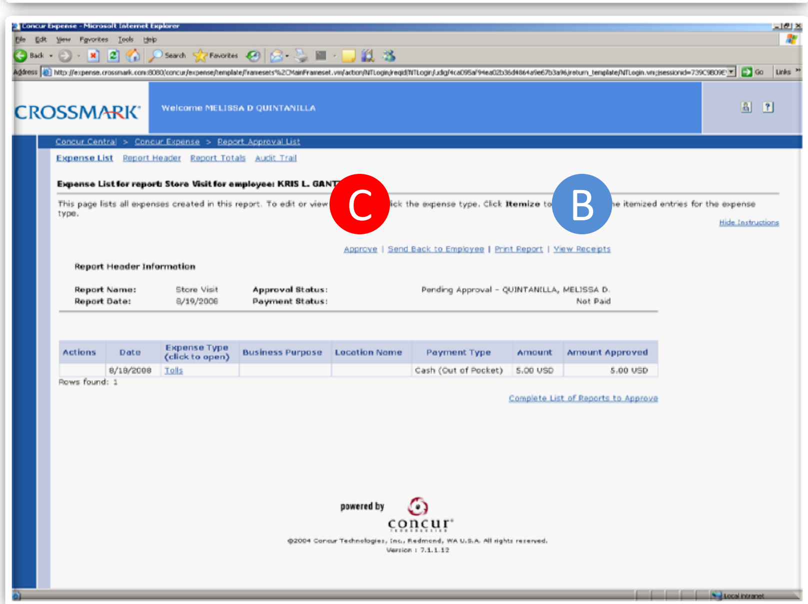
CROSSMARK Web Expense: Review and Approve an Expense Report (Management)



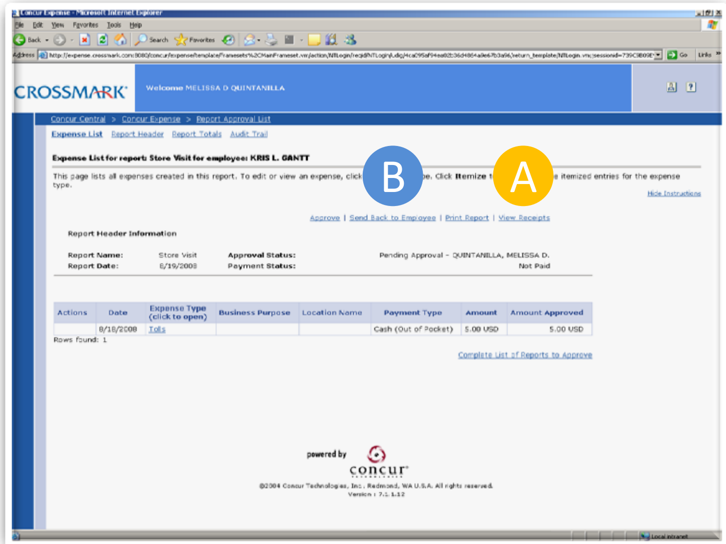


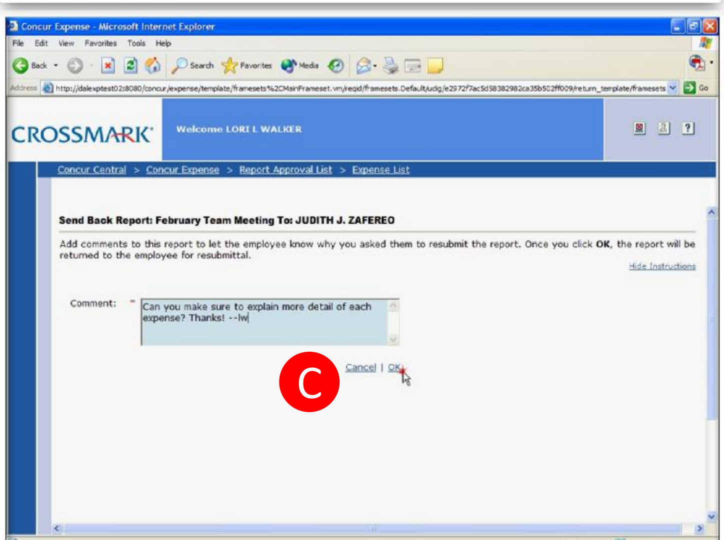
A — If you are an Approving Manager, you can click on Approve Expense Reports to review and approve.

1. Open the report and view expense details.
2. Confirm that receipts have been received.
3. (B) Look through the report and click on individual expenses (Example: Tolls) for details and review receipts by clicking **View Receipts**.
4. (C) If no additional changes/clarifications are needed click **Approve**.
5. An email notification is sent out to the employee when a report status changes.

CROSSMARK Web Expense: Sending a Report Back to an Employee (Management)

You can send a report back to an associate if changes or clarifications are needed for approval. Once you reject a report, an email notification is sent out to the employee. The employee then needs to make changes and re-submit it back to you.





A Look through the report and click on individual expenses (Example: Tolls) for details and review receipts by clicking **View Receipts**.

B To send the report back to the employee for changes, click **Send Back to Employee**.

C Type an explanation for why the report was sent back and what should be changed. Click **OK**.

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