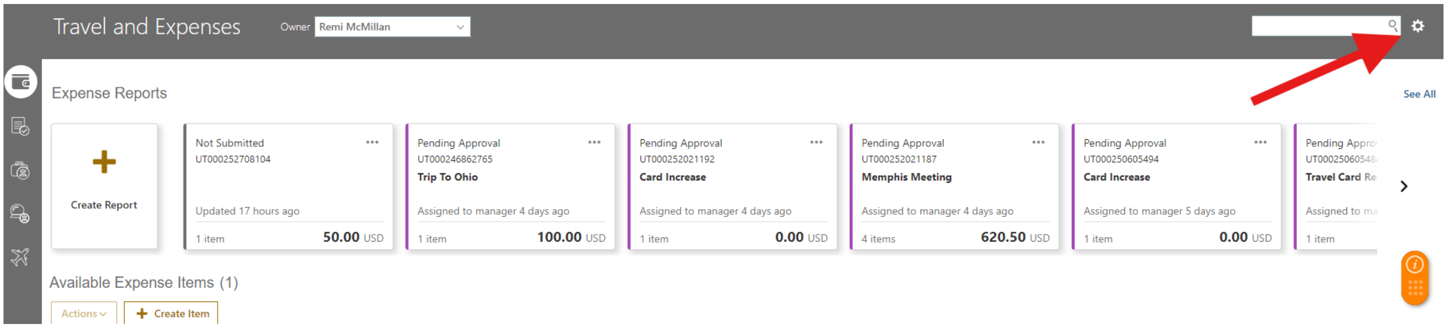
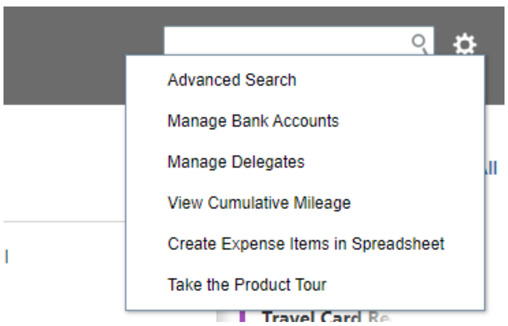
Adding an Entry Delegate for Expense

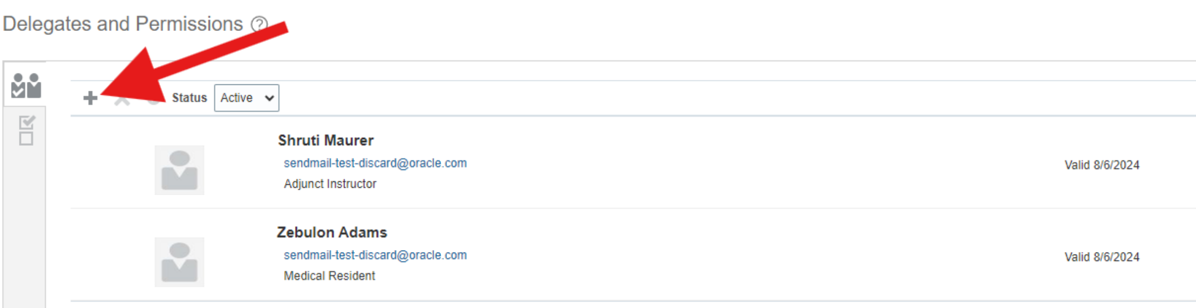
To add a delegate, start in the Expense screen and click on the gear in the upper right-hand corner.



In the drop-down menu, select Manage Delegates



Click the plus icon

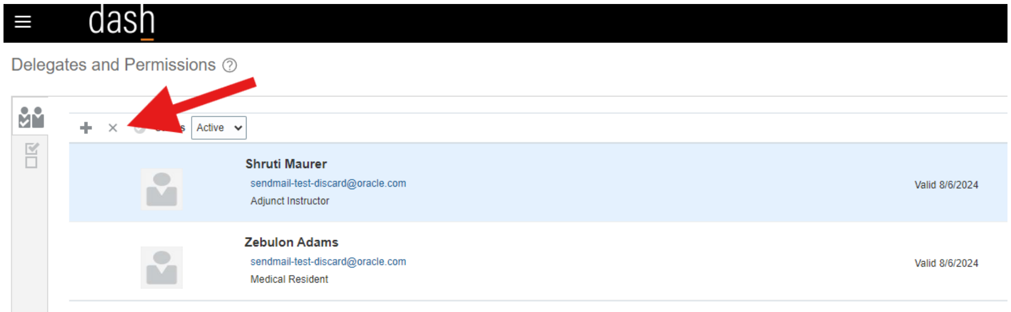


In the search field, start typing the name of the person you are looking for and you can click on that name. If you do not see the person you are looking for, click on the magnifying glass and you can search by name, email or do an advanced search in the upper right corner. There are multiple search options to choose from. If you search by name, make sure that the first letter is capitalized.

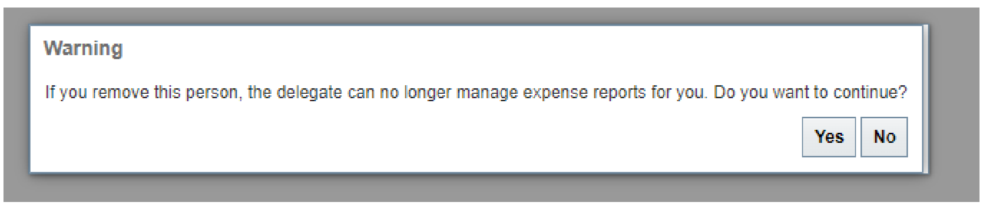
When you find the appropriate delegate, click on their name and click save.

Managing an Entry Delegate for Expense

To manage a delegate, select the delegate you want to remove and click the X to deactivate.



You will receive a pop-up warning to confirm if you want to remove. Click yes and save.



The validity dates will now be updated and show the beginning and end date.