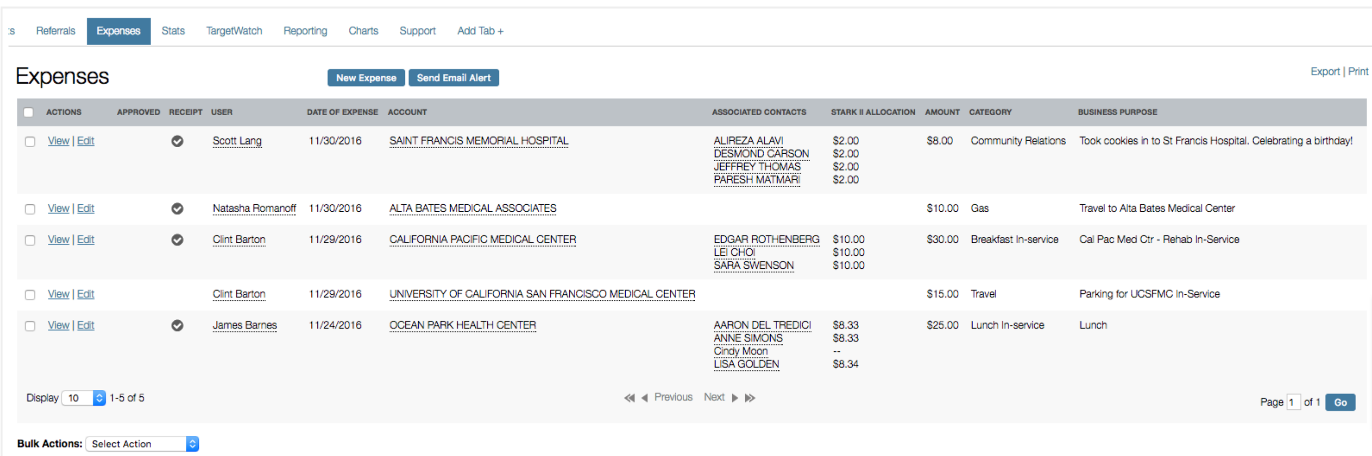
Approving And Deleting Expenses

Administrators and managers have the ability to approve (and delete) expenses for their teams. While Administrators can approve/delete expenses for all users, Managers are able to review expenses for users in their sales territory.

Note: Administrators must enable expense approval for their PlayMaker CRM account. To learn how to do so, as well as how to enable marketer budgets, click here.

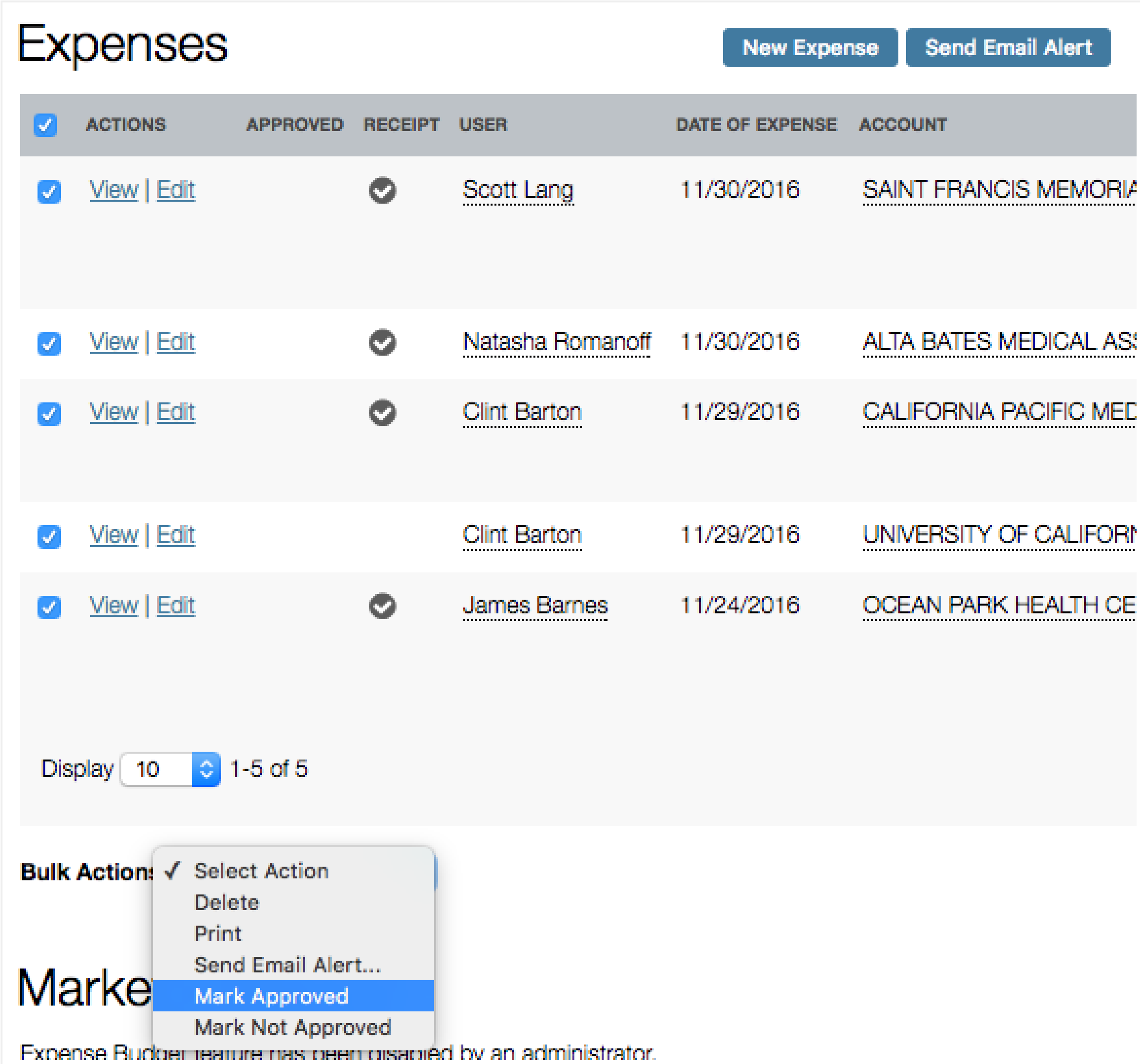
Approving Expenses

When an administrator or manager navigates to the Expenses page in PlayMaker CRM, they are presented with a list of expenses, as shown below.

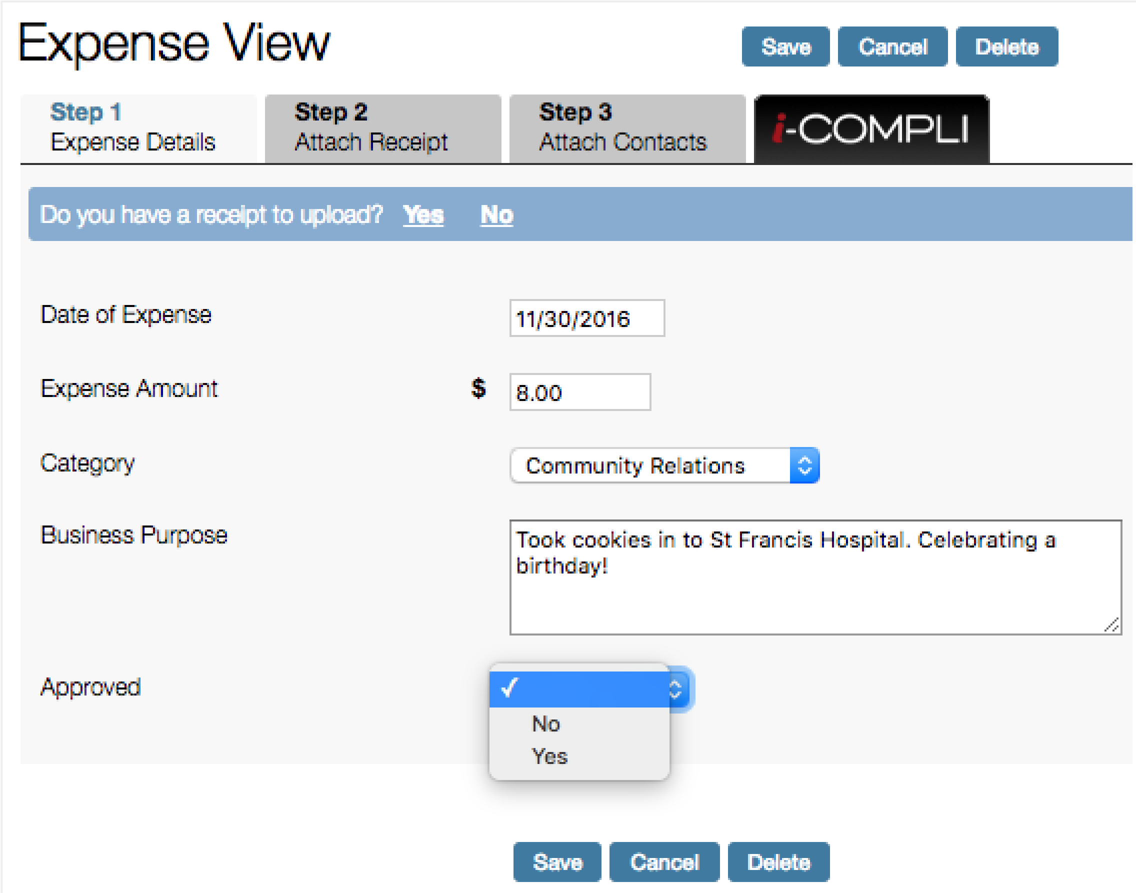


Approving expenses can be done in one of two ways:

- *Bulk Actions* - Checking the boxes in the left column of the table will allow users to use the *Bulk Actions* menu to mark the selected expenses as approved (or not approved).

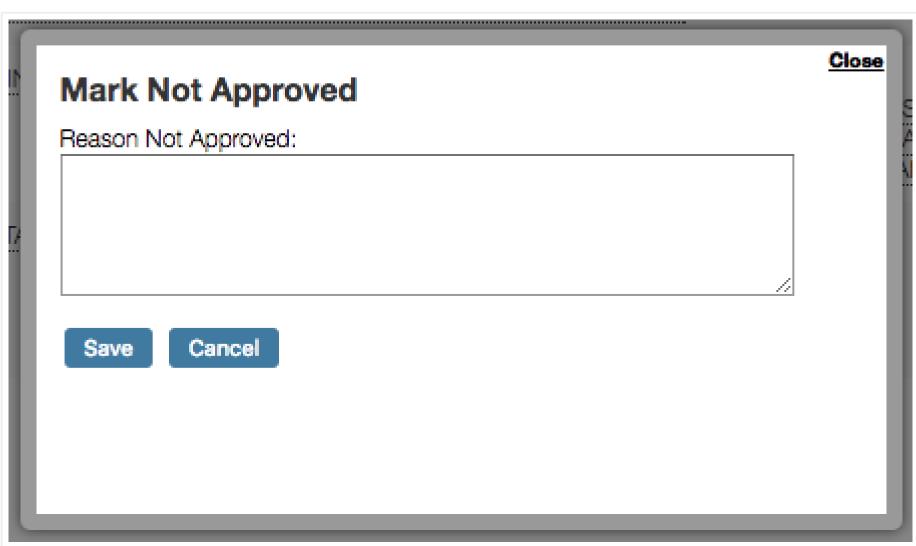


- *Edit the expense* - Clicking the *Edit* link in the *Actions* column will present Administrators and Managers the ability to approve an expense from within the *Expense View* screen. Users will simply select the appropriate choice from the *Approved* drop-down menu to mark the expense. Once a choice is made, simply click the *Save* button.



Marking an Expense as Not Approved

If an administrator or manager should need to deny an expense, they will be prompted to enter a reason that will be visible to the expense creator. Just like approvals, marking expenses as not approved can be done through the *Bulk Actions* drop-down menu, or through editing the expense. If an expense is marked as not approved from the *Bulk Actions* drop-down, the below dialog box appears, allowing the user to enter a reason.



Similarly, if an expense is edited and the *Approved* drop-down is toggled to *No*, a *Reason Not Approved* text box appears so that an explanation can be provided.

Deleting Expenses

Similar to approving expenses, there are two different ways to delete expenses. In the above screenshot that shows the *Bulk Actions* drop-down, it should be noted that the *Delete* option is available. Additionally, in the following screenshot (displaying the *Expense View*) a *Delete* button can be seen above the data entry fields.

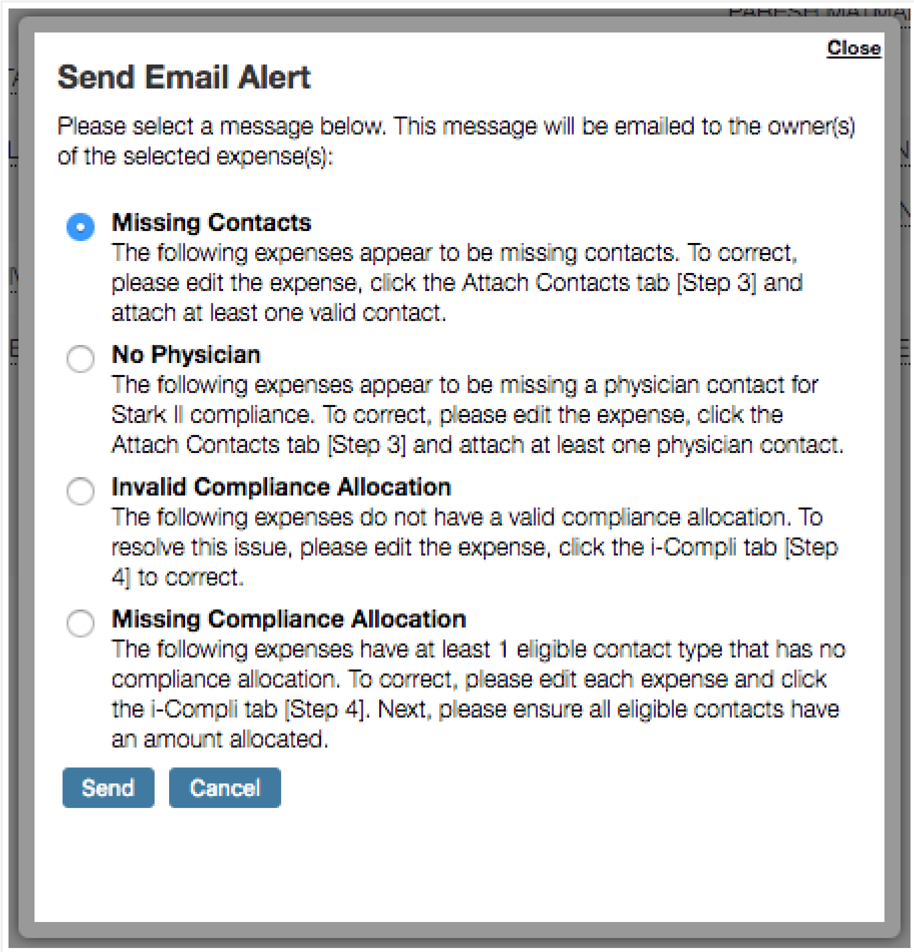
Notes: By default, some user roles won't have the ability to delete expenses. This role permission can be changed by modifying that role's permissions. To learn more about user role permissions, click here. Additionally, deleting an expense (or other record) in PlayMaker is a permanent process. Once a record has been removed, it will no longer be available, which is why most roles don't have access to delete records.

Additional Bulk Actions

Also available in the *Bulk Actions* drop-down are the following actions:

Print - This option allows the user to print the current list of expenses. Additionally, there is a *Print* link at the top right of the expense table that performs the same feature.

Send Email Alert - Also available as a button above the table of expenses, this allows the user to send an alert to the owner of the expense that the expense needs further action. Below is a screenshot that displays the different alert options available.



Exporting the Expense List

At the top right of the expense list is an Export option, next to the Print option. Clicking the Export link will create and download a .csv (comma separated values) file, which can be opened in Excel.

Note: When printing or exporting the expense list, attached receipt files are not included (though attachment file names may be listed). Receipts can be viewed in PlayMaker (and printed when they are viewed, since they are opened within the user's web browser), but they are not exportable, nor are they automatically printed when printing the expense list.

Tip: If a contact is not showing up in the i-COMPLI step for allocation, check to see if the contact has a *Contact Type* in *Step 3*. If the contact does not have a *Contact Type*, or if the *Contact Type* is not eligible for compliance tracking, the contact will not show up in *Step 4*.