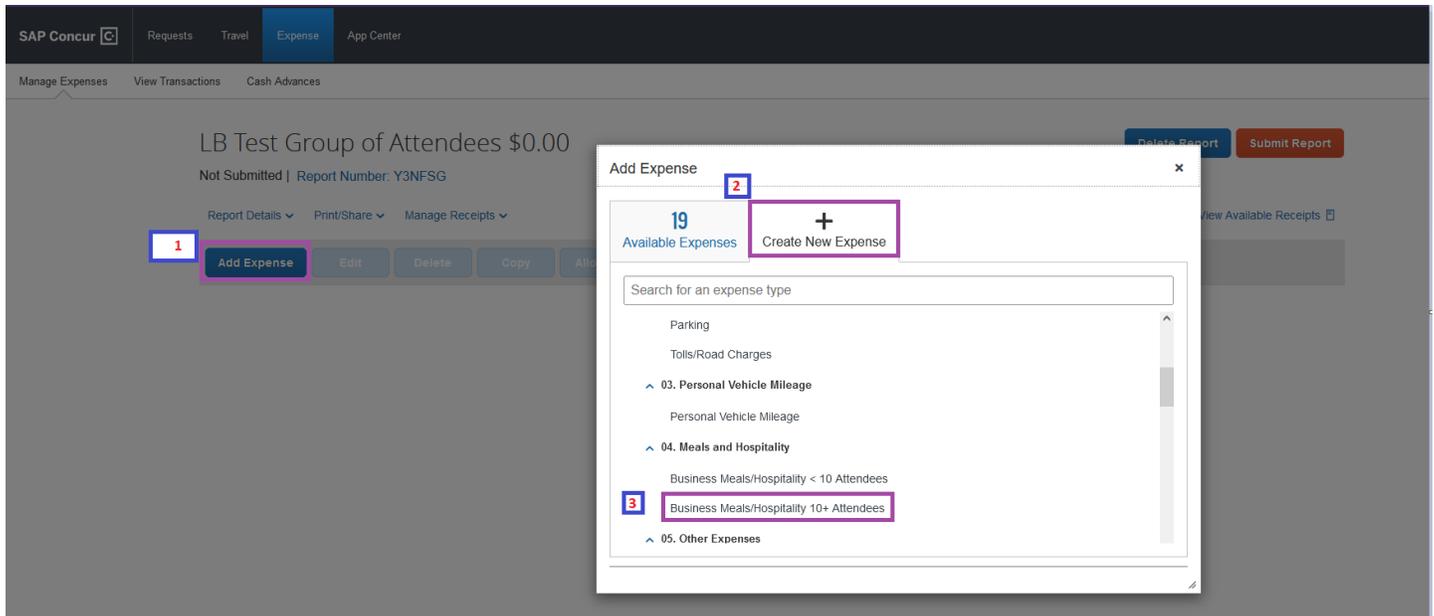


Creating a Group of Attendees to add to a Business Expense

1. Select Add Expense

2. Click on Create New Expense tab

3. Select Business Meals/Hospitality 10+ Attendees (this selection allows users to create a group instead of adding individual attendees).



4. Fill out all Expense fields

Details | Itemizations

Attendees (1) | Allocate

* Required field

Expense Type *
Business Meals/Hospitality 10+ Attendees

Transaction Date *
06/02/2023

Business Purpose *
Business Meeting/Event

City of Purchase *
Fort Worth, Texas

Trip Type *
1. In-State - No Overnight

Supplier *
Dutch's

Payment Type *
Employee Paid

Amount *
116.75

Currency *
US, Dollar

Justification *
Lunch with dept

5. Click on Attendee link

New Expense

Details | Itemizations

Attendees (1) | Allocate

6. Click on Add

Attendees

Business Meals/Hospitality 10+ Attendees | \$75.00

Attendees: 1

Add Remove Create Group Copy from Request

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type
<input type="checkbox"/>	TEST, Traveler Two			Employee

7. Under Attendee Type dropdown, select "Group of Attendees"

Add Attendees

Attendees Recent Attendees Attendee Groups No Shows Import Attendees

Attendee Type * Group Name / Description

Group of Attendees

Employee

Group of Attendees

Guest

Student

Can't find an attendee? [Create New Attendee](#)

Search Reset Close

8. This will allow you to search for an attendee group name to see if you have previously created one

Add Attendees

Attendees Recent Attendees Attendee Groups No Shows Import Attendees

Attendee Type * Group Name / Description

Group of Attendees Business Lunch & Learn

Fewer Search Options

Can't find an attendee? [Create New Attendee](#)

Search Reset Close

9. You can also click on Attendee Groups tab to see available attendee groups previously created

Add Attendees

Attendees Recent Attendees Attendee Groups No Shows Import Attendees

My Team (31)

Cohort Fall 2022 (0)

Group Lunch (1)

Group Lunch (1)

Add to List

10. If you have searched and are unable to locate a previously created "group of attendees," select the link shown on the screenshot below to "Create New Attendee"

Add Attendees

Attendees Recent Attendees Attendee Groups No Shows Import Attendees

Attendee Type * Group Name / Description

Group of Attendees Business Lunch & Learn

Fewer Search Options

Can't find an attendee? [Create New Attendee](#)

Search Reset Close

11. Next you will see the Attendee Type and Group Name / Description from your search display. Click "Create New Attendee" once satisfied with attendee type and group name selection.

Create New Attendee ✕

[← Go back](#)

* Required field

Attendee Type * Group Name / Description *

Group of Attendees Business Lunch & Learn

Cancel Create Attendee

12. You can exit out of the box that pops up after you create your group.

Create New Attendee ✕

[← Go back](#)

✔ Attendee added: Business Lunch & Learn

* Required field

Attendee Type * Group Name / Description *

Group of Attendees

Cancel Create Attendee

13. The next screen that displays will be your attendee listing. To add the number of attendees click on Attendee Count. Be sure to check the box that includes the user (in this scenario the submitter is the Test, Traveler) and check the box for the newly created group (in this scenario Business Lunch & Learn) of attendees as well then click Save.

Attendees: 11

Add Remove Create Group Copy from Request

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	Attendee Type	Attendee Count	Amount
<input checked="" type="checkbox"/>	Business Lunch & Learn			Group of Attendees	10	\$106.14
<input checked="" type="checkbox"/>	TEST, Traveler			Employee	1	\$10.61

14. Now you can see that the Attendee listing shows a number of 11

Details | [Itemizations](#)

Attendees (11) | Allocate

* Required field

Expense Type *
 Business Meals/Hospitality 10+ Attendees

Transaction Date *
 06/02/2023

Business Purpose *
 Business Meeting/Event

City of Purchase *
 Fort Worth, Texas

Trip Type *
 1. In-State - No Overnight

Supplier *
 Dutch's

Payment Type *
 Employee Paid

Amount *
 116.75

Currency *
 US, Dollar

Justification *
 Lunch with dept

15. You can click on the Attendee link again if you want to verify all attendees have been added

Attendees: 11

[Add](#) [Remove](#) [Create Group](#) [Copy from Request](#)

<input type="checkbox"/>	Attendee Name ↕	Attendee Title ↕	Institution/Company ↕	Attendee Type ↕	Attendee Count ↕
<input type="checkbox"/>	Business Lunch & Learn			Group of Attendees	10
<input type="checkbox"/>	TEST, Traveler			Employee	1