Adding Attendees to a Business Meal or Conference Expense

On your report page, click to open the expense that requires attendees. The Attendees tab appears only for certain expense types, such as business meals, conferences/seminars, and special events.

Click Attendees to open the Attendees screen for making entries and changes. Note: The employee name for the report automatically appears as an attendee in the Attendees field. If this is the only attendee for the meal/event, check the name and click Save.
To add an attendee to an expense, click **Add**. The **Add Attendees** window appears; all of the options for adding attendees to the expense are available in this window.

You can choose from recent attendees, add a new attendee, choose from attendee groups (and Favorites), or identify no-shows (if your configuration allows).
CHOOSE FROM RECENTLY USED ATTENDEES

A good place to start is with the **Recent Attendees** tab. Select the check box for the desired attendee(s) and then click **Add To List**. The selected attendees will be added to the expense.

At the bottom of the **Recent Attendees** tab is the **Search All Attendee History** link. Click the link to see all attendees you have ever used - regardless of whether they are in your favorites.
CHOOSE FROM YOUR FAVORITES
To search for an attendee that you have designated as a favorite (in Profile) but who is not available on the Recent Attendees page, click Attendee Groups. The first group is Favorites. Click Favorites. The Favorites window appears.

Select the check box for the desired attendee(s) and then click Add To List.

SEARCH FOR OTHER ATTENDEES
In the following example, assume that you want to add an attendee who is not available on the Recent Attendees tab or in Favorites. The first step is to search for the desired attendee.

Click New Attendee. The Search for Attendee window appears.
Select the appropriate attendee type, and enter the search term (e.g., the first few letters of the attendee's last name). Click **Search**. In the search results that appear, select the check box for the desired attendee and then click **Add To List**.

**NOTE:** If you do not find the desired attendee, you can click **Modify Search** to modify your search criteria and try again.
CREATE NEW ATTENDEE

If you want to create a new attendee manually, click **New Attendee > Create New Attendee**.

Complete the **Create New Attendee** window and then click **Create Attendee**.
When done, all attendees appear.

Click **Save** to add the attendees to the expense and return to the expense page.

If you click **Cancel**, a message appears. If you then click **Continue Without Saving**, then the newly added or updated attendees on this page will not be saved to the expense.
Manage Duplicate Attendees

When you attempt to add a new attendee and click **Create Attendee** (as described above), Expense immediately searches for duplicates. If Expense finds a duplicate attendee, you are prompted to use the duplicate or to add the new attendee if, in fact, they are not the same person.