

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.

Report Details ▼ Print/Share ▼ Manage Receipts ▼

Add **Edit** **Delete** **Copy** **Allocate** **Combine Expenses** **Move to** ▼

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53102-US BUSINESS MEALS	Cattleman's Steakhouse Dallas, Texas	04/05/2019	\$157.25
<input type="checkbox"/>			JP Morgan Chase Corp Card CBCP	53103-US LOCAL TRANSPORTATION	Yellow Cab of Dallas	04/05/2019	\$11.99

New Expense Cancel Save Expense

Details Itemizations

Attendees (0) Allocate * Indicates required field

Expense Type *
Business Meals (Attendees) ▼

Transaction Date * Business Purpose *

Enter Vendor Name City *

Payment Type *
Cash ▼

Transaction Amount * Currency *

Receipt CFDi

Cattleman's Steakhouse
100 Rancho Del Gato
Dallas Texas

April 5 2017

Prime Rib sm	32.00
Prime Rib lg	42.00
Prime Rib lg	42.00
New York Steak.....	18.00
Dessert	9.50
Dessert	9.75

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**.

Attendees

Business Meals (Attendees) | \$240.24

Attendees: 1

[Add](#) [Remove](#)

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Collins, Chris			This Employee		\$240.24

[Cancel](#) [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.

Attendees

Business Meals (Attendees)

Attendees: 1

[Add](#) [Remove](#)

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Collins, Chris					\$240.24

Add Attendees

Recent Attendees [+](#) New Attendee [+](#) Attendee Groups [+](#) No Shows

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest

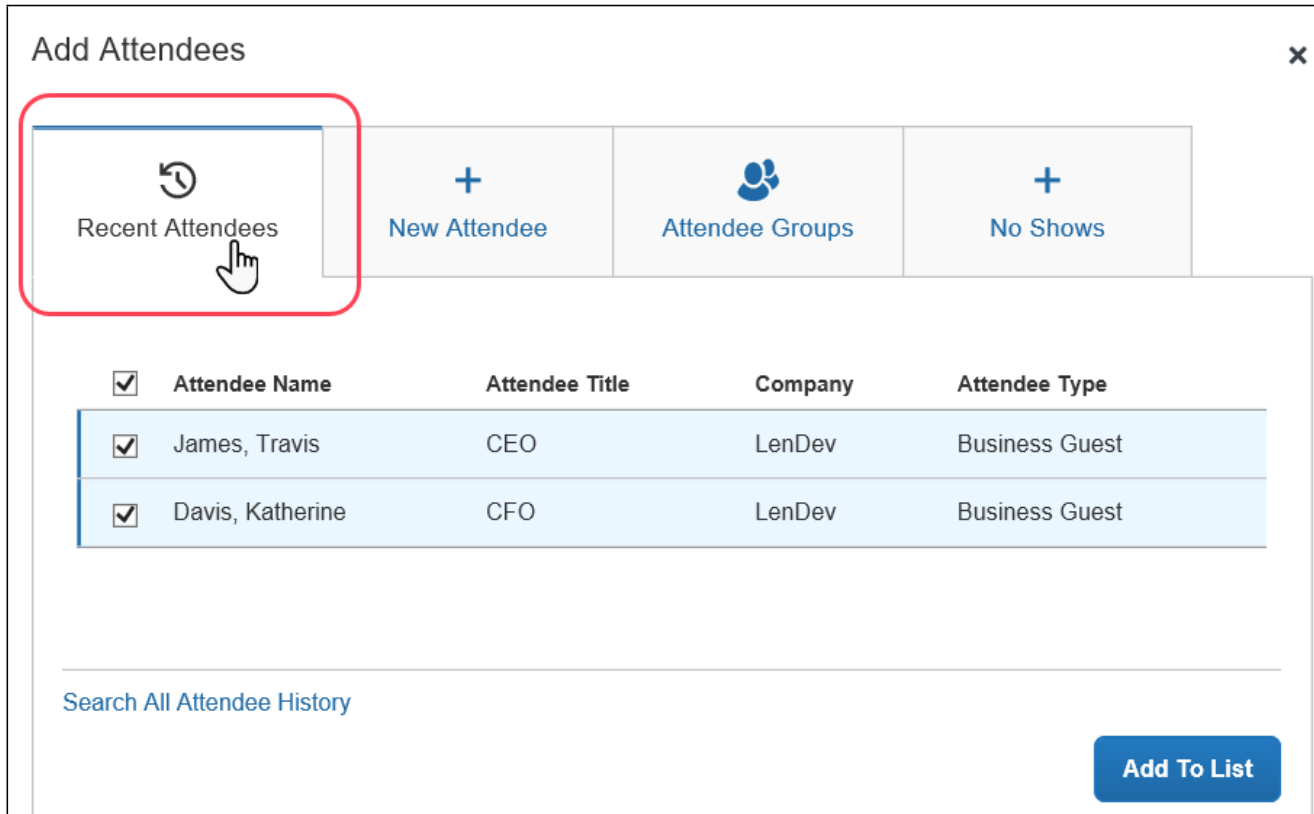
[Add To List](#)

[Cancel](#) [Save](#)

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.



Add Attendees [Close]

Recent Attendees | **New Attendee** | **Attendee Groups** | **No Shows**

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input checked="" type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest

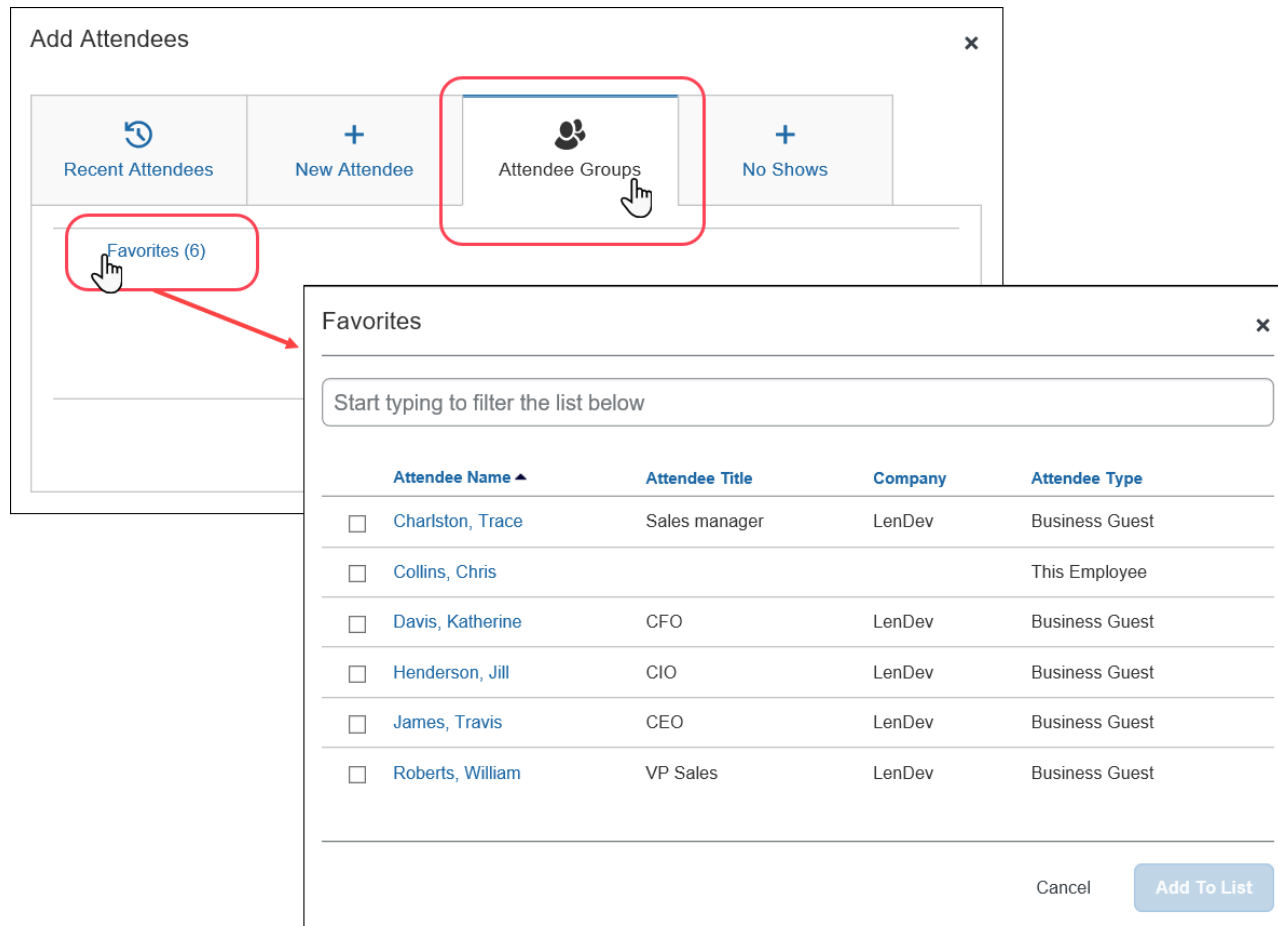
[Search All Attendee History](#)

Add To List

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.



The screenshot shows the 'Add Attendees' window with four tabs: 'Recent Attendees', 'New Attendee', 'Attendee Groups', and 'No Shows'. The 'Attendee Groups' tab is selected and highlighted with a red box. Below it, the 'Favorites (6)' group is also highlighted with a red box. A red arrow points from the 'Favorites (6)' label to the 'Favorites' window below.

The 'Favorites' window displays a search bar with the text 'Start typing to filter the list below'. Below the search bar is a table with the following columns: 'Attendee Name', 'Attendee Title', 'Company', and 'Attendee Type'. The table contains six rows of attendee information, each with a checkbox in the first column.

	Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	Charlston, Trace	Sales manager	LenDev	Business Guest
<input type="checkbox"/>	Collins, Chris			This Employee
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev	Business Guest
<input type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input type="checkbox"/>	Roberts, William	VP Sales	LenDev	Business Guest

At the bottom of the 'Favorites' window, there are two buttons: 'Cancel' and 'Add To List'.

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.

The 'Add Attendees' dialog box contains a 'Recent Attendees' section with a list of attendees: James, Travis and Davis, Katherine. Below this is a 'Search All Attendee History' link. The main area has three buttons: 'New Attendee' (highlighted with a red box and a hand cursor), 'Attendee Groups', and 'No Shows'. A red arrow points from the 'New Attendee' button to the 'Search For Attendee' dialog box.

The 'Search For Attendee' dialog box has a search criteria section with the following fields:

- Attendee Type * (dropdown menu): Business Guest
- Last Name (text input): Davis
- First Name (text input):
- Attendee Title (text input):
- Company (text input):
- State (text input):

There is a note: '* Indicates required field'. At the bottom, there is a 'Close' button and a blue 'Search' button. A link 'Can't find an attendee? Create New Attendee' is also present.

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**.

The 'Search For Attendee' dialog box shows search criteria: Business Guest, Davis. Below this is a 'Modify Search' link. The search results are displayed in a table:

Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/> Davis, Katherine	CFO	LenDev	Business Guest

At the bottom, there is a 'Close' button and a blue 'Add To List' button.

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**.

The image shows a software interface for adding attendees. At the top, a window titled "Add Attendees" contains three buttons: "Recent Attendees" (with a refresh icon), "New Attendee" (with a plus sign and circled in red), "Attendee Groups" (with a group icon), and "No Shows" (with a plus sign). Below these buttons is a table with columns for "Attendee Name", "Attendee Title", "Company", and "Attendee Type". The table lists two attendees: "James, Travis" and "Davis, Katherine", each with an unchecked checkbox. A "Search All Attendee History" link is at the bottom left of the table.

A "Search For Attendee" modal window is open, overlapping the table. It has a search bar at the top and a legend: "* Indicates required field". The form fields are: "Attendee Type" (a dropdown menu with "Business Guest" selected), "Last Name" (text input with "Davis"), "First Name" (empty text input), "Attendee Title" (empty text input), "Company" (empty text input), and "State" (empty text input). At the bottom of the modal, there is a link: "Can't find an attendee? [Create New Attendee](#)" (circled in red). Below the link are "Close" and "Search" buttons.

Complete the **Create New Attendee** window and then click **Create Attendee**.

Create New Attendee ✕

* Indicates required field

Attendee Type *

Last Name *

First Name

Attendee Title

Company

State

Project ID

When done, all attendees appear.

Attendees ✕

Business Meals (Attendees) | \$240.24

Attendees: 4

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Collier, Franklin	Sales Manager	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Collins, Chris			This Employee		\$60.06

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.

Duplicate Attendees Found ✕

New Attendee
Kerry Craig
Business Guest

[Modify Attendee](#) [Continue Adding New Attendee](#)

Duplicates

Attendee Name	Attendee Title	Company	Attendee Type
<input type="radio"/> Craig, Kerry	CFO	LenDev	Business Guest

[Cancel](#) [Add Selected Attendee](#)

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