

Create an Expense Category

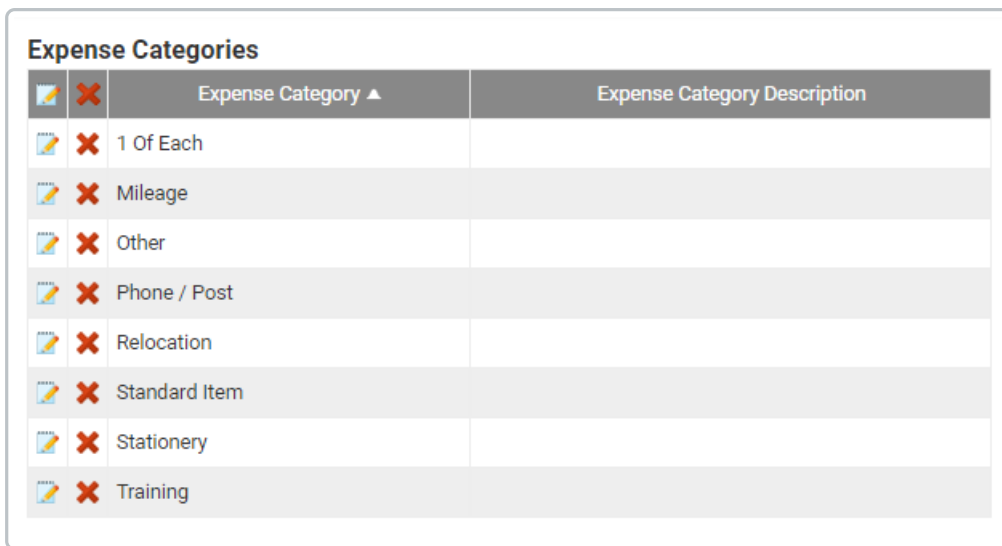
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Permissions

You will require the following permissions:

- Base Information (Expense Categories)

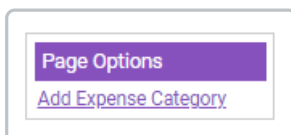
1. Navigate from the homepage to **Administrative Settings | Base information | Expense Categories**.



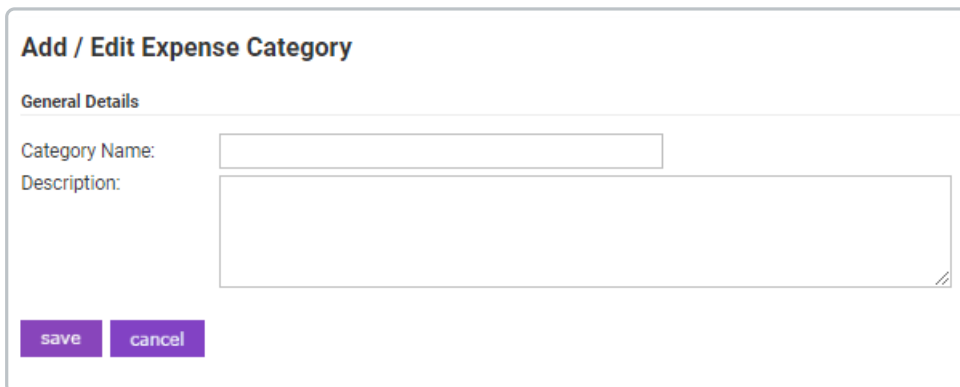
The screenshot shows a table titled "Expense Categories". The table has two columns: "Expense Category" and "Expense Category Description". There are nine rows, each representing a different expense category. Each row has a small icon of a notepad and a red 'X' in the first column, indicating that the category is currently disabled or in a state where it cannot be edited. The categories listed are: 1 Of Each, Mileage, Other, Phone / Post, Relocation, Standard Item, Stationery, and Training.

| Expense Category | Expense Category Description |
|------------------|------------------------------|
| 1 Of Each | |
| Mileage | |
| Other | |
| Phone / Post | |
| Relocation | |
| Standard Item | |
| Stationery | |
| Training | |

2. From the Page Options menu, click **Add Expense Category**.



3. Complete the 'General Details' section and then click **Save** to add your new Expense Category.



The screenshot shows a form titled "Add / Edit Expense Category". Under the "General Details" section, there are two input fields: "Category Name:" and "Description:". The "Category Name" field is a single-line text box, and the "Description" field is a larger multi-line text area. At the bottom of the form, there are two buttons: "save" and "cancel", both in purple.

To assign expense items to your expense category see [Create an Expense Item](#).

