Travel Expense - Submit for Customer Billing

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Cost of travel to customer site is typically billable to the customer. The Order Acknowledgment Form (OAF) and/or Statement of Work (SOW) documents specific to the project will include information regarding travel expense. This document walks through the process for booking travel, recording expenses, and submitting the expenses to the Billing team to invoice the customer.

The flow chart Process Flow - Travel Expense provides a visual of the process.

Note: There may be occasion where circumstances of the project may dictate waving travel expense fees to the customer. The Project Manager (PM) should discuss with the Services Manager(s) and receive approval before waiving any travel expenses. Full documentation in a project task with details of the discussion should be captured.

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Follow the steps below to book and report travel expenses:

1. Book travel following Evercommerce Employee Travel Process
2. Submit expenses via Coupa
    1. Video overview of Coupa
3. Print expense report: Printing an Expense Report from Coupa
4. Attach the report to the related project task File section
    1. If expense covers multiple tasks add to the project files
5. Create a case to submit the expenses using the following field information:
    1. Account: Customers Account
    2. Contact: Customers AP person
    3. Subject: Customer Travel Expenses
    4. Related Project: link the project name
    5. Description: use the following as a template:
        1. For Travel Dates:
        2. Total to Bill:
        3. Detailed expense report attached in File section of case
    6. Save the case
6. Open the case
    1. Assign the case: change the Owner to the queue Accounting - Bold Group
7. Copy the case number to the project Chatter
    1. Example: Expense case submitted: see case #xxxxxxx

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