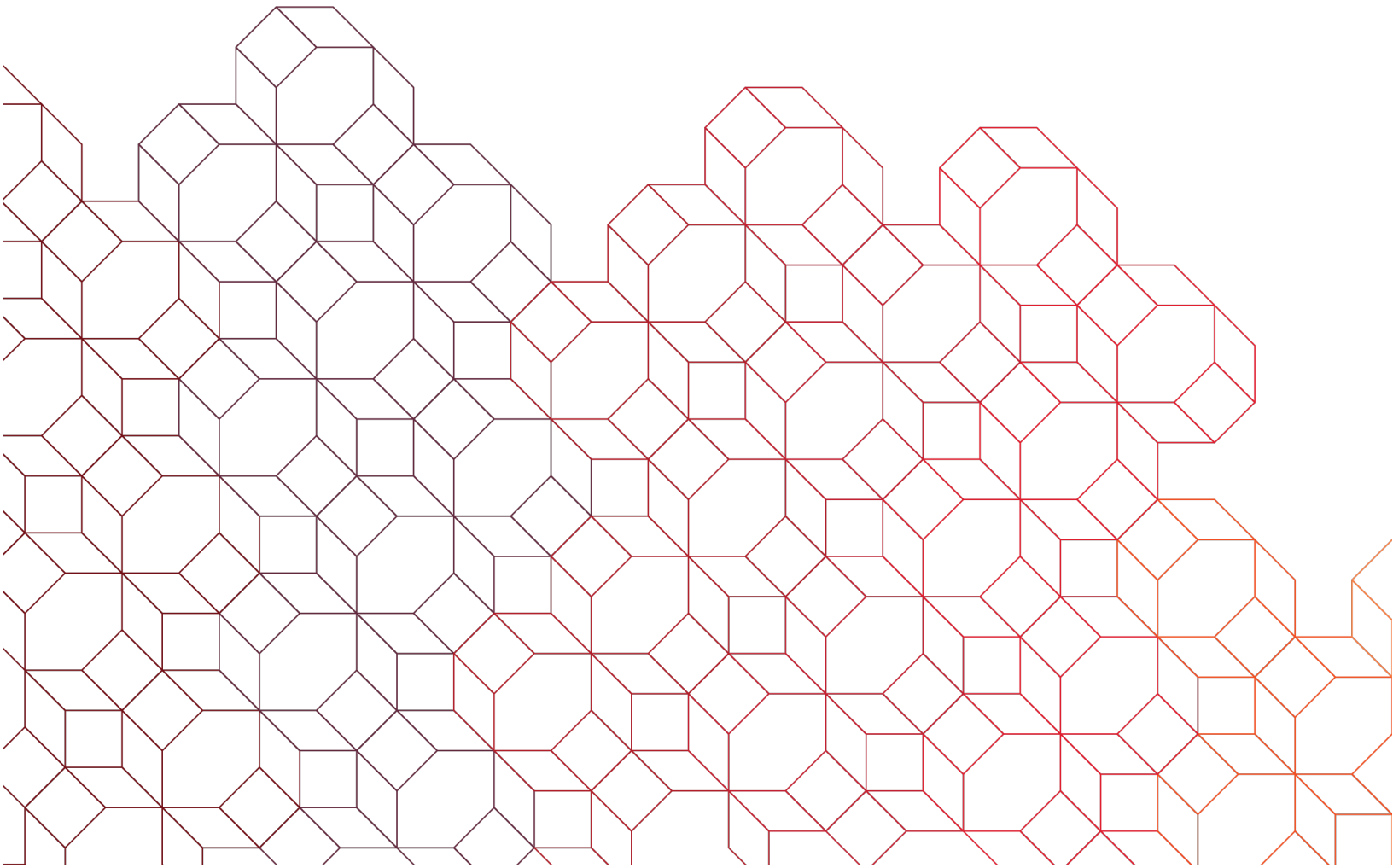




Spend Control

Expense Groups

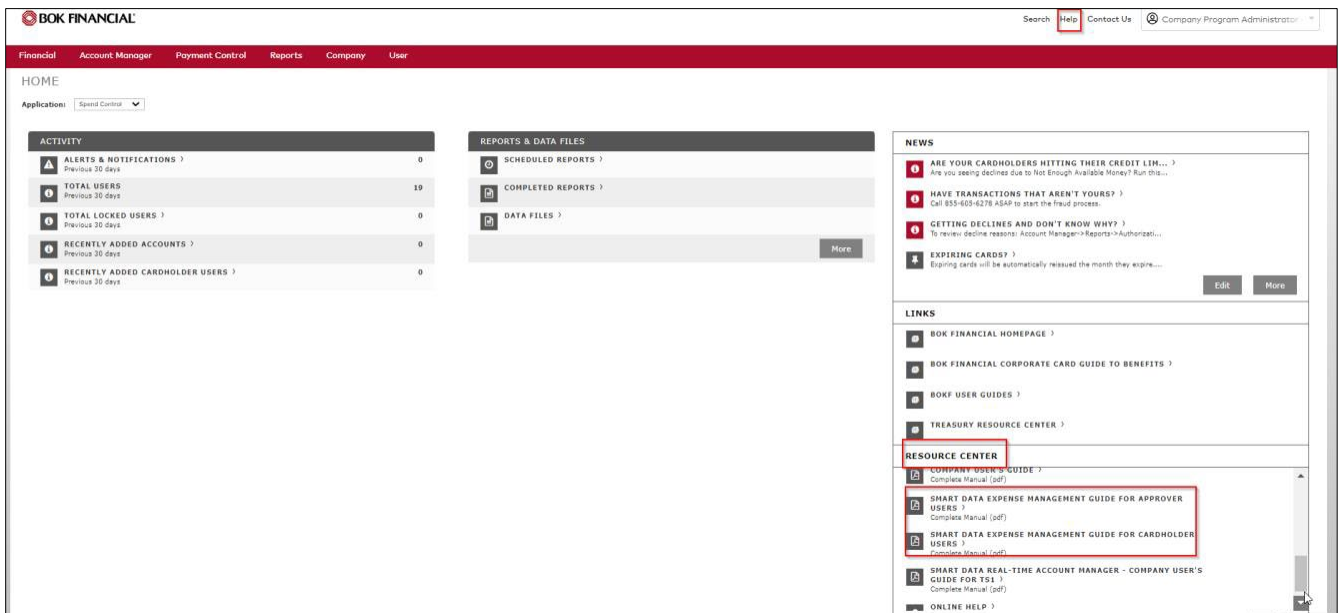


Expense Groups is an optional feature that allows users to group related expenses together so that there is additional context for cardholders and approvers to complete their workflows.

- Cardholders can use Expense Inbox to create groups, add expenses, remove expenses, edit, submit, and view groups of expenses.
- Approver users can approve or reject an expense group from Expense Inbox.
- Cardholders can add Expenses to an Expense Group through the Mobile App.
- Using Expense Groups will not impact reporting of transaction information and the corresponding cost allocation. It is simply a way to group related expenses together.
- This is not required functionality, but an option that is available to use if desired.

Additional information regarding Expense Groups can be found in Spend Control in the Resource section of the Landing Screen: <https://spendcontrol.bokf.com/sdportal/dashboard.view>

- Smart Data Expense Management Guide for Cardholder Users.
- Smart Data Expense Management Guide for Approvers.
- Smart Data Mobile Guide for Cardholders.



E-learning content can be found by clicking on the 'Help' Icon found at the top of the Landing screen.

Use the term 'Expense Groups' in the search field to access this information.

