

Trust us, we have seen it all. Here, find tips from our team to facilitate your own, and best, training on Mercury!

GETTING READY



PLANNING YOUR SESSIONS

How many employees? If over 50, think about more than one session to accommodate different schedules.

For a large employee base, consider utilizing a “power” group of users - employees tasked with becoming experts to help train and support the larger group.

Who needs to be trained? If it is just administrators, you can cover that in one session altogether. If end users, perhaps split up sessions on how to login/submit their first expense report, and how to review/approve at a different time.

Will everyone have access at the time of the training? We often find that you can go two directions:

1. *Watch & Listen*
2. *Watch & Practice*

We recommend separating the formal instruction from the practice time. This will allow everyone to receive the same messaging without going off track. Then, schedule a separate workshop for others with you to practice and ask questions.

When do we need to train? We always encourage planning ahead for training – however, remember that things can change when implementing. Something might take longer than expected, requirements may change, and/or your organization may decide to purchase an add-on product. Have a solid plan but try to keep some flexibility in timing.



Always wait to train until configuration is completely done. We recognize that there can be pressure to go-live by a certain date; but we advise to prioritize employees’ adoption success as well.

REQUIRE TRAINING



Often, the amount of training that one receives can make or break their success with new software. A user may have very simple questions, but a negative reaction on the system as a whole; therefore, deterring them from even trying to use it correctly. Require that they attend your training, send them all our resources that you can find, and follow-up.

Let them know where they can find support after you are finished.

DEFINE AND COMMUNICATE T&E POLICIES EARLY

Though Chrome River will be new to learn as a system, you may curb extra questions around policies by communicating these early. Keeping questions related to the software can be helpful to keep the group focused.



PREPPING THE MATERIAL



GET ACCOUNT-READY

Creating and Submitting Expense Reports and Pre-Approvals

- Enter and approve a pre-approval to demo the *Import Pre-Approval* function.
- Load receipts to the Receipt Gallery for expense reports.
- Walk through entering an expense report.
 - Add line items for *Airfare, Mileage, Hotel Itemization, and a Credit Card transaction.*
- Walk through entering a Pre-Approval.
 - Add line items for *Airfare, Mileage, and Business Meals.*
- Walk through approving an expense report.
 - Approve
 - Return
 - Reassign
 - Adjust
- Walk through approving a pre-approval.
 - Approve
 - Return



BEST PRACTICES

REPORT SUBMITTERS

Download the Chrome River and CR SNAP mobile apps, dependent on which you like best.

- **Chrome River App** – Is a hybrid application that offers customers an easier way to log in to the full Chrome River application using Single Sign-on (SSO) authentication or by enabling mobile biometrics like fingerprint and facial identification.
- **CR SNAP for Android or iOS** – Enables Expense users to quickly and easily capture and upload receipt images right when the expense occurs to avoid losing them, and it saves time when back in the office.

REPORT APPROVERS

Approve invoices and expense reports via email for compliant submitters. No need to login to Chrome River each time, just open the email and forward on for approval.

ACCOUNTANTS & ADMINISTRATORS

Try to regularly review analytics for usage, spend, and workflow patterns:

- For Weekly Cash Management
 - **Export Listing** – Expenses that have completed the approval process and are waiting export.
 - **Export Totals** – Expenses that have been exported.
- For Monthly Accruals
 - **Expense Analysis** – Expenses within a specified date range.
 - **Credit Card Reconciliation** – Credit card transactions within a specified date range.
- For Audit Purposes
 - **Compliance** - Are your policies working, or are they too permissive/restrictive?
 - **Open Approvals and Expense Report Tracking** - Is your general workflow still working for your organization?
- Checking on adoption? Try **Submitted Reports** and **Expense Analysis Report**.
- Thinking of making changes to your data in Chrome River? Try any reports in the **Reference Standard Reports** section for extracts.



ANTICIPATE THE QUESTIONS

COMMON FAQS

Is there a way to differentiate between personal and company expenses on the same receipt?

Yes, there is a Personal Non-Reimbursable allocation available. You would need to split the allocation between personal and company paid.

As an approver, can you edit the report instead of returning it?

Yes. As an approver you can adjust the amount (only down), business purpose and the allocation. You can also add an image. The expense owner will be notified of this adjustment, unless the Notify Expense Owner checkbox is unchecked.

Can you split a credit card charge?

Yes, you can allocate the charge to more than one allocation.

Can delegates submit receipts on behalf of the users they are working on behalf of?

Yes.

What is the main difference between eWallet and eReceipts?

The eWallet is where you will find all of your transactions, including Trips, Credit Card items, Personal Account items, Offline items submitted via Snap & Send or Chrome River SNAP, Travel Agency items, Travel Data items and Authorizations. You may see more or fewer types of transactions, depending on your organization's configuration. eReceipts is the area where you upload receipts to.

What causes a merged transaction in the eWallet?

The system will auto merge a receipt with a credit card transaction when the date, amount and expense type match.

How does the External guests lists get populated on meals?

External guests are populated by the expense owner and the list is private to them.

Can you attach more than one pre-approval to an expense report?

You can attach the same pre-approval to multiple expense reports, but only one pre-approval to an expense report.