

CardQuest

Expense Types

To Itemize or Not?

Expense Types now offer cardholders the ability and flexibility to pick and choose when a transaction needs to be itemized. However some departments and/or funding sources may mandate certain transactions be itemized.

Simple vs Itemized

Expense Type	Description	Example
Goods Simple	Lumping all your receipt/invoice lines to one line in CardQuest.	Any tangible item(s) entered as 1 line
Goods Itemized	Detailed transaction breakdown. Items, sales tax and freight is broken out as individual lines in CardQuest.	Tangible items entered with multiple lines with more than one goods line.
Service Simple	Lumping all of your service lines to one line in CardQuest.	Any service (non-tangible items)
Services Itemized	Detailed transaction breakdown. May include service lines, goods line, sales tax and freight (if applicable) in CardQuest	Multiple services with or without a tangible item on the same transaction
Other Simple	Transaction that does not fit the description of a good or service.	International transaction fee, license, patents, etc.
Other Itemized	Detailed transaction breakdown.	License, patents etc.