

# *How to use* **EXPENSE 365**



## Expense 365 – Prezi extracts.

### 2. What is the app designed for?

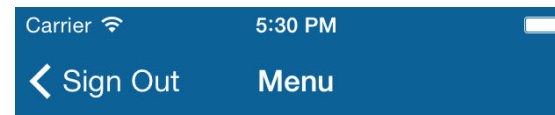
1. Making it easier to claim expenses for student group activities.
2. Enabling student groups to check their current account balance at the touch of a button.

### 3. Setting up the app.

1. Download the app (eXpense 365) from the relevant app store for your device - it is currently available for Apple and Android devices, with Windows devices coming soon.
2. Tap 'register' and enter your student email address, first and last name. Keep the email you are sent with your default password, sign in then change the password.
3. From the main menu screen, tap 'Details' to add your bank account information so that expenses claims can be paid straight into your account.
4. When you do this, you'll be prompted to enter your password again, as an additional security check.

### 4. Creating an expenses claim.

1. When creating an expenses claim, make sure you have all the totals and proof of purchases ready, so you can complete the process faster.



# eXpense365



Expenses



Documents



Notifications

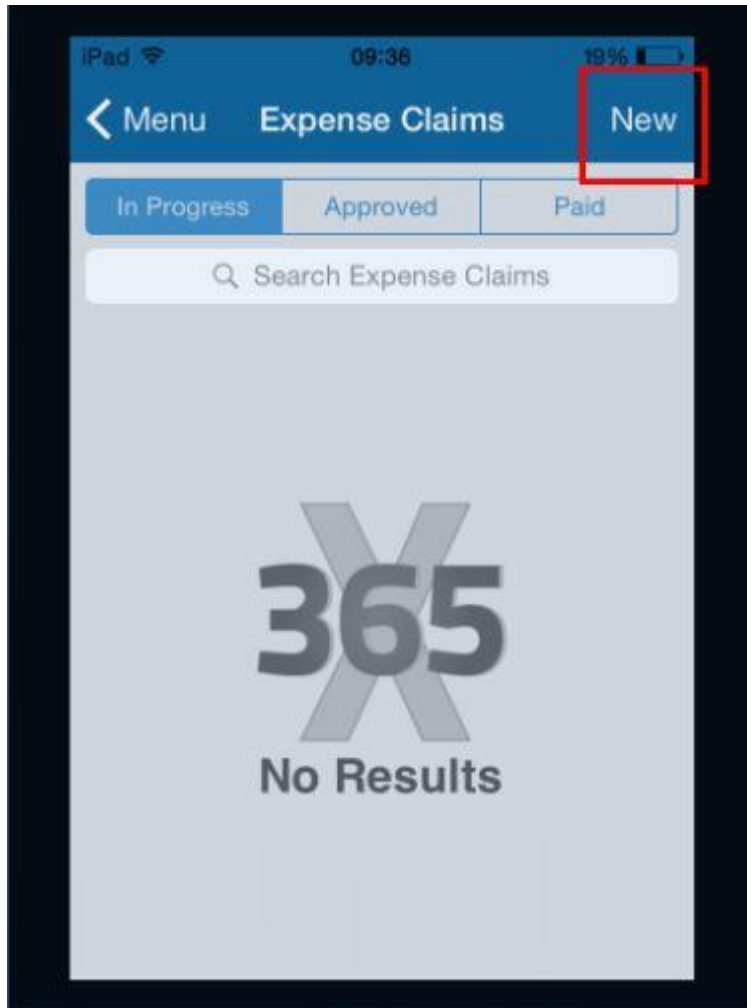


Details

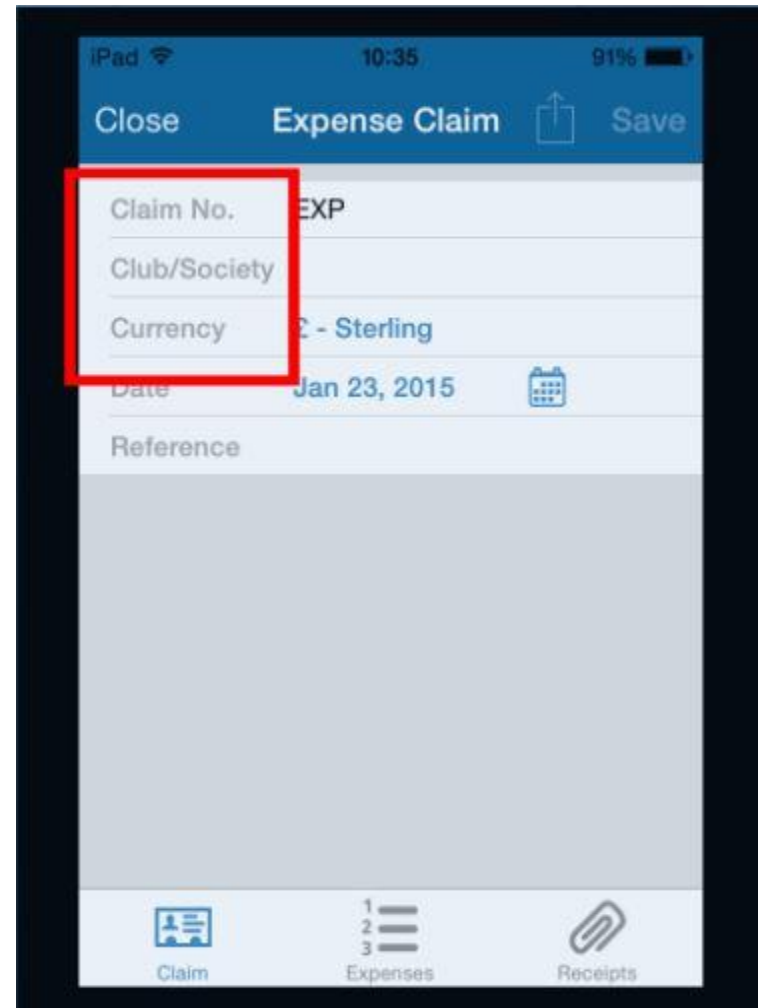


2. From the 'menu' screen tap 'expenses'.



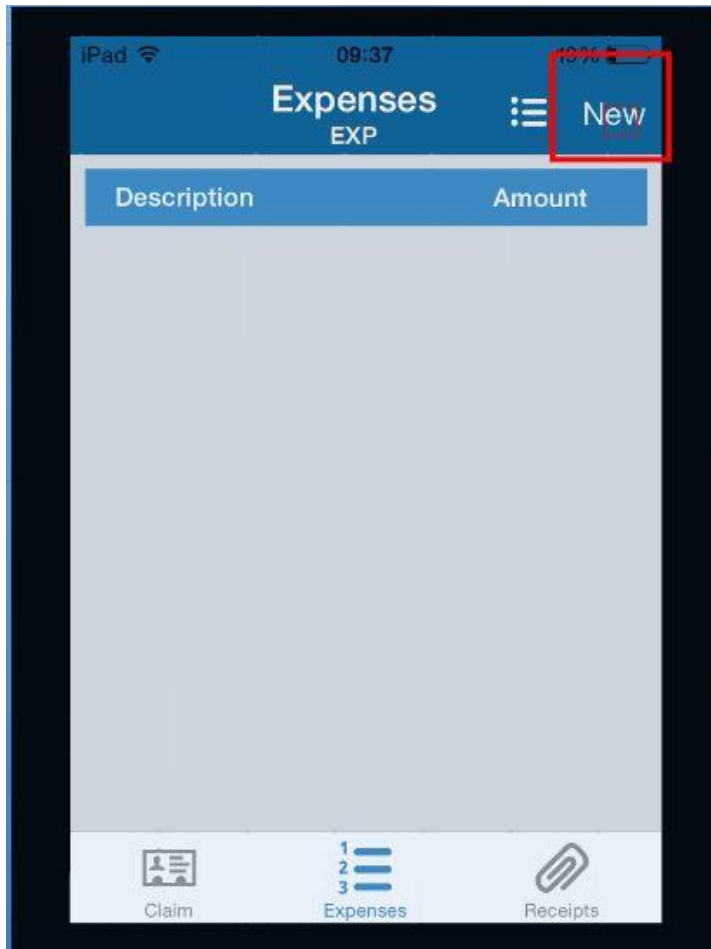


3. This takes you to a summary of which claims you have in process you can also tap to see which claims have already been approved, and which have been paid. Tap 'new' to begin a new claim.

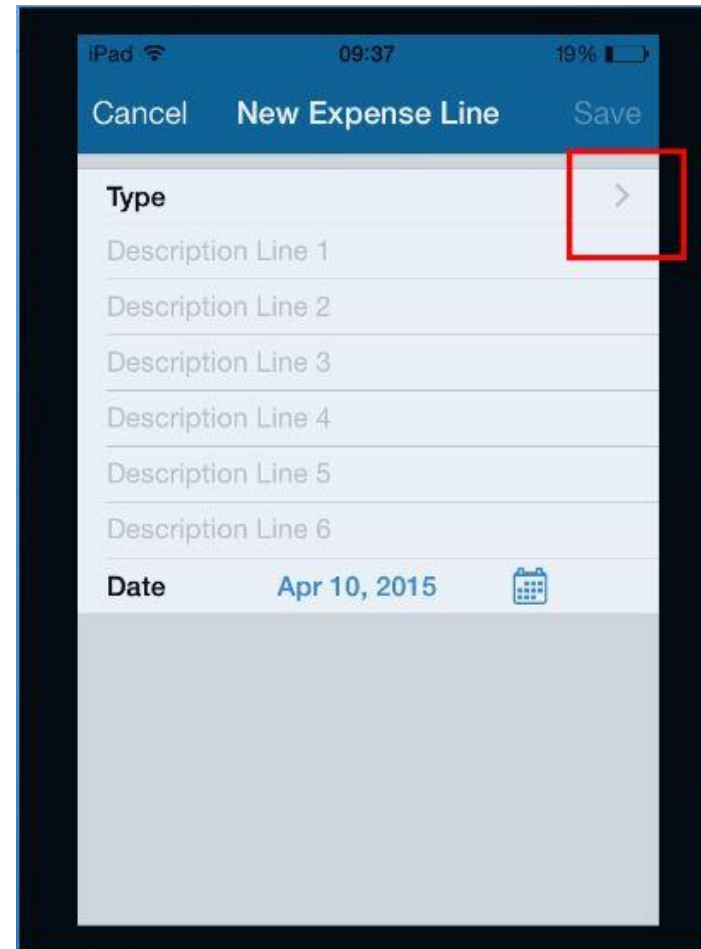


4. Select which student group you are representing in 'club/society'. You can also add a reference (e.g. fresher's materials). When finished tap onto 'expenses' at the bottom of the screen.



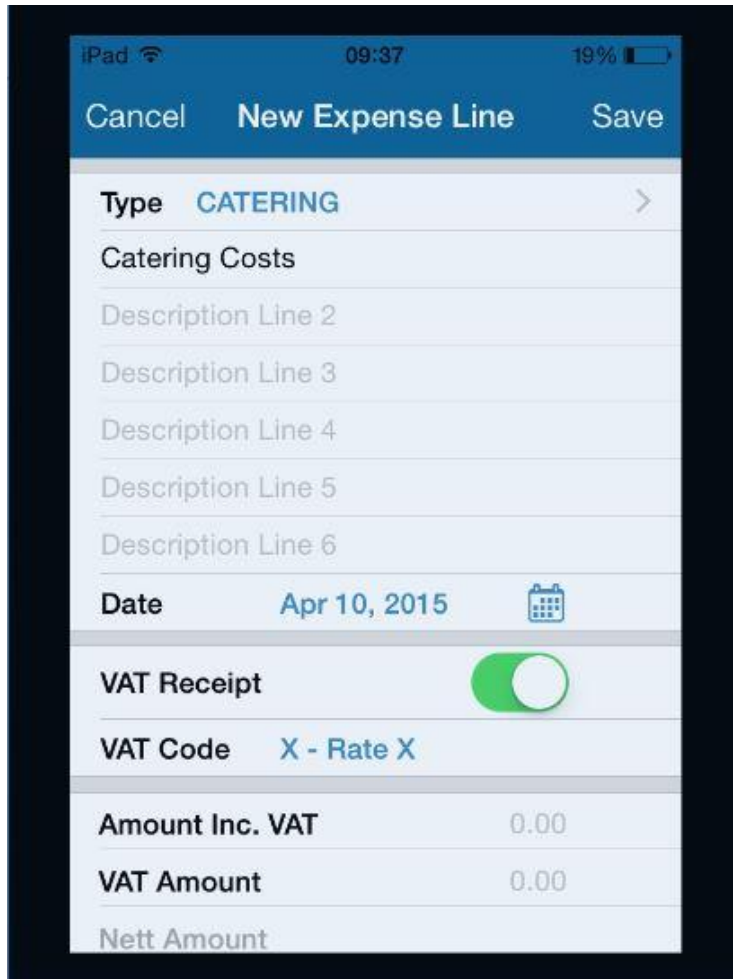


5. This takes you to a screen where you can add different expense lines. Click 'new' to start adding lines to your expense claim.

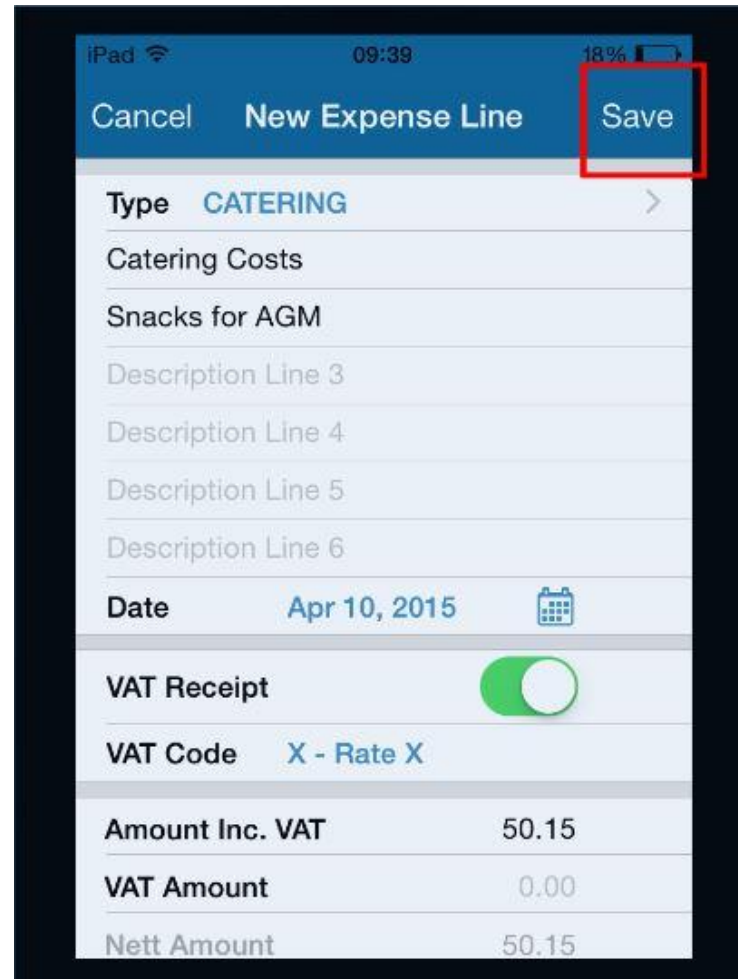


6. Choose which type of expense you are claiming for by tapping the arrow by 'type'. Remember you can change the date for when the expense was incurred towards the bottom of the screen.



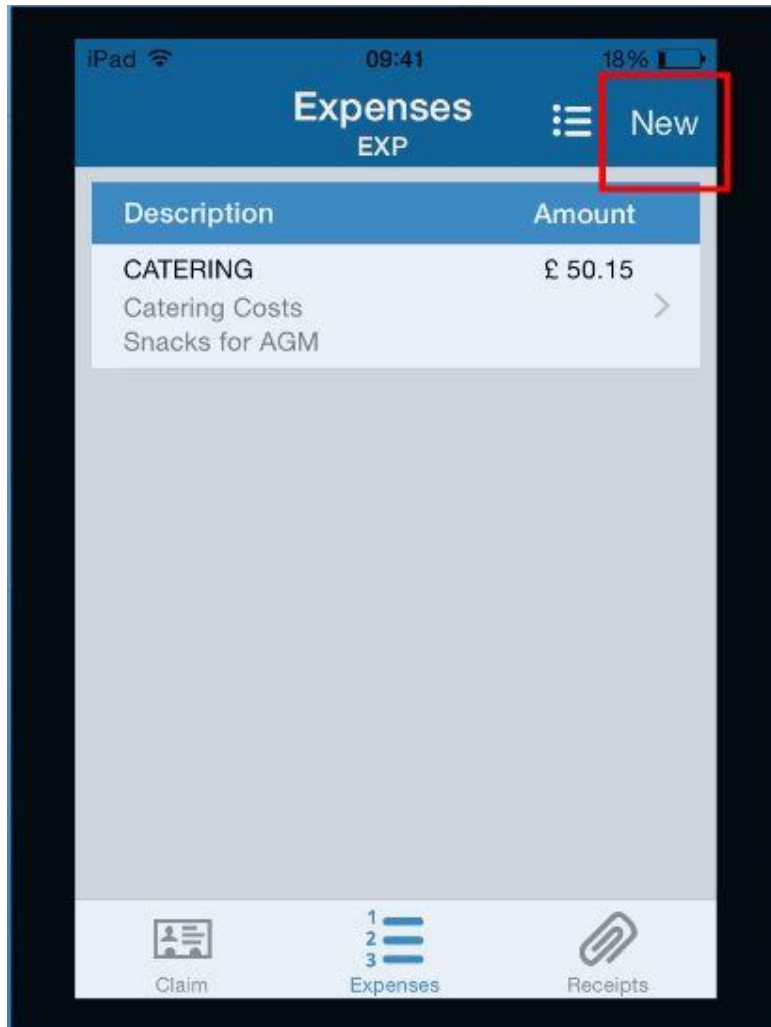


7. In this example we have selected 'catering costs'. Don't worry if you have multiple things to claim for – you can add more on later.

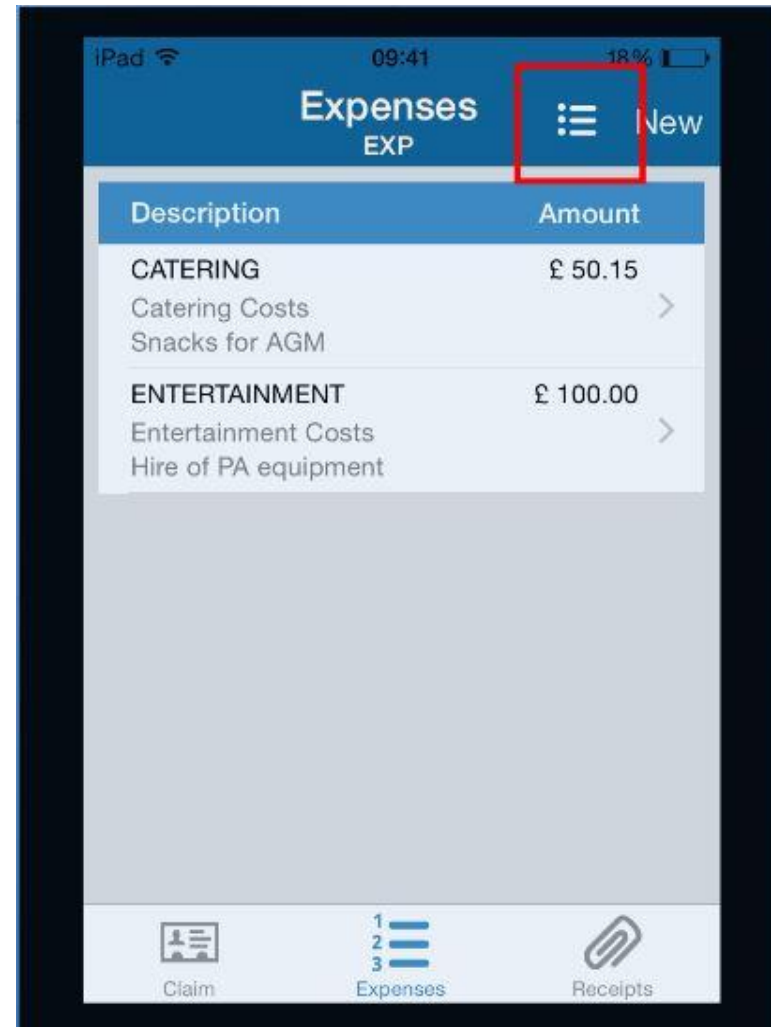


8. Add further details to help later reference as to what the expense was for (in this instance, snacks for AGM) and at the bottom insert the amount claimed for. Clicks 'save' when finished.



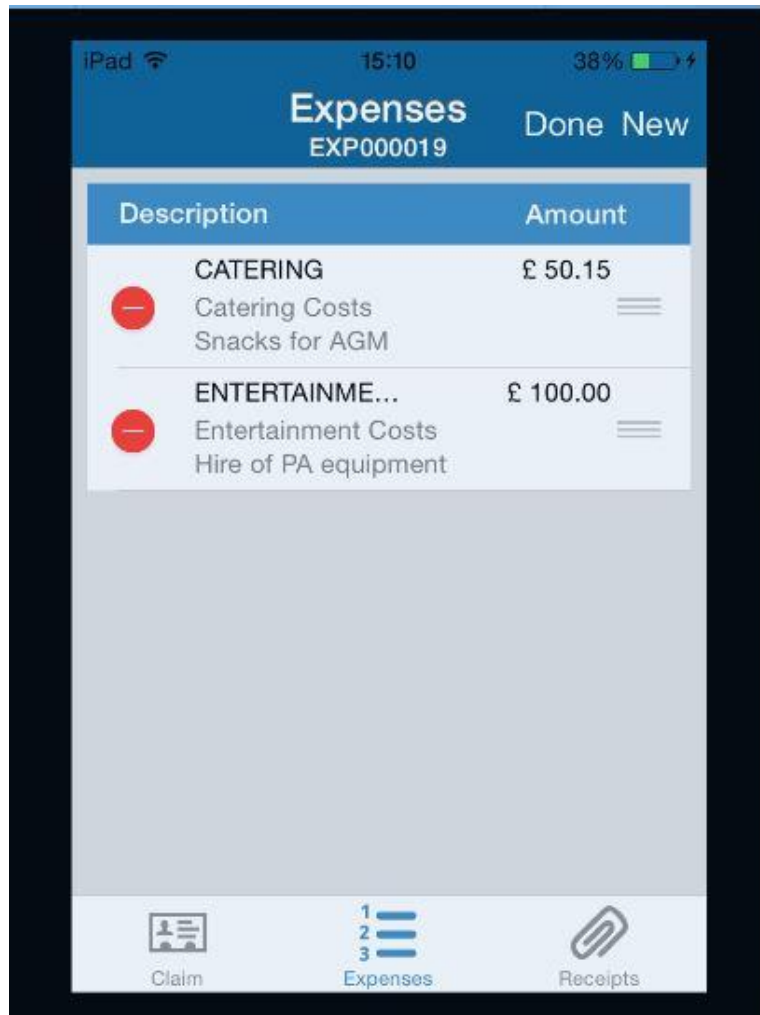


9. We can now add further items to claim for ('new') , or proceed to adding receipts ('receipts').

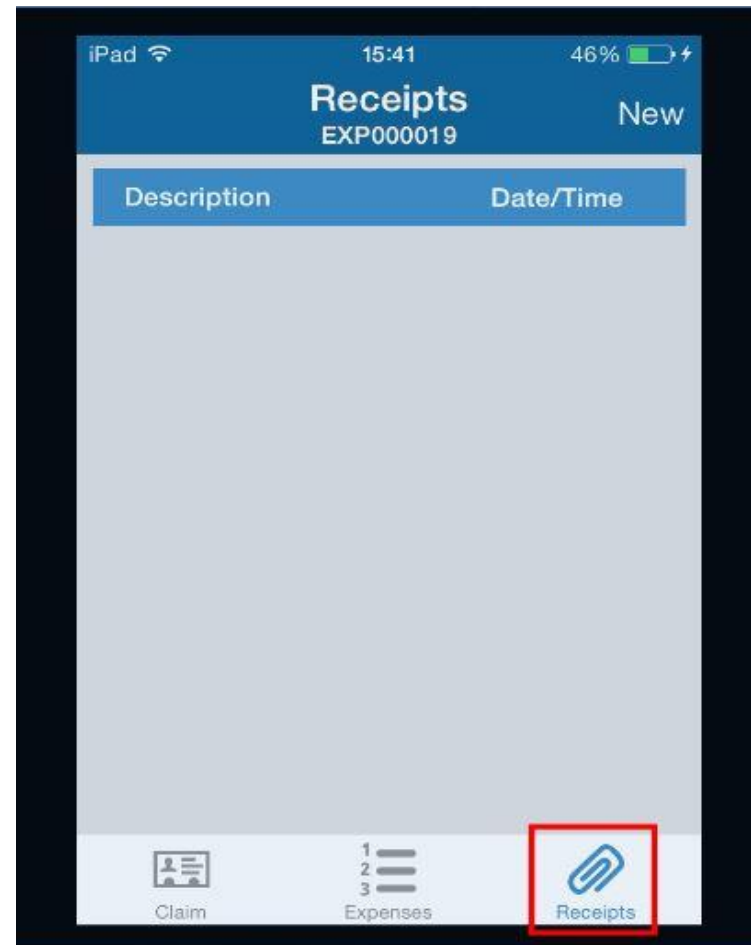


10. In this example we have added an extra line of expenses.



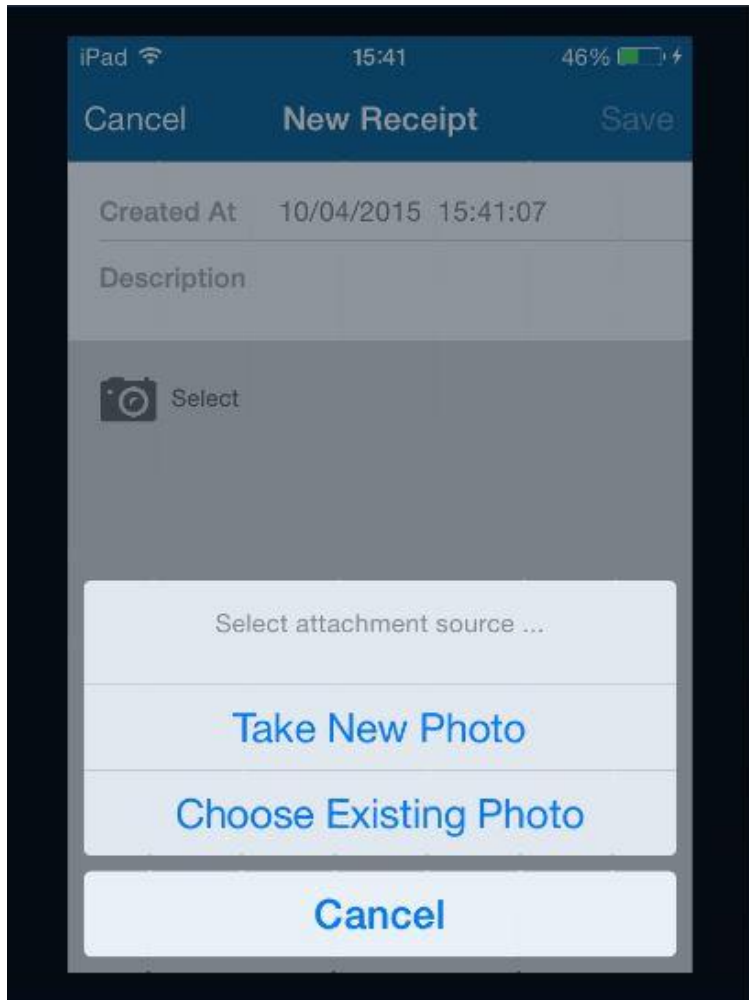


11. If we wanted to remove a line, tap the (logo) button and you will have the option to remove a line. Tap 'done' when complete.



12. Tap 'receipts' to attach proof of your expenditure.





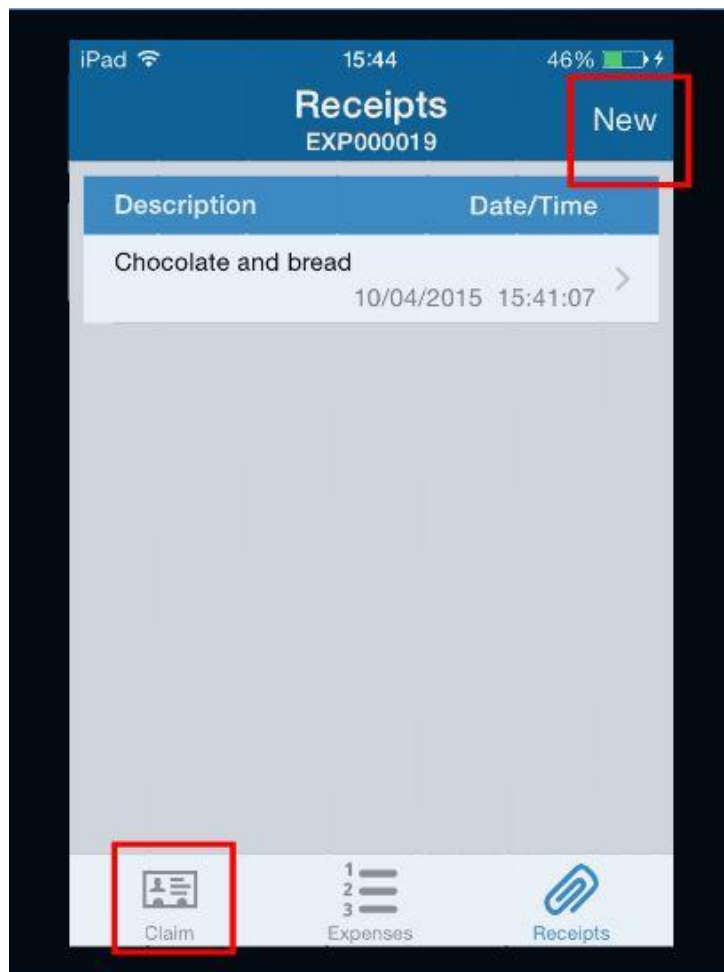
13. When you move onto 'receipts', you can easily take a photo of the receipt, or choose an existing photo.



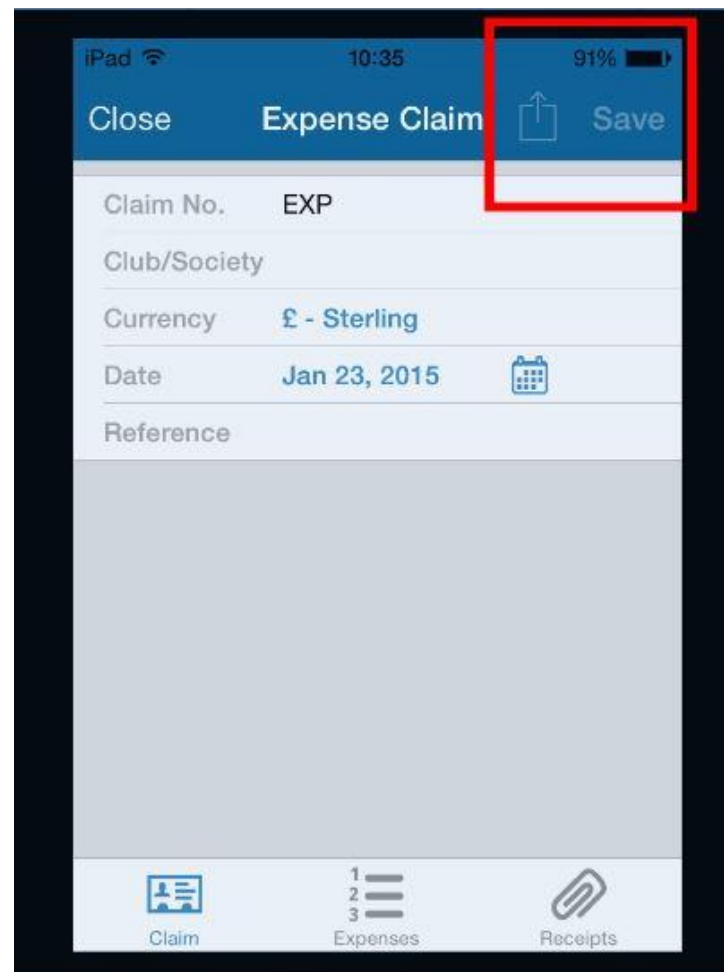
14. Take a photo of your proof, making sure that the total amount spent is clearly visible. Use the 'description' field to clarify what is being claimed for.





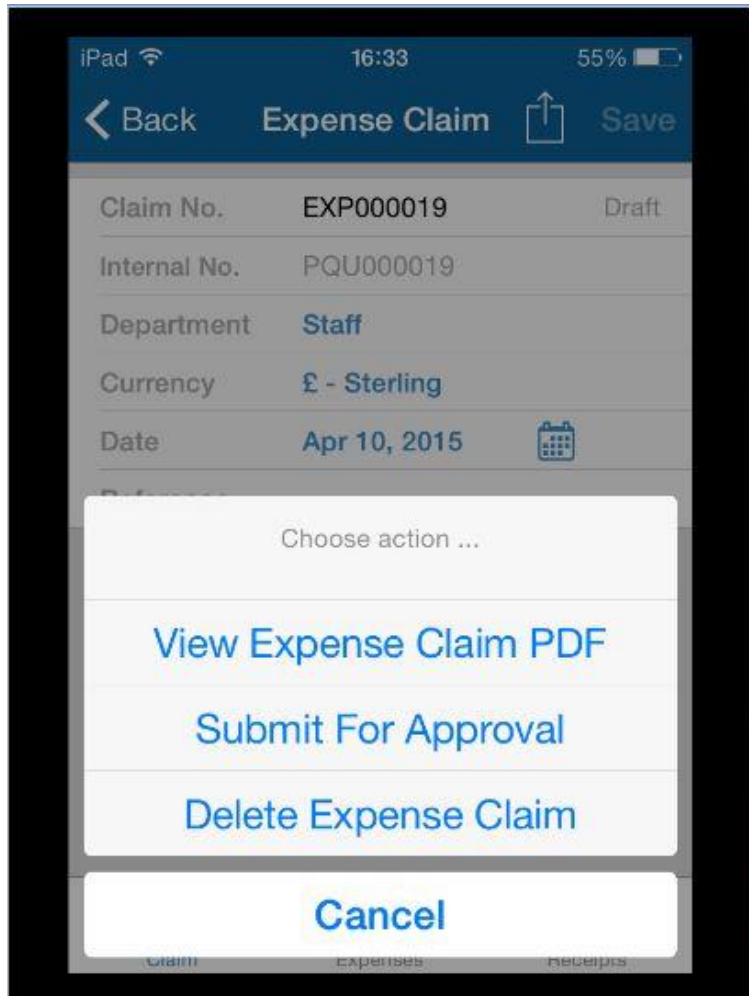


15. After you have clicked 'save', you come back to this screen. You can add further receipts by clicking 'new', or go back to the initial claim page to proceed.

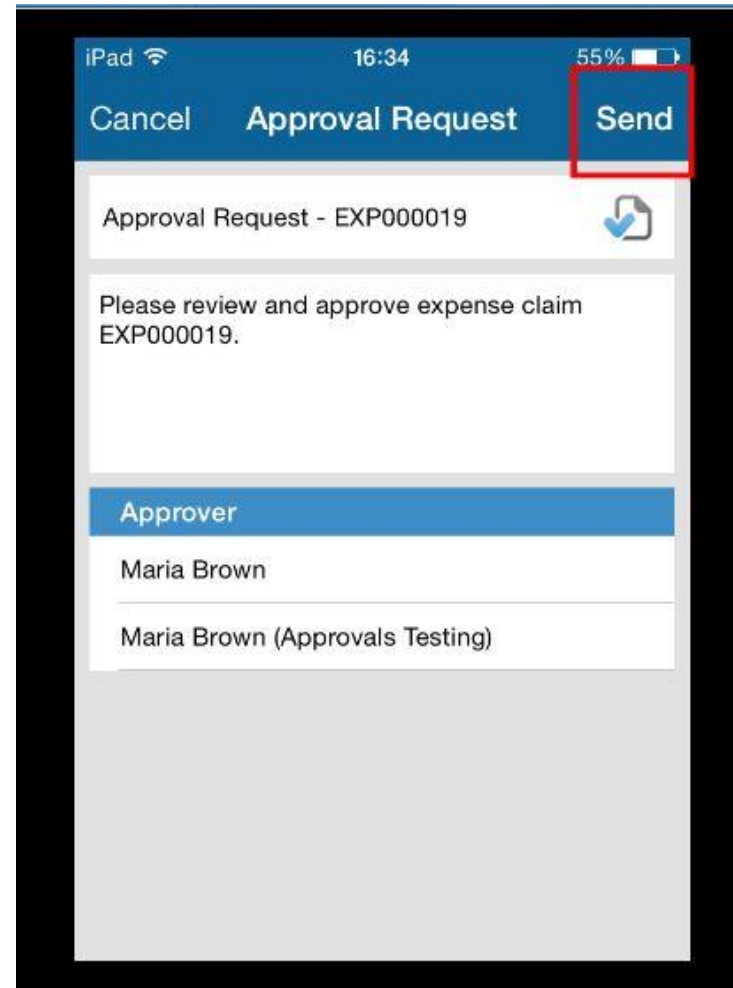


16. On the 'claim' screen first tap 'save', then the 'send' icon next to it.



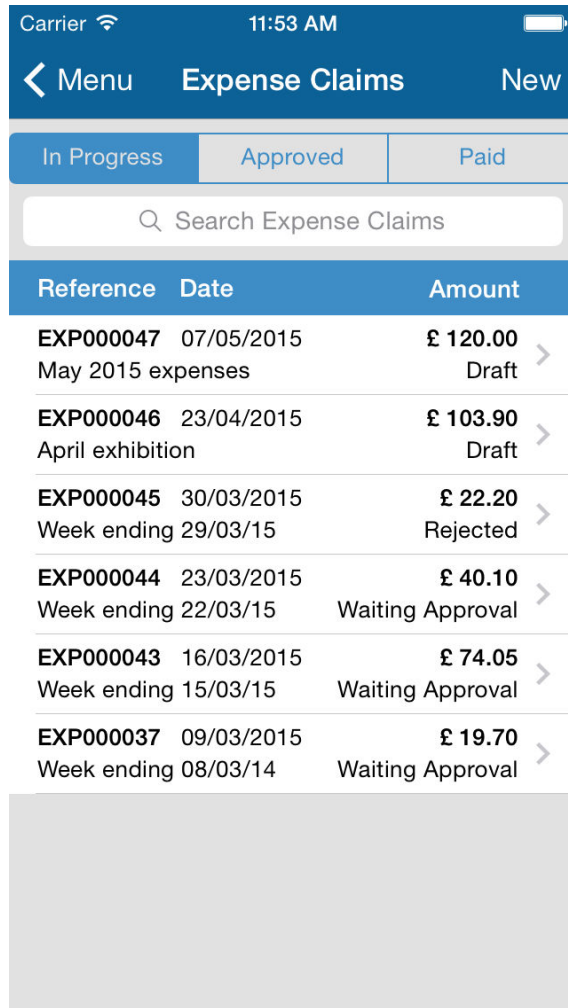


17. At this point, you can view the claim as a PDF, submit it for approval or delete the claim.

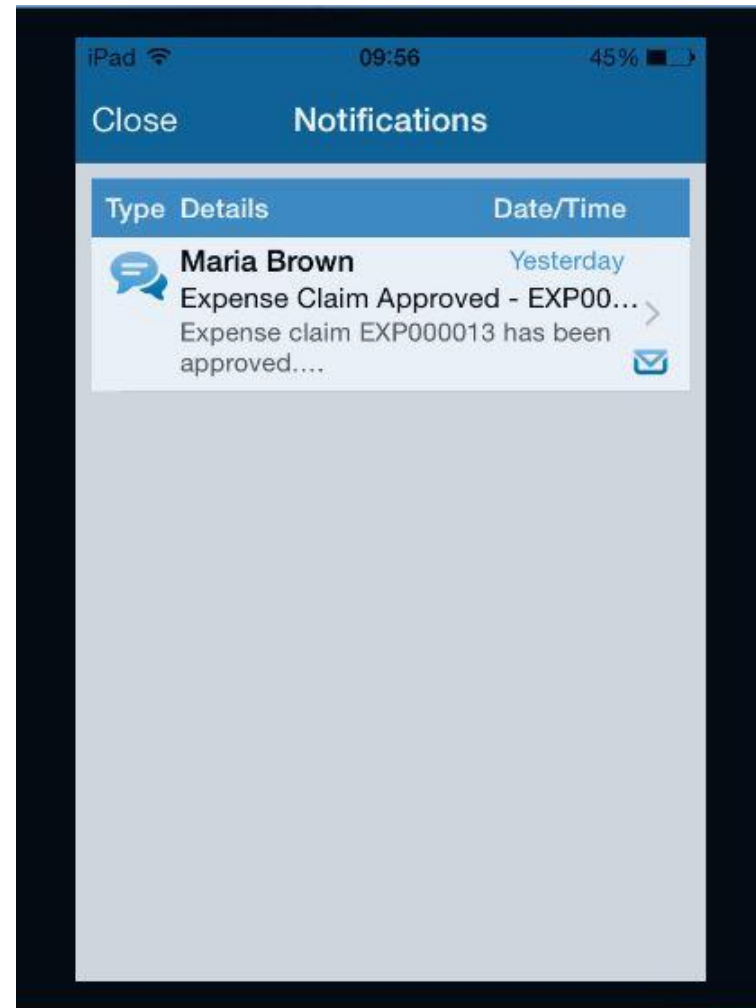


18. When you choose 'submit for approval', you will get a screen where you can choose who you are asking to approve the claim, click 'send' once you have chosen the relevant approver.



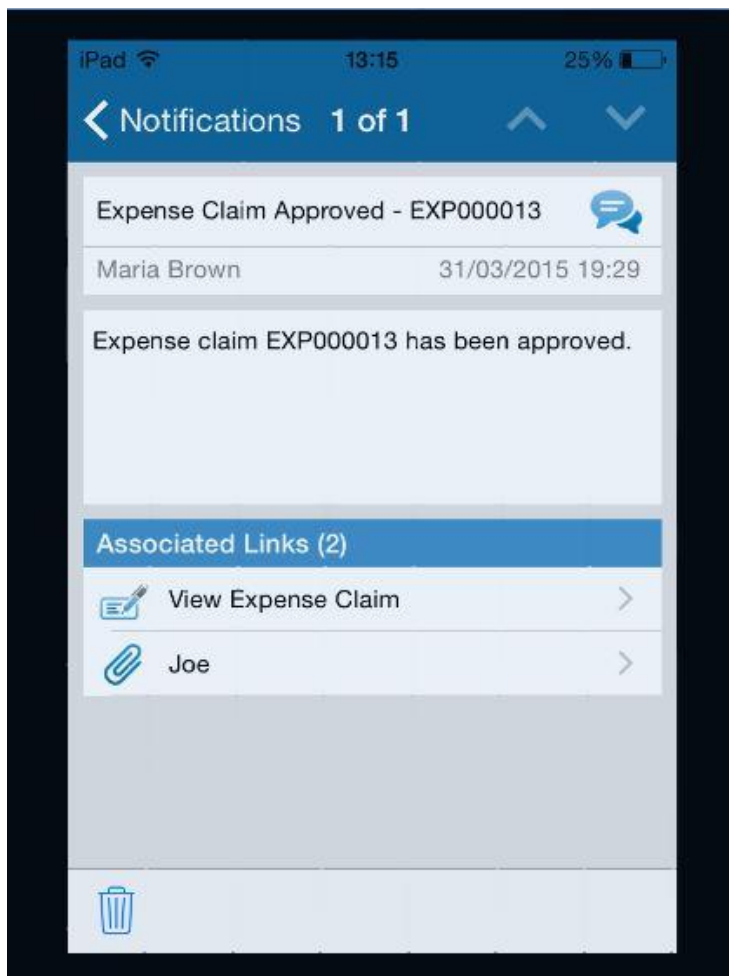


19. After submission, you will be brought back to the Expense Claims menu. Your new claim will be listed as 'In progress', with 'waiting approval' under the amount.

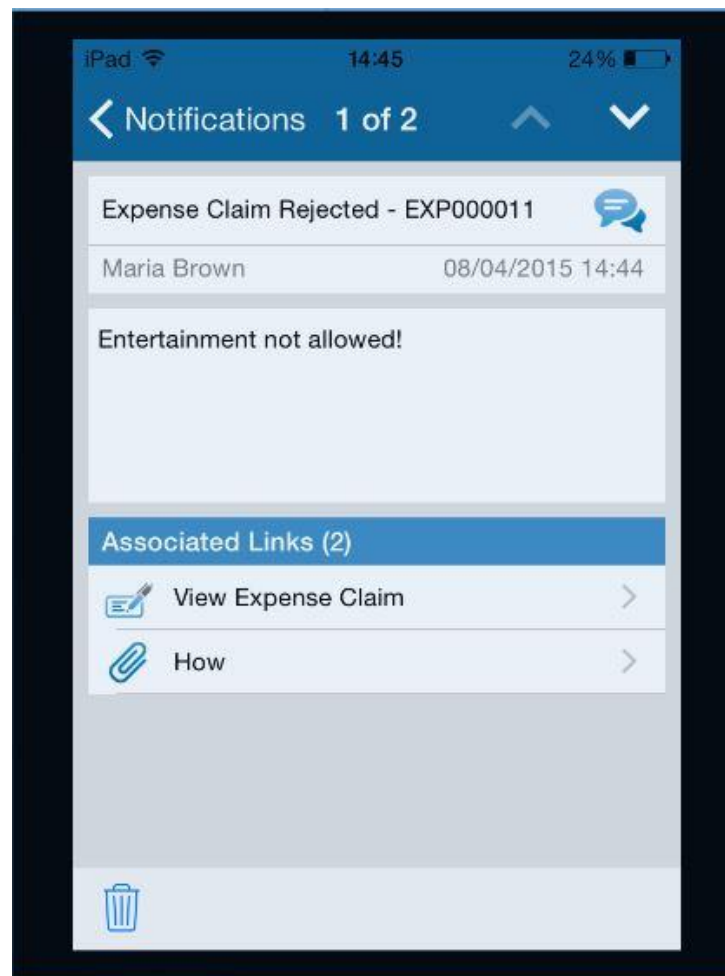


20. When your claim has been approved you will get a notification from the app to let you know.



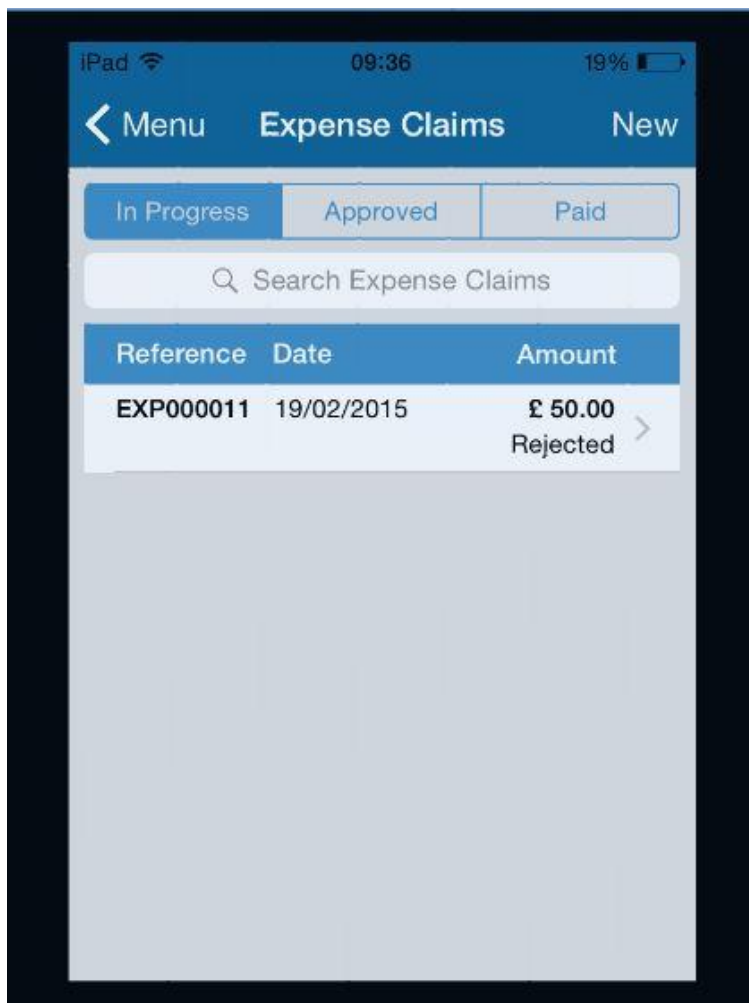


21. You can tap onto the notification to see the full detail, such as any message that may have been left for you.



22. If your claim is rejected by the approver, you will also get a notification. You can tap into this for more detail; there should be a reason why it has been rejected.

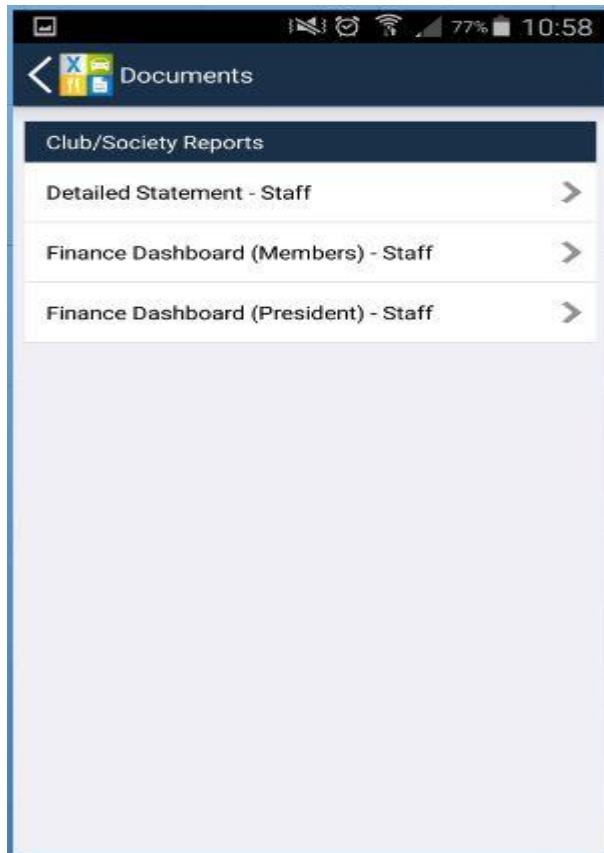




23. Rejected claims appear back in your 'in progress section', so you can edit and resubmit if you need to. Alternatively you can delete the claim.



## Viewing your balance.



1. When you tap into 'Documents', you are presented with this screen. Presidents and Treasurers will see something similar to this for each group they are involved in, whereas others will only see the 'Finance Dashboard (Members)'.

Statement at 06/02/2017 06/02/2017 15:59:31  
 Football Men UNIO01  
 Page 1

Department : FOM Balance Bfwd : -229.82

Date	Description	Cash In	Cash Out
31/08/2016	Balance Adjustments	229.82	
16/09/2016	MSL Rec 16.09.16-30.09.2016	605.00	
16/10/2016	MSL Rec 01.10.16-16.10.2016	2,475.00	
18/10/2016	MEN'S FOOTBALL - MONEY FROM TRIALS	329.00	
21/10/2016	MEN'S FOOTBALL REFUND		55.00
25/10/2016	MSL Rec 17.10.2016-25.10.2016		110.00
25/10/2016	MSL Rec 17.10.2016-25.10.2016	495.00	
25/10/2016	TRAINING EQUIPMENT		344.75
26/10/2016	Football money in bank	250.00	
01/11/2016	MSL Rec 01.11.2016	110.00	
01/11/2016	MSL Rec 16.10.2016	110.00	
02/11/2016	MSL Rec 02.11.2016	55.00	
02/11/2016	REIMBURSEMENT OF COST FOR THE SPORTSPARK		85.00
08/11/2016	MSL Rec 08.11.2016	55.00	
22/11/2016	MSL Rec 22.11.2016	55.00	
13/12/2016	CB - Affiliation Fees		20.00
13/12/2016	CB - Affiliation Fees		20.00
21/12/2016	UEA SPORTS REIMBURSEMENT TO MENS FOOTBALL CLUB	75.00	
26/01/2017	CB - Uniform and Kit		64.00
26/01/2017	CB - Sports Equipment		58.80
26/01/2017	CB - Uniform and Kit		36.00
		4,843.82	793.55

Please note recent transactions may not be included. Closing Balance 3,820.46

2. The 'Detailed Statement' will be the most useful for Presidents/Treasurers as it enables you to see the most recent transactions for your student group, and gives you your current account total.

