# ExpenseMe Quick Guide

## ExpenseMe Menu

**Expenses:** Shows any expenses in ProMaster awaiting your attention.

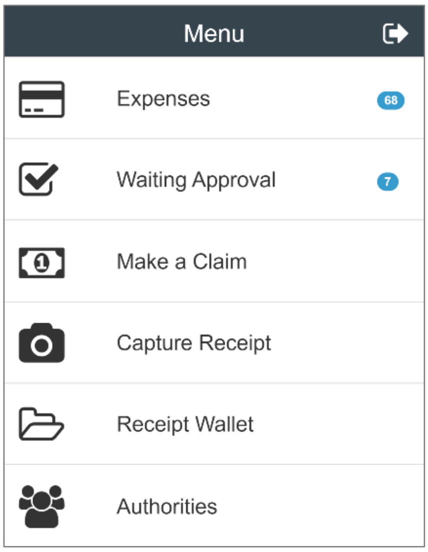
**Waiting Approval:** Only displays Approval steps if you are an approver.

**Make a Claim:** Used to submit a Cash reimbursement claim. (We recommend using Capture Receipt if you have a receipt to upload.)

**Capture Receipt**: For **Claim Receipts** or for **SmartAttach Card Transactions.**

**Receipt Wallet:** Displays any receipts already in ProMaster (including emailed receipts).

**Authorities:** Where you can access any Proxy Authorities you have. Will only display if you have authorities assigned.

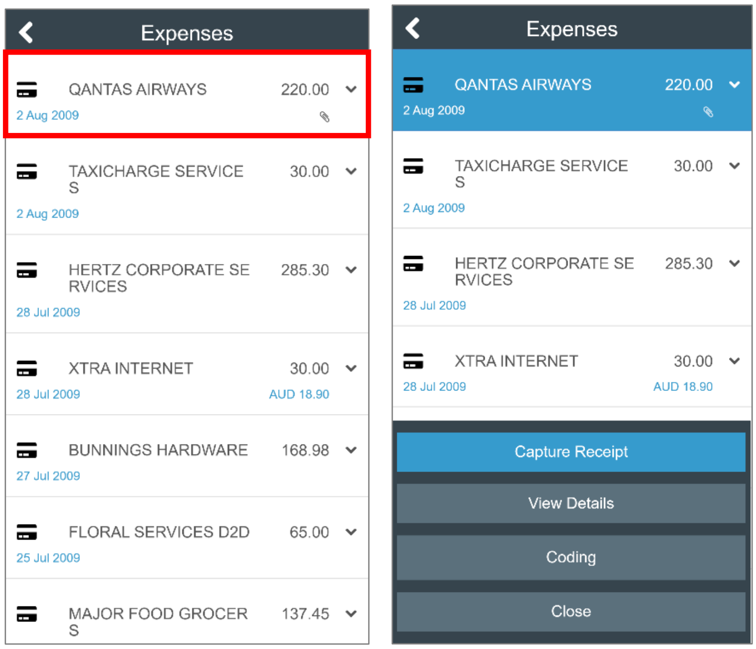



## Expenses

1. From the Menu, tap **Expenses** to view your unsubmitted transactions.
2. Tap the transaction you wish to action.

   ***Note**: If you see a paperclip it means there is already a receipt attached*.

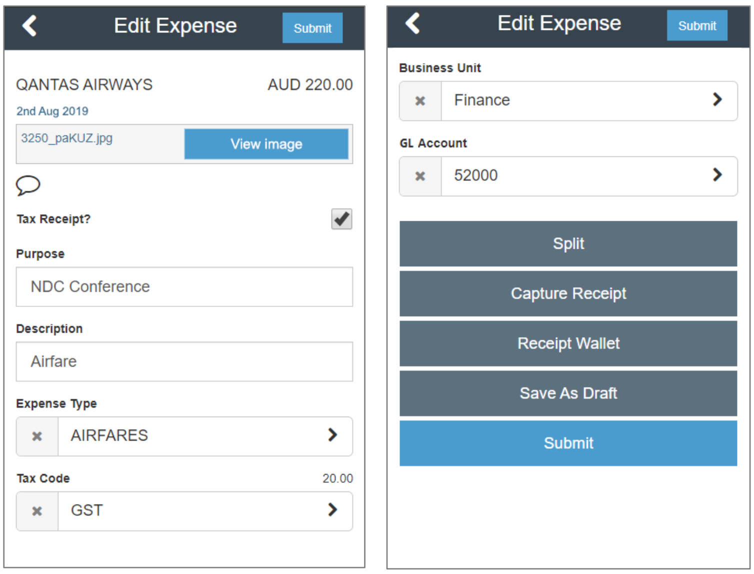
3. From there you can select:
   ***Capture Receipt***: To attach receipt to that transaction.
   ***View Details:*** Displays additional transaction details.
   ***Coding***: Enter the required details to submit the transaction.
   ***Close:*** Returns to the ExpenseMe Menu.




4. When you click **Coding**, enter the following information into the fields.

- **Tax Receipt:** Check this box to verify you have a valid tax receipt.
- **Purpose:** The business reason for the purchase.
- **Description:** What was purchased.
  **Expense Type:** Tap to select or search for your Expense Type.
- Add or change other coding segments if required.

5. Scroll to the bottom to:
   ***Split***: Split your transaction to more than one line (refer to Complete App User Guide).
   ***Attach your receipt:*** by either **Capture Receipt** or **Receipt Wallet**.
   ***Save as Draft***: if you are not ready to submit your transaction (it will stay in Expenses).
6. Tap **Submit**.



## Waiting Approval

1. From the Menu, tap **Waiting Approval** (or relevant Approval / Review step).

***Note**: Your ProMaster system might have additional approval steps. These are all able to be approved via ExpenseMe. The tab you select defines which step you are approving.*

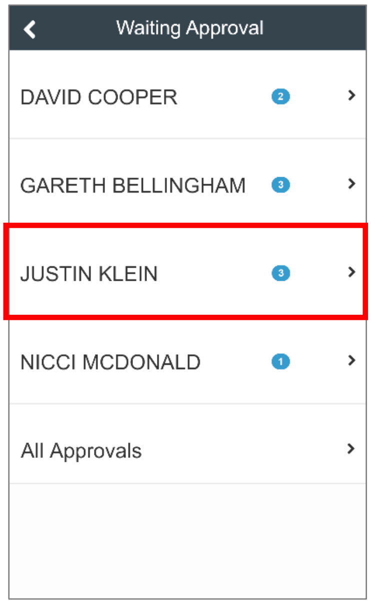
2. Either tap the name of a single account holder to view their expenses or tap **All Approvals** to see all.

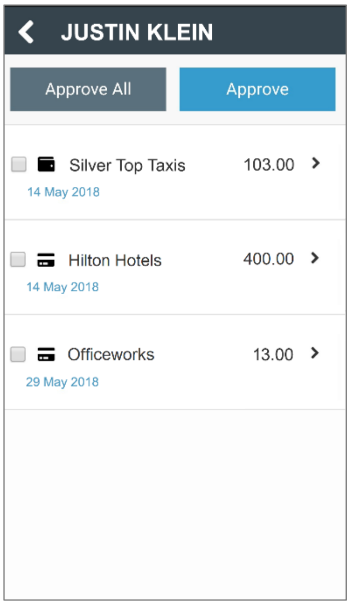
3. Tap the expense to review the coding and see the receipt. Tap the receipt to pinch & zoom in closer.

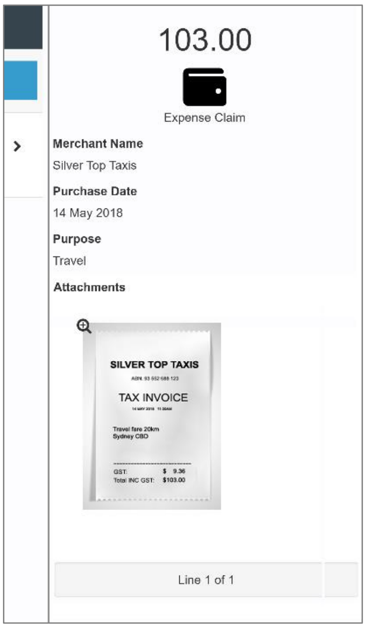
4. Swipe down to review the coding.

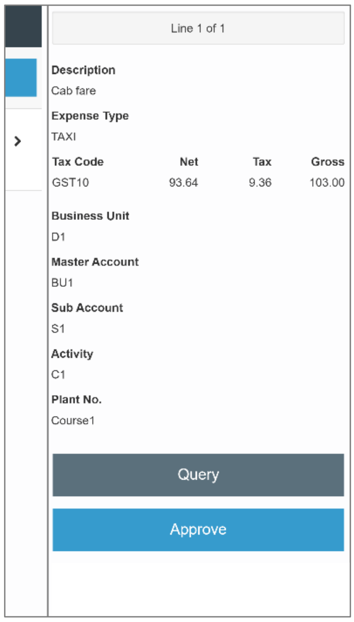
5. If okay, tap **Approve** at the bottom of the expense, or tick the boxes beside the expenses to bulk approve, then tap **Approve**. You can also tap **Approve All** to approve everything at once.

***Note**: You can use the **Query** button to send the transaction back to the Account Holder requesting clarification on the transaction/purchase or to instruct the user to make a change if required.*



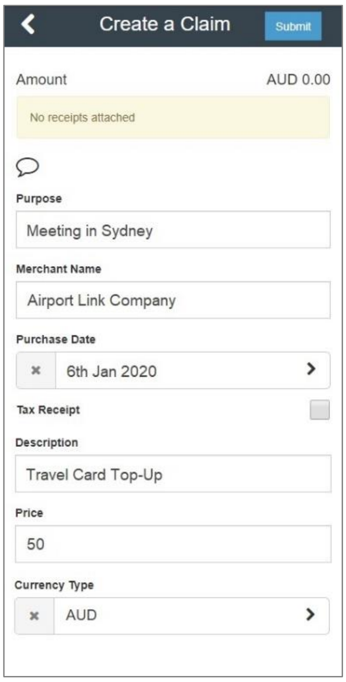

## Make a Claim

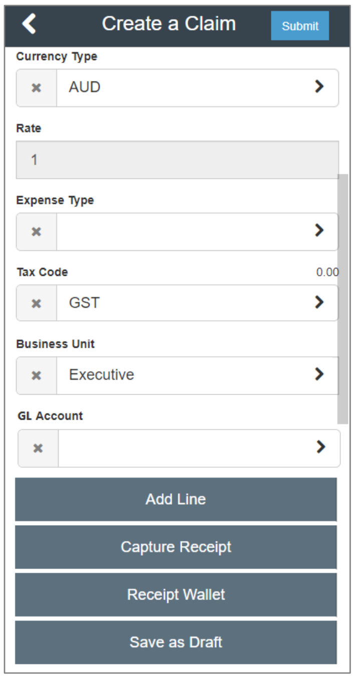
1. Tap **Make a Claim** in the Menu, then enter the following: ([click here](#) for a quicker claim option)

- **Purpose:** Business reason for the purchase.
- **Merchant Name:** Enter the Merchant/Supplier.
- **Purchase Date:** Pre-populates with today's date. You can change if required.
- **Tax Receipt:** Check this box to verify you have a valid tax receipt.
- **Description:** What was purchased.
- **Price:** Enter the claim amount.
- **Expense Type:** Tap to select or search for your Expense Type.

2. Scroll to the bottom to:
   ***Add Line***: Split your transaction (refer to Complete App User Guide).
   ***Attach your receipt***: by either **Capture Receipt** or **Receipt Wallet.**
   ***Save as Draft***: if you are not ready to submit your transaction (it will sit in Expenses).

3. Tap **Submit** in the top right corner.



## Capture Receipt

This button provides two different processes. One for Card Transactions and one for Claims Reimbursements. See below.

You will only have the option select an account that is set up on your profile. Contact your Administrator for further details.

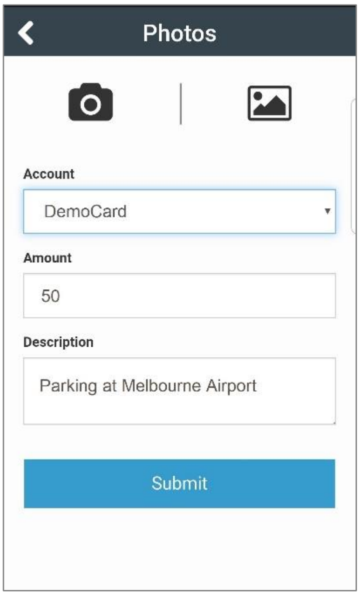
### Using SmartAttach (to automatically attach receipts to card transactions)

1. Tap **Capture Receipt** in Menu.
2. Tap to photograph your receipt or tap to upload one from your smartphone gallery.
3. Fill in purchase details:

- **Account:** Select the Card Type.
- **Amount:** Enter the Total value of the transaction. (Used for SmartAttach)
- **Description:** Explain what was purchased. (Populates in Transaction Line Description when SmartAttach occurs)

4. Tap **Submit**. The receipt will be stored in the Receipt Wallet until it can SmartAttach to a valid transaction.

***Note**: The SmartAttach feature will match your receipt value to a transaction when it arrives in ProMaster. When it finds a match, it will also populate the description you enter here into the transaction line description. (If it can't find a match or finds more than one match, it remains in your receipt wallet until you attach it.)*




### For Claim Receipts

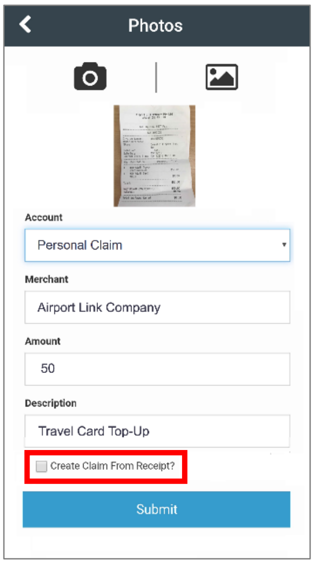
1. Tap **Capture Receipt** in Menu.
2. Tap to photograph your receipt or tap to upload one from your smartphone gallery.
3. Fill in purchase details:

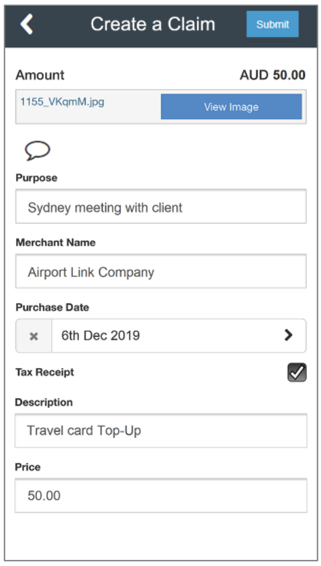
- **Account:** Select Personal Claim.
- **Amount:** Enter the amount being claimed.
- **Description:** Explain what was purchased.

An additional tick box appears at the bottom: "Create Claim From Receipt?"

When you select this and click 'Submit', a claim is created and pre-populates the details as provided here on the receipt. You will need to complete the details as per **Make a Claim** to complete the claim and submit for approval/reimbursement.

Alternatively, if you click **Submit**, the receipt will be saved into your Receipt Wallet to be attached at a later time.

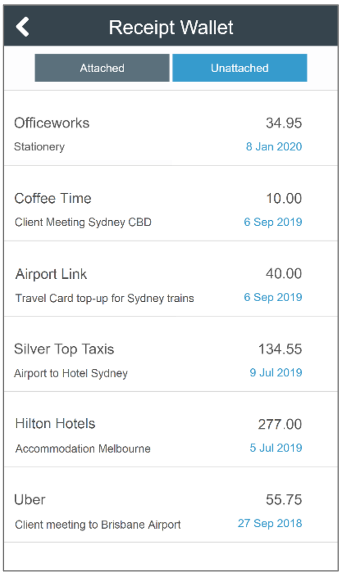


## Receipt Wallet

The Receipt Wallet organises all your images in one place, so you can figure out which receipt images you have uploaded, which images you have attached to an expense, and which images have not yet been attached.

Click on the item to view the receipt.




## Authorities

Users can switch profiles and access their assigned authorities from the mobile app, simply by clicking on the Authorities option in the Menu.

You will only see the Authorities tab if you have access to code/approve on behalf of other users.