How Do I Use ExpenseIt?

1. Once you’ve downloaded the app from either Google Play or the iOS App Store log in using your mobile id (UIN@tamus.edu) and PIN.
   a. If you have forgotten, or need to reset, your mobile PIN please visit the Forgot Mobile Password (PIN) section of your Concur Profile.

   ![ExpenseIt Pro](image)

   [UIN]@tamus.edu

   ![Sign In](image)

   ExpenseIt is a premium service for Concur users. Your company must purchase ExpenseIt in order for you to sign in.

   Help with Sign In

2. Access the application settings menu

   ![Account Settings](image)

   Automatically export expenses to Concur

   Email Notifications

   Push Notifications

   News and Updates

   Sign Out
a. Initially, leave the option to “Automatically export expenses to Concur” turned off. The reason for this is to allow you to adjust the automatically selected expense types as needed. ExpenseIt will "learn" your preferred expense types and change patterns and adjust its logic to select the appropriate expense types on future expenses. Once you feel it is selecting appropriately you may turn this option on.

b. Once turned on, you may skip to #14

3. Select which type of notifications you want to receive
4. You are now ready to capture receipt images to generate expenses
5. Tap the camera button
6. Capture the image of the receipt

7. Save the image, or select discard to recapture the image

8. The image will now show as “submitted for analysis”
9. Once the image has been processed you will receive notification based on your notification settings you set previously. Below is an example of the push notification received on the mobile device.

10. The image is now ready to export
   a. Even though the image copy isn't perfect, and I have handwritten in the tip and total, it still picked up the right amount, date, and vendor, and determined that it was a business meal.

11. If the wrong expense type was selected, you may change it.
   a. Tap on the expense information or image
   b. Click on the edit button
c. Select the information you need to edit
d. Correct the information

Individual Meals
- Business Meal
- Business Meal-Alcohol
- Meals

e. Save the edited Expense

Edit Expense
- Date: Oct 12, 2014
- Vendor Name: OCEANA GRILL
- Location: New Orleans, Louisiana
- Expense Type: Meals
- Amount: 20.26 USD

Add a Note
12. You may now export the expense to Concur
13. You may choose to export a single expense, or all expenses.
   a. To export a single expense, tap the expense to open it
   b. Tap the export icon

14. Once exported, the expense will show up in Concur in the same area where credit card charges show up for import onto a report.
15. When the University Travel Card is used Concur will automatically match the card charge to the expense once received so they can be added to the report automatically as well.
16. To manually import an expense onto your report, click the Import button and select Charges & Expenses
17. Select the expense to import. Expenselt-generated expenses will be separated into their own section and marked with a new icon, 🗃️

18. Import the charges to the current report.

19. Concur will import the selected expenses onto the current report along with the receipts, credit card charge, and itinerary data where available.
20. It will also import over the itemization for hotels, saving you from having to manually itemize all the nightly entries.