



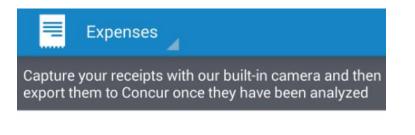


# How Do I Use Expenselt?

- 1. Once you've downloaded the app from either <u>Google Play</u> or the <u>iOS App Store</u> log in using your mobile id (<u>UIN@tamus.edu</u>) 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.

Expenselt Pro
[UIN]@tamus.edu
••••
Sign In
Expenselt is a premium service for Concur users. Your company must purchase Expenselt in order for you to sign in.
Help with Sign In
2. Access the application settings menu
< 🗮 Account Settings
Automatically export OFF
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. Expenselt 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 selecing 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

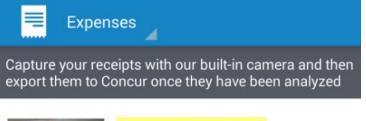


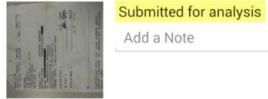


#### 6. Capture the image of the receipt

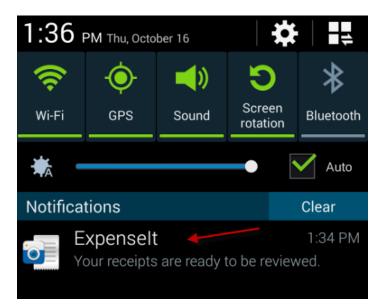
	Auto	<b>1</b> 07
	0519 Server: SARAH L (#272) Rec:278 10/12/14 18:44, Swiped T: 998 Term: 1	Ъ.
	DCEANA 739 CONTI NEW ORLEANS,LA 70130 (504)525-6002 MERCHANT #:	\$
	CARD TYPE ACCOUNT NUMBER MASTER CARD XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
>	CHECK: 17.78	
	TOTAL:	100
	17 June 1	
	×	1
	CARDHOLDER WILL PAY CARD ISSUER ABOVE AMOUNT PURSUANT TO CARDHOLDER AGREEMENT GUEST COPY PLEASE TOTAL & SIGN BOTTOM	- COLOR
	MODE D	

- 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





1000

Oct 12, 2014 OCEANA GRILL New Orleans, Louisiana Business Meal 20.26 USD

Add a Note

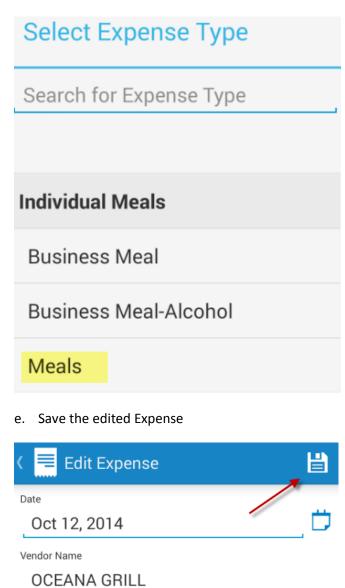


Receipt ID: 4304747 Sent for Analysis: 2014-10-16 11:30:07

## c. Select the information you need to edit

K 📕 Edit Expen	se	Ľ
Date		
Oct 12, 2014		Ö
Vendor Name		
OCEANA GRILI	_	
Location		
New Orleans, L	ouisiana	
Expense Type		
<b>Business Meal</b>		
Amount		
20.26	USD	
Add a Note		
		0/500

### d. Correct the information



Location

New Orleans, Lo	ouisiana	
Expense Type		
Meals		
Amount		
20.26	USD	
Add a Note		

0/500

- 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

🕻 📃 Expense Detail	A COM	<u>+</u>	Ť
Oct 12, 2014 OCEANA GRILL New Orleans, Louisiana Meals 20.26 USD Add a Note		Î	

c. To export all expenses that are ready for export access the application menu and select Export All

Expen	ises
	eipts with our built-in camera and then oncur once they have been analyzed
	Oct 15, 2014
	Oct 15, 2014 Royal Sonesta Hotel
	New Orleans, Louisiana
4 19	Hotel
All All	1,029.46USD
	Add a Note



Help

Oct 12, 2014 OCEANA GRILL New Orleans, Louisiana Business Meal 20.26 USD Add a Note

Export All	
Settings	

- 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

C. CONC	UR						
My Concur Requ	uest Travel	Expense	Reporting	Administra	tion Profi	ile App Cen	ter
View Charges View	Reports New Ex	pense Report	View Receipt	Store Approv	ve Reports P	Process Reports	Ad
ExpenseIt Tes		Turnet	Dataila	Beneficte	Drint (1	Fee all	
New Expense	Quick Expenses				Print / i	Email 👻	
Expenses			irges & Expen	ses / V	iew 🔻 <	New Expense	
Date 👻	Expense	Fro	m File	Reque	ested		
Adding New Expense						Expense To create a ne	w exp

17. Select the expense to import. Expenselt-generated expenses will be separated into their own section and marked with a new icon, 🕒

Ехре	enseIt Test	Entries						Delete Report	Submit Report
⊕ Ne	w Expense	Quick Expenses	Import - Deta	ils 🛛 Receip	ts 🔹 Print / E	imail 👻			
Expe	nses	Move	• Delete Copy	View 👻 <	Smart Exp	enses			
	Date 👻	Expense	Amount	Requested	All Cards	▼ Im	nport 🗸 Match Unmatch	Delete	
Adding	New Expense					Expense Detail	Expense	Date 🔺	Amount
No Exp	enses Found				ExpenseIt Entry	tries			
						OCEANA GRILL	Meals	10/12/2014	\$20.26
						Royal Sonesta Hotel	Hotel	10/15/2014	\$1,029.46

18. Import the charges to the current report.

ExpenseIt Test	Entries								Delete Report	Submit Report
Or New Expense	Quick Expenses	Import 🔹	Details 🔹 Receip	ots 🝷	Print / Emai	1 -				
Expenses	Move	▼ Delete	Copy View 🔹 候	Sn	nart Expens	ses				
Date -	Expense	Amount	Requested	All	l Cards	•	Import - Match	Unmatch Delete	]	
Adding New Expense						Expense Detail	To Current Report	<b></b>	Date 🔺	Amount
No Expenses Found				⊟ E	ExpenseIt Entries		To New Report			
					⊌	OCEANA GRILL	Meals		10/12/2014	\$20.26
			_		•	Royal Sonesta Hotel	Hotel		10/15/2014	\$1,029.46

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.

# ExpenseIt Test Entries

⊕ Nev	v Expense	Quick Expenses	Import 👻 🛛	Details 👻	Receipts 👻	Print / Email 🔹
Expen	ses			Move 🔻	Delete	Copy View 🔻
	Date	Expense 🔺			Amount	Requested
Adding I	Vew Expense					
•	10/15/2014	<b>Hotel</b> Royal Sonesta Hotel,	, New Orleans, Louisi	iana	\$1,029.46	\$1,029.46
	10/12/2014	Hotel			\$289.00	\$289.00
	10/13/2014	Hotel			\$289.00	\$289.00
	10/14/2014	Hotel			\$289.00	\$289.00
	10/12/2014	Hotel Tax			\$26.01	\$26.01
	10/12/2014	Hotel Tax			\$5.06	\$5.06
	10/12/2014	Hotel Tax			\$11.56	\$11.56
	10/12/2014	Hotel Tax			\$2.00	\$2.00
	10/13/2014	Hotel Tax			\$26.01	\$26.01
	10/13/2014	Hotel Tax			\$5.06	\$5.06
	10/13/2014	Hotel Tax			\$11.56	\$11.56
	10/13/2014	Hotel Tax			\$2.00	\$2.00
	10/14/2014	Hotel Tax			\$5.06	\$5.06
	10/14/2014	Hotel Tax			\$11.56	\$11.56
	10/14/2014	Hotel Tax			\$2.00	\$2.00
	10/14/2014	Hotel Tax			\$26.01	\$26.01
	10/14/2014	Meals			\$28.57	\$28.57
	10/12/2014 🕗	Meals OCEANA GRILL, New	/ Orleans, Louisiana		\$20.26	\$20.26
		OUTSTAND	ING ADVANCE	TOTAL AN		TOTAL REQUESTED
			\$0.00	\$1,04	9.72	\$1,049.72