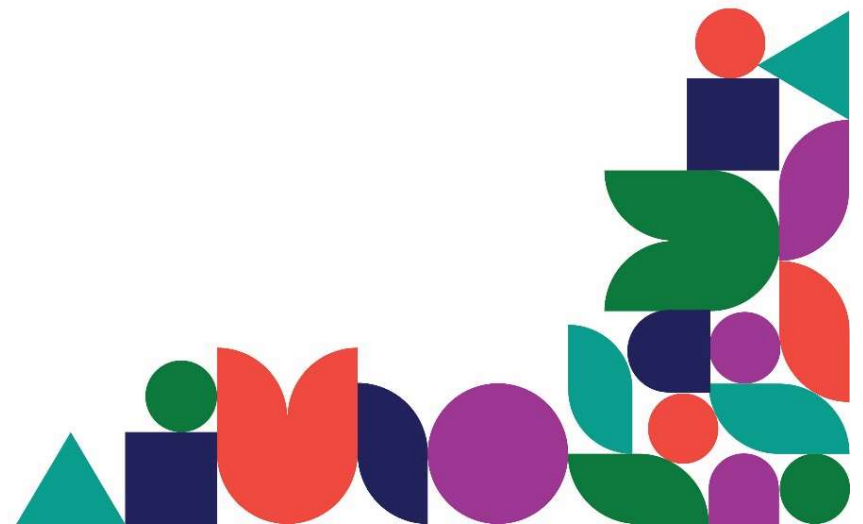


eXpense365 Training

2019/20



What is eXpense365?

- eXpense365 is a new app that the SU will be using to allow students to make reimbursement claims from their groups.
- It is an app that is calibrated for most smartphones, and can be found in your app store and downloaded.
- eXpense365 should streamline the process of making claims within the SU and save a lot of paper by eliminating the need for some of our finance forms.

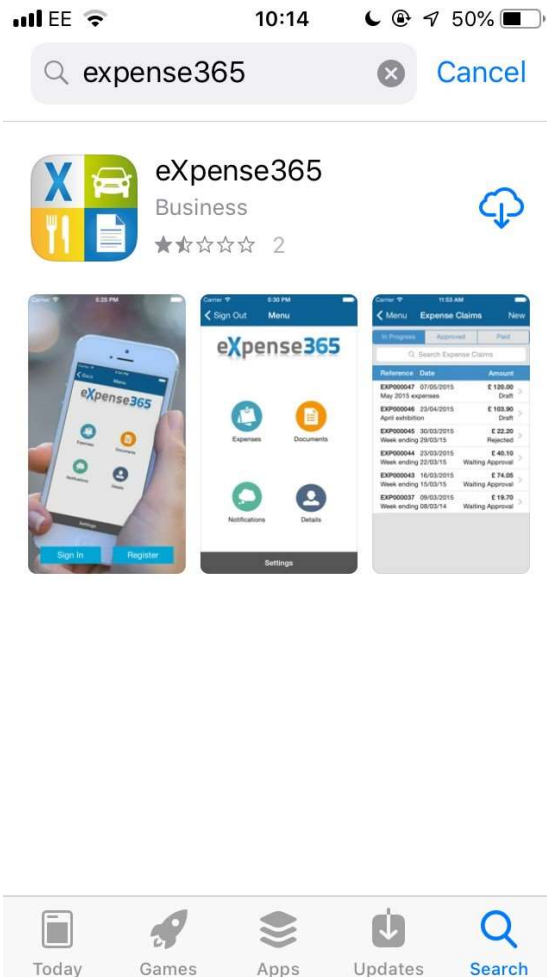


When would I use eXpense365?

- eXpense365 is going to replace the use of yellow forms for financial reimbursement claims, and green forms for mileage claims.
- This means that if you have made a purchase on behalf of your group it will now be much quicker and easier to claim your money back!



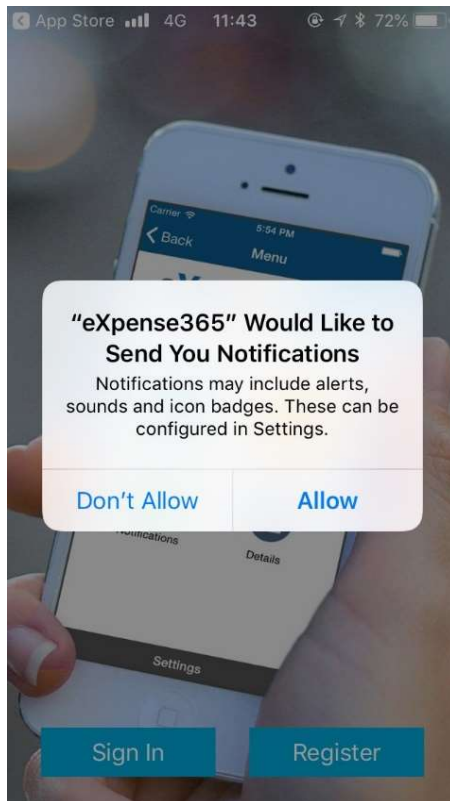
Downloading



- eXpense365 is available for Apple and Android, on the app store.
- Simply search for 'expense365', and you will be able to download it onto your device for free.



Push Notifications



- If you're an authoriser on the app (Chair or Treasurer of a group), then it's very important to have push notifications enabled on the eXpense365 app, so that you don't miss any claims that your members submit.



Registration

eXpense365

Email address
Forename
Surname
ESN (Optional)

Register



Version 1.4.2

Already registered? Tap here to sign in.

eXpense365

js999@bath.ac.uk
John
Smith
ESN (Optional)

Register

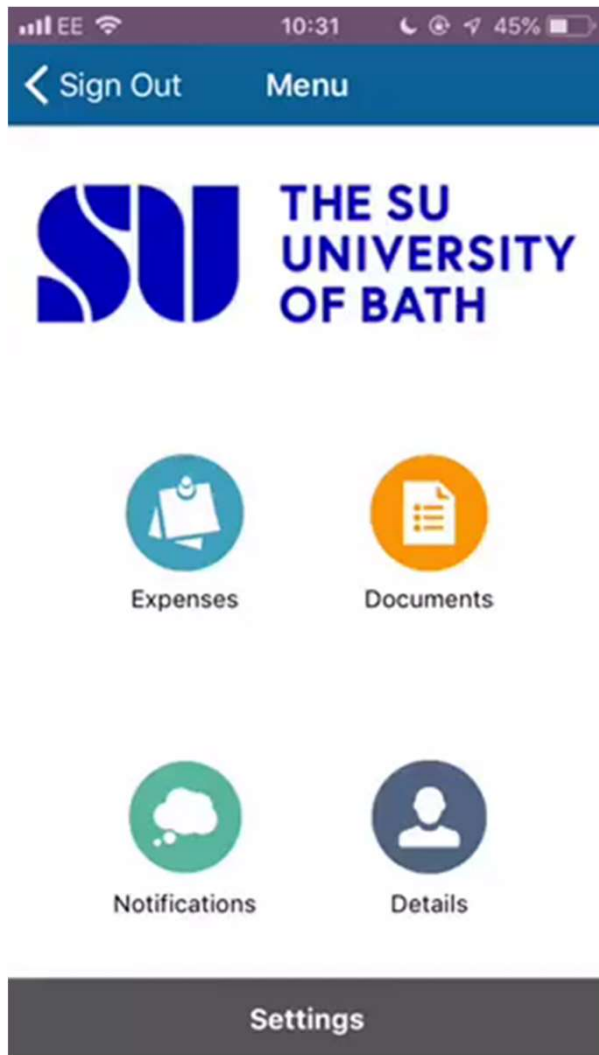


Version 1.4.2

Already registered? Tap here to sign in.

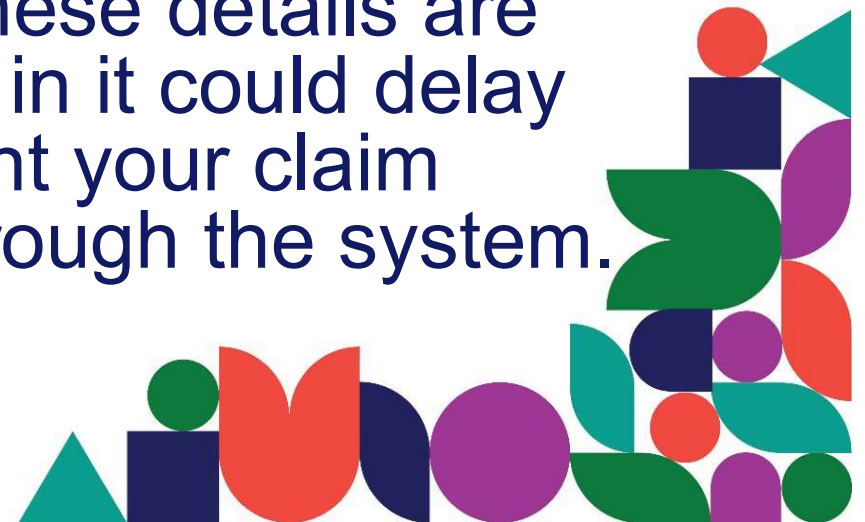
- You'll need to use your University email address to register and log in (and leave the ESN field blank).
- The app is linked to the SU systems, so by using your University email address it will know automatically which groups you are a member of, making it quick and easy to make any finance claims.





Entering Your Details

- It's really important to make sure that ALL of your details are entered in your app
- It is very secure, so there's no danger of your details being misused
- If all of these details are not filled in it could delay or prevent your claim going through the system.



Making a Claim

Close Expense Claim Save

Claim No. EXP

Internal No.

Student Group

Currency £ - Sterling

Date May 13, 2019

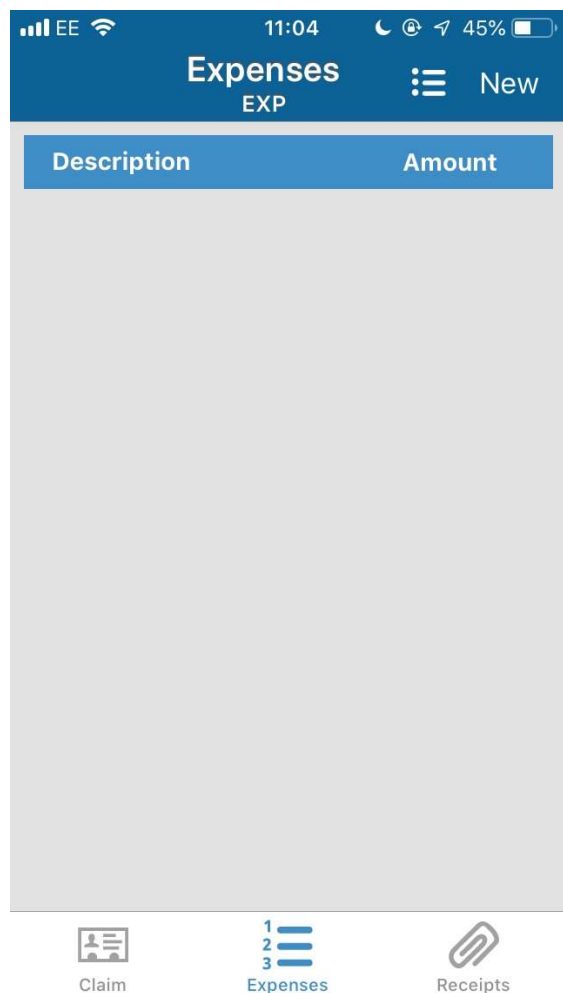
Reference

Claim Expenses Receipts

- If you are making claims to more than one group that you are a member of, you will need to do them separately.
- Select the group you want to claim from
- Leave the date as the day that you are making the claim
- Put a reference for the claim (e.g. 'decorations for social')



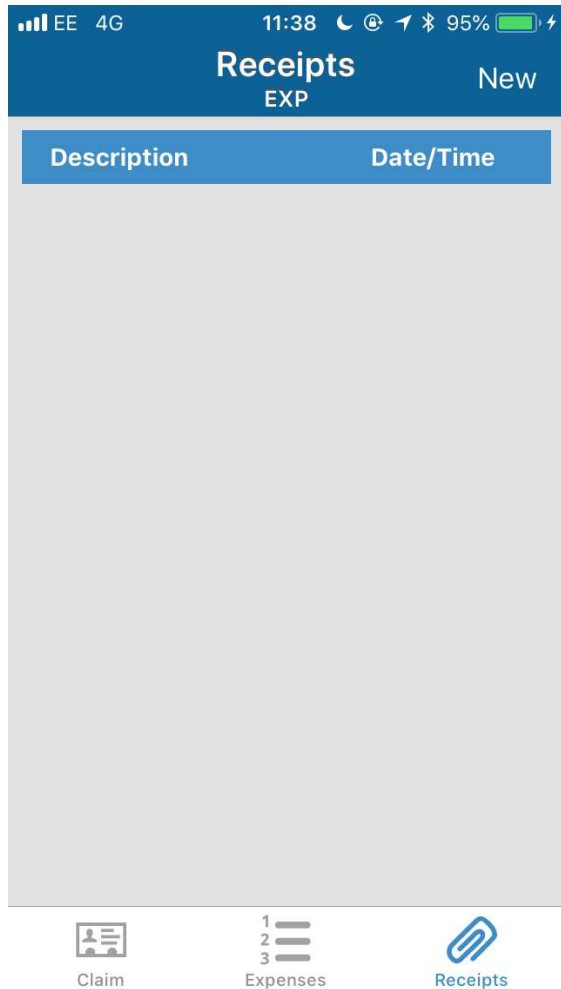
Making a Claim



- On this page you can add detail to your claim, and choose which expense code to charge it to.
- The different expense codes will be labelled, and you just need to choose the one that matches your purchase.



Making a Claim



- You will need to upload a receipt with your claim
- You can just snap a picture with your phone and upload it straight to the app!
- Make sure that the amount shown in the receipt matches the amount that you are claiming
- You can upload more than one receipt per claim, so it's best to combine your claims than do them all separately.





Expenses



Documents



Notifications



Details

Settings

Viewing Your Balance

- Click on 'Documents' on the Home Screen.
- Here you will be able to look at all transactions into and out of your group's account.
- The 'closing balance' at the bottom is the amount that is currently in your account.
- Please note that, just like paper ledgers, this balance **DOES NOT** include any budget that your group has.



eXpense365



Authorising

- If you are an authoriser, you will receive a notification when someone in your group submits a claim.
- You can either choose to approve the claim, or to deny it.
- If you approve the claim, it will go through to the next level of authorisation, and then to payment.
- If you deny the claim you can enter a reason why it was denied (e.g. 'no receipts attached') and the person who sent it in will have a chance to edit their claim and submit again.



Any Questions?

- If you have any questions about using the app to make a claim or view your balance please contact sufinance@bath.ac.uk, or pop up to the SU Finance Office (Level 3 Norwood House, open Mon-Fri 10-4) and we will be happy to help you with it!

