



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

[UIN]@tamus.edu

....

Sign In

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

Automatically export expenses to Concur OFF

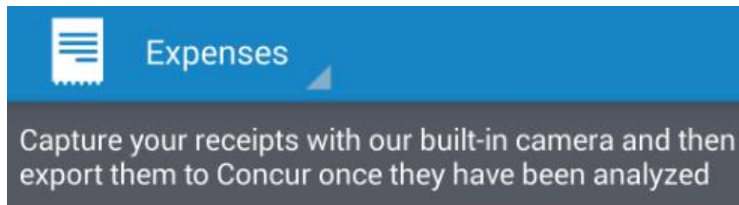
Email Notifications

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 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

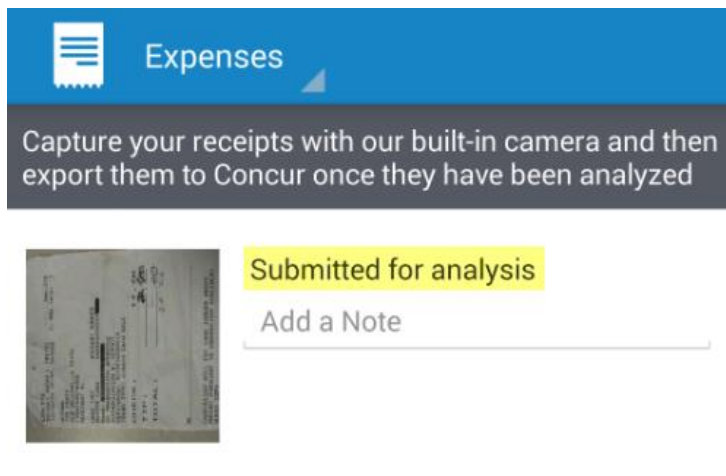


6. Capture the image of the receipt

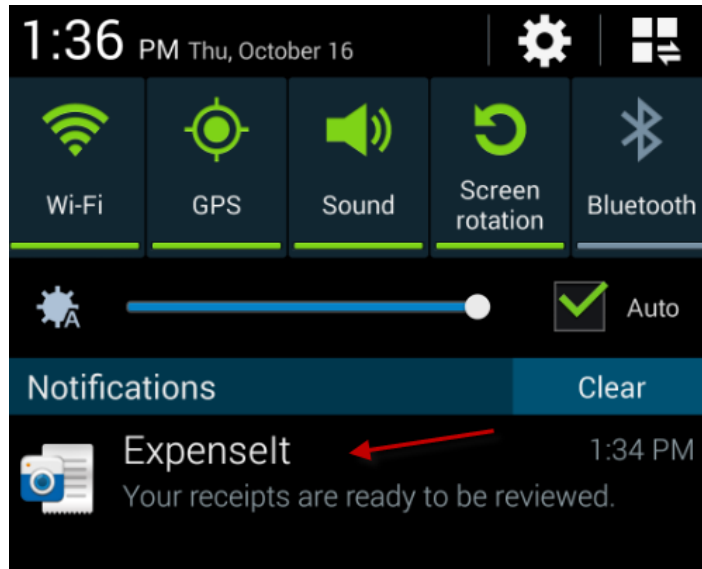


7. Save the image, or select discard to recapture the image

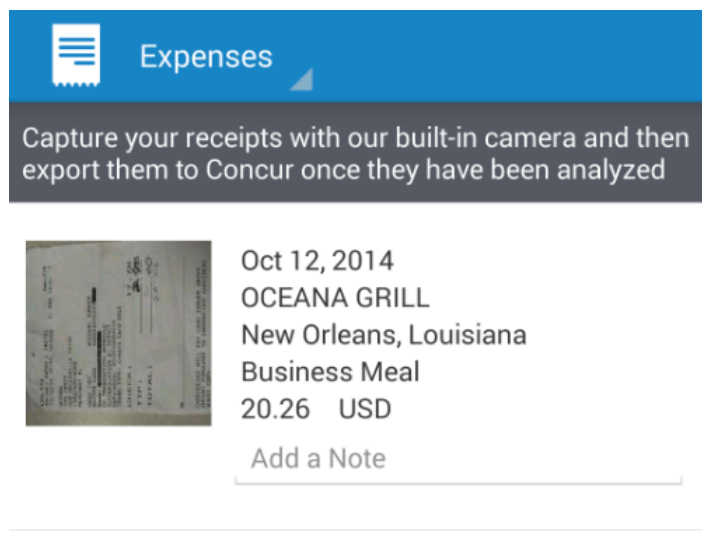
8. The image will now show as "submitted for analysis"



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
- 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.
- Tap on the expense information or image
 - Click on the edit button

Expense Detail

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

Edit Expense

Date
 Oct 12, 2014

Vendor Name
 OCEANA GRILL

Location
 New Orleans, Louisiana

Expense Type
 Business Meal

Amount
 20.26 USD

Add a Note

d. Correct the information

Select Expense Type

Search for Expense Type




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

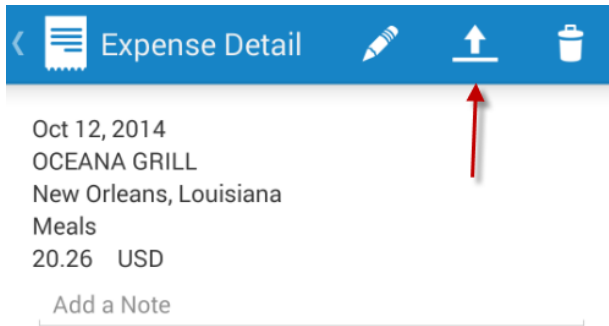
Expense Type
Meals

Amount
20.26 USD

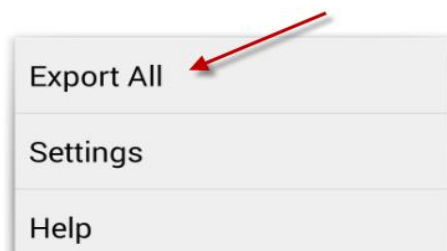
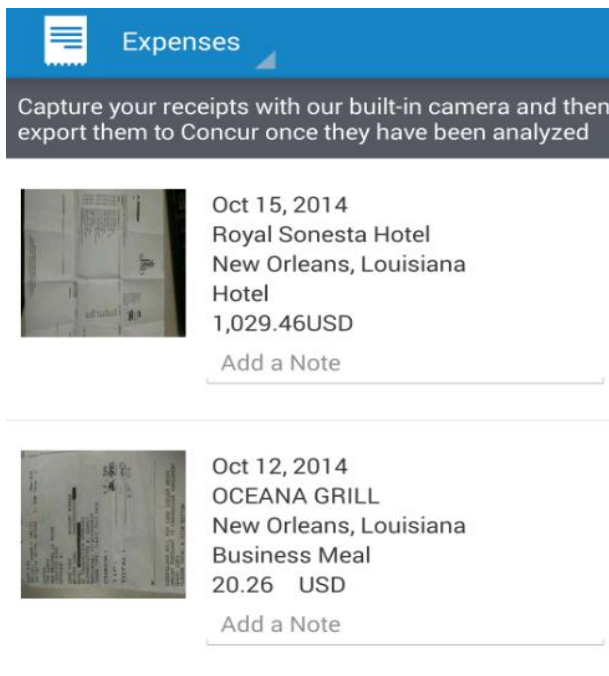
Add a Note

0/500

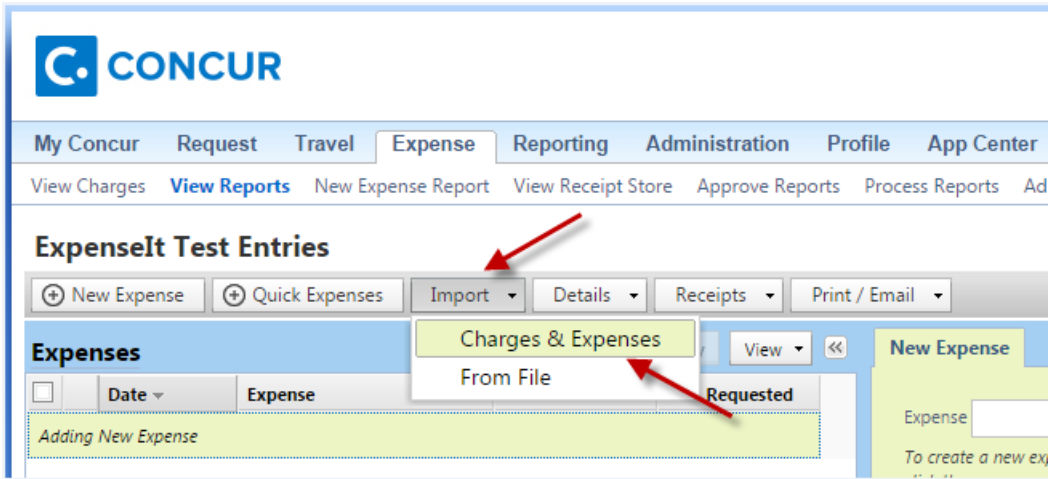
- 12. You may now export the expense to Concur
- 13. You may choose to export a single expense, or all expenses.
 - a. To export a single expense, tap the expense to open it
 - b. Tap the export icon




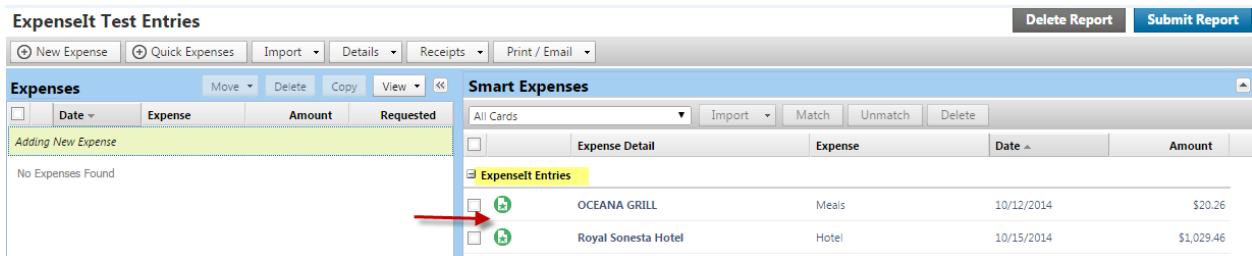
- c. To export all expenses that are ready for export access the application menu and select Export All



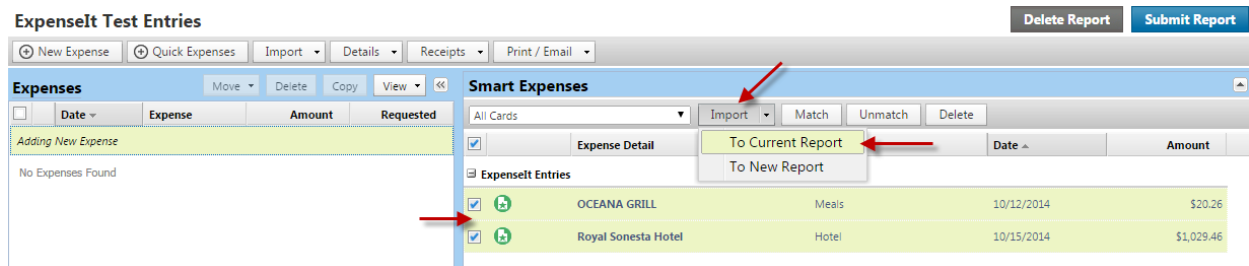
- 14. Once exported, the expense will show up in Concur in the same area where credit card charges show up for import onto a report.
- 15. When the University Travel Card is used Concur will automatically match the card charge to the expense once received so they can be added to the report automatically 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.

ExpenseIt Test Entries

<input type="button" value="New Expense"/> <input type="button" value="Quick Expenses"/> <input type="button" value="Import"/> <input type="button" value="Details"/> <input type="button" value="Receipts"/> <input type="button" value="Print / Email"/>										
Expenses										
<input type="checkbox"/>	Date	Expense	Amount	Requested						
Adding New Expense										
<input type="checkbox"/>	10/15/2014	Hotel Royal Sonesta Hotel, New Orleans, Louisiana	\$1,029.46	\$1,029.46						
<input type="checkbox"/>	10/12/2014	Hotel	\$289.00	\$289.00						
<input type="checkbox"/>	10/13/2014	Hotel	\$289.00	\$289.00						
<input type="checkbox"/>	10/14/2014	Hotel	\$289.00	\$289.00						
<input type="checkbox"/>	10/12/2014	Hotel Tax	\$26.01	\$26.01						
<input type="checkbox"/>	10/12/2014	Hotel Tax	\$5.06	\$5.06						
<input type="checkbox"/>	10/12/2014	Hotel Tax	\$11.56	\$11.56						
<input type="checkbox"/>	10/12/2014	Hotel Tax	\$2.00	\$2.00						
<input type="checkbox"/>	10/13/2014	Hotel Tax	\$26.01	\$26.01						
<input type="checkbox"/>	10/13/2014	Hotel Tax	\$5.06	\$5.06						
<input type="checkbox"/>	10/13/2014	Hotel Tax	\$11.56	\$11.56						
<input type="checkbox"/>	10/13/2014	Hotel Tax	\$2.00	\$2.00						
<input type="checkbox"/>	10/14/2014	Hotel Tax	\$5.06	\$5.06						
<input type="checkbox"/>	10/14/2014	Hotel Tax	\$11.56	\$11.56						
<input type="checkbox"/>	10/14/2014	Hotel Tax	\$2.00	\$2.00						
<input type="checkbox"/>	10/14/2014	Hotel Tax	\$26.01	\$26.01						
<input type="checkbox"/>	10/14/2014	Meals	\$28.57	\$28.57						
<input type="checkbox"/>	10/12/2014	Meals OCEANA GRILL, New Orleans, Louisiana	\$20.26	\$20.26						
<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="text-align: right;">OUTSTANDING ADVANCE</td> <td style="text-align: right;">TOTAL AMOUNT</td> <td style="text-align: right;">TOTAL REQUESTED</td> </tr> <tr> <td style="text-align: right;">\$0.00 ⓘ</td> <td style="text-align: right;">\$1,049.72</td> <td style="text-align: right;">\$1,049.72</td> </tr> </table>					OUTSTANDING ADVANCE	TOTAL AMOUNT	TOTAL REQUESTED	\$0.00 ⓘ	\$1,049.72	\$1,049.72
OUTSTANDING ADVANCE	TOTAL AMOUNT	TOTAL REQUESTED								
\$0.00 ⓘ	\$1,049.72	\$1,049.72								