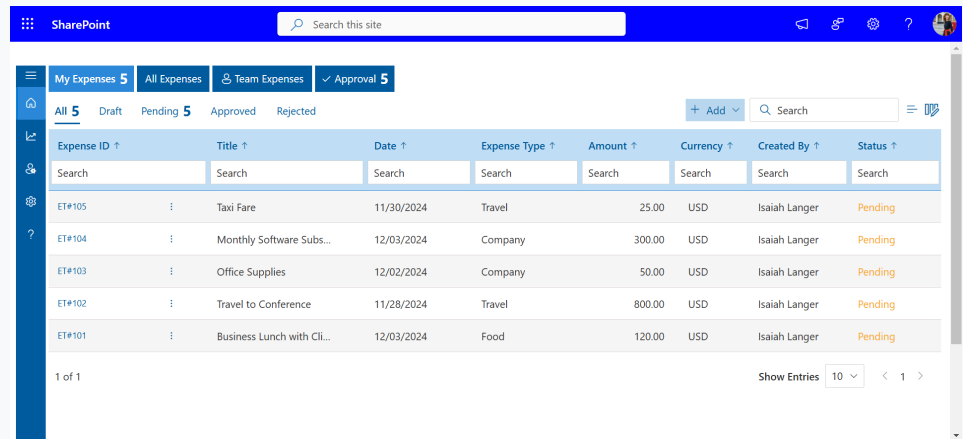


Expense tracker 365

Admin Guide

- Introduction
- Architecture Diagram
- Home Page**
- Report
- Administration
- Settings
- Help

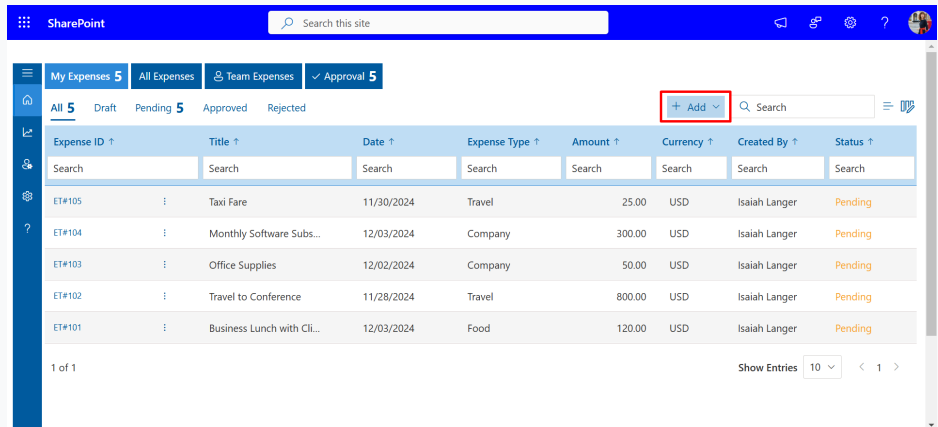
Home Page



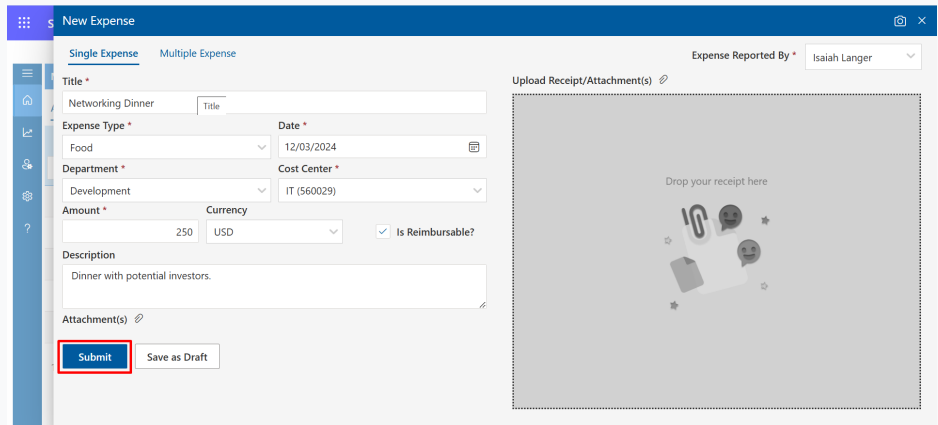
On the homepage, you can see four tabs: **My Expense**, **All Expenses**, **Team Expense**, and **Approval**.

My Expense: In the My Expense tab, you can view your expenses and add new ones by clicking on the Add button.

- Click on Add button to Add your expense.



- After clicking on the Add button in the My Expense tab, a new panel will open. Fill in the details and click on the Submit button to submit your expense.



If you upload a receipt or attachment, the file will immediately be displayed.

SharePoint Search this site

My Expenses 7 All Expenses Team Expenses Approval 7

All 7 Draft Pending 7 Approved Rejected + Add Search

Expense ID ↑	Title ↑	Date ↑	Expense Type ↑	Amount ↑	Currency ↑	Created By ↑	Status ↑
ET#107	Taxi Fare	12/03/2024	Travel	25.00	USD	Isaiah Langer	Pending
ET#106	Networking Dinner	12/03/2024	Food	250.00	USD	Isaiah Langer	Pending
ET#105	Taxi Fare	11/30/2024	Travel	25.00	USD	Isaiah Langer	Pending
ET#104	Monthly Software Subs...	12/03/2024	Company	300.00	USD	Isaiah Langer	Pending
ET#103	Office Supplies	12/02/2024	Company	50.00	USD	Isaiah Langer	Pending
ET#102	Travel to Conference	11/28/2024	Travel	800.00	USD	Isaiah Langer	Pending
ET#101	Business Lunch with CL...	12/03/2024	Food	120.00	USD	Isaiah Langer	Pending

- After clicking on the Add button in the Team Expense tab, a new panel will open. Fill in the details and click on the Submit button to submit your expense.

SharePoint New Expense

Single Expense Multiple Expense Expense Reported By * Isaiah Langer

Title * Networking Dinner

Expense Type * Food Date * 12/03/2024

Department * Development Cost Center * IT (560029)

Amount * 250 Currency USD Is Reimbursable?

Description Dinner with potential investors.

Attachment(s)

Submit Save as Draft

Upload Receipt/Attachment(s)

Drop your receipt here

Approval

In the Approval tab, there are three sub-tabs: Pending, Approved, and Rejected.

- In the Approved tab, all approved expenses are shown.

SharePoint Search this site

My Expenses 7 All Expenses Team Expenses Approval 7

All 7 Pending 5 Approved 2 Rejected + Add Search

Expense ID ↑	Title ↑	Expense Type ↑	Expense Date ↑	Amount ↑	Currency ↑	Status ↑
ET#107	Taxi Fare	Travel	12/03/2024	25.00	USD	Pending
ET#106	Networking Dinner	Food	12/03/2024	250.00	USD	Pending
ET#105	Taxi Fare	Travel	11/30/2024	25.00	USD	Pending
ET#104	Monthly Software Subscription	Company	12/03/2024	300.00	USD	Pending
ET#103	Office Supplies	Company	12/02/2024	50.00	USD	Pending
ET#102	Travel to Conference	Travel	11/28/2024	800.00	USD	Pending
ET#101	Business Lunch with Client	Food	12/03/2024	120.00	USD	Pending

- In the Pending tab, all pending expenses are shown.

SharePoint Search this site

My Expenses 7 All Expenses Team Expenses Approval 7

All 7 Pending 5 Approved 2 Rejected

Expense ID ↑	Title ↑	Expense Type ↑	Expense Date ↑	Amount ↑	Currency ↑
Search	Search	Search	Search	Search	Search
ET#105	Taxi Fare	Travel	11/30/2024	25.00	USD
ET#104	Monthly Software Subscription	Company	12/03/2024	300.00	USD
ET#103	Office Supplies	Company	12/02/2024	50.00	USD
ET#102	Travel to Conference	Travel	11/28/2024	800.00	USD
ET#101	Business Lunch with Client	Food	12/03/2024	120.00	USD

3. In the Approved tab, all Approved expenses are shown.

SharePoint Search this site

My Expenses 7 All Expenses Team Expenses Approval 7

All 7 Pending 2 Approved 2 Rejected

Expense ID ↑	Title ↑	Expense Type ↑	Expense Date ↑	Amount ↑	Currency ↑
Search	Search	Search	Search	Search	Search
ET#107	Taxi Fare	Travel	12/03/2024	25.00	USD
ET#106	Networking Dinner	Food	12/03/2024	250.00	USD

4. In the Rejected tab, all rejected expenses are shown.

SharePoint Search this site

My Expenses 7 All Expenses Team Expenses Approval 7

All 7 Pending 2 Approved 2 Rejected 3

Expense ID ↑	Title ↑	Expense Type ↑	Expense Date ↑	Amount ↑	Currency ↑
Search	Search	Search	Search	Search	Search
ET#105	Taxi Fare	Travel	11/30/2024	25.00	USD
ET#102	Travel to Conference	Travel	11/28/2024	800.00	USD
ET#101	Business Lunch with Client	Food	12/03/2024	120.00	USD

5. If the user has multiple expenses, downloading them one by one would take more time. To simplify this, a Download button is provided, allowing the user to download multiple expenses with a single click.

Multiple Expense Approve

Name: John Taylor (IT Head | IT 23/2102) | Manager: Joseph Weeks (Director | Manufacturing 23/3101)

Title: Multiple expenses | Start Date: 10/11/2024 | End Date: 10/11/2024

Department: IT | Cost Center: IT (560029) | Currency: USD | Project: Select Project

Date	Description	Expense Type	Amount	Attachment(s)	Is Reimbursed
10/11/2024	Travelling	Air Fair	299	Employee-E...	<input type="checkbox"/>
10/11/2024	Food	Food	102	download.p...	<input type="checkbox"/>

Total Expense: 401.00 USD

Comments: Please Enter Comments

