



JustExpense End User Guide





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Introduction

This guide will show how to use JustExpense on the mobile app as well as the Web version

Steps (Mobile)

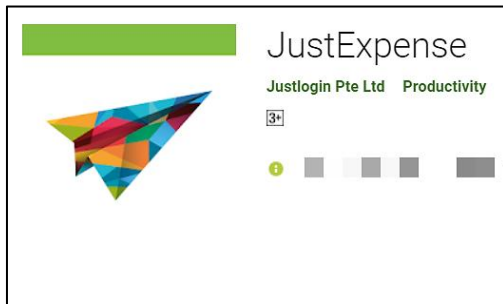
Download

Step 1: Download the JustExpense Mobile Application. Please refer to the images below:

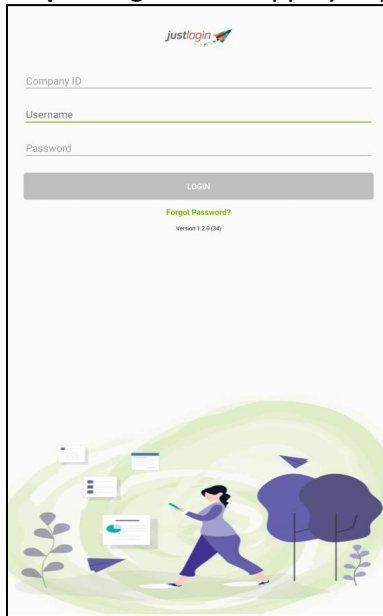
IOS JustExpense App



Android JustExpense App

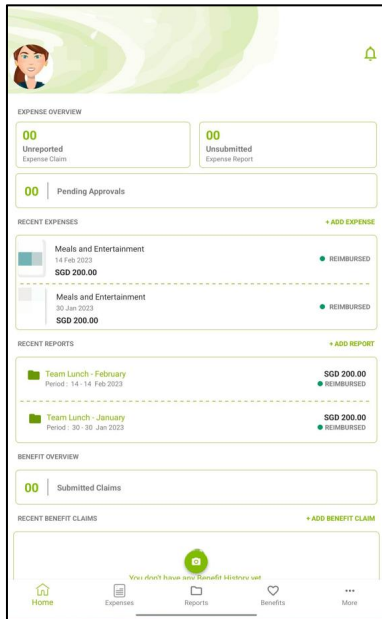


Step 2: Login to the app by keying in your Company ID, Username and Password





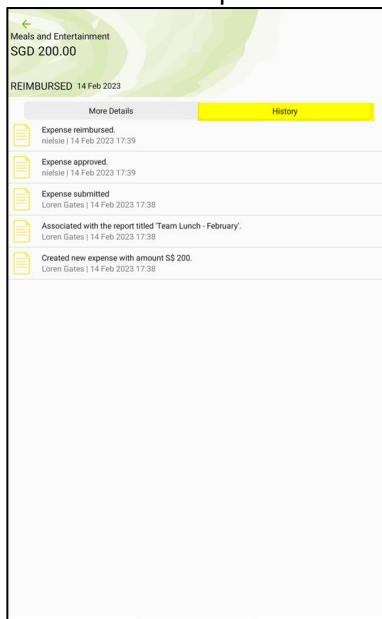
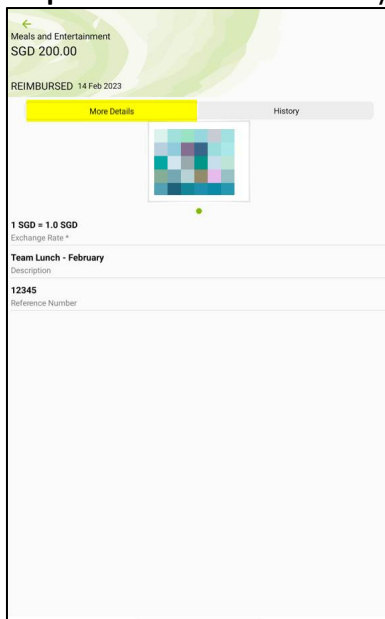
The Homepage: It will show a summary of reports and expenses that are either Unreported or Unsubmitted. Also the Recent Expenses and Reports.




Step 3: Click on one of the items on Recent expenses, for example,

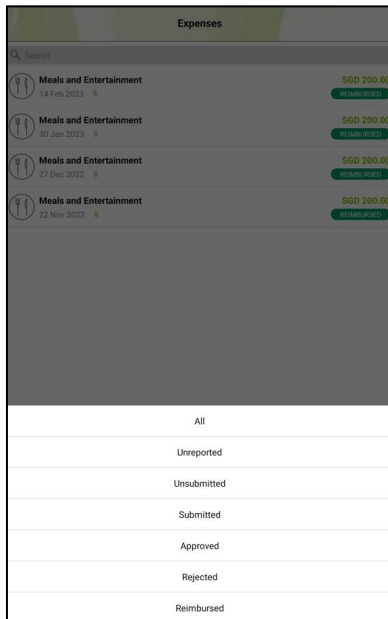


Step 4: You will see the history and details for this particular submission:





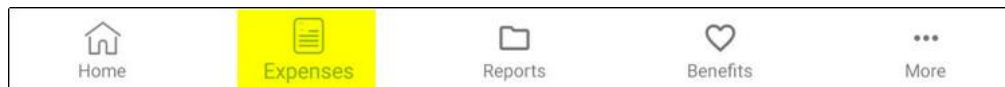
Step 5: If you will go to Expense menu, You can click on  to filter the information you want to view




To Prepare Expenses Record

Log in to the app


Step 1: Go to





Step 2: Click on the  icon and you will be brought to a page where you can input the expense details that you would like to submit.




Step 3: Click on  to show the list of available categories.

Step 4: Click on  and a calendar will show up for you to choose the date the expense was incurred.


Step 5: Input the amount in  field (negative value is not allowed)

Step 6: (Optional) Tap on  to view the different tax rates that you can choose from.

Step 7: Type in a brief description

on  the field.

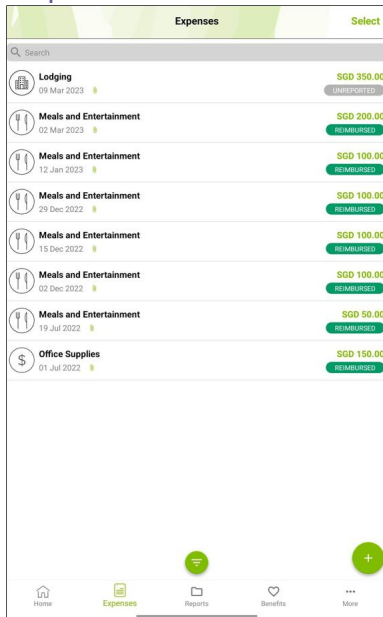
Step 8: Tap on  to add the expense to an existing report or to create a new report. You can also leave this blank at this point and add the expense to a specific report at a later time.

Step 9: Tap on  to choose from your device's photo gallery, or to take a photo of receipts or documents that you would like to attach to this submission.

NOTE: The mobile app can auto-scan the receipt and populate the amount into Expenses detail when the user takes a photo of a receipt

Step 10: Click  in the upper right corner of your screen.

Step 11: You should see the screen like the one below:



NOTE: If you have multiple Expense records, continue to create, and prepare expenses here.

The status of the expense you created is still “unreported”. This means that this hasn’t been added to a report and cannot be submitted for approval yet.

To Submit for Approval

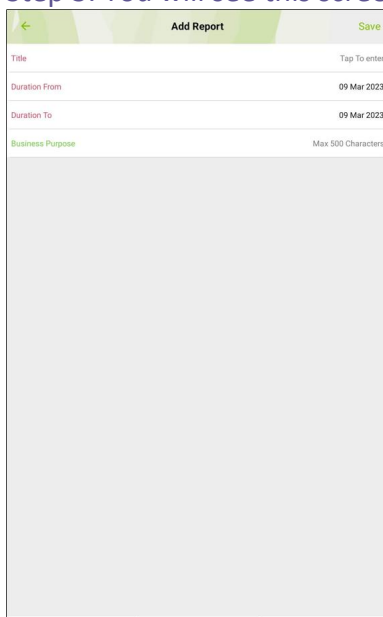


Step 1: Go to



Step 2: Click on the icon

Step 3: You will see this screen below:





Step 4: Type in the title of the report (e.g., local expense) in

the Tap To enter field

Step 5: Indicate the coverage period of the expense items to be included in this report in

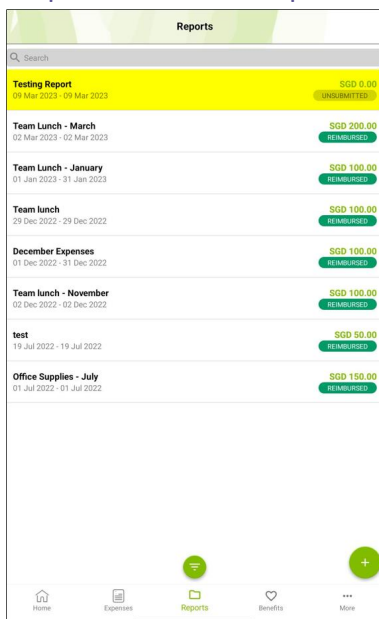
the 09 Mar 2023
 09 Mar 2023 fields.

Step 6: Max 500 Characters This field will appear depending on how your account is set up. You can input the purpose for this report into this field.



Step 7: Once done, click on

Step 8: Click on the report that was just created.





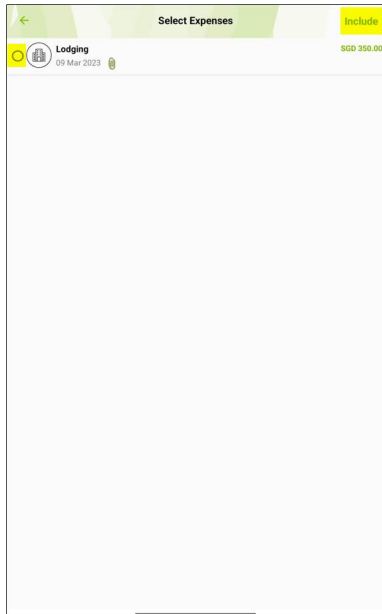
Step 9: Click on the name of the report.



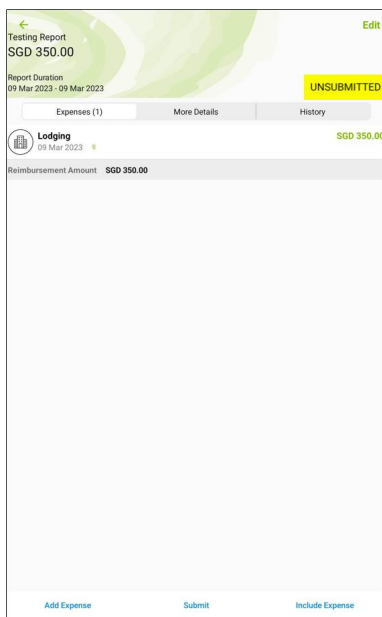
Step 10: Click on "Include Expense"



Step 11: The screen will show all the expenses created. You can choose the expenses you want to include in the report and click on "Include" in the upper right corner.

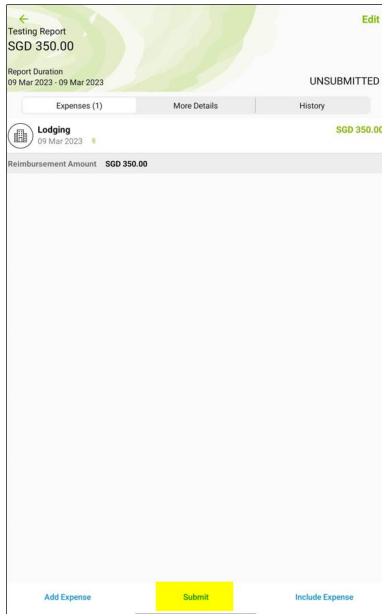


Step 12: This time, you will see the total amount of the expenses included in the report on this screen

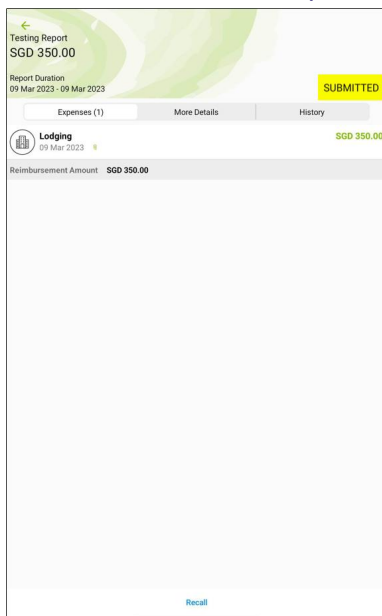


NOTE that the status is still "Unsubmitted"

Step 13: Click on the "Submit"



and the status will be updated to "Submitted"



NOTE: If in case after submission, you would like to modify any of the information you have

submitted, you can click on the  button at the bottom of the screen.

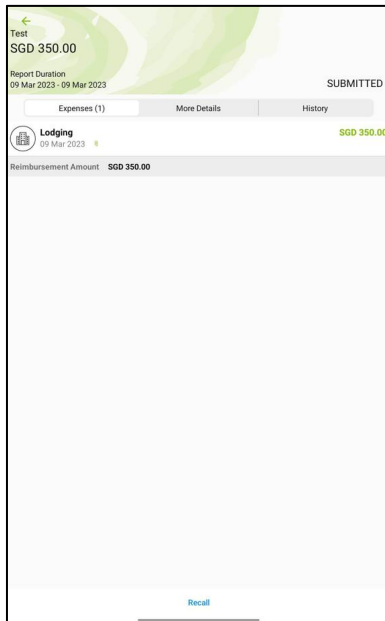
To Recall A Submitted Report

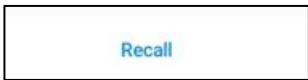
If in case there's a need to edit the report you have submitted, you will need to recall the submission

Step 1: From the home screen, click on Reports:

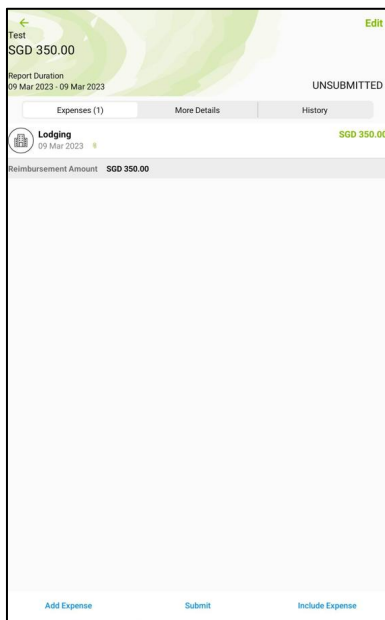


Step 2: Click on the report you want to recall:




Step 3: Click on  button at the bottom of the screen


Step 4: Once you click on the Recall button, the status of the submission will change to “Unsubmitted”



Step 5: Once the status changes to “Unsubmitted”, you can then edit the details of the Report by clicking on the report you need to edit.

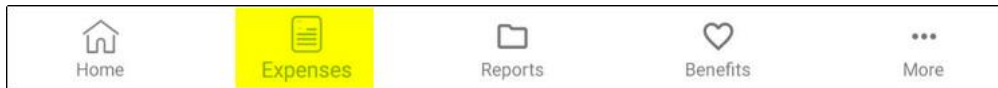
Step 6: Click on the  icon at the top. You will then be able to edit the Title, Duration Dates, as well as the Business Purpose of the report as necessary.




Step 7: Once done, click on  You can then follow the submission process to submit the report

NOTE: If you need to edit the Expenses included in the report, follow steps 1-4 in “To Recall a Submitted Report” and then continue here:


Step 5: Click on Expenses:



Step 6: You will see the list of Expenses that you have created. Click on the expense you need to modify and click on 

Step 7: After clicking on Edit, you will then be able to modify the details of the Expense like the Category, Date, Amount, Tax (Optional) and the Description.

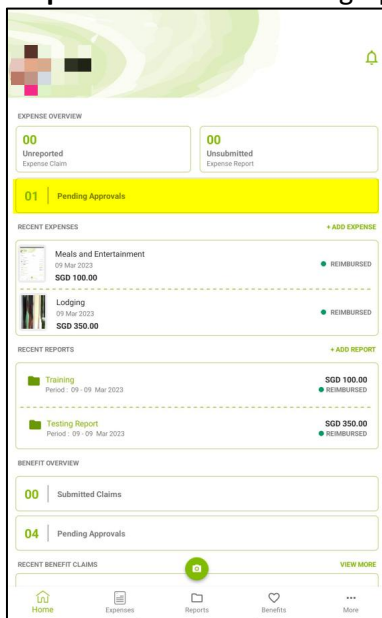


Step 8: Once done modifying, click on . You can then follow the steps on including the expense to a report for submission

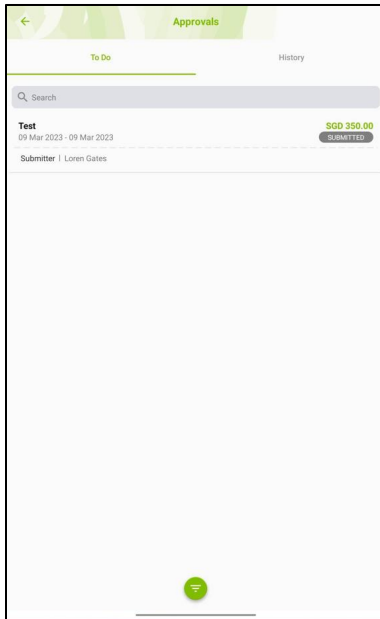
To Approve Submitted Reports

Step 1: Login to JustExpense Mobile App.

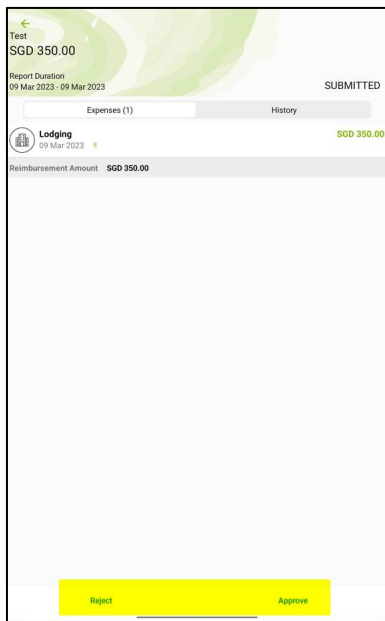
Step 2: Click on the Pending Approvals section from the home screen.



Step 3: You will see the page below. Click on the item that you need to approve.



Step 4: You will then be brought to a screen wherein you can either Approve or Reject the submission:



Steps (Web)

To Prepare Expenses Record

Step 1: Login to your account on the computer



Step 2: Click on

Claims

Step 3: Click on

Step 4: You will see the screen below.

**To add one/single expense record, you can complete the page as above image. Type in the



necessary information for the expense and then click on

Bulk Claims

** To add multiple expenses records, toggle to , you will then see the page below:

<input type="checkbox"/>	Category	Date	Merchant	Reference No.	Description	Location	Amount	Exchange Rate
<input type="checkbox"/>	Please select a value	2020-05-01	Enter merchant	Enter reference n	Enter description	Enter location	SGD Enter amount	1 SGD = 1.0
<input type="checkbox"/>	Please select a value	2020-05-04	Enter merchant	Enter reference n	Enter description	Enter location	SGD Enter amount	1 SGD = 1.0
<input type="checkbox"/>	Please select a value	2020-05-14	Enter merchant	Enter reference n	Enter description	Enter location	SGD Enter amount	1 SGD = 1.0
<input type="checkbox"/>	Please select a value	2020-05-07	Enter merchant	Enter reference n	Enter description	Enter location	SGD Enter amount	1 SGD = 1.0
<input type="checkbox"/>	Please select a value	2020-05-04	Enter merchant	Enter reference n	Enter description	Enter location	SGD Enter amount	1 SGD = 1.0

Type in the necessary information for each field. If you need to add more lines, click on

Add More

Save

If you want to save the information, click on

To Submit for Approval

Expense

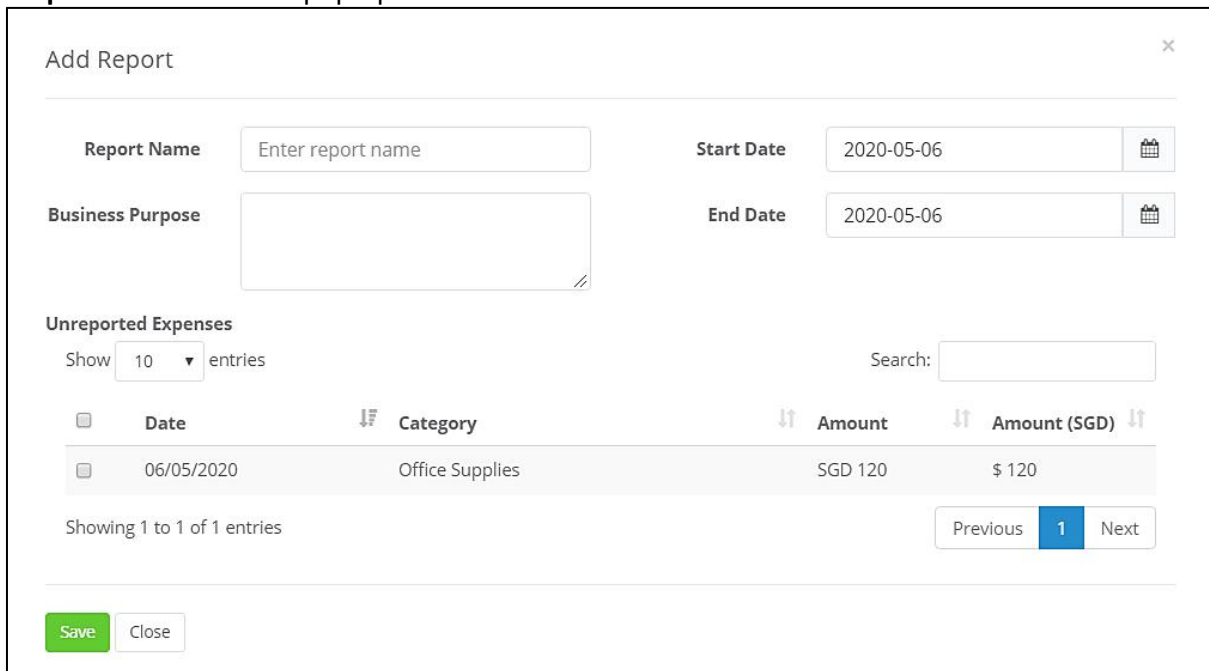
Step 1: Go to

Step 2: Go to 

Step 3: Click on 

Step 4: Click on 

Step 5: You will see the pop-up window below.



The screenshot shows a pop-up window titled "Add Report" with a close button in the top right corner. The form contains the following fields:

- Report Name:** A text input field with the placeholder "Enter report name".
- Business Purpose:** A large text area for entering the purpose of the report.
- Start Date:** A date picker field set to "2020-05-06".
- End Date:** A date picker field set to "2020-05-06".
- Unreported Expenses:** A section with a "Show 10 entries" dropdown and a search bar.
- Table:** A table with columns: Date, Category, Amount, and Amount (SGD). It displays one entry: 06/05/2020, Office Supplies, SGD 120, \$ 120.
- Navigation:** "Showing 1 to 1 of 1 entries" and "Previous 1 Next" buttons.
- Buttons:** "Save" and "Close" buttons at the bottom left.

Step 6: Input the 

Step 7: Indicate the date of coverage for the report on



The screenshot shows two date picker fields:

- Start Date:** 2020-05-06
- End Date:** 2020-05-06

Step 8: This field will appear depending on how your account is set up. You can input the purpose for this report into this field.



The screenshot shows a text area labeled "Business Purpose" for entering the purpose of the report.

Step 9: Next, put a tick on the expense/expenses you would like to include in the report:


Unreported Expenses

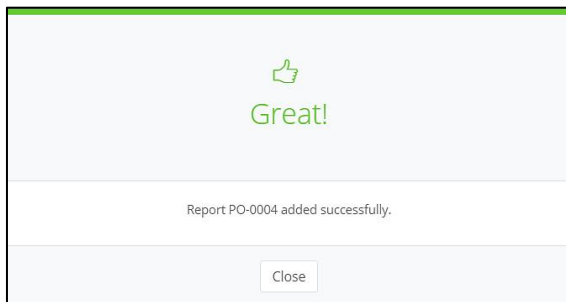
Show 10 entries Search:

	Date	Category	Amount	Amount (SGD)
<input type="checkbox"/>	06/05/2020	Office Supplies	SGD 120	\$ 120


Showing 1 to 1 of 1 entries Previous 1 Next

Save Close

Step 10: Click on  and you will see the notification that the report has been created successfully.



Step 11: The screen you will see next is similar to below. Notice that the status is still unsubmitted



Expenses **Reports** Approvals Reimbursements

History Add Report

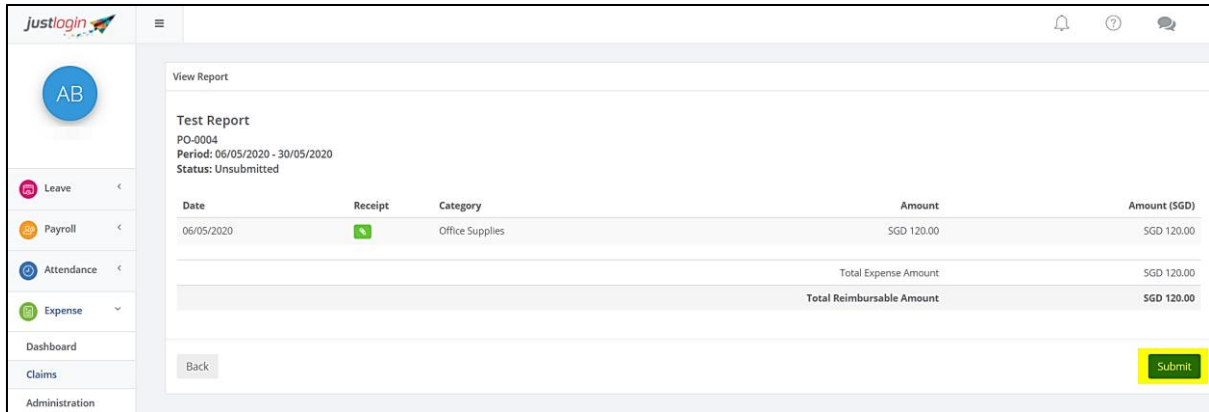
Show 10 entries Search:

Report No.	Report Name	Business Purpose	Start Date	End Date	Status	Date Incurred	Amount	Actions
PO-0004	Test Report		06/05/2020	30/05/2020	Unsubmitted	05/05/2020	SGD 120	✦ ✕
PO-0002	Local expense		05/05/2020	05/05/2020	Submitted	05/05/2020	SGD 350	✦
PO-0001	Cost incurred	traveling to clients	04/05/2020	04/05/2020	Reimbursed	04/05/2020	SGD 555	✦

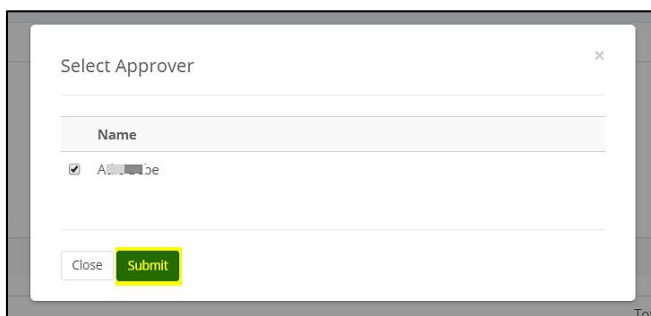
Showing 1 to 3 of 3 entries Previous 1 Next

Step 12: Click on the  icon adjacent to the report you just created.

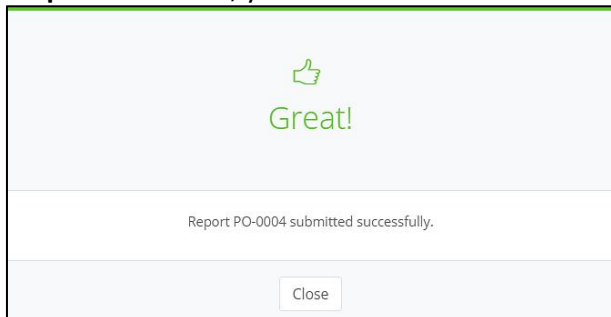
Step 13: You will be brought to the next page where you can submit the report:



Step 14: When you click on “Submit”, you will be asked to choose the approving officer, put a tick beside the name of the approving officer, click on submit.




Step 15: This time, you will receive a notification for a successful submission:



To Recall A Submitted Report


If in case there’s a need to edit the report you have submitted, you will need to recall the submission

Step 1: Go to 

Step 2: Click on  You will see the list of reports you have created.

Step 3: Click on the  icon adjacent to the report you want to modify.




Step 4: You will see the  button near the bottom of the page. Please click on it.

Step 5: Once you click on the recall button, you will notice that the submission status has changed to “Unsubmitted”.

****To modify the report details,** go back to Reports Tab>Look for the report you wish to modify



and then click on the . You will then be able to modify the details of the report, like the Report Name, Business Purpose, Start Date and End Date.




After making the necessary changes, click on . You can now submit as per steps given in submitting an Expense Report.

****To modify the expense details,** follow steps 1-5 on “To Recall a Submitted Report” and go back to Expenses Tab.



Click on



Look for the expense you wish to modify and click on the  icon. You will then be able to modify the details of the expense, like Category, Date, Reference Number, Description, Amount, Exchange Rate, Tax, etc.



After making the necessary changes, click on  You can then add the expense to a report for submission.

To Approve Submitted Reports



Step 1: Go to




Step 2: Go to



Step 3: Go to

Step 4: You will see the page below:

Report No.	Report Name	Business Purpose	Start Date	End Date	Status	Submitted On	Amount	Actions
PO-0004	Test Report		06/05/2020	30/05/2020	Submitted	06/05/2020	SGD 120	
PO-0002	Local expense		05/05/2020	05/05/2020	Submitted	05/05/2020	SGD 350	

Step 5: Click on the  icon to view the details of the report.

Step 6: Once you have gone through the details, you will be able to click on either Approve or Reject:

Date	Receipt	Category	Amount	Amount (SGD)
06/05/2020		Office Supplies	SGD 120.00	SGD 120.00
Total Expense Amount				SGD 120.00
Total Reimbursable Amount				SGD 120.00