

ExpensAble Mobile App



Let your smartphone simplify your expense management tasks!

- Snap photos of your receipts and upload them instantly
- The app enters the expense date and city for you
- Create and submit expense reports
- Approve others' expense reports from your phone
- Compatible with iPhone and Android

Install the Mobile App

Important. Before you install and log in to the mobile app, you must first log in and set your password on the ExpensAble website at www.insperity.com/signin. Refer to the other training materials or contact your administrator for instructions.

1. As stated above, first set your password on the ExpensAble website.
2. Then, in your phone's App Store, search for "**ExpensAble Corporate.**"
3. Install the app. Allow ExpensAble to use your current location.
4. Enter your login information.

Accessing the Menu

All of the available functions in the app can be accessed through the menu.

1. Tap the **Menu** symbol to access the full menu.
2. The menu will slide out on the left side of the screen.

Configure the Settings

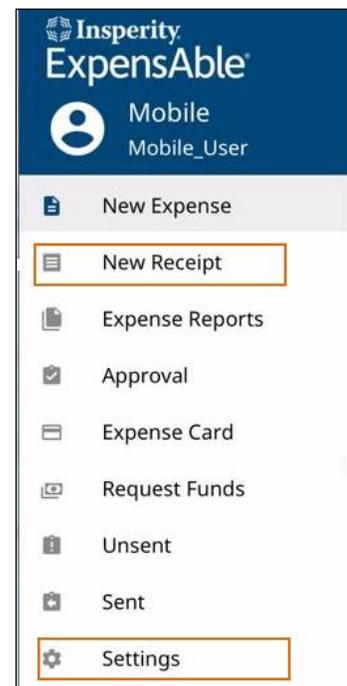
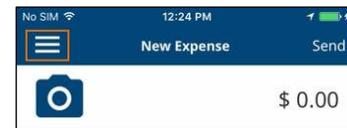
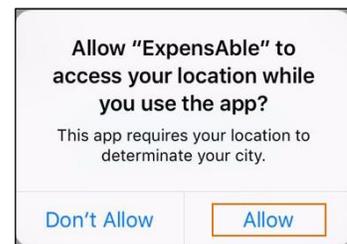
Most users will want to keep the default app settings. However, if you want to change any settings, follow these steps.

1. Tap the Menu link in the top bar.
2. Tap Settings.
 - **Login Info.** Used to update your password, if you ever change it on the website.
 - **Store receipt images.** Enable this to keep copies of your receipt photos in your phone's pictures gallery.
 - **Always include self.** Enable this so you don't ever need to add yourself to expenses involving guests.

To Capture Corporate Card Receipts

When you pay for an item using your credit card, you can take a photo of the receipt. There is no need to enter any other details in the app. You may want to write the names of guests or other details you will need to remember on the receipt to help you complete the entry later.

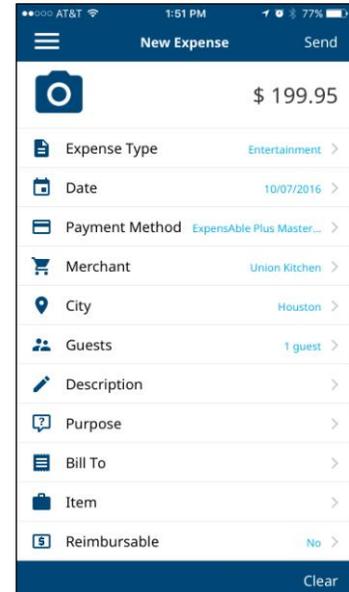
1. Tap the **New Receipt** icon in the menu.
2. Tap the large **camera** icon in the middle of the screen.
3. Take a photo or select one from the phone's gallery.
4. Click **Use Photo**.
5. Tap **Send**. The photo is automatically uploaded to the E-Bin on the ExpensAble website, where you can attach it to the associated expense from the credit card feed.



To Enter Reimbursable Expenses

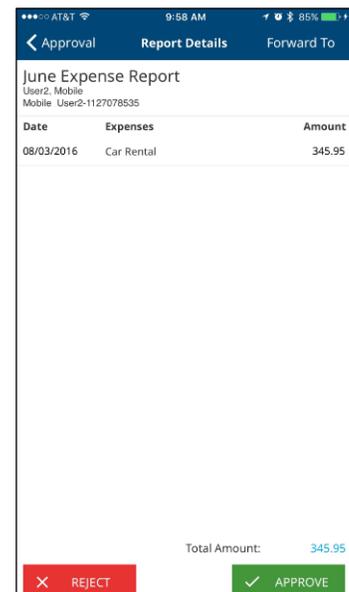
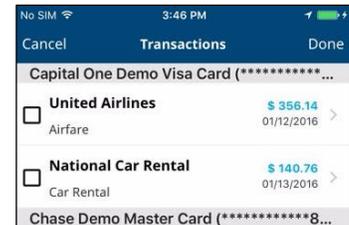
You can capture a photo and details of “out-of-pocket” (cash) expenses for reimbursement to you.

1. Click **New Expense** in the menu.
2. Take a photo of the receipt by clicking on the camera icon.
3. Enter the details of the transaction.
 - If you capture the information at the time of purchase, the date and city will be entered for you.
 - To add a new merchant, type the name in the *Search* field, tap the **Add** line, further edit the merchant’s name, and tap **Done**. It is saved in your app for future use.
 - To add a guest, begin typing the name in the *Guests* field. If there are no matches in the list, finish typing the name and add a semicolon (;). Alternatively, you may tap the + icon to search through your phone’s address book. Be sure to include yourself in the *Guests* list for each expense; this should happen automatically if you kept your default settings.
4. When all of the details for this expense are entered, tap **Send**. It is sent to the ExpensAble website, where you can add any additional details and submit the expense report.



Creating an Expense Report

1. Tap the **Expense Reports** icon in the menu.
2. Tap the plus sign in the top right corner to start a new report or choose an existing report from the list of Draft Reports by tapping the arrow on that report.
3. If a new report, complete the expense report details (report header) information.
4. Tap **Expenses** to add expense items.
5. Choose from New Expense, E-Bin, Credit Card or Unsent transactions.
6. To add credit card transactions, choose to view either Corporate Card or Personal Card transactions by tapping the list name on the bottom of the screen. Personal Card transactions must be previously imported in the online application to be available on the mobile app.
7. Check off the transactions you want to add to the report by tapping the check box next to the expense and tap **Done**. Transactions must have a valid expense type before they can be added to a report.
8. To add E-Bin transactions, check off the transactions you want to add to the report by tapping the check box next to the expense and tap **Done**.
9. To add receipts, view details of or edit expense items, tap the arrow on the item.
10. To add receipts to an expense item tap the camera icon and choose **From Device** to take a new image or use one from your camera roll or choose **E-Bin** to use an image previously sent via email or from the app.
11. When the expense report is complete, tap **Submit** to submit the report.
12. Policy enforcement will take place upon submitting the report. If you must or would like to make changes to comply with a policy, go back into the report and make the needed adjustments.



Approving Expense Reports

If you are a designated approver, you can approve others’ expense reports in the mobile app.

1. Tap the **Approval** icon in the menu bar.
2. Select the expense report from the list.
3. Review the receipt photos and any other details.
4. Tap **Approve** or **Reject**. The employee receives a notification.