

Expense Management

Custom Application built on Now Platform

Luca Morlupi – Advisory Solution Consultant

Name:

expense ma ✕



- Expense Management
- Start a Report**
- My Expense Reports
- My Expense Lines
- Required Approval
- Dashboard

☰ Expense Management ▼

My Expense Reports

	Expense type	Transaction Date	Amount	Report Status
▼ <u>Name: 20july2017 (2)</u>				
	<u>Transportation: Airfair</u>	12/07/2017	€124.00	● Approved
	<u>Transportation: Taxi</u>	12/07/2017	€35.00	● Approved
▶ <u>Name: FlightToMilan (2)</u>				

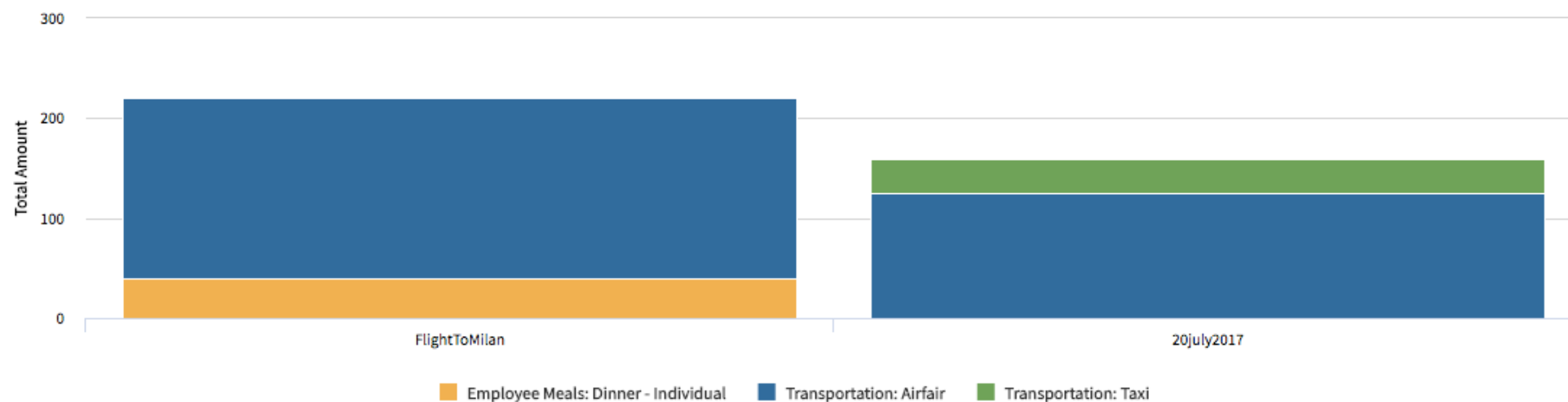
◀◀ ◀ 1 to 2 of 2 ▶ ▶▶


Expense Report Status



■ Waiting for Approval = €220.2873 (57.95%)
■ Approved = €159.3383 (42.05%)


My Expense Lines







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- Expense Management
- Start a Report 
- My Expense Reports
- My Expense Lines
- Required Approval
- Dashboard


 Expense Report
New record





* Name	<input type="text"/>	Number	EXP0001088
* Business Purpose	<input type="text"/>	Submitted by	<input type="text"/>
* Report Date	<input type="text"/> 	Manager	<input type="text"/>
Report Status	Not Submitted		
Total Amount	\$0.00		

Activities

Comment



expense ma 





Expense Management



Start a Report



My Expense Reports

My Expense Lines

Required Approval

Dashboard


 Expense Report
New record

* Name

MyNewReport

Number

EXP0001088

* Business Purpose

Travel and Business Meals

Submitted by

* Report Date

21/07/2017



Manager

Report Status

Not Submitted

Director

Total Amount

\$0.00

Activities



Comment



expense ma



Expense Management

Start a Report

My Expense Reports

My Expense Lines

Required Approval

Dashboard

< Expense Report
EXP0001088




Update Delete

* Name MyNewReport

Number EXP0001088

* Business Purpose Travel and Business Meals

Submitted by Joe Employee

* Report Date 21/07/2017

Manager Mara Rineheart

Report Status Not Submitted

Director Natasha Ingram

Total Amount €0.00

Activities

Comment

Update

Delete

Related Links

[Show Workflow](#)



Expense Lines

New

Go to

Expense type

Search



Expense Report = EXP0001088



Expense type


Transaction Date

Expense Description

Receipt Image

Amount

No records to display



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- Expense Management
- Start a Report
- My Expense Reports
- My Expense Lines
- Required Approval
- Dashboard


 Expense Line
New record

* Expense type -- None --

* Transaction Date 

* Amount €

* Payment Type Out of Pocket

Expense Description


Comment

Expense Report EXP0001088

Submitted by Joe Employee

Receipt Image [Click to add...](#)





expense ma 



- Expense Management
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- Dashboard


 Expense Line
New record







* Expense type	<div> <div>✓ -- None --</div> <div>Lodging: Dry Cleaning</div> <div>Lodging: Hotel</div> <div>Employee Meals: Breakfast - Individual</div> <div>Employee Meals: Business Meals (Employees Only)</div> <div>Employee Meals: Dinner - Individual</div> <div>Employee Meals: Lunch - Individual</div> <div>Customer Meals: Business Meals (with non-employees)</div> <div>Customer Meals: Entertainment</div> <div>Transportation: Airfair</div> <div>Transportation: Airfair Ticket Tax</div> <div>Transportation: Airline Fees</div> <div>Transportation: Car Rental</div> <div>Transportation: Parking & Tools</div> <div>Transportation: Personal Car Mileage</div> <div>Transportation: Personal Lift to Airport</div> <div>Transportation: Road or Rail Transport and Gas (non-taxi)</div> <div>Transportation: Taxi</div> <div>Communications: Cellular Phone</div> <div>Communications: Phone & Internet Expense (non-Cell)</div> </div>
* Transaction Date	
* Amount	
* Payment Type	
Expense Description	
Comment	

Expense Report	EXP0001088
Submitted by	Joe Employee
Receipt Image	Click to add...



expense ma
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Expense Management

Start a Report

My Expense Reports

My Expense Lines

Required Approval

Dashboard

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Expense Line
 Created 21/07/2017 18:17:00




Update
Delete

* Expense type

Transportation: Airfair

* Transaction Date

18/07/2017



* Amount

€

350.00

* Payment Type

Out of Pocket

Expense Description

Flight Rome-Milan-Rome

Comment

Expense Report

EXP0001088


Submitted by

Joe Employee

Receipt Image

Click to add...

Update
Delete



Attachments
New


Search








for text


▼

Search

✕


Attachments

		 File name	 Content type	 Size bytes	 Created	 Updated
No records to display						



expense ma

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Expense Management

Start a Report

My Expense Reports

My Expense Lines

Required Approval

Dashboard

< Expense Line
Created 21/07/2017 18:17:00

📎 ⋮ Update Delete

Manage Attachments (1): ticket1.jpg [rename][view]

* Expense type Transportation: Airfair

* Transaction Date 18/07/2017

* Amount € 350.00

* Payment Type Out of Pocket

Expense Description Flight Rome-Milan-Rome

Comment

Expense Report EXP0001088

Submitted by Joe Employee

Receipt Image [Update][Delete]

Ricevuta del biglietto elettronico

Modello dell'acconto
Si desidera stampare il contenuto di questa email e di presentarlo al check-in insieme al documento di identità.
In alternativa è sufficiente presentare al check-in il codice del biglietto e il documento di identità.

DATI CLIENTE		DETTAGLI DI PAGAMENTO		
PASSEGGERO/I COGNOME/NO Numero E-ticket 05526352004		Tariffa	444,00 EUR	
Codice di prenotazione: STD-04		Tasse e supplementi	214,99 EUR	
		Servizio di verifica	15,00 EUR	
		Prezzo totale	673,99 € /div= EUR	
ITINERARIO				
DA:	A:	PARTENZA:	ARRIVO:	VOLO:
Roma, Fiumicino	New York, Newark, NJ	17-Sep-2006 19:00	17-Sep-2006 13:10	AZ644
New York, JFK, NY	Roma, Fiumicino	20-Sep-2006 13:10	20-Sep-2006 06:10	AZ7615

Update

Delete

Attachments New Search for text Search

1 to 1 of 1

Attachments

	File name	Content type	Size bytes	Created	Updated
<input type="checkbox"/>	<u>ticket1.jpg</u>	image/jpeg	227469	21/07/2017 18:18:22	21/07/2017 18:18:22

Actions on selected rows...

1 to 1 of 1

You can attach multiple Receipt Images/Files

Age (years)	Percentage (%)
18	10
20	15
25	25
30	40
35	55
40	70
45	80
50	85
55	85
60	85
65	85

Delete

[Show Workflow](#)

ch

Expense Report = EXP0001088

≡ Amount

Ricevuta del biglietto elettronico

Riepilogo dell'acquisto

Suggeriamo di stampare il contenuto di questa e-mail e di presentarlo al check-in insieme al documento di identità.
In alternativa è sufficiente presentare al check-in il codice del biglietto e il documento di identità.

Amount is rolled up

 expense ma









Expense Management


Start a Report


My Expense Reports


My Expense Lines


Required Approval


Dashboard



 Expense Report
EXP0001088







Update

Submit Report

Delete


Update

Submit Report

Delete

Related Links

[Show Workflow](#)


 Expense Lines


New

Go to

Expense type ▾


Search







1

to 2 of 2










Sum **€385.00**

☐

Actions on selected rows... ▾

✕

Expense Management

Start a Report

My Expense Reports

My Expense Lines


Required Approval

Dashboard

<
☰
Expense Report
EXP0001088



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* Name	<input type="text" value="MyNewReport"/>	Number	<input type="text" value="EXP0001088"/>
* Business Purpose	<input type="text" value="Travel and Business Meals"/>	Submitted by	<input type="text" value="Joe Employee"/>
* Report Date	<input type="text" value="21/07/2017"/> 	Manager	<input type="text" value="Mara Rineheart"/>
Report Status	<input type="text" value="Not Submitted"/>	Director	<input type="text" value="Natasha Ingram"/>
Total Amount	<input type="text" value="€385.00"/>		

Activities

Comment

Related Links

[Show Workflow](#)

☰
Expense Lines

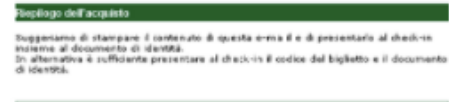
 Go to


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 to 2 of 2
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🔍
Expense Report = EXP0001088


⚙️ 🔍 ☰ Expense type	☰ Transaction Date	☰ Expense Description	☰ Receipt Image	☰ Amount
			<div>Ricevuta del biglietto elettronico</div> <div>  </div>	



expense ma 





- Expense Management
- Start a Report
- My Expense Reports
- My Expense Lines
- Required Approval
- Dashboard




 Expense Reports
 New
Number ▾
Search
Grid
Split

 All > Submitted by = Joe Employee

<input type="checkbox"/>		 Number	 Name	 Business Purpose	 Report Date ▾	 Report Status	 Submitted by	 Total Amount	 Updated
<input type="checkbox"/>		EXP0001088	MyNewReport	Travel and Business Meals	21/07/2017	● Waiting for Approval	 Joe Employee	€385.00	21/07/2017 18:27:29
<input type="checkbox"/>		EXP0001082	FlightToMilan	Meeting in Milan	21/07/2017	● Waiting for Approval	 Joe Employee	€220.00	21/07/2017 17:59:35
<input type="checkbox"/>		EXP0001069	20july2017	Meetings with Customers	20/07/2017	● Approved	 Joe Employee	€159.00	20/07/2017 17:07:25

expense ma
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Expense Management

Start a Report

My Expense Reports

My Expense Lines

Required Approval

Dashboard

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Expense Report
EXP0001088




Update
Delete
↑
↓

* Name	MyNewReport	Number	EXP0001088
* Business Purpose	Travel and Business Meals	Submitted by	Joe Employee
* Report Date	21/07/2017	Manager	Mara Rineheart
Report Status	Waiting for Approval	Director	Natasha Ingram
Total Amount	€385.00		

Activities ▼

Comment

Update
Delete

Related Links

[Show Workflow](#)

≡

Expense Lines

New
Go to

Expense type ▼

Search

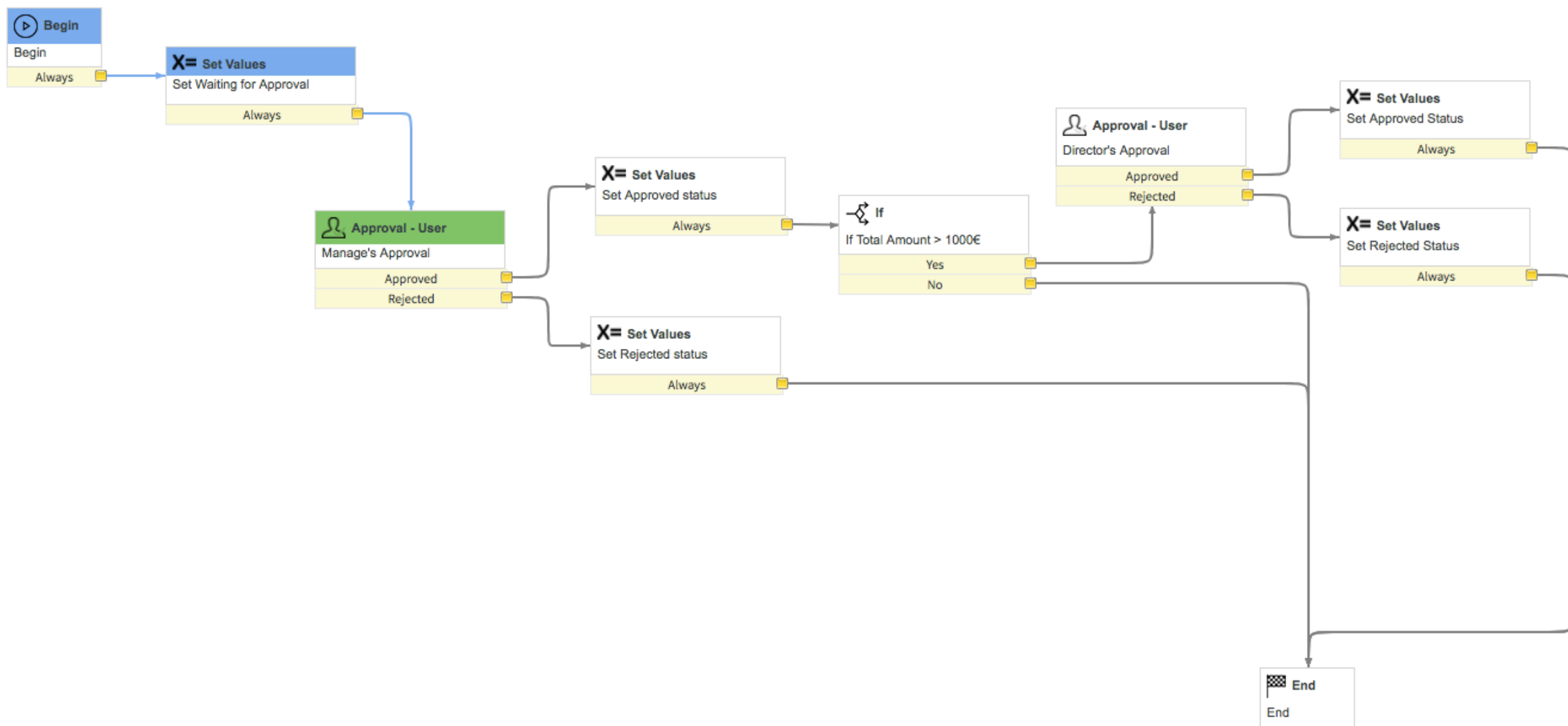
◀◀
◀

1

to 2 of 2
▶
▶▶
⌂


Expense Report = EXP0001088

	 	≡ Expense type	≡ Transaction Date	≡ Expense Description	≡ Receipt Image	≡ Amount
					<div style="background-color: #006d3c; color: white; padding: 5px; margin-bottom: 5px;">Ricevuta del biglietto elettronico</div> <div style="background-color: #006d3c; color: white; padding: 2px 5px; font-size: 0.8em;"> Suggeriamo di stampare il contenuto di questa email e di presentarlo al check-in insieme al documento di identità. In alternativa è sufficiente presentare al check-in il codice del biglietto e il documento di identità. </div>	



Mara is Joe's Manager

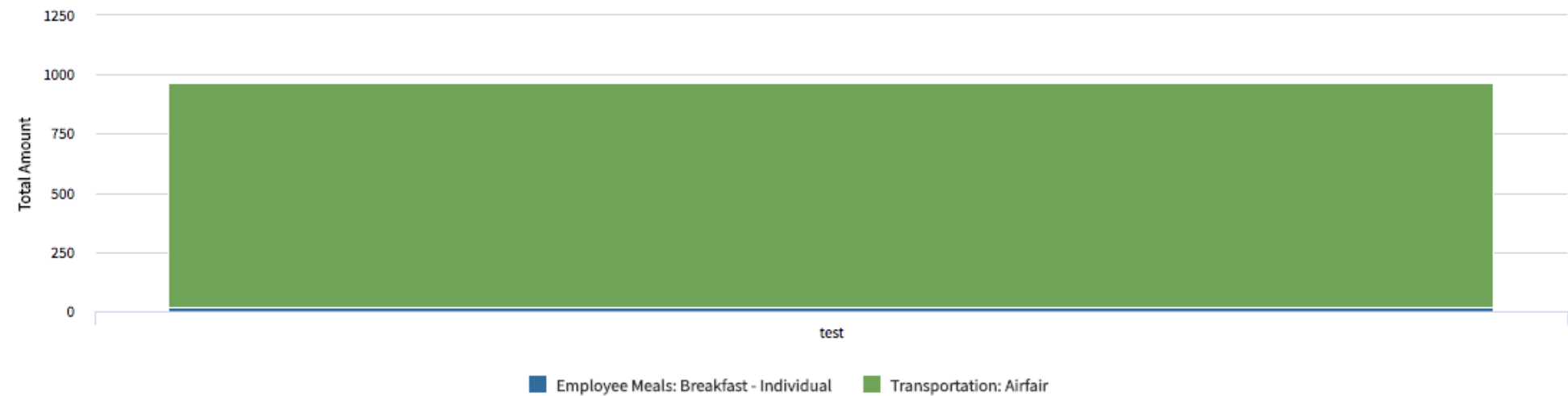
expense management









- Expense Management
- Start a Report
- My Expense Reports
- My Expense Lines
- Required Approval
- Dashboard
- My Expense Approvals

Expense Management

My Expense Lines



My Team's Expense Reports (only for Managers)

	Name	Business Purpose	Report Date	Report Status	Total Amount
Submitted by: Joe Employee (3)					
	 MyNewReport	Travel and Business Meals	21/07/2017	 Waiting for Approval	€385.00
	 FlightToMilan	Meeting in Milan	21/07/2017	 Waiting for Approval	€220.00
	 20july2017	Meetings with Customers	20/07/2017	 Approved	€159.00
Submitted by: Luca Morlupi (2)					
Submitted by: Mara Rineheart (1)					

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expense management

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- Expense Management
- Start a Report
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- My Expense Lines
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- Dashboard
- My Expense Approvals

☰

Approvals (My Expense Approvals)

State

Search

Grid

Split

🔄

📈

🔍

All > Approver is Mara Rineheart > State = Requested > Source table = x_snc_expensegmt_expense

☐

🔍

☰

State

☰

Approver

☰

Comments

☰

Approval for

☰




Created

☐

=requested

90d1921e5f510100a9ad2572f2b477fe

Search

<div>☐</div>	<div>📘</div> <div>●</div> <div>Requested</div>	<div>Mara Rineheart</div>	21/07/2017 18:27:29
<div>☐</div>	<div>📘</div> <div>●</div> <div>Requested</div>	<div>Mara Rineheart</div>	21/07/2017 17:52:42
<div>☐</div>	<div>📘</div> <div>●</div> <div>Requested</div>	<div>Mara Rineheart</div>	21/07/2017 15:59:56

Approver

Mara Rineheart

Approving

Expense Report: EXP0001088

📘

Comments

Comments

Post

Activity



Joe Employee

21/07/2017 18:27:29

Approver

Mara Rineheart

State

Requested

🔍

Update

Approve

Reject

Delete

Summary of Item being approved

Expense Report

*Name

MyNewReport

*Business Purpose

Travel and Business Meals

*Report Date

21/07/2017

Report Status

Waiting for Approval

Total Amount

€385.00

Number

EXP0001088

Submitted by

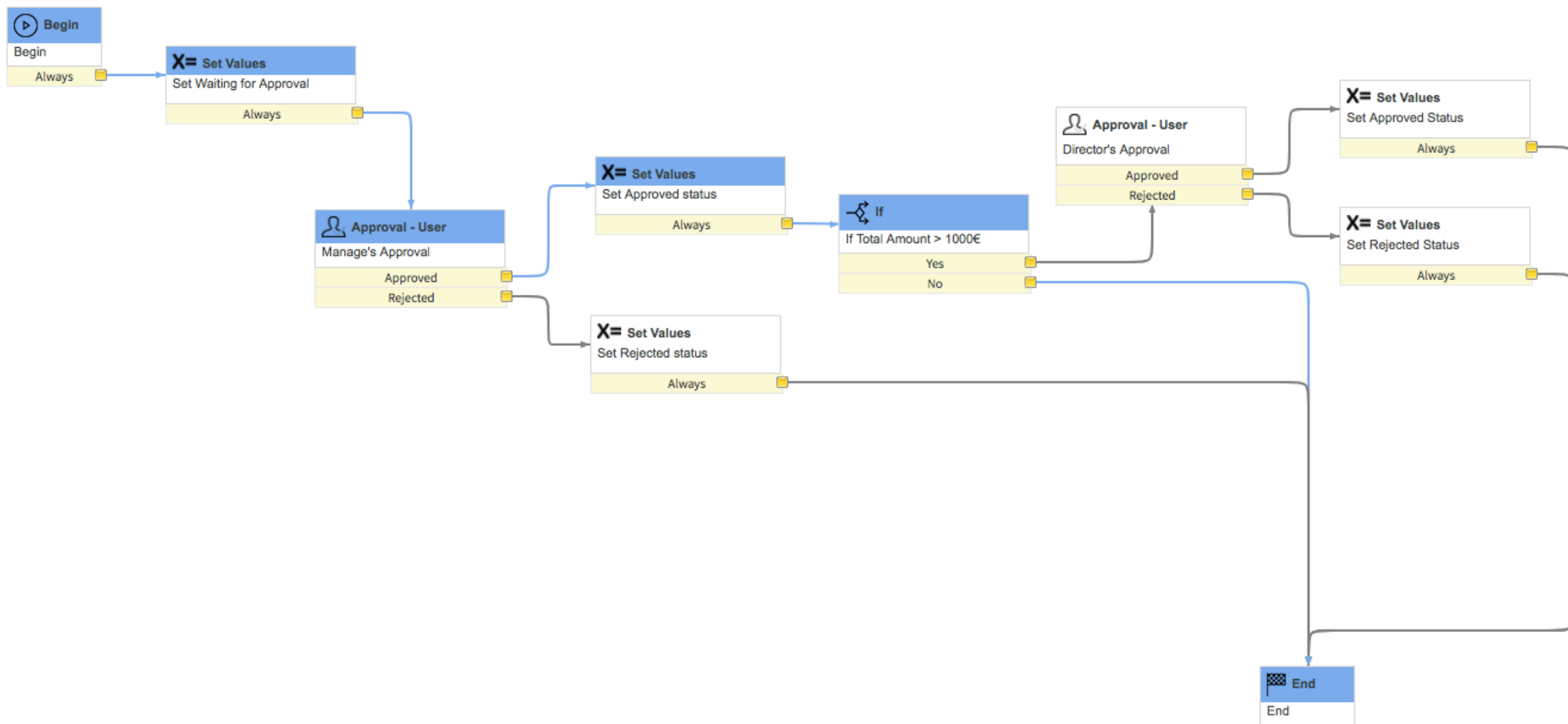
Joe Employee

Manager




Mara Rineheart

Director

Natasha Ingram



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Expense Management

Start a Report

My Expense Reports

My Expense Lines

Required Approval

Dashboard

<
☰
Expense Report
EXP0001088




Update
Delete
↑
↓

* Name	MyNewReport	Number	EXP0001088
* Business Purpose	Travel and Business Meals	Submitted by	Joe Employee
* Report Date	21/07/2017	Manager	Mara Rineheart
✓ Report Status	Approved	Director	Natasha Ingram
Total Amount	€385.00		

Activities

Comment

Update
Delete

Related Links

[Show Workflow](#)

☰
Expense Lines
New
Go to
Expense type ▾

⏪
⏩
1 to 2 of 2
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⏵
⌂

🔍 Expense Report = EXP0001088

⚙️ 🔍 ☰ Expense type	☰ Transaction Date	☰ Expense Description	☰ Receipt Image	☰ Amount
			<div>Ricevuta del biglietto elettronico</div> <div>  </div>	

☰ Expense Lines (My Expense Lines) New

Expense Report Name

Search

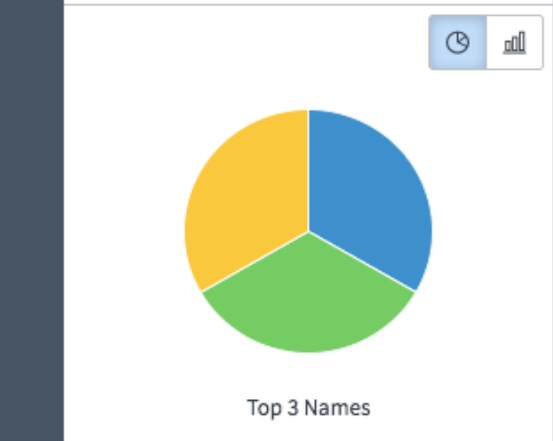
- Show All Show Selected
- ☒

All
- ☒

20july2017 2
- ☒

FlightToMilan 2
- ☒

MyNewReport 2

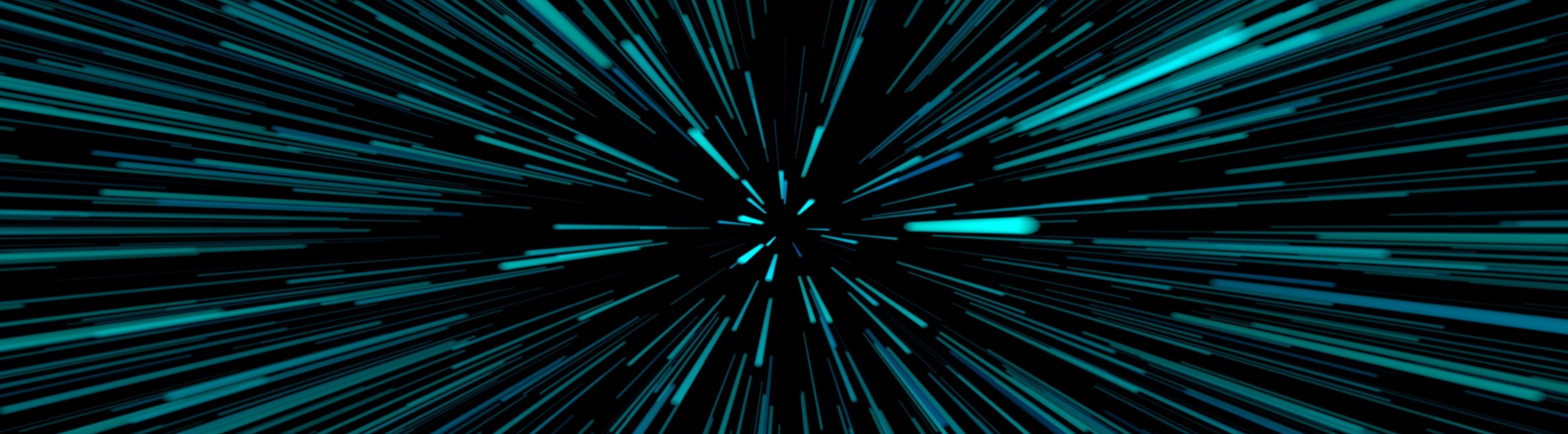


☰ All > Expense Report Submitted by is Joe Employee

<input type="checkbox"/>	<input type="checkbox"/>	☰ Expense Report Name	☰ Expense type	☰ Transaction Date	☰ Expense Description	☰ Payment Type	☰ Amount
20july2017 (1 - 2 of 2)							
<input type="checkbox"/>	<input type="checkbox"/>	20july2017	Transportation: Airfair	12/07/2017	Flight RM-MI-RM	Out of Pocket	€124.00
<input type="checkbox"/>	<input type="checkbox"/>	20july2017	Transportation: Taxi	12/07/2017	Taxi	Out of Pocket	€35.00
FlightToMilan (1 - 2 of 2)							
<input type="checkbox"/>	<input type="checkbox"/>	FlightToMilan	Employee Meals: Dinner - Individual	20/07/2017	Dinner	Out of Pocket	€40.00
<input type="checkbox"/>	<input type="checkbox"/>	FlightToMilan	Transportation: Airfair	20/07/2017	Flight RM-MI-RM	Out of Pocket	€180.00
MyNewReport (1 - 2 of 2)							
<input type="checkbox"/>	<input type="checkbox"/>	MyNewReport	Transportation: Airfair	18/07/2017	Flight Rome-Milan-Rome	Out of Pocket	€350.00
<input type="checkbox"/>	<input type="checkbox"/>	MyNewReport	Transportation: Taxi	21/07/2017	Taxt	Out of Pocket	€35.00

Total

€764.6645



Thank You!