

# 2022

## SutiExpense User Guide for Mobile Devices



Version 9.8 SutiSoft, Inc.



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## **Table of Contents**

Table of Contents
I. Intended Audience4
II. Typographic Conventions4
III. About the Mobile Application4
1. Installing SutiExpense Application5
2. Login5
3. Sync Data6
4. Create an Expense Report7
5. Attach Receipts to Reports/Line Items8
6. Add Line Items11
6.1. Mileage Tracking13
6.2. Update Line Item Details15
6.3. Delete a Line Item16
7. Voice-activated Expense Reporting17
8. Assign Codes
8.1. Edit Codes19
9. Import Corporate Card Transactions20
10. Attach Receipts22
11. Drafts24
12. View Expense Report Status25
12.1. Recall an Expense Report25
12.2. Move Rejected Reports to Drafts27
13. Expense Report Approval29





#### I. Intended Audience

This guide is intended for the users who use Android or iOS mobile devices to access the SutiExpense native mobile application.

#### **II. Typographic Conventions**

Type Style	lcons	Description
Bold Text		Identifies page titles and button.
Note	3	Notes provide extra information about the topic.
	ex	SutiExpense launcher icon
	0	Identifies tips in the application.
	(	Indicates an expense
	+	To add line items
	<b>*</b> *	To add project codes

#### **III. About the Mobile Application**

SutiExpense native mobile application speeds approvals, eliminates errors and enables the proper allocation, analysis and management of every expense.

Expense automation is the best practice that can help companies:

- Reduce out-of-policy expenses
- Reduce reimbursement cycle times
- Reduce the cost of every expense report transaction

Immediate expense reductions can also improve visibility and compliance, thereby cutting down the extended costs of expenses.

With SutiExpense native mobile application, it's easy to automate the entire expense reimbursement process. The mobile app (with intuitive interface) allows employees to generate and submit reports anytime and anywhere.

**Note:**To use SutiExpense mobile app, you should have Internet/Wi-Fi connected to your mobile device.





## 1. Installing SutiExpense Application

To install the SutiExpense mobile application, simply type 'SutiExpense' in your iPhone or Android App Store. Install the application on your mobile device. After installing the application, you will find the SutiExpense launcher icon on your mobile's home screen. Tap on the icon to access the SutiExpense mobile application on your mobile.

## 2. Login

- 1. Tap 🌱 on your mobile home screen.
- 2. The SutiExpense login screen appears.

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		Forgot Password
	Login	Contraction of the second
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- 3. Enter your username and password that you use to access the SutiExpense web application from your computer.
- 4. Tap Login.





#### 3. Sync Data

You can sync data in your mobile application. To sync, follow the instructions below:

- 1. On your SutiExpense dashboard, tap Settings.
- 2. The **Settings** screen appears.
- 3. Tap **Sync**.

About > Delegate User Approver Signature OCR Sync
egate User Approver Signature OCR
If V OCR OCR Sync
ocR Sync
Sync
0.000
Contact Us
ct Us >

#### Android

iPhone

4. The application will sync the data from your SutiExpense web application account and displays the updated data.





#### 4. Create an Expense Report

To create a new expense report using the mobile app, follow the instructions below:

1. On the SutiExpense dashboard, tap **New Report**.

<b>≡-</b> ÇîutiSoft	Admin Web 🗸
Dashboard	AskSuti Camera
Camera	
+ New Expense Repor	t
Drafts	
Reports Pending Ap	proval
My Receipts	
Time Expense	
Submitted Reports	
S My Card Transaction	ns
र्ट्रे Settings	
© 2022 SutiSoft, Inc. All Rig	ghts Reserved - v9.8.1
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- 2. A Create New Report screen appears.
- 3. Fill in the required details.
- 4. On the navigation bar, tap **Save**. The report will be saved and displays line item icons using which you can categorize your report.





		7:33		**
Create New Report	Save	=	Create New Report	聞Sav
Report Name	1	Benort N	ame	
Trip to New York		Trip to M	Jew York	
уре		Type		
Expense		Expense	2	
enuest		From Da	te	
Select		Jun 23,	2022	•
		To Date		
rom Date	(2)	Jun 23,	2022	
Jun 23, 2022	*	Descript	ion	
o Date				
Jun 23, 2022	. <b>H</b>	4		
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and a world.		Project Co	de	
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## **5. Attach Receipts to Reports/Line Items**

Users can attach receipts to the expense report/line item in one shot without much navigation.

1. Tap on the Camera icon on the dashboard.





Dashboard	AskSuti Came
Camera	
+ New Expense Repo	ort
Drafts	
Reports Pending A	pproval
My Receipts	
Time Expense	
Submitted Reports	(
My Card Transactio	ons
ঠিটু Settings	

2. On capturing the receipt, the OCR will auto-populate the receipt details in the expense report.





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3. Click **Save** to save the receipt details in the expense report.





#### 6. Add Line Items

- 1. Open an expense report to which you want to add line items.
- 2. On the navigation bar, tap the plus icon +.



3. Choose an expense category line item you want to add to the report and tap on it.

ŧ	Expense Items(19)		
N	S Laundry	2	
NC	🕝 Gas	2	
E	Miscellaneous	2 0	
N	Other Tax samples samplessam	nples 🐊	
	Parking	2 8	3
	Postage	2	3
	Telephone	2	0
	CashAdvance	>	
	Credit	2	
	O Entertainment	Σ	
	Food	×	
	O Hotel	Σ	
	( Internet	2	
	Mileage	2	

4. Enter the line item details; you can attach a receipt by tapping the receipt icon 🖳



Back to TOC



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← Par	king	Save
Line Item	Details	
<b>()</b>	37 <b>A</b> 5-117	6
Expense Ty; Parking	e *	
Merchant * Timothy		
Payment Me Cash	thod *	
Date* May 30, 2	2022	
Amount * \$242.00		
	Tax Det	ails
Tax Name Select	Tax Amoun \$0.00	t
		EDIT CODES
-	0	4

- 5. Click on the cross icon to detach receipt from the line item.
- 6. On the navigation bar, click 🔚 icon to save the line item details.
- 7. The expense summary screen appears displaying the line item you have added.







8. You can add more line items by tapping the plus icon  $\pm$  icon on the navigation bar.

#### 7. Mileage Tracking

Users can track the number of miles traveled while on a business trip using GPS.

To track the number of miles, follow the instructions below:

- 1. In the mileage line item screen, enable the GPS button to capture the point-topoint path that employee travels.
- 2. A map image will appear wherein you have to click on **Start** button to start tracking the location.







- 3. Once your trip is done, click on the Stop button.
- 4. The map automatically gets attached to the mileage line item. Details such as **Mileage**, **From** and **To location**, and **Amount** gets auto-populated in the mileage line item screen.





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← Mileage	C
Line Item Details	
0	E.
Note: A line item can an sectors. To add more to another line item or use	ccept only four travel avel sectors, add e desktop version.
Expense Type *	
Mileage	
From Date *	
Jun 23, 2022	
To Date *	
Jun 23, 2022	
Price Per Mile	
\$0.575	
Amount	
\$596.85	
Purpose	
Business Meeting	
Provinces	
Select	
colorado arizo	na 1038.00
Deduct Home to C	Office distance: 50
-	ar ar

## 8. Update Line Item Details

- 1. Open an expense report whose line item details you want to update.
- 2. The expense report screen opens displaying the line items added to the report.
- 3. Choose a line item whose details you want to update and tap on it.
- 4. Update the details.





1:42		0 = \$\$\$ # 51 @	
← Par	king		
Line Item	Details		
	37 😣		
Expense Typ	ie *		
Parking			
Timothy			
Payment Me	thod *		
Cash			
Date *	000		
JUN 23, 2 Amount *	022		
\$100			
	Tax De	tails	
Tay Name	Tax Amou	int	
Select	\$0.00		
		EDIT CODES	
	0	4	

5. On the navigation bar, tap **Update**.

#### 9. Delete a Line Item

- 1. In the expense summary screen, tap and hold the line item you want to delete.
- 2. The respective line item gets highlighted displaying **Delete** option on the navigation bar.







#### 3. Tap Delete.

4. In the confirmation message box, tap **OK**.

#### **10. Voice-activated Expense Reporting**

SutiExpense allows users to create expense reports with your voice. Navigate through the application, add line items, receipts, approve/reject or submit the expense reports using your voice commands.

1. Tap the AskSuti button on the action bar and tell SutiExpense what you want to do.





AskSuti) Camera
val

2. The chatbot appears. Give your voice command and SutiExpense does the action for you.

Senier 🕈	3.14 PM	-
	9	» <b>» ×</b>
Hey Admin We	ά,	
Welcome to Sk SutExpense, a solution	di, the virtual assistant of voice command based expe	ense.
Here are a cou	ple of things I can do for you	5
	Create expense seport	
	Weiw analthi	
	View automated reports	
	Oxfecte (replact	
	Delete roceipts	
	Charige tame	
	Churge datas	
	Recal report	
	1	Mexidiantia
Showing you t Click on the re	he most recent reports in "De port for summary.	atts".
	New york http 2021	
	pine experies.	
Siy something.		4





SNote: You can edit your voice command by tapping on the recording screen.

#### **11. Assign Codes**

Once you <u>add a line item</u> to a report, you can split the amount and assign various codes across line items.

For example, you can split 65% of the amount and assign to one code and the remaining 35% of the remaining amount to another code.

#### **12. Edit Codes**

1. In the expense summary screen, choose a line item to which you want to assign codes and tap on the  $\bigcirc$  icon.



- 2. Tap the record which has 100%.
- 3. Alternatively, you can also edit codes while updating the line item details.
- 4. Edit the percentage value; the amount will be adjusted automatically.





Total Amount \$242.00 Department Name IT Expense Code Parking - 434 Client Code Select	Total Amount : \$242.0 Department Name IT Expense Code Parking - 434 Client Code
Department Name IT • Expense Code Parking - 434 • Client Code Select •	IT Expense Code Parking - 434 Client Code
IT   Expense Code Parking - 434 Client Code Select	Expense Code Parking - 434 Client Code
Expense Code Parking - 434 • Client Code	Parking - 434 Client Code
Parking - 434   Client Code Select	Client Code
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ost center KT	Percentage
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ercentage (%)	Amount
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Amount	
242.00	

#### Android

iPhone

\* \*

- 5. On the navigation bar, tap **Update**.
- 6. You will be navigated to the assign codes screen.
- 7. To assign code for the remaining percentage, tap the plus icon  $\pm$  and assign the codes.

#### **13. Import Corporate Card Transactions**

Import your transactions using your corporate card to an expense report. To import transactions, follow the instructions below:

- 1. On the SutiExpense dashboard, tap My Transactions.
- 2. Select a card, specify the duration.





	My Transactions				
Transa	ctions	Ó			
Selec	t Card				
From	Date				
To Da	te	_			
		Search 🕥			

- 3. Tap **Search**. Credit card transactions will be displayed based on the criteria, if any.
- 4. Tap on the Expense Name field and select an expense report to which you want to add the transactions.

+ Transactions		Archived
Expense Report Name	E00118	34 - Trip t_ •
meals Mar 15, 2022 17.00 USD	Food	•
trip to new york U Jul 26, 2021 50.00 USD	Select	•
Import I	Delete	Archive

- 5. Select the Expense report name and the transaction(s) you want to add.
- 6. Tap Import.





## **14. Attach Receipts**

To attach receipts to an expense report, follow the instructions below:

- 1. On the SutiExpense dashboard, tap My Receipts.
- 2. On the navigation bar, tap 🧮.



## Android

iPhone

- 3. Select an expense report to which you want to add receipts and then tap **OK**.
- 4. Select receipt(s).







Android

iPhone

5. Tap on 'SubExpense Type' field and select a type to which you want to add the receipt to, and then tap **OK**.



**Android** 6. On the navigation bar, tap **Attach**. iPhone





## 15. Drafts

- 1. On the SutiExpense dashboard, tap Drafts.
- 2. Tap and hold an expense report you want to submit.
- 3. The respective report gets highlighted displaying **Submit** ( $\bigcirc$ ), and **Delete** ( $\boxed{\boxtimes}$ ) options on the navigation bar.









4. Tap Submit.

5. In the confirmation message box, tap **Submit**.

#### **16. View Expense Report Status**

Once you have submitted an expense report for approval, you can view the status such as submitted, approved, or rejected. An expense report you have submitted might be in any of the following statuses:

- a. Submitted: Indicates that your approver has not yet performed any actions on the report. In this case, you have an option to recall the report back to the drafts page where you can update details and submit again.
- b. Rejected: Indicates that your approver has rejected the expense report. You can move the report back to drafts page, update the details and submit again.
- c. Approved: Indicates that your approver has approved the expense report.

#### 17. Recall an Expense Report

Once you submit an expense report for approval, you can recall it back provided the approver had not performed any action on the report.

To recall an expense report, follow the below instructions:

1. On the SutiExpense dashboard, tap Submitted.





- 2. The **Active Reports** screen opens displaying the list of expense reports you have submitted.
- 3. Tap and hold an expense report you want to recall.









- 4. The respective report gets highlighted displaying **Recall** and **Cancel** options on the navigation bar.
- 5. Tap Recall.
- 6. The report will be moved back to the drafts page where you can edit the expense report and submit once again.

#### **18. Move Rejected Reports to Drafts**

If an expense report you have sent for approval is rejected, you can view the status as 'Rejected'. To move rejected expense report back to the drafts page, follow the below instructions:

- 1. On the SutiExpense dashboard, tap Submitted.
- 2. The **Active Reports** screen displaying the list of expense reports you have submitted appears.
- 3. Tap and hold the rejected expense report.
- 4. The respective report gets highlighted displaying **Move to Draft** and **Cancel** options on the navigation bar.







#### 5. Tap Move to Draft.

6. The report will be moved to the drafts page where you can update details and submit once again.





#### **19. Expense Report Approval**

You will receive reports for approval if you are given approver privileges by your administrator.

If you are an approver, follow the below instructions to verify an expense report:

- 1. On the SutiExpense dashboard, tap **Approvals**.
- 2. Expense reports sent to you for approval, if any, will be listed on the screen.
- 3. Tap and hold an expense report you want to verify.









- 4. The respective report gets highlighted displaying Approve, Reject and Cancel options on the navigation bar.
- 5. You can use Approve and Reject options to approve or reject the expense report respectively.

Back to TOC

