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SutiExpense User Guide for Mobile Devices

Version 9.8

SutiSoft, Inc.

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SutiSoft, Inc.

333 West El Camino Real,

Suite 210,

Sunnyvale, CA 94087 USA

Support:
support@sutisoft.com (888) 445-2847 or (650) 396-7740

For more information, visit us at www.sutisoft.com

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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	Icons	Description
Bold Text		Identifies page titles and button.
Note		Notes provide extra information about the topic.
		SutiExpense launcher icon
		Identifies tips in the application.
		Indicates an expense
		To add line items
		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

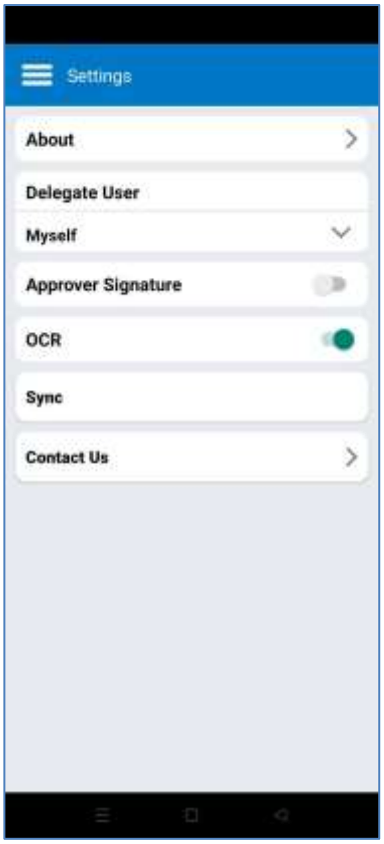
1. Tap on your mobile home screen.
2. The SutiExpense login screen appears.

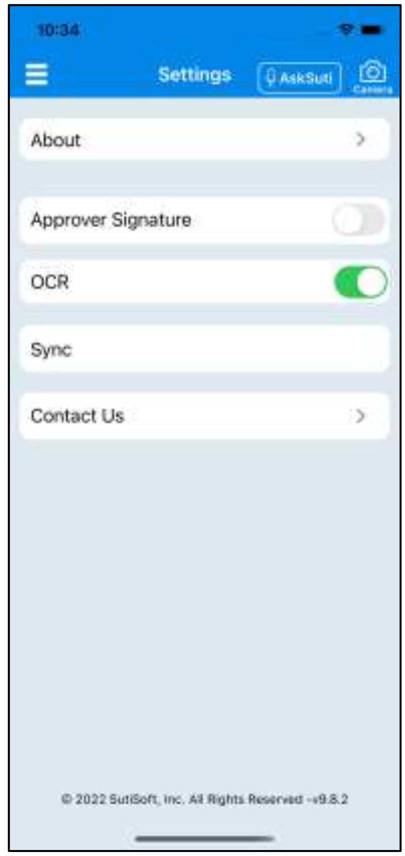
3. Enter your username and password that you use to access the SutiExpense web application from your computer.
4. Tap **Login**.

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**.





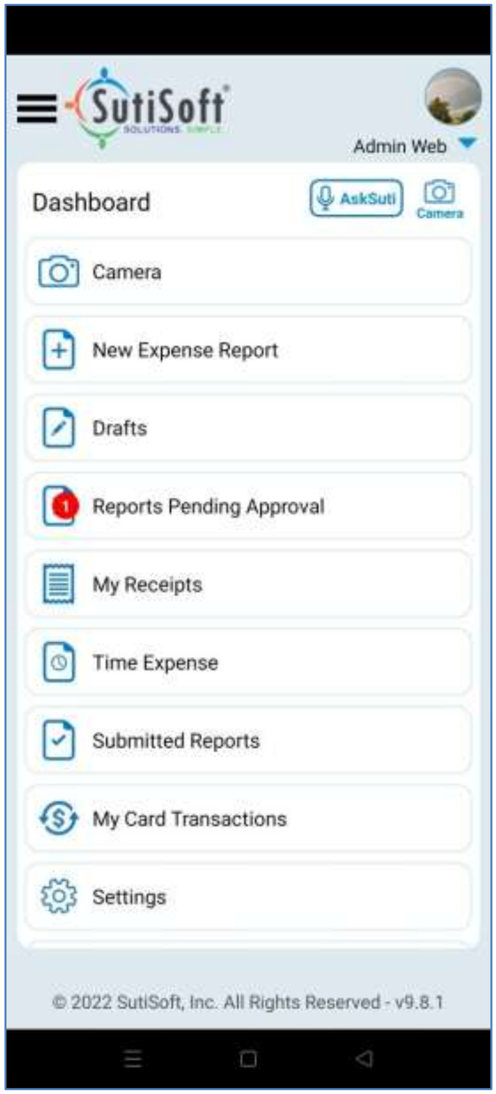
Android **iPhone**

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

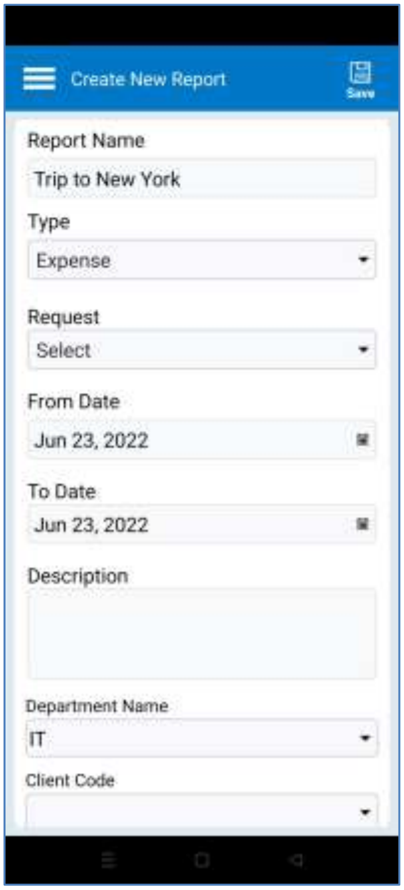
4. Create an Expense Report

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

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



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.



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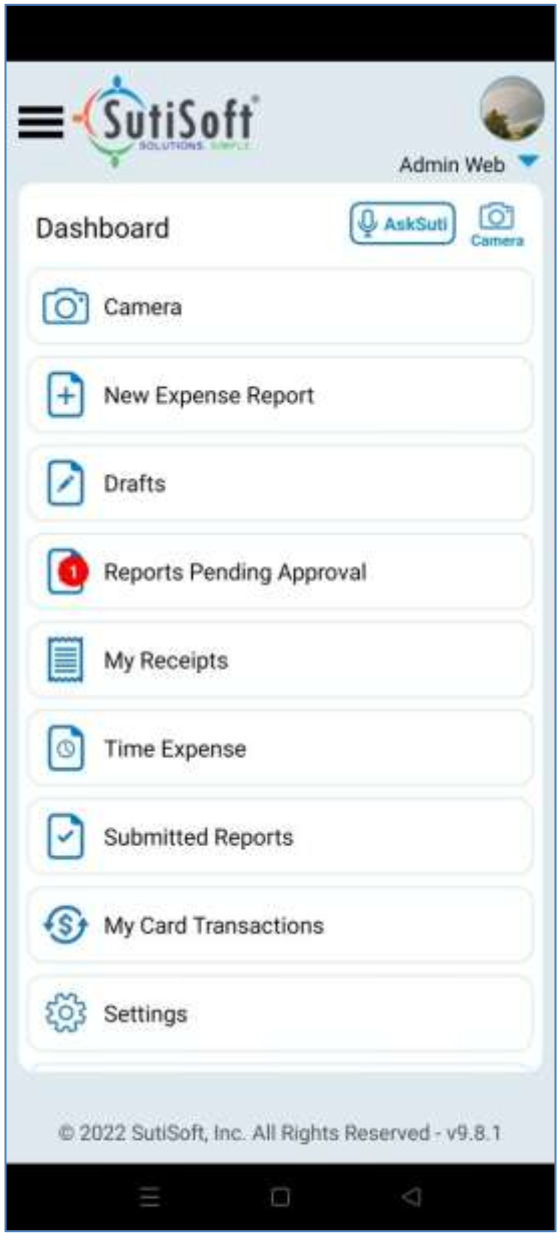
5. Attach Receipts to Reports/Line Items

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.

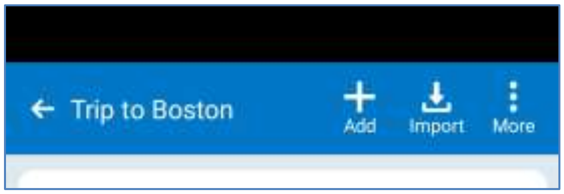


2. On capturing the receipt, the OCR will auto-populate the receipt details in the expense report.

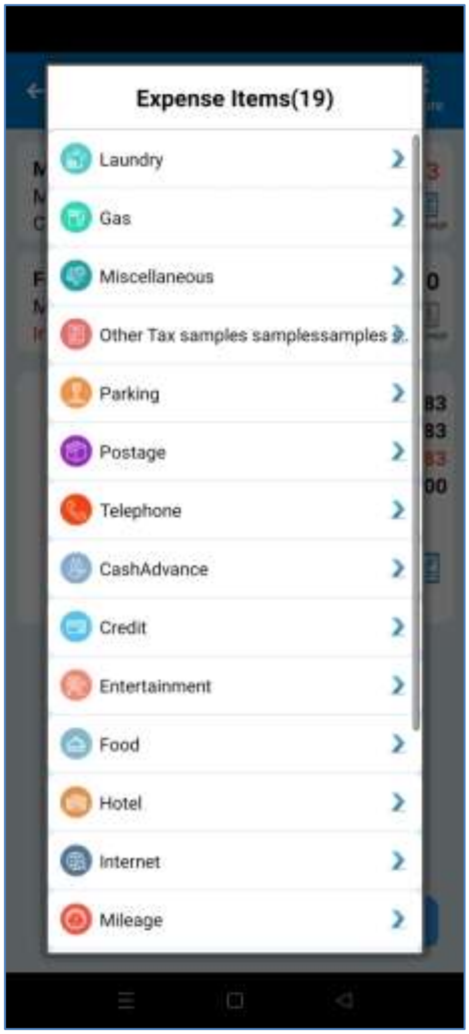
3. Click **Save** to save the receipt details in the expense report.

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.



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

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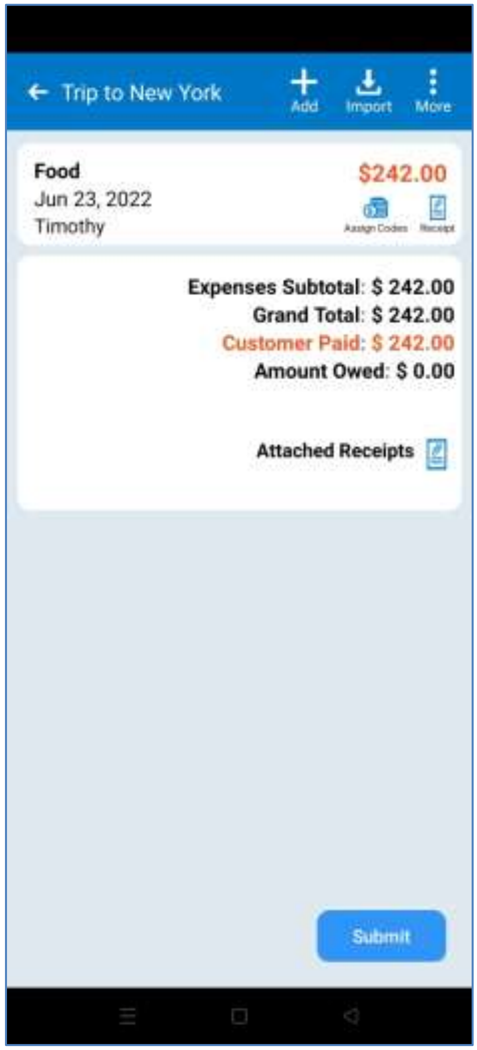
5. Click on the cross icon to detach receipt from the line item.
6. On the navigation bar, click icon to save the line item details.
7. The expense summary screen appears displaying the line item you have added.



8. You can add more line items by tapping the plus icon 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-to-point 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.

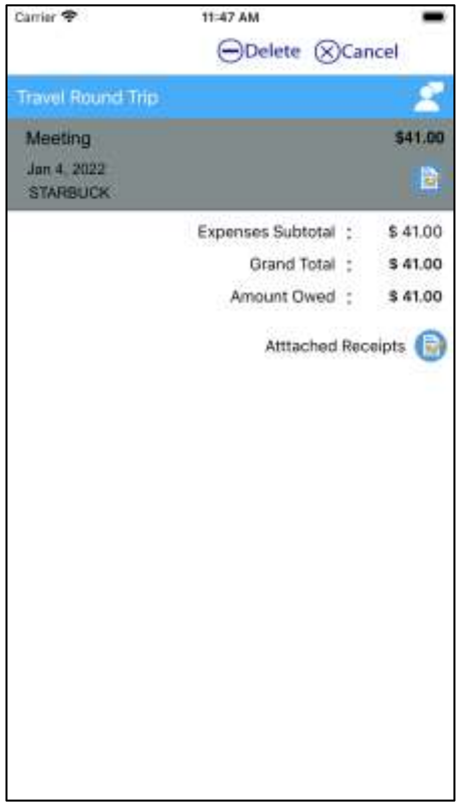
8. Update Line Item Details

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.

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.

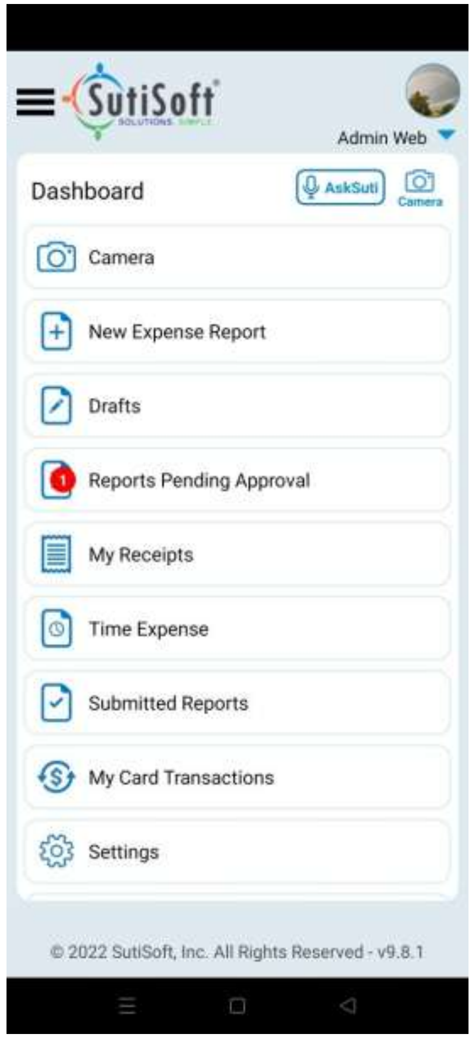


3. Tap **Delete**.
4. In the confirmation message box, tap **OK**.

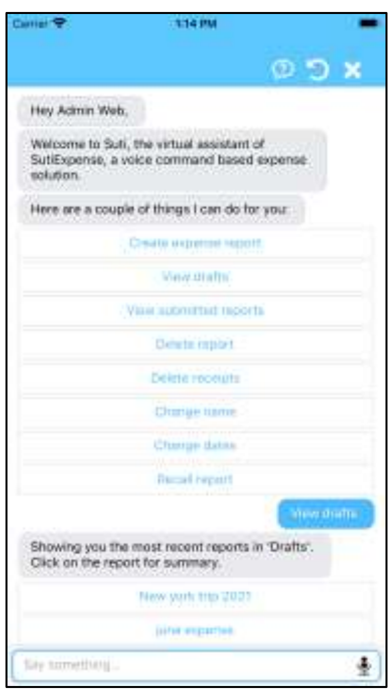
10. Voice-activated Expense Reporting

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.



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



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

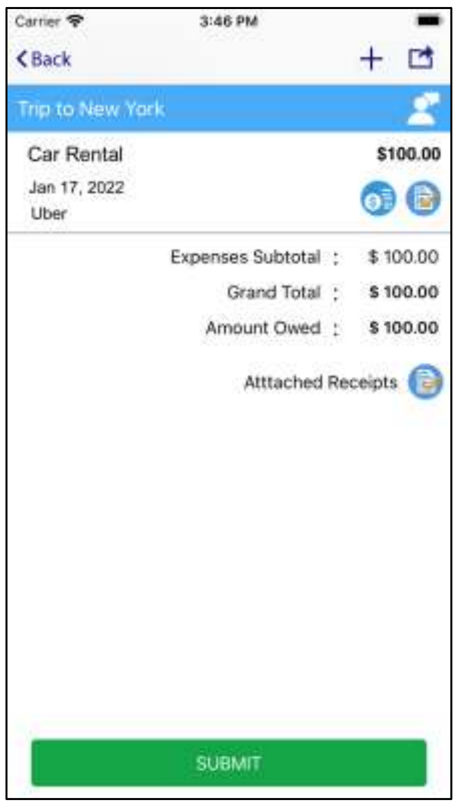
11. Assign Codes

Once you [add a line item]() to a report, you can split the amount and assign various codes across line items.

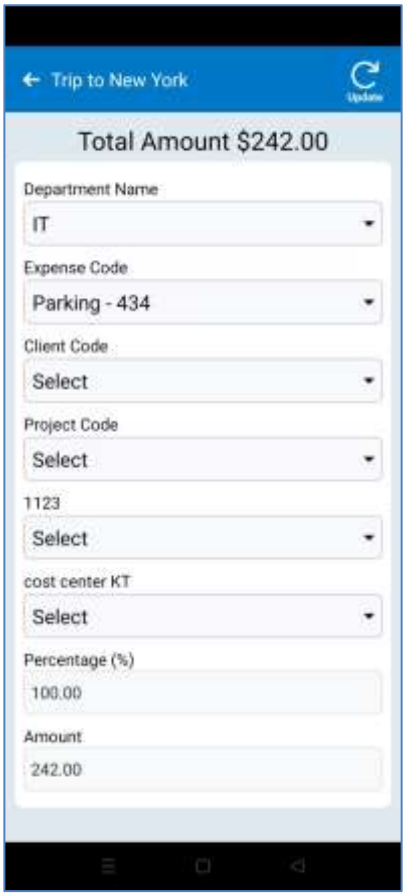
For example, you can split 65% of the amount and assign to one code and the remaining 35% of the remaining amount to another code.

12. Edit Codes

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



Android **iPhone**

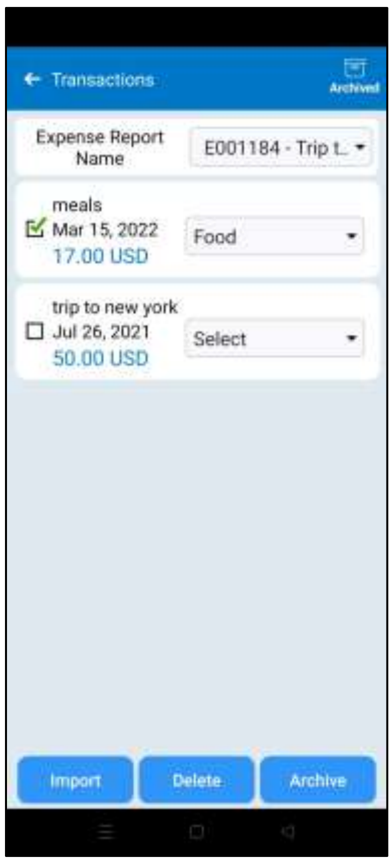
5. On the navigation bar, tap **Update**.
6. You will be navigated to the assign codes screen.
7. To assign code for the remaining percentage, tap the plus icon and assign the codes.

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.

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.

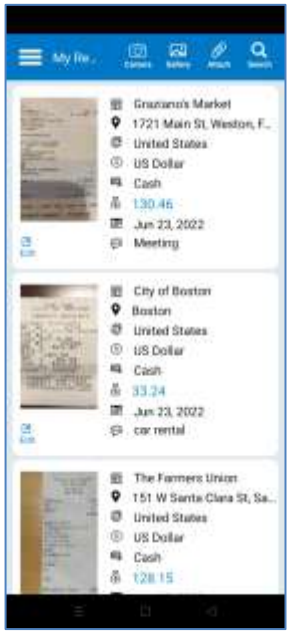


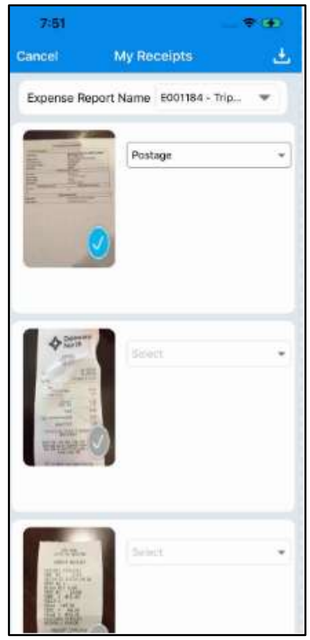
5. Select the Expense report name and the transaction(s) you want to add.
6. Tap **Import**.

14. Attach Receipts

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

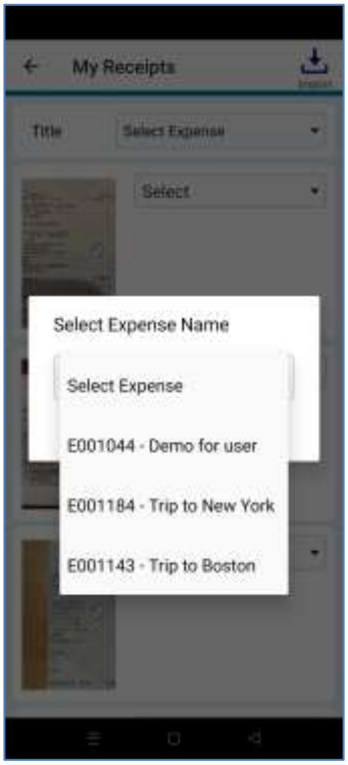
1. On the SutiExpense dashboard, tap **My Receipts**.
2. On the navigation bar, tap ![icon].

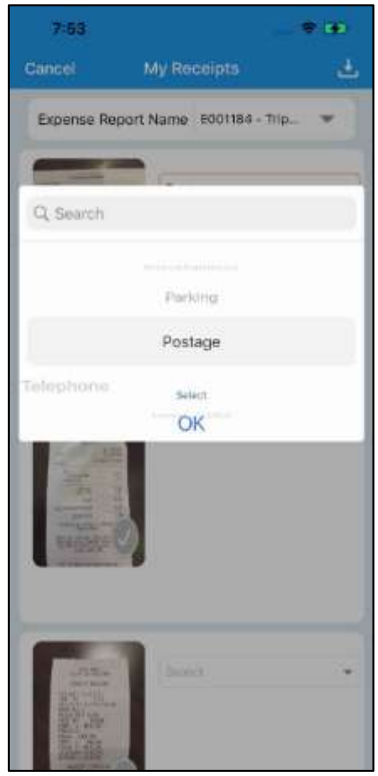




Android **iPhone**

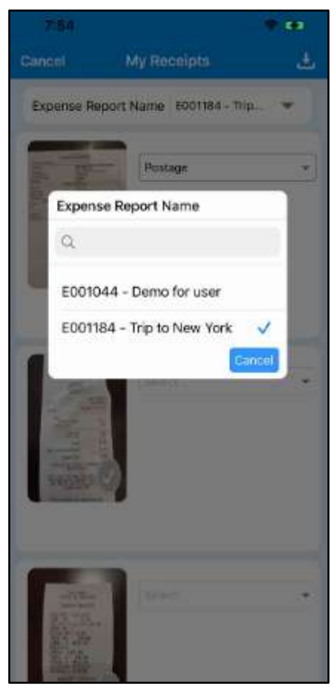
3. Select an expense report to which you want to add receipts and then tap **OK**.
4. Select receipt(s).





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**.

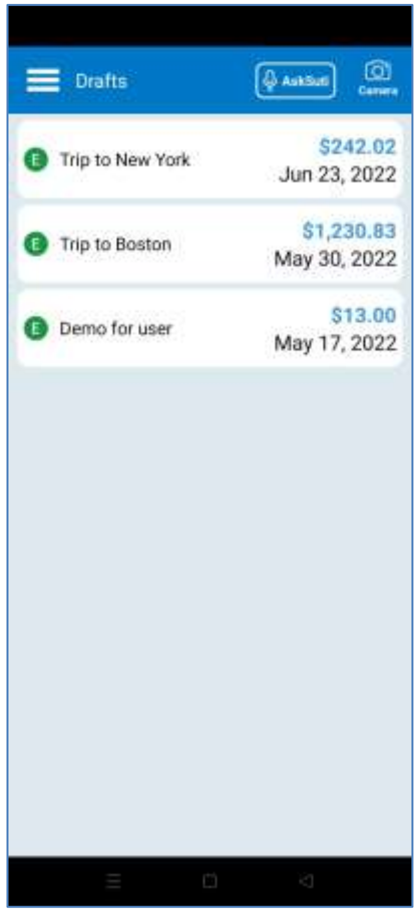


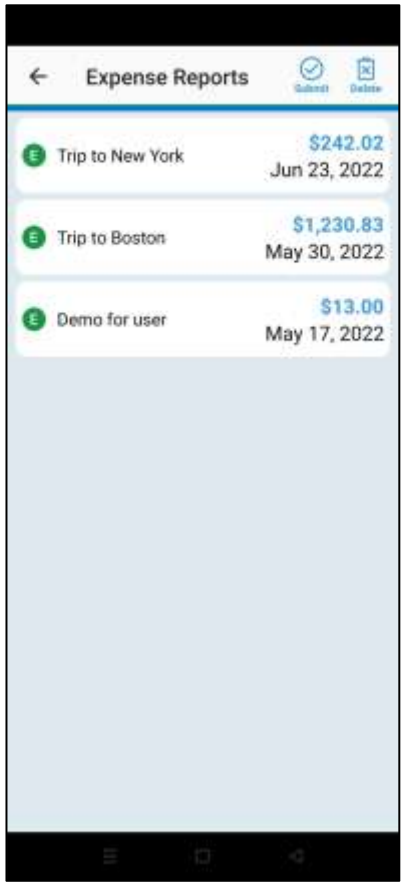
Android **iPhone**

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

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 ()**, and **Delete** () 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.

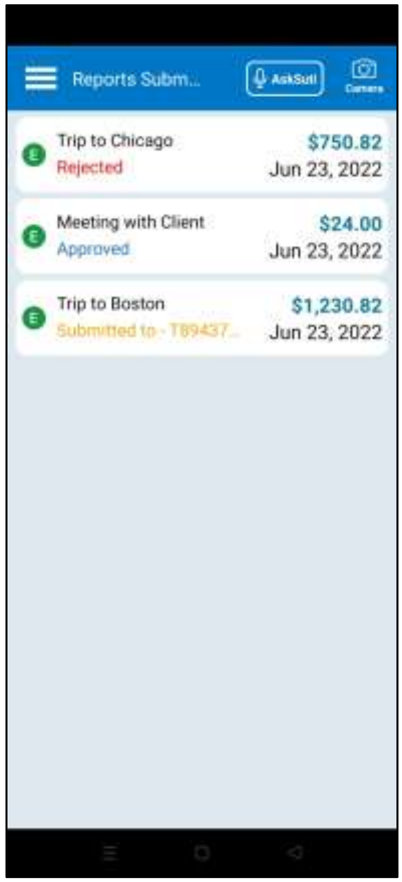
17. Recall an Expense Report

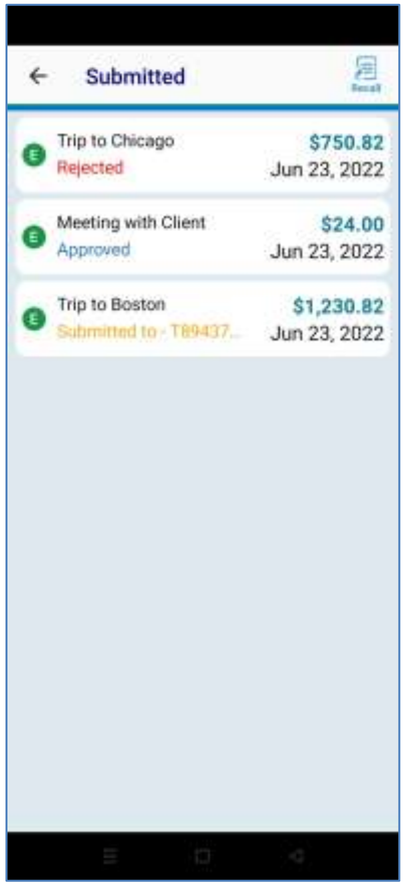
Once you submit an expense report for approval, you can recall it back provided the approver had not performed any action on the report.

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.

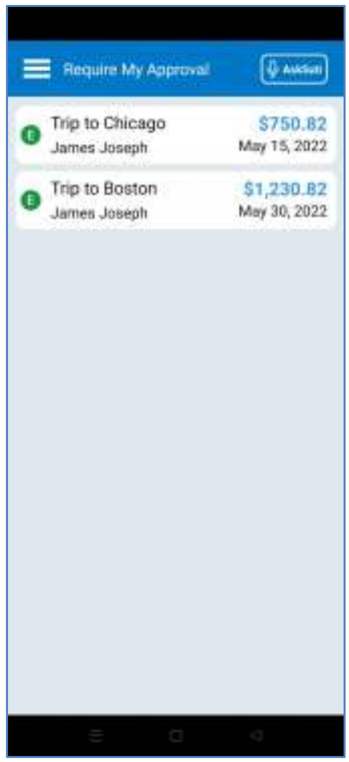
5. Tap **Move to Draft**.
6. The report will be moved to the drafts page where you can update details and submit once again.

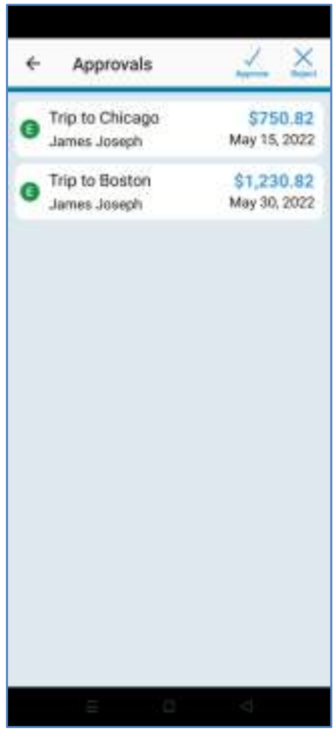
19. Expense Report Approval

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.

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