

# New report view

In the release R3 (the 22:th of March) the report view will be updated. The changes will be found in this document.

You find the Report view in the same place as before.

## Old view

The screenshot shows the 'Old view' of the Reports section. The left sidebar contains navigation items: Dashboard, Users, Reports (active), Card transactions, Settings, SSO Admin, Marketplace, and Support. The main content area is titled 'Reports' and 'Reports for approval'. It features a filter bar with categories: Errors (21), Corporate card (8), For approval (39), Ready to send (18), Transfer (1), Sent (131), Files (84), Paid (62), and Other (-). Below the filter bar is a search input, a date interval selector, and a 'Remember' button. The main table lists reports with columns: User, Name, Created, Sent, Report number, Amount, Expenses, and Approval. The table contains 10 rows of data, including reports for Magnus Wadman, Ryder Norberto, and Per Qvarforth. A pagination bar at the bottom shows '1 2 3 4 >'.

## New view

The screenshot shows the 'New view' of the Reports section. The left sidebar is identical to the old view. The main content area is titled 'Settings / Reports' and 'Reports'. It features a filter bar with categories: Errors (21), Corporate card (8), For approval (39), Ready to send (18), Transfer (1), Sent (131), Files (84), Paid (62), and Other (-). Below the filter bar is a search input, a 'Manage table columns' button, and date range selectors for 'Date from' and 'Date to'. The main table lists reports with columns: User, Name, Created, Sent, and Report number. The table contains 10 rows of data, including reports for Magnus Wadman, Ryder Norberto, and Per Qvarforth. A pagination bar at the bottom shows 'Items per page: 10', '1 - 10 of 39', and 'Go to page: 1 | < > >>'.

# Send reports

Go to Organization / Reports / Ready to send. You will find Send reports under the option "Manage reports". In the future more functions will be added here.

## Old view

The 'Old view' interface shows a navigation bar with tabs: 'Ready to send (1)', 'Sent (1)', 'Files (2)', and 'Other (-)'. Below the tabs, there is a section for selecting reports and a date picker. The date is set to 2023-03-14, and a 'Send reports' button is visible. A search bar is present, along with a 'Date interval' section with 'From' and 'To' dropdowns, and a 'Hits/page' dropdown set to 10. A table lists reports with columns: User, Name, Date, Amount, and Expenses. One report is listed: Anna Användare O, Expense report Anna Användare013, dated 2021-02-09 14:40, with an amount of 361,88 and 1 hit. The report is checked, and there are 'Show' and 'Handle' links.

## New view

The 'New view' interface shows a breadcrumb 'Settings / Reports' and a title 'Reports'. It features a navigation bar with tabs: 'Ready to send (1)', 'Sent (1)', 'Files (2)', and 'Other (0)'. Below the tabs, there is a section for 'Ready to send' with a search bar and date pickers for 'Date from' and 'Date to'. A table lists reports with columns: User, Name, Created, Report number, Amount, and Expenses. One report is listed: Anna Användare O, Expense report Anna Användare013, created on 2021-02-09 14:40, with an amount of 361,88. The report is checked, and there are 'Manage reports' and 'Send reports' buttons.

# Edit the expense

Go to Organization / Reports / Ready to send and click on the report that you want to change. Pick the correct expense by clicking on the pen to the right or at the row somewhere. You will enter the edit mode. You can edit the category, payment method, description, date, VAT, amount and dimensions.

Edit expense ×

Category	Payment method	Description	Date	Net (SEK)	VAT (SEK)	Amount (SEK)	Image
Friskvård 2020	Privat	friskvård	2022-10-	339,00	12	351	
Förmåner - kategorin		Dim xxx					Testlista rapport
		33333					

+ Split expense

Receipt total: Net: 339,00 SEK VAT: 12,00 SEK Amount: 351,00 SEK

Cancel Save

# Split expense

By clicking on “Split expense” you will get a copy of your first expense. You can edit the category, payment method, description, VAT, amount and dimensions. You can do several splits. The function split expense for Admins is visible on all organizations. (For users you still need to activate it in the Marketplace)

Edit expense ×

Category	Payment method	Description	Date	Net (SEK)	VAT (SEK)	Amount (SEK)	Image
Friskvård 2020	Privat	friskvård	2022-10-	339,00	12,00	351,00	
Förmåner - kategorin		Dim xxx					Testlista rapport
		33333					

+ Split expense

Category	Payment method	Description	Date	Net (SEK)	VAT (SEK)	Amount (SEK)	Image
Friskvård 2020	Privat	Description	2022-10-	0,00	0	0	
Förmåner - kategorin		Dim xxx					Testlista rapport
		33333					

Receipt total: Net: 339,00 SEK VAT: 12,00 SEK Amount: 351,00 SEK

# Add category on the fly

Instead of changing the category, you can scroll down in the list and add a category.

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**Edit expense**

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- Representation FI
- Taxi admin
- Warning!
- Övriga utlägg

+ Add category

Search... ^ Privat

Förmåner - kategorin

You can choose if the new category should be visible for the users or not.

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**Add category** ×

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Type \*  
General expenses ▾

Symbol \* Description \*  
 ▾ New category 1

Account \* Salary type \*  
1110 - Byggnader och markanläggning ▾ 101 - Övriga utlägg ▾

Dimension (Förmåner - kategorin)  
Dimension

VAT % \*  
25 ▾  Deductible VAT

Only visible for administrators

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Cancel Save

# Manual accounting

The old function Manual accounting will be removed and you can from now on use Split expense and add category instead.

## Old view

Automatic accounting (Gransking #1)

For manual accounting, you can only correct the debit account for the expense. The credit account is based on payment method and can be changed in the upper left of this view. NOTE! The amounts below are stated in NOK.

Account	Amount
2646 - Ingående moms på uthyrning	127
Account	Amount
5619 - Övriga personbilskostnader	1163

## New view

Use the Split expense function and if needed add a new category only visible for you as a Administrator

### Edit expense

Category	Payment method	Description	Date	Net (NOK)	VAT (NOK)	Amount (NOK)	Image
Resor	Private	test	2022-12-	963,00	127,00	1 090,00	
Dimension (Projekt)		Dimension (Vidarefakturering)		Dimension (DIM Category)			
02 - Projekt 2		NO - Nej detta skall inte vidarefaktureras		131 - 131			
<b>+ Split expense</b>							
Fika	Private	Description	2022-12-	200,00	0	200	
Dimension (Projekt)		Dimension (Vidarefakturering)		Dimension (DIM Category)			
02 - Projekt 2		NO - Nej detta skall inte vidarefaktureras		131 - 131			
Receipt total:				Net: 1 163,00 NOK	VAT: 127,00 NOK	Amount: 1 290,00 NOK	

# Customize the columns

You can choose what you want to see in the columns by clicking on Manage columns and check/uncheck the columns.

Settings / Reports

### Reports

Errors 18 Transfer 1 Sent 131 Files 84 Paid >

For approval

Search

Search

User

Magnus

Wadman230220 (billed 20230221)

Magnus Wadman230220 Corporate Card Report

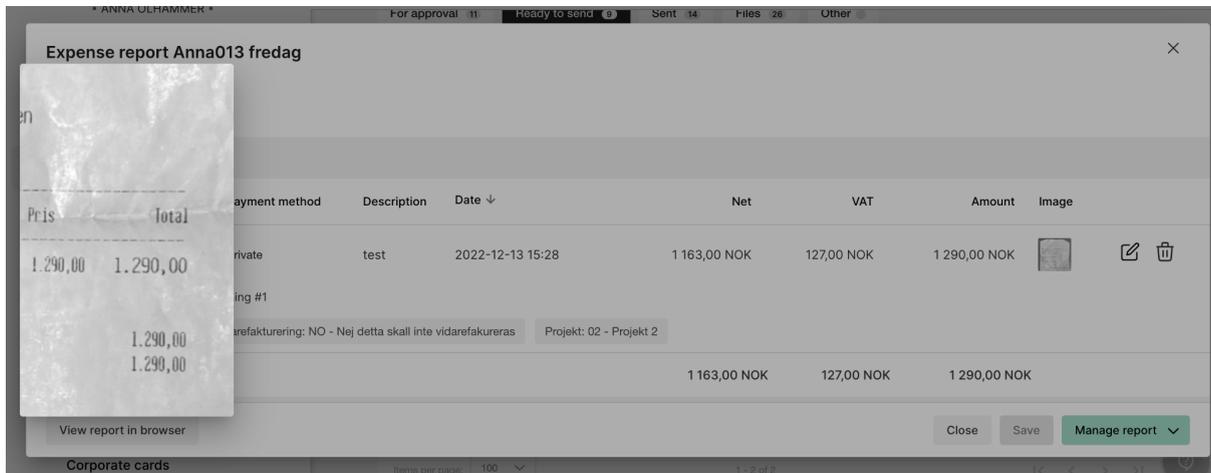
#### Manage table columns

- User
- Name
- Created
- Sent
- Report number
- Amount
- Expenses
- Approval

Report number	Amount	Expenses	Approval
5	200,00	1	Jens Joffer
4	600,00	3	Jens Joffer
3	200,00	1	Jens Joffer

# Zooming in the receipt

To have a closer look at the numbers in the receipt you can click on the receipt icon and zoom in the receipt.



# Delete reports and expense

When you mark one report and choose delete report. The report AND all expenses in the report will be deleted. Before we have sent the expenses back to the users.

