Getting started - For users

FINDITY

Findity Expense enables you to report your business and travel expenses using your web browser and our mobile app. Findity Expense also gives you an overview of all your reports, messages, and personal settings.

Expense Management.
Simplified. For you.

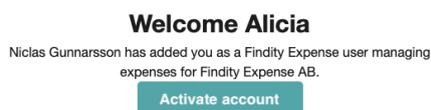# FINDITY

Creating an account

When your organization invites you to use Findity Expense, you receive your invitation in a welcome email which contains some background information and a link you use to activate your user account. The invitation comes from the person who administers the organization to which you will be submitting expense reports.

In the email, click **Activate account**.

Welcome Alicia

Niclas Gunnarsson has added you as a Findity Expense user managing expenses for Findity Expense AB.

Activate account

When prompted, enter your first and last names and a strong password. Click **Create account**. Findity Expense creates your account and signs you in. You will receive an email containing a link to help you download the Findity Expense app for your mobile device.

Downloading our app and getting started

You can download our Findity Expense app from Apple's App Store or Google Play. When you've downloaded and installed it, open the app and sign in with your Findity Expense user credentials.

If you belong to more than one organization, you can easily switch between organizations by swiping sideways at the top of the screen.

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The Findity Expense app menu
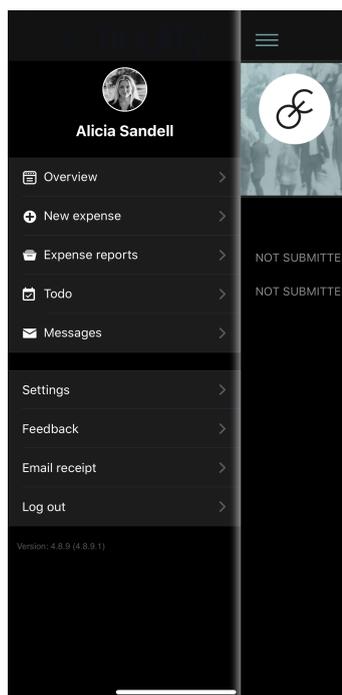
Dashboard

Overview is displayed first whenever you log in. Overview is where you can see which expenses and expense reports you haven't yet submitted. You can also create expenses and expense reports here.

New expense

You can create new expenses here in the main menu or in Overview by tapping **New expense** and then tapping Plus.

Expense reports

In **Expense reports**, you find information on all your ongoing and previously submitted reports.

Todo

In **Todo** you can find a list of tasks that need your attention. For example, if you have emailed a receipt that needs to be assigned to an organization, you'll see it here. In **Done**, you can see the tasks you have completed. If you are an expense report approver, Todo will show you when you have expense reports to approve.

Messages

Messages is where all messages you receive via Findity Expense are stored.

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Settings

Settings enable you to configure your personal user account. You can change your language and date format as well as manage your password and email address. You can also add or change your profile picture.

Settings is where you can activate automatic interpretation of your receipts. When enabled, the app automatically scans and records amounts, VAT, and dates on receipts you photograph.

You can also enable and disable automatic VAT calculation. When it's enabled, the app automatically calculates VAT on your expenses after you've entered the total amount.

Email receipt

From here you can forward any receipts you receive by email to **expense@findity.com**. Keep in mind that you must send the receipt from an email address associated with your Findity Expense user account. You can add more email addresses by using your web browser to sign in to Findity Expense and going to **Settings** and entering them in **Additional email addresses**.

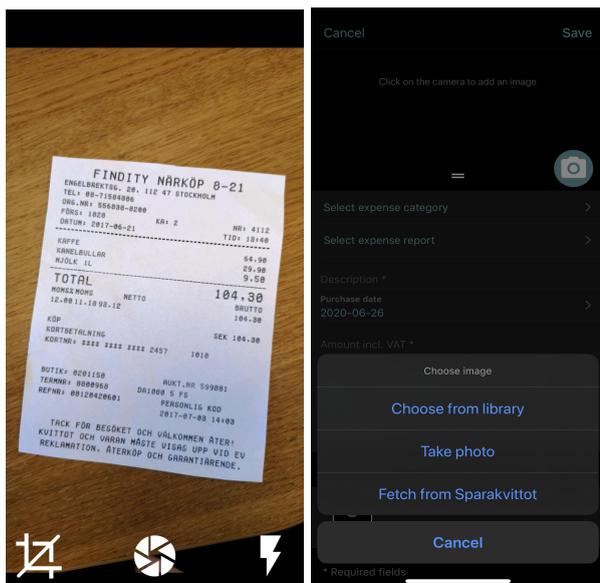# Reporting expenses, mileage and per diem allowances

Reporting expenses

Tap Plus and select **New expense**.

Findity Expense starts your device's camera so you can take a photo of your receipt. If you only want a photo of your receipt and not the background it's on, tap **Crop**, position the crop outline over your receipt, and then take a picture.

You can add an image of your receipt later or add one you've already received and saved in your image library. To access these options, tap **Cancel** or the back arrow when your camera starts.

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Findity Expense analyzes your receipt and automatically suggests the amount, VAT, date and currency.
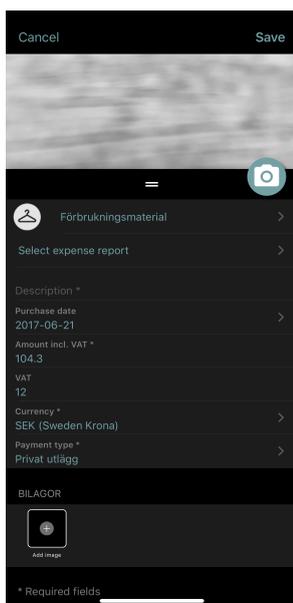
Check that the app has scanned the information correctly. If you need to make a change, tap on the field you want to change and enter the information manually. If the app hasn't already done so, complete any further information needed and select the expense category.

The administrator for your organization determines which fields you must complete.

NOTE for spanish customers! For it to be a certified digitalization, the user, now of taking the photo of the ticket, must choose from the options offered by the camera of the mobile device, the option containing the "watermark" that indicates that it is an "AEAT Certified Digitalization". In this case the original paper

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invoice/receipt, once it has been digitized, will go through a validation process where the resulting electronic document has the same legal backing, validity, and evidentiary effectiveness for accounting purposes as the original paper document. The digitization requirements defined by the legislation on the matter have been met.

On the other hand, if the user chooses the options: "select from the library/select another file", it will be a simple non-certified digitalization that eliminates the possibility of treatment according to approval with the Spanish Tax Agency (AEAT). In this case, the user will have to keep the original document (ticket/invoice) and send it to the Accounting Department for accounting and physical preservation, because the resulting electronic document lacks the effectiveness and legal validity of the original document.

Reporting entertainment/hospitality

Tap Plus and select **New expense**.

Add the receipt as described above.

Check the information the app suggests and select the correct expense category based on whether it is internal or external entertainment/hospitality.

Specify the type of entertainment/hospitality your expense relates to for, example, lunch, dinner, coffee, or something else.

Enter how many guests were there. Tap Plus to add more guests. You can also attach a guest list if you don't want to enter each guest's details manually. You do this by adding an attachment (Bilagor) at the bottom of the screen.

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Reporting mileage

Tap Plus and select **New mileage**.

Enter your trip's details.

Your organization determines compensation per kilometer and the vehicle types you can select. Is the compensation wrong or is your vehicle type not available? Let your organization's administrator know.

Reporting domestic per diem/subsistence allowances

Tap Plus and select **New subsistence allowance**.

Select **Domestic**.

Enter your trip's details. For domestic allowances, you need to specify your destination and when your trip started and ended.

Under **Food and accommodation**, enter any expenses your company paid directly so that your allowance can be calculated correctly for tax. Companies often pay for accommodation and that's why it is already selected.

Reporting international per diem/subsistence allowances

Tap Plus and select **New subsistence allowance**.

Select **International**.

Enter your trip's details. When traveling abroad, you need to specify when your trip started in your home country, where you traveled to and at what time you arrived at your destination. Finally, enter at what time you left the country you visited and when your trip ended in your home country. You can add multiple destinations if you have visited more than one country.

Submitting your expenses to your employer

You can find your expenses on **Overview**, under **Not submitted expenses**.

Tap Plus and select **Create expense report**.

Enter a name for your expense report and select the expenses you want to include in it.

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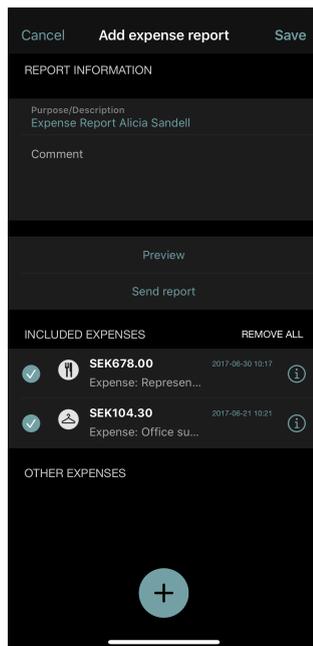
Click **Preview** to see your report before you submit it. Check that all the information and images are correct.

If you want to submit it later, click **Save**. You can find your saved reports on **Overview** under **Not submitted reports**.

To submit your expense report immediately, click **Submit**. Findity Expense submits your report to your organization for processing.

Reporting expenses using 3D touch

This feature applies to iPhone users. You can use 3D touch to create an expense without opening our app.

Press firmly on the Findity Expense app to access new expense options.

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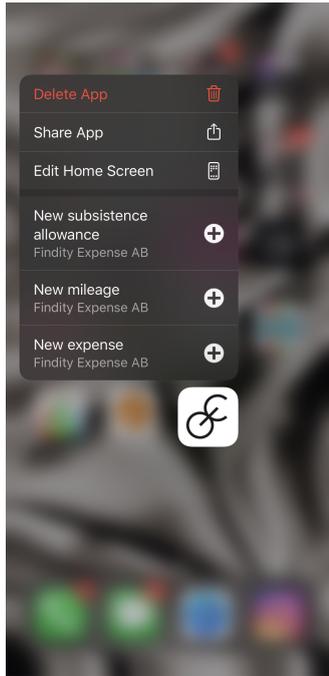
Once you've tapped on the type of expense you want to add, your camera starts and you can take a photo of your receipt. When you are done, save your receipt. You can find it under Not submitted expenses.

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