



# How to Use eXpense365



**BRISTOL SU**  
the best student life



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## Introduction to eXpense365

As a result of feedback from students we have overhauled our finance systems with a view to giving committees power to do more, and without the need to come to the Richmond Building for simple transactions.

Our new system comes with an app, eXpense365, for student committees and members of groups to use. This app will allow group members to submit expense claims and view progress, and allow Presidents/club Captains and Treasurers to:

- Authorise or decline expense claims
- View the income and expenditure reports for their club/society

We hope you find the app makes your life easier, and would like to hear your feedback on the other steps we can take to support you in the running of your group.

**Please note: You Treasurer or President cannot submit claims on your behalf. If you spent money for your club or society, it must be paid directly back to you.**

## Setting Up and Registering

The first step is to download the eXpense365 app from the Play Store (Android) or iTunes (Apple).

Then open the app and register by filling in all the fields.



Your email address must be the same as the one you're registered with on the Bristol SU website. This can be found in the 'My Details' section of the 'Your Account' tab.

It will normally be your university ID (ie ab12345) and "@bristol.ac.uk"

Once you have clicked 'Register' a verification email will be sent to you, with a password for you to log in with.

Once you have logged in, you will be asked for your bank details. Whenever you make a claim, the money will go to that account. These details can be changed later, and it is your responsibility to make sure these are correct and up to date.

You will then reach the main page:

The screenshot shows the main page of the eExpense365 system. At the top, there is a dark blue header with a back arrow, a 'Menu' label, and a hamburger menu icon. Below the header is the Bristol SU logo, which consists of a hot air balloon icon in a blue circle and the text 'BRISTOL SU the best student life'. The main content area contains four circular icons arranged in a 2x2 grid:

- Expenses:** A teal circle with a white icon of a document and a pushpin. An annotation points to it: "This is where you make a claim".
- Documents:** An orange circle with a white icon of a document with a checklist. An annotation points to it: "This is where you can view the society statements (only available to Treasurers and Presidents)".
- Notifications:** A green circle with a white icon of a thought bubble. An annotation points to it: "This is where you will get notifications about any claims you have put in, or any claims you need to approve/reject".
- Details:** A dark blue circle with a white icon of a person's silhouette. An annotation points to it: "Your personal details".

## Changing Your Details

To change your details, first click on the 'Details' button.

This page will show your name and bank details as you put in during set-up. You can change the details here if you ever need to.

The first thing you should do is change your password to something memorable, by clicking on the 'Change Password' option



 A screenshot of the 'My Details' page in the eExpense365 app. The page has a dark blue header with a back arrow, a 'My Details' title, and a 'Change Password' button with a magnifying glass icon. Below the header, there are three sections: 'Personal' with fields for Email, Forename, and Surname; 'Bank Details' with fields for Sort Code (pre-filled with '99-99-99'), Account No., and Pay Reference; and 'Vehicle Details' which is highlighted with a blue border. The 'Vehicle Details' section has a 'Registration' field and a 'Vehicle' dropdown menu currently set to 'Select Vehicle Class'.

You will also need to alter the 'Vehicle Details' so that the 'Vehicle Class' is 'Default Vehicle Class'. The 'Registration' can be left empty.

 A screenshot of the 'Vehicle Classes' page in the eExpense365 app. The page has a dark blue header with a back arrow, a 'Vehicle Classes' title, and a search icon. Below the header, there is a list of vehicle classes. The first class is 'No Vehicle'. The second class, 'Default Vehicle Class', is highlighted with a blue border.

## Making a Claim

Outline of the process for making a claim:

- 1) Student makes a claim from the society via the app
- 2) The claim is sent to the President/Club Captain/Treasurer of the society for approval
- 3) Upon approval by the President/Club Captain/Treasurer the claim is sent to the Student Services Team
- 4) The claim goes to the Finance Team for payment

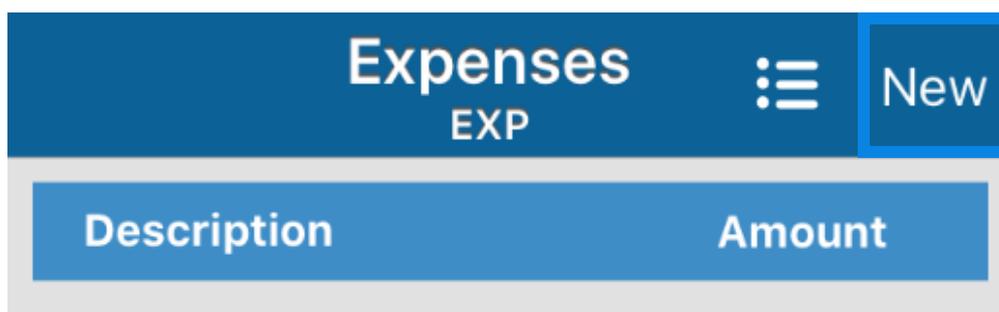
If the President/Treasurer or Student Services Team reject the payment then the student will receive a notification to let them know. The student will then be able to go back into the claim, alter it and resubmit for approvals

Reasons for rejecting a claim include:

- No receipt attached
- A claim for a larger amount than the receipts show
- Claim amount given in a currency other than GBP
- A claim that the Treasurer or President doesn't think should be coming through the society
- Insufficient funds in the society account.

## How to make a claim

- 1) Click on the 'Expenses' button
- 2) To create a new expense click on the '+' (Android) or 'New' (iOS) button in the top right.



- 3) Click on the 'Select Student Group' option, and choose the student group that you are claiming from. This drop down will show all the groups that you are a member of.

Claim No.	EXP
Internal No.	
<b>Student Group Z -Test Group - Do Not Join</b>	
Currency	GBP - Sterling
Date	Sep 09, 2016 
Reference	

- 4) Without clicking the tick (Android) or 'Save' (iOS), click on the 'Expenses' button. Then as before click on the '+' or 'New' button in the top right.

Create New Expense Claim +

CLAIM
EXPENSES
RECEIPTS



Claim

1 —  
2 —  
3 —

Expenses



Receipts

- 5) Choose the 'Type' of expense from the list and fill in the description, stating what you are claiming for. Try and make it so that the President/Treasurer and the Student Services Team will know exactly what you're claiming for.

<b>type</b>
Description Line 1
Description Line 2
Description Line 3
Description Line 4
Description Line 5
Description Line 6
<b>Date</b> Sep 09, 2016 

- 6) In the 'Amount Inc VAT' box put in the **total amount** you are claiming for this expense.

Create New Expense Line
✕ CANCEL
✓ SAVE

Type SUN

---

Sundry Expenses

---

Apple juice

---

Description Line 3

---

Description Line 4

---

Description Line 5

---

Description Line 6

---

Date Sep 09, 2016

---

Amount Inc. VAT 1.25

- 7) You can claim money back for more than one thing in each claim – just put them in as multiple separate expenses in the same claim. For example, if you are claiming for 15 t-shirts and 3 packs of orange juice, you will need to have one expense for the t-shirts and one for the orange juice, but these can both be in the same claim.

**From now on we will not be approving more than one claim per person per week, so please make sure you have put all the claims into one.**

- 8) Then click on the 'Receipts' tab. Again, click on the '+' or 'New' button in the top right.

Create New Expense Claim
+

CLAIM

EXPENSES

RECEIPTS



Claim

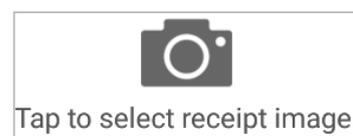
1 —  
2 —  
3 —

Expenses



Receipts

- 9) Now you need to add a receipt to your claim. Tap on the screen to choose either a picture you have previously taken, or take a picture of the receipt you wish to use. Add a description of what the receipt is for, to make it easier for those approving it. Then click 'Save'



**Receipts should clearly show:**

1. The date of payment
2. The payment method

Cancel
New Receipt
Save

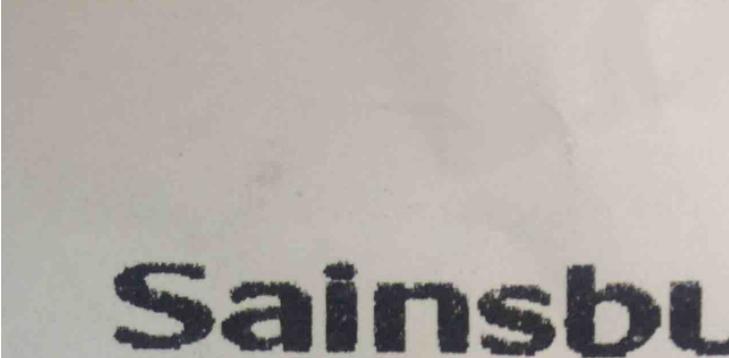
---

Created At 09/09/2016 16:22:05

---

Description

Select



- 10) If you have more than one receipt you will need to add them in separately. You can add as many receipts as you like to one claim.

- 11) Click back on the 'Expenses' tab, and then click 'Save'

- a. For Android users you will need to select the three dots in the top right and click 'Submit for Approval'.
- b. For iOS users you will need to select the 'upload' button, , and then 'Submit for Approval'.

Expense EXP000030

CLAIM EXPENSES

Submit For Approval

Delete Expense Claim

Claim No. EXP000030 Draft

Internal No. PQU000030

12) Choose which out of the President or Treasurer for approval, and then click 'Send'.

Cancel Approval Request Send

Approval Request - EXP000029

Please review and approve expense claim EXP000029.

**Approver**

Rebecca	(Treasurer)
Caitlin	(President) ✓

13) This claim will then show up in you 'In Progress' Expense Claims, and it will show as 'Waiting Approval'.

Reference	Date	Amount
EXP000030	13/09/2016	GBP 5,000.00 Waiting Approval

Your claim has to be approved by both the President/Treasurer of the society, and by the Student's Services Team. You will get a notification once it has been approved by both. Notifications can be found in the 'Notifications' section.

If your claim has been approved then it will be sent on to the next

Type	Details	Date/Time
	<b>Caitlin</b> Expense Claim Rejected - EXP000... Please provide receipt...	16:02
	<b>Student Services Te...</b> Expense Claim Approved - EXP00... Expense claim EXP000029 has been approved....	Friday



step of the process. You can view your approved claims in the 'Approved' part of the 'Expenses' section.

If it has been rejected then there will be an explanation as to why it has been rejected if you click on the notification. You can then go back into the 'Expenses' section, update your claim and resubmit for approval.

IN PROGRESS	APPROVED	PAID						
<table border="1"> <thead> <tr> <th>Reference</th> <th>Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>EXP000031</td> <td>13/09/2016</td> <td>GBP 5,000.00 Rejected</td> </tr> </tbody> </table>			Reference	Date	Amount	EXP000031	13/09/2016	GBP 5,000.00 Rejected
Reference	Date	Amount						
EXP000031	13/09/2016	GBP 5,000.00 Rejected						

Your claim will be rejected if it fails either of these questions:

- Is it an expense that is for a legitimate student group expense incurred by the person making the claim?
- Is it in GBP?
- Is the evidence attached sufficient to allow us to be sure of the above?

## FAQs

### **I can't find eXpense365 on the Play Store/iTunes**

It can be found at:

Android: [play.google.com/store/apps/details?id=com.eXpense365.Android](https://play.google.com/store/apps/details?id=com.eXpense365.Android)

iOS: [itunes.apple.com/gb/app/expense365/id932455445?mt=8](https://itunes.apple.com/gb/app/expense365/id932455445?mt=8)

For iPads you may need to make sure you're viewing 'iPhone only' apps, else it will not show up.

If you're still having problems, check that you are writing eXpense365 correctly – 'expense' must not be a plural, and there are no spaces

### **I don't have a phone that I can use this app on!**

If you have a friend with a phone that supports this app you are able to use it on that – just make sure you log out after. Else you can come into the Richmond Building and use our tablet there.

### **Why can't I find my group to claim from?**

The only groups you can claim from are student societies/sports clubs that you are a member of. The groups you are a member of will show up on the list of groups you can claim from. To claim money from a group you must be a member of that group.

For other groups, such as voluntary groups, you will still have to come into the Richmond Building and fill in a paper form to make a claim.

### **I've received a notification saying I've been paid but I haven't?**

You will be paid 2-3 days after receiving notification of payment on the app.

### **What if my claim is in another currency?**

Claims can only be made in GBP (Pounds Sterling), any other claims will be rejected by the Student Services Team. To work out how much you can claim please find out the conversion rate on that day at [www.xe.com/currencytables/](http://www.xe.com/currencytables/).

## Current and Historical Rate Tables

Build current and historic rate tables with your chosen base currency with XE Currency Tables. For commercial purposes, get an automated currency feed through the XE Currency Data API.

From:	Date:	Change this to the date you made the payment
USD - US Dollar ▼	2016-09-21	

You will then need to multiply the amount you paid by the conversion rate ("[currency] per Unit"), and this is the amount you can claim. Please also attach a screenshot/photo of the conversion rate in the 'Receipts' section, so that the President/Club Captain/Treasurer and Student Services Team can check it's correct.

### What if I want to claim from a grant the society have received?

In the 'Expenses' section of the claim, select "BSU Grant Funded Costs" as the type of claim.

### What happens if I want to submit a claim as President/Treasurer?

You will still need to get authorisation for the claim to go through. For example, if the President wants to make a claim, the Treasurer must approve it, and vice versa.

### Why isn't it showing any of the groups that I am a member of?

First, check that you have created your account under the correct email address. This address can be found in the 'My Details' section of your account on the Bristol SU website. If you're still having problems please contact .

### What if we have paid using cash?

If you need to pay with cash, there are two ways to do it:

- 1) You can take out a float from your society account. Float request forms can be found at the Bristol SU reception desk.
- 2) You can pay by cash, and fill in one of the receipts that can be [found on the website](#). This must be signed by the recipient, and **cannot** be for an amount over £50. You can then claim this money back from the account as normal using the app, with a picture of this receipt as the receipt.

If you're still having problems, please contact [bristolsu@bristol.ac.uk](mailto:bristolsu@bristol.ac.uk).