Using Expensify

Hello Zeal Staff and Ministry Coordinators,

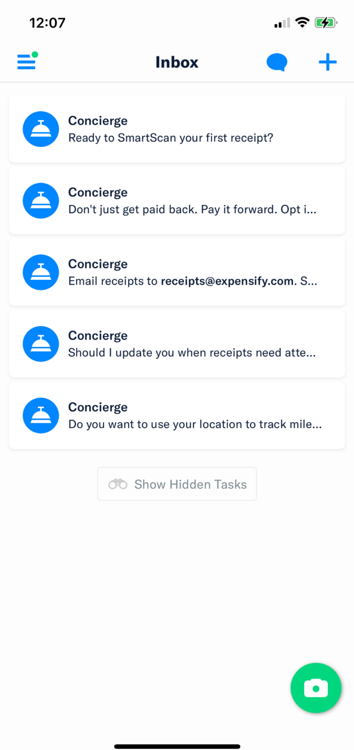
This form will be your main source of information on how to access and use Expensify. Going forward, Expensify will be Zeal's primary way of managing expenses and transactions made through your Zeal Church credit card.

Starting in the month of October your receipts and how the transactions need to be expensed will be done through Expensify.

Rather than receiving your statement in the middle of the month, labeling each transaction, taking pictures of receipts, and then sending them to Gloria, you can now immediately upload the corresponding receipts and categorize them using the expensify website or app (Gloria will still send a screenshot of your transactions, but this will only be for reference if a transaction or receipt is missing on Expensify). If after reading the document you have any questions or concerns, please reach out to Gloria McKinney at gloria@zealchurch.com for assistance. There will be an in-person expensify training to answer any questions on October 14th (you will receive an invite from Sarah Steffensen).

Getting Started:

1. **To start using expensify download the app through the App Store or Google Play Store.**
    a. Above is the logo you will be looking for.
2. **All of you should have received an email from the Expensify Concierge inviting you to Zeal Church's group.**
    a. Using your Zeal Church domain email, you will then be able to sign into your Expensify account
    b. Please make your username your first name and last initial, so that way the account is easily identifiable.
3. **Using the App**
    a. Once logged onto the app, in the bottom right hand corner of your phone screen you will see a camera (as shown below).



Concierge
Ready to SmartScan your first receipt?

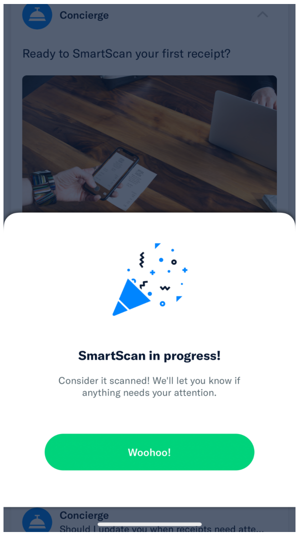
Concierge
Don't just get paid back. Pay it forward. Opt i...

Concierge
Email receipts to **receipts@expensify.com**. S...

Concierge
Should I update you when receipts need atte...

Concierge
Do you want to use your location to track mile...

b. **Take a picture of your receipt and Expensify will “SmartScan” the receipt, picking out the needed information (receipt total, vendor etc.)**



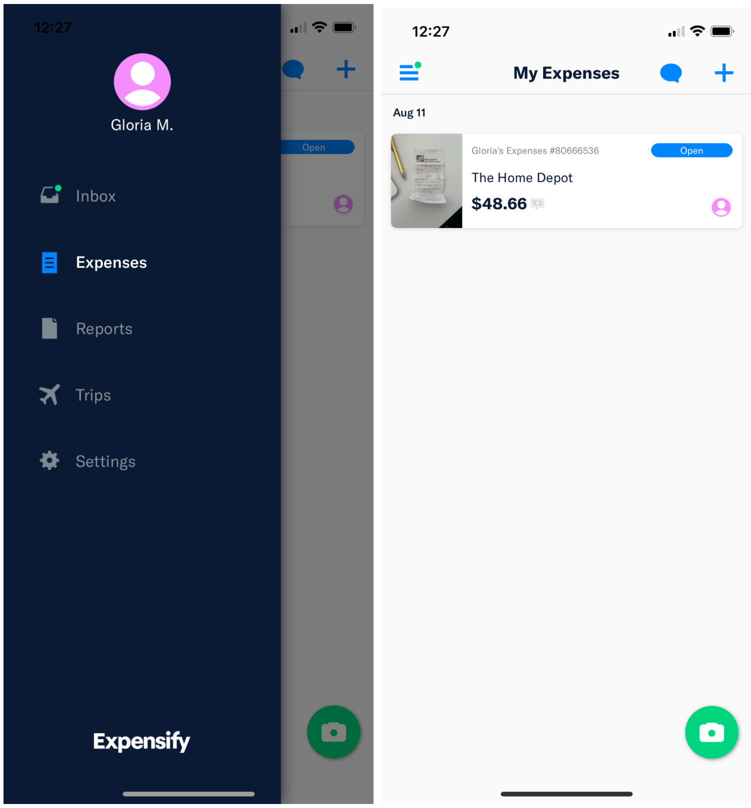
Ready to SmartScan your first receipt?

SmartScan in progress!

Consider it scanned! We'll let you know if anything needs your attention.

Should I update you when receipts need atte...

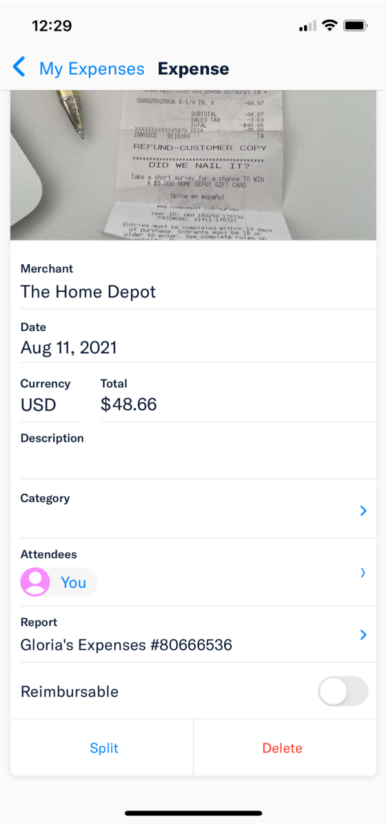
   i. You will then tap on the three horizontal lines in the top left hand corner of your screen which will pull up a menu
   ii. Tap the “Expenses” option and you will see the scanned receipt



c. **On the "My Expenses" screen, you will tap on the receipt which will then take you to the "Expense" screen.**

   i. On the "Expense" screen you will tap on "More options" at the bottom center of the screen, where you will then see an option called "Category".

      ** Note- Type into the description section what the receipt is for. A description will help determine if it's in the right place before the report is finalized. For example, if you have "meals and entertainment" expenses, in the description type discipleship lunch, guest speaker lunch, meal/coffee for core team etc.*



Merchant
The Home Depot

Date
Aug 11, 2021

Currency: USD
Total: $48.66

Description

Category

Attendees
You

Report
Gloria's Expenses #80666536

Reimbursable

ii. Tap “Category” and this will then show you all of the categories that the transcaction can be expensed under.

** Note- If you feel unsure or that it may be the wrong category, do not worry, all of the expenses will be reviewed before the expense report is finalized.*

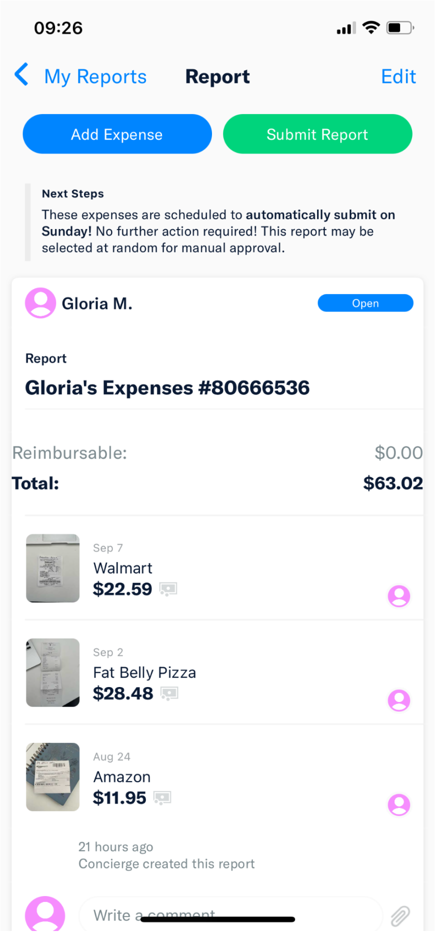
iii. After choosing the best category, you will then click save in the top right corner and the transaction will be added to your personal expense report.

d. After you are done submitting receipts you will then click on the menu using the three horizontal lines in the top left corner to change the Expense Report name.

i. After opening the menu, click on the “Reports” tab

ii. There should be a report entitled “[Insert name]’s Expenses #123456...”

iii. Click on the report and then tap on the report title. This will then allow you to change the name.



Next Steps

These expenses are scheduled to **automatically submit on Sunday!** No further action required! This report may be selected at random for manual approval.

Gloria M.

Report

Gloria's Expenses #80666536

Reimbursable:	$0.00
Total:	**$63.02**

Sep 7	Walmart	**$22.59**
Sep 2	Fat Belly Pizza	**$28.48**
Aug 24	Amazon	**$11.95**

21 hours ago
Concierge created this report

iv. Change the name to your first name and last initial- the month and the year for those transactions. For example: Gloria M.- Oct 2021

****Note- the credit card statement runs from the 16th-16th, for instance the month of August includes transactions from July 16th-Aug 16th. Please make sure the receipts are in the right month.***

        v. Once you have changed the report name and all the receipts have been uploaded you can then tap “Submit Report”

4. **Using the Website from a Laptop or a Desktop**
    a. **Once logged into your account to add a new expense you will choose either the “Expenses” tab or the “Reports” tab on the left hand side of the screen**
    b. **If Using the “Expenses” tab (Recommended)**
        i. You will click on the “New Expense” drop down in the top right hand corner. From there you can then choose “Manually create” or “Scan Receipt”.
            1. If you choose to “manually create”, you will then have to insert the merchant name, receipt amount, receipt picture etc.
            2. If you choose “scan receipt”, a screen to upload a picture from your computer will automatically pull up, and then it will be the same process as using the app on the phone.
            3. Ensure that the expense goes into the proper Report. For example, if it’s a purchase made between August 16th and October 16th, make sure it goes into the October report and not the August report.
    c. **If Using the “Reports” tab**
        i. Click on the Report that corresponds with the proper month. For instance, if I am submitting a receipt for an expense made on September 25, I would click on the report entitled “Gloria M./Oct 2021”. (*Remember- the card statement runs from 16th-16th)

ii. In the report, click on “Add Expenses” on the top left corner of the screen, then on the new page, click on new expense which will then take you through the process of manually entering the expense information.

Thank you for reading through this training. Please come to the in-person with any questions or concerns. Please email Gloria, for any further questions prior to the training.