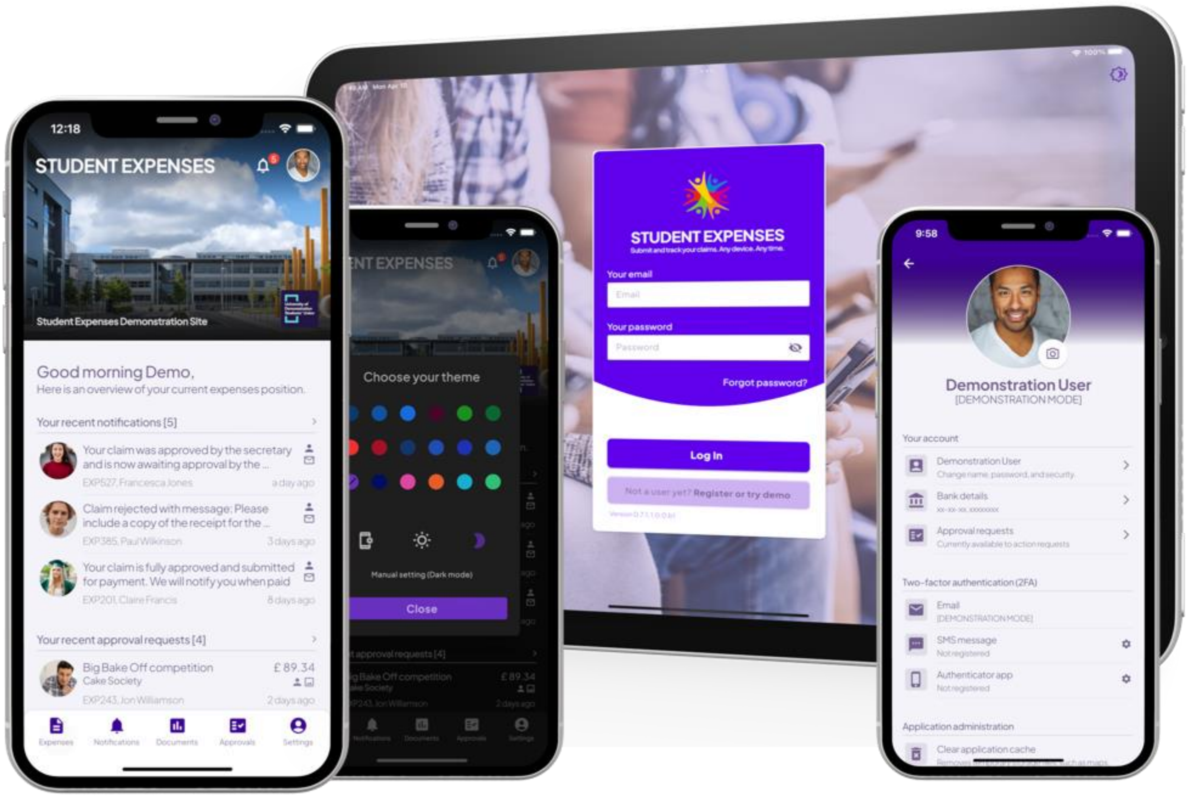
STUDENT EXPENSES

Helping you manage clubs, societies and students.
Any device. Any time.



QUICK START GUIDE

Familiarise yourself with the app, then set-up your own user.
(available apps, play with the demo, register your user, enter a claim, submit for approval…)

Some quick links for reference:
website: www.studentexpenses.com (overview website)
iOS: https://apps.apple.com/app/student-expenses/id1501332908 (iPhone and iPad)
Google: https://play.google.com/store/apps/details?id=com.konnekt365.studentexpenses
Web-Login; https://app.studentexpenses.com/ (web app login)

YouTube Watch a range of short app overview videos on our YouTube playlist:
https://www.youtube.com/playlist?list=PLyk29NrK4ij9LSfJfYFzt1q2_vpIDzmLI

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Familiarise yourself with the app

What does the Student Expenses app do?

Student Expenses is part of a leading solution designed to help Student Union Finance teams manage expense claims from their students. Integrated with the leading SU systems, the app automatically pulls in registered groups and lets students create claims, add receipts, and submit for approval.

Approval requests will automatically route to group approvers, treasurers and presidents for review. When fully approved, claims are then automatically pushed into SU finance systems, ready to be paid. With real-time integration, the app keeps students updated on status, and payment.

For club and society management, we also provide *real-time* income and expenditure reporting to help Presidents and Treasurers control their group finances – all within the apps.

Get started- choose an app (iOS, Android, or web)

The Student Expenses app can be accessed from any of our supported platforms. When registered, you can create and progress claims on any device, at any time. Initially though, if you are new to the app, we suggest you use the demo login option to review the app, and then register later.

App store apps (iOS, Android, iPad)

All the apps are free to download in the app stores, and the best way to locate these is to search for "Student Expenses" in the Apple or Google play stores 📱

Website or Web App (browsers, Chrome, Edge, Safari)

Our apps are designed with mobile layouts in mind, but to provide full, any device, any time access, we support the leading browsers. To access the web version, simply visit our website and select the "Web Login" option. The web version is fully responsive (mobile to desktop size) and also supports installation as a Web-App.

Visit us at www.studentexpenses.com 🌐

OK, let's get going – Open the app and login as demo user

All our apps open to the user login screen. Later, we will show you how create your own registered user, where you login with your own email and password. Initially though, (for a quick review of the app), we suggest you use the "**Try demo login**" option.

At the login page, select the lower button entitled "**Not a user yet? Register or try demo**". On the next page, select the "**Try demo login**" option. Once logged in as a demo user, an example set of transaction data is created, and your screens will populate with pre-prepared details.

Our demo login is a great way to get familiar with the apps as you can see examples we have created for you. When you register (later), you get a blank setup ready for your transactions. – If helpful, remember you can always login as demo at any time, even after registration… 👍

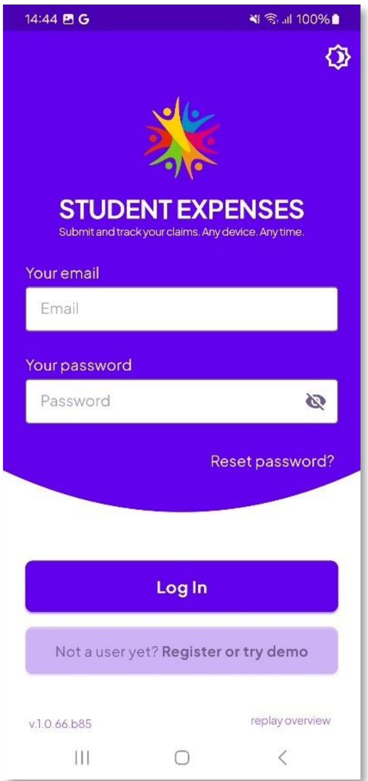
Welcome – home screen overview and navigation

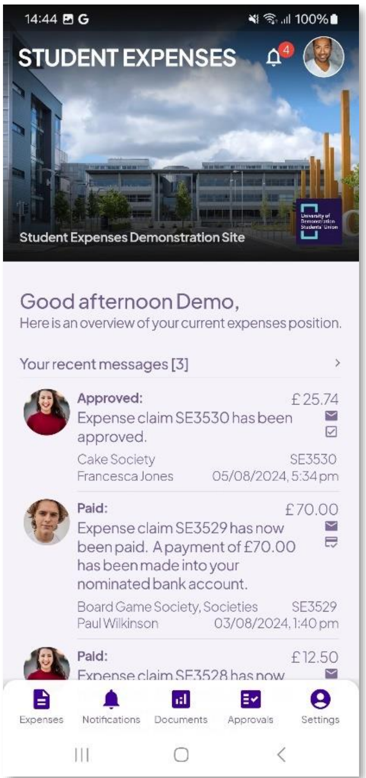
When you are logged in, you will be presented with the home screen. This will be your main navigation area, and you will navigate from here to perform tasks, heading back here when done.

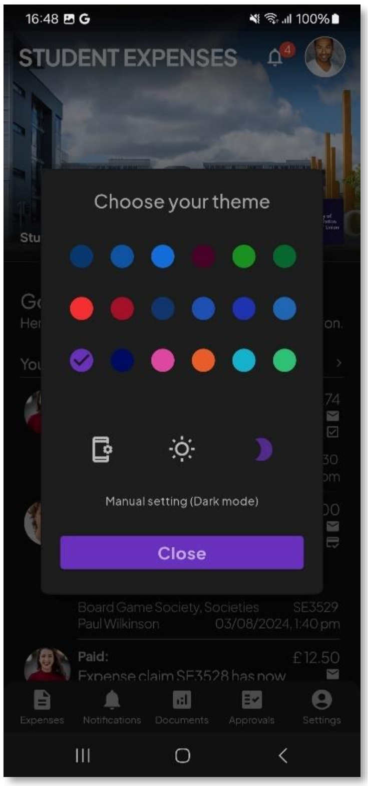
Scrolling up and down the screen you will initially see a summary position of your latest notifications, messages, approval requests and statistics. Navigation wise, you simply tap the listed cards or select the icons at the header or footer.

Configure you user settings and colour preference

Once logged in, Student Union branding is applied automatically. For the demo login, we will show a basic banner image and logo. For your own Union login, the logo and avatar will have been set by your Student Union team. That said, you can still choose your own avatar and theme (dark, light, colours etc) by simply tapping the user avatar at the top and selecting "choose your theme".







User settings: bank details and user configuration

Your first stop in the app is to setup and personalise your user. Access your user settings by tapping the avatar image/icon at the top right of the home screen. This will pop up a menu and offer the following options.

User details (name, password, notifications and security preferences)

This is where you set your name and personal preferences for account. Select whether you want to receive alerts (email, push-messages) regarding your claim status changes, as well as how you want to login to the app (entering a password, using face-id or touch-id etc). This is also where you can opt to manually change and set your password.

Setting your users avatar picture for the app

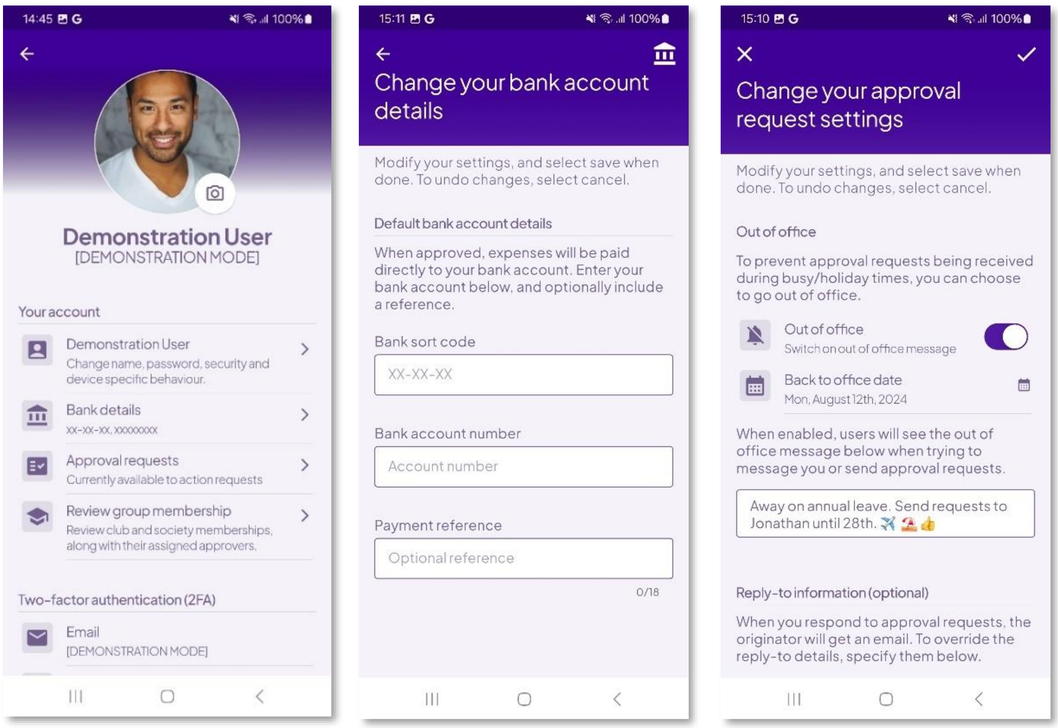
Each user can assign an avatar image to their registered user. To set the image, tap the camera button on the user avatar area. Avatars are used throughout the app (visible to relevant users) and will help identify you to claim approvers for example. – If no image is provided, your initials will show instead.

Bank details

Your bank details are very important and will need to be setup once before you submit a claim for approval. These details are your responsibility, and you should maintain them as required. Your bank details are only passed into the Student Admin finance system whenever you have a personal claim approved by the app (as we need them to make your payment).

Approval requests (approvers only)

If you have a claim approver role for a SU group, then you may receive requests from other student users to approve their claims. To streamline the approval process, the app allows you to mark when you are not going to be available to action these requests. The information (your narrative and/or optional return date) entered will be shown to students when sending for approval.



Review group memberships (linked to your student membership system)

The app is linked to your student union membership system (from your registered email address) so that it can determine what groups you can make claims for. To check your details, you can select review group membership. This will display your registered groups, as well as who the approvers.

Two-factor authentication and trusted devices

Security is a high priority, and as such, we use two-factor authentication as standard. When confirming a device with two-factor verification, it will appear as "trusted". To revoke a previously verified and trusted device – simply swipe to revoke.

Claims – Entering an expense claim

Adding a new claim (or editing an existing claim)

Your claims are controlled in the “Expenses” area, and this is selected using the **home page** screen icon. Initially, existing claims will be listed, and to start a new claim, simply select the “New” button. *Claims consist of key sections of information, each providing specific details of the claim.*

Step 1: Claim header (type, group, date, currency, reference)

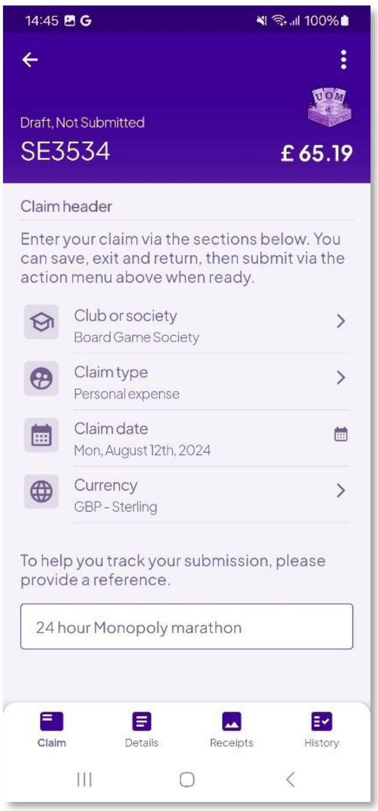
A claim can be made against any club or society that you are a member of. To get started, tap the club or society option and select a club from the list. Please note that, in some cases, your group selection may offer an optional “subgroup” selection. – *Subgroups are typically used where you need to identify sub-area, such as a drama group, or financial fund of money for example.*

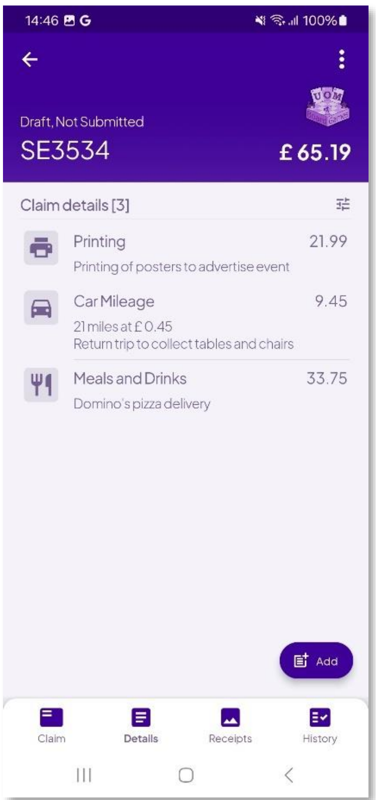
As well as personal claims, the app also supports other claim types. If activated by your union, you may be offered purchase orders, purchase invoices or credit card claims for example. Entry of the details are pretty much identical, albeit only personal claims are reimbursed to your own bank.

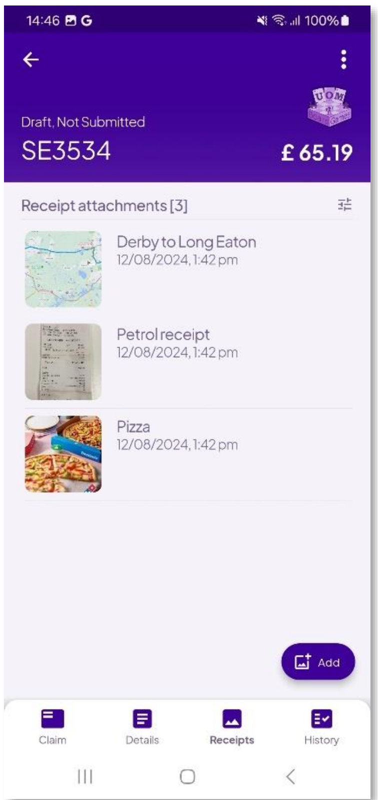
When all header fields have been provided, you will be able to select the details and/or receipts tab. Selecting the details tab, or selecting Save, will allocate a claim reference number, e.g. EXP000123.

Step 2: Entering your lines (what are you claiming for?)

Your claim can consist of as many lines as you require and when added, the lines will list on the details page. To edit an existing line entry, simply tap it.
*For a new line, tap the “**Add**” option.*





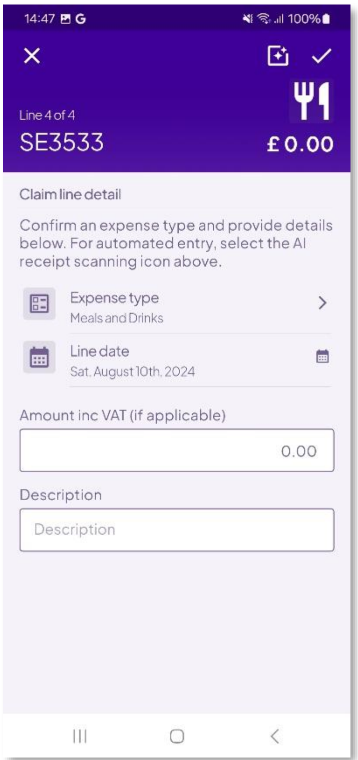


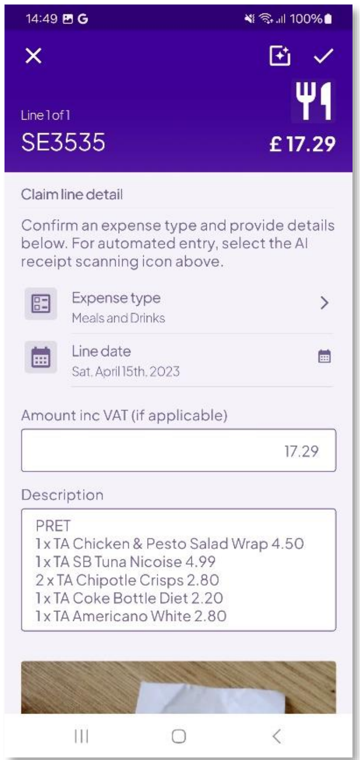
Option 2a: Manual or automatic entry with receipt scanning

When entering a new line, you initially need to select an expense type. Tapping the expense type line will offer several expense types that have been setup by your organisation. These typically range from meals, subscriptions or mileage for example – and simply tap the category to select it.

The category selection made will determine the analysis of expenditure (used by finance), but also determine what input actions are available on the line. In the example below, we have selected "Meals and drinks", and this requires a simple amount and description entry.

Using manual input, we can simply enter the required details, tap the save (tick) and move on to the next line. As this is an amount entry though, (not mileage), we can also opt to use AI scanning.





To use our AI receipt scanning, simply select the AI scan option at the top of the screen. Selecting this takes you to the "Scan receipt" dialog. Here, you can take a new photo of your receipt, or alternatively, select an image from your gallery or folders (image or PDF).

When you are happy with the image displayed on screen, select "Attach and process with AI" and we'll then analyse the image to extract the date, the text and amount. When processed, we'll automatically go back to the line where you will see the results of the scan.

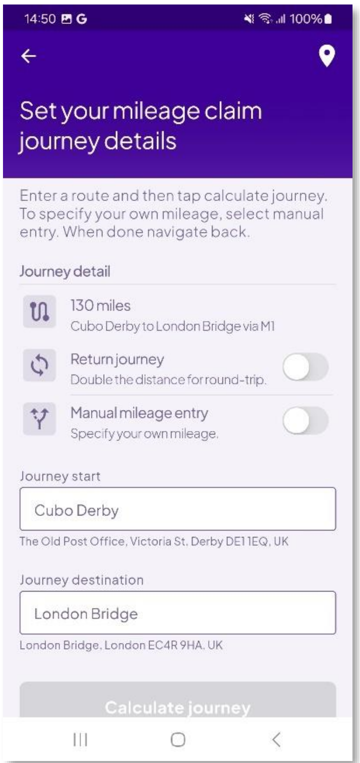
As well as entering any recognised details for you (which you can edit/change as required), you will also see that the image is displayed. Images pulled in via receipt scanning will automatically attach to your claim and subsequently show on the receipts tab.

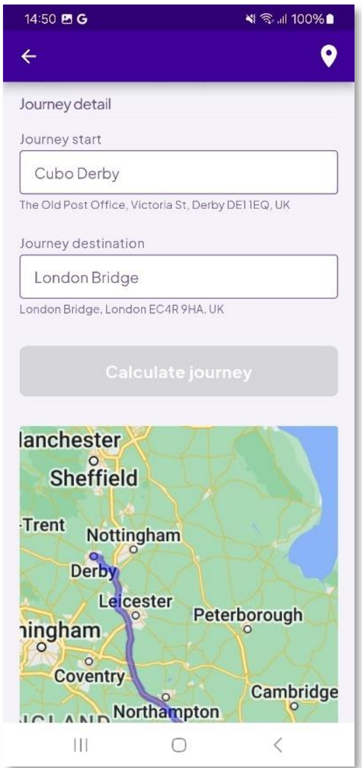
Option 2b: Validated mileage using google maps

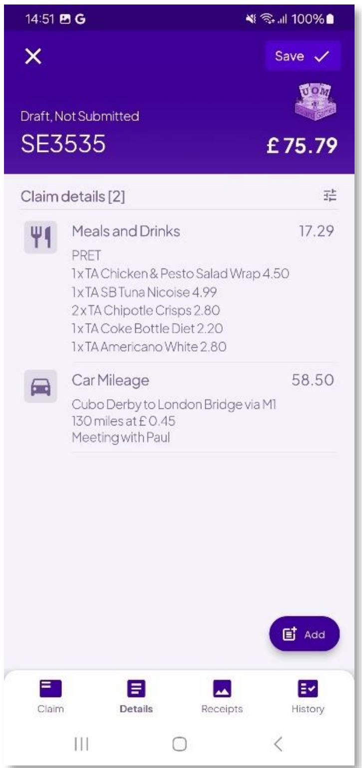
When selecting an expense type for your line, you may well have selected a **mileage** type line. When you do this, the line layout changes from the example above, and entry relates to a journey.

Tapping the journey option on your line will navigate you to provide specifics for your trip. As below, this will consist of the start and end location, along with options for whether it was a return (x2) journey.

Routing wise, you will need to enter the start and destination text and then tap "calculate journey". Lookups wise, we use Google maps to lookup the location, so this can be postcode, a town, a business etc – so long as we can get a map coordinate from Google.







When you have successfully calculated the mileage, and confirmed if this is a return journey, you can simply navigate back to the line. If you took a different route, or Google maps could not locate your start or destination, you can toggle on "manual mileage entry". - *Doing this allows you to specify your own mileage.*

Note:

Please note that when you toggle "manual mileage", the UI will reflect this with a warning. – This is for information, but also because we will want to be highlighting the fact that a student has manually calculated the mileage to subsequent approvers later…

Step 3: Manually adding receipts to support your claim

Receipt evidence is typically required to support your claim request, and you provide this under receipts. From here you review, add, update or delete images and PDFs to support your claim. When added, the thumbnails will display and you can view, or swipe to reorganise and delete.

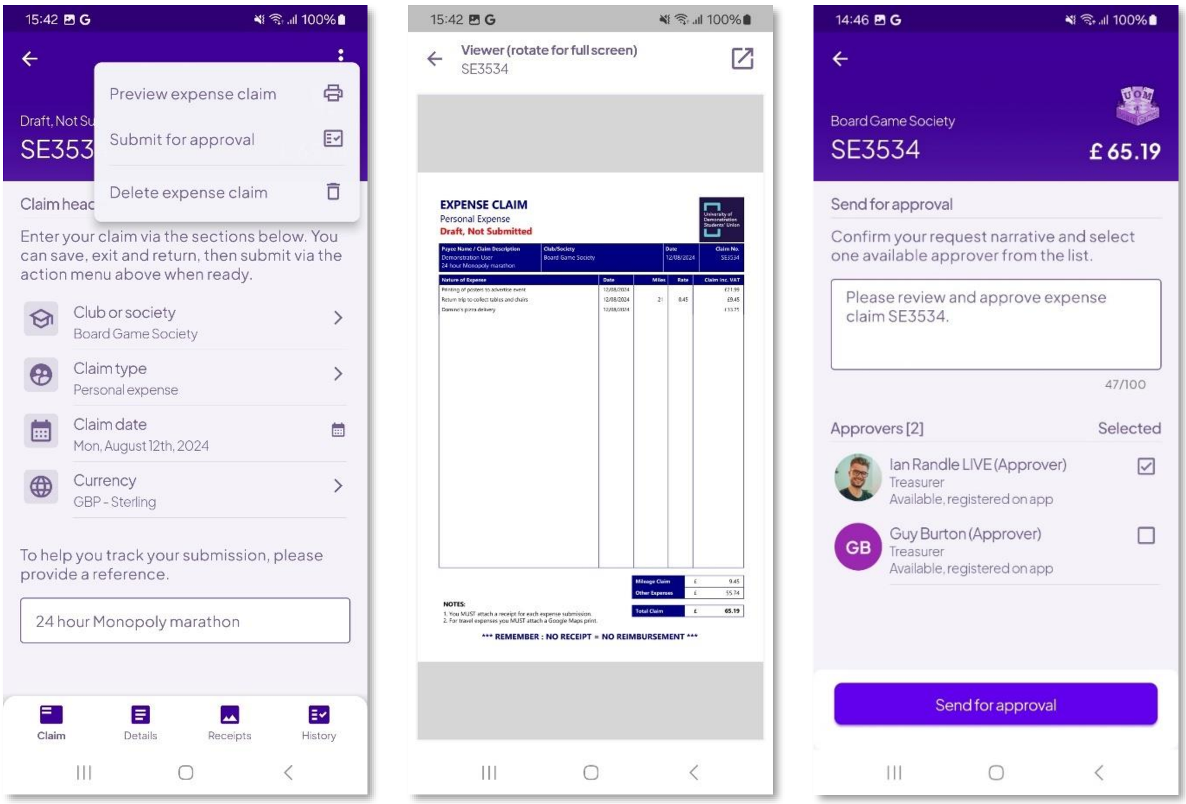
Step 4a: Not fully done yet?- save it in draft status and return later

You can optionally save your claim in **draft** and return later if you do not yet have all the details. To do this simply select "save" and navigate back to your claims list. Your entry will show as "Draft, in progress" and you can tap to return to it later. *If you want to abort changes you just made, you can cancel (X) these changes. If you no longer require the claim at all, select "delete" from the action menu.*

Step 4b: All done; preview and submit for group approval

When your claim is complete, ensure you have saved any changes, and then select the **action menu** at the top. Here you can choose to preview the claim (PDF preview), as well as "submit for approval".

When submitting for approval, provide any additional message (for your approver to see), select the required approver(s) and then tap "send for approval".



When claims are submitted, they will show on the expenses list as "Waiting for approval". Once submitted, you can still view the claim detail but no longer change it. If you wish to make changes, you can however cancel your approval request (action menu), re-edit, and re-submit, or delete.

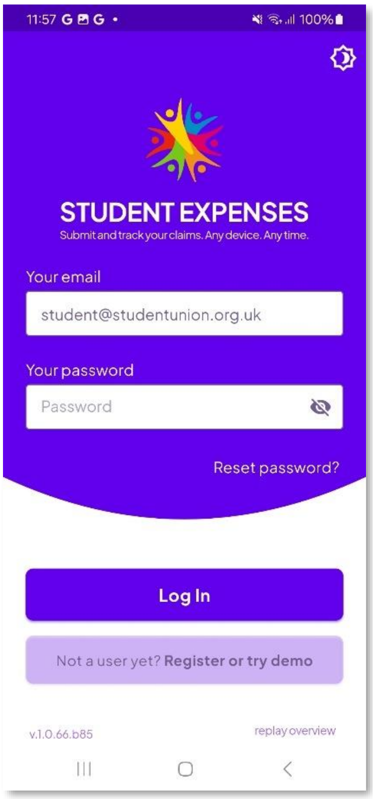
When your claim has been reviewed, you'll receive email and notification updates. To review your claims, at any status, just return to your claims list. A full activity is detailed in the "history" tab.

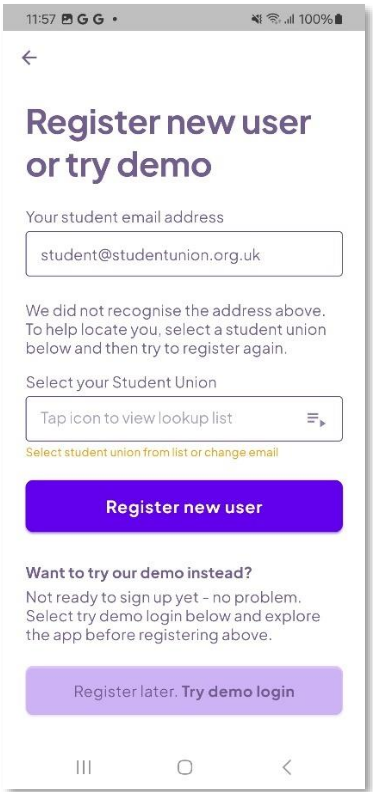
Registration – Setting up your own user

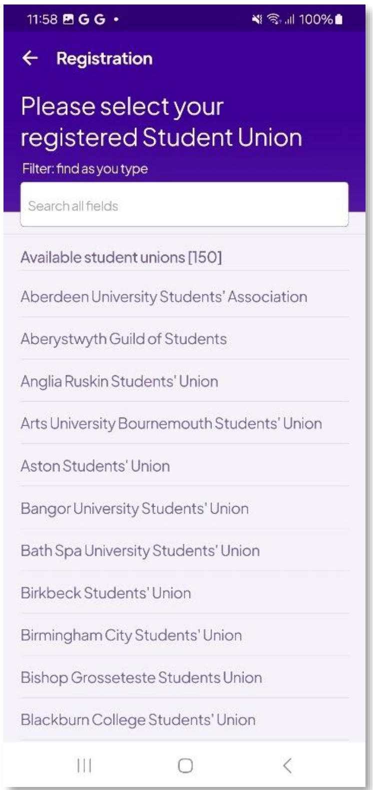
Register your own student union email address

Now that you understand the app, it is time to setup your own user account. Registration is a simple process, and you start the process from the login screen.

At the login page, tap the "Register or try demo" button and then enter your email address. The email address you require here is the one that is used within your Student Union system (SUMS, MSL, UnionCloud etc) and will likely be your union email address.







When entered, press "**Register new user**" and we'll look to see if we locate you from the email you provided. In most cases, we will match this to a Student Union email domain, and then email you a login password. If we can't identify you though, we'll ask you to manually select your Student Union – and then we will check again.

If we still can't locate you, it is likely that you will need to contact your Union team to assist. The common problem is that you are either using a non-student-union email (Gmail etc), or you have multiple accounts of the SU system. – *In these cases, the Union will need to assist you.*

As above, if we can locate you though, you will receive and email password.
You are then good to go…! 🥳 📱 👍

Learn more – check out our additional resources

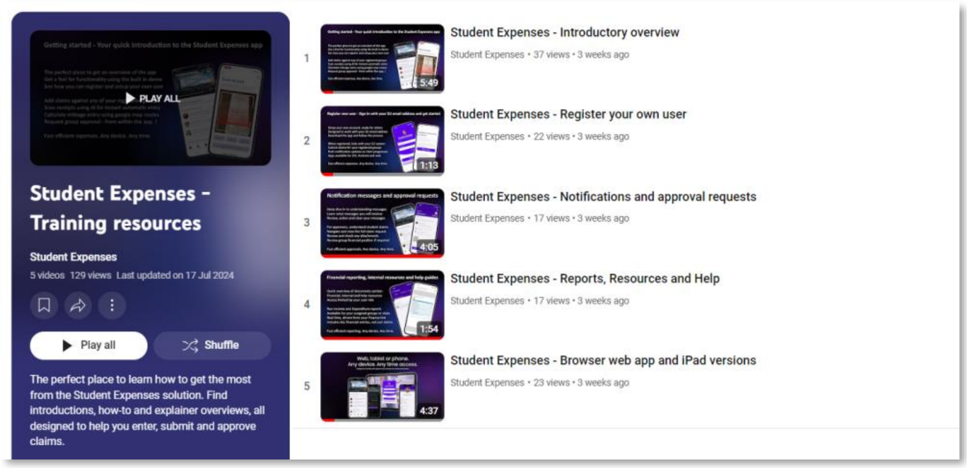
In-app information resources

The documents area of the apps contains a section called “Help”. This will provide in-app access to some of the YouTube materials (below) as well as a few help PDF files (like this one). The content here is provided by the app team.

YouTube playlists and overview videos

Our YouTube channel contains several resources designed to cover a range of topics. Where possible, we will categorise these into playlists – such as “Training resources”.

https://www.youtube.com/@StudentExpenses/playlists



Website and FAQ

Our website contains useful resources about our solution. Here you will be able to check out our latest news, integrations, help and guidance, as well as links to all our apps.

https://www.studentexpenses.com/