# Zoho Expense Submitter's Manual

# New to Zoho Expense?

## Don't worry!
## We will help you get started.

Zoho Expense is an online expense reporting application which makes your expense reporting effortless. It auto-scans your receipts and converts them into expenses automatically. It also automates report generation and helps you receive reimbursements on time, every time!

## If you have joined Zoho Expense as a submitter, this guide is for you.

In this guide, you will learn how to:

✓ **Activate your account**

💼 **Raise a trip request**

🧾 **Record your expenses**

📁 **Submit your expense report**

⚙️ **Explore My Settings**

# How to activate your account

**Accept the invitation and join the organisation.**

> After your admin sets up the account for the organisation, they will invite you to use Zoho Expense for your expense reporting needs. You will receive an email with the subject **'Join <your organisation name>Zoho Expense account'.**

Account Activation Flow

**Click the invite link in the email.**

**In the page that follows, create a password for your account.**

**You will receive an email to verify your account.**

**Click the verification link, and your account will be verified.**

If your email address is already registered with Zoho, that is, if you are using a Zoho product other than Zoho Expense, we will automatically take you to your Zoho Expense account. You need not create a password or verify your account, you can use your existing Zoho account's email address and password to access Zoho Expense.
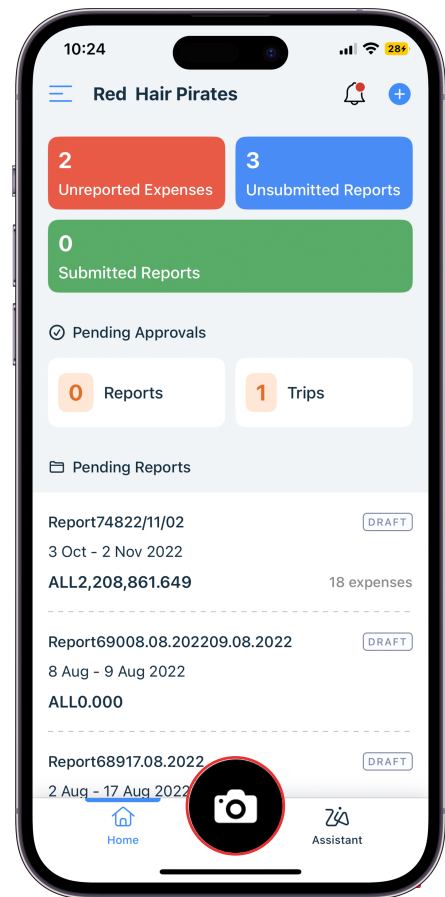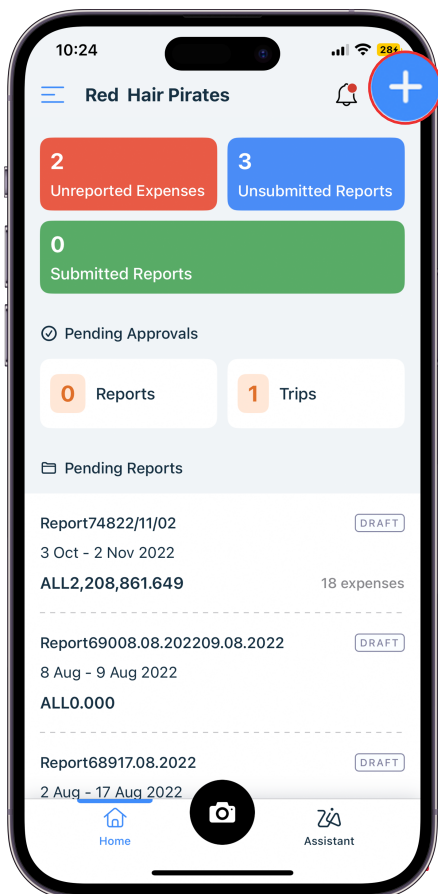
# IOS App
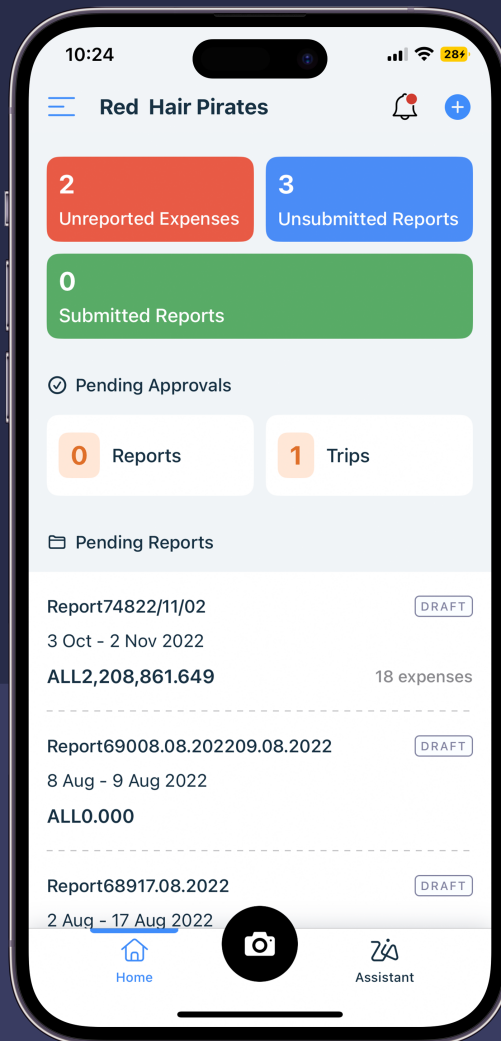
# Mobile App - IOS

## 1. Create expenses from receipts

Tap the Camera icon on the Dashboard. Take a snap of the receipt using your phone camera or upload it from the gallery.
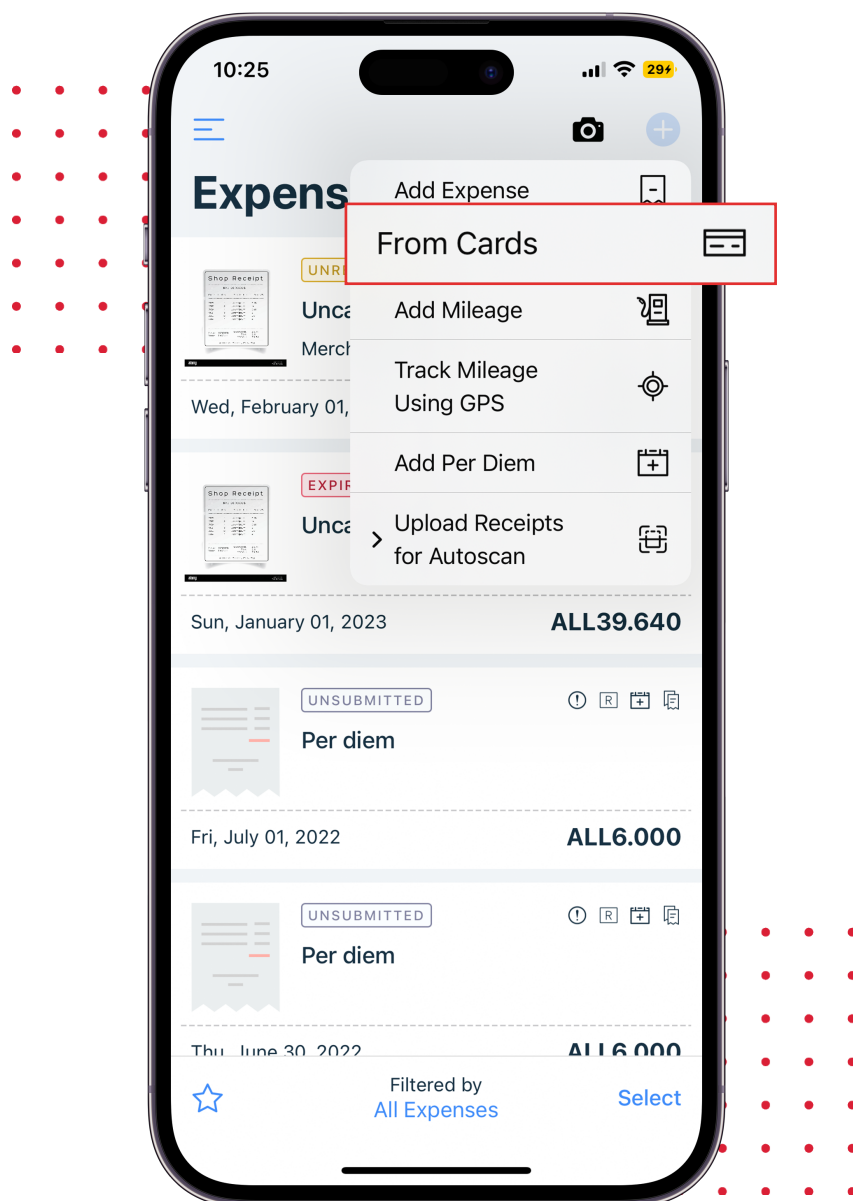


## 2. Create expenses

Tap the ➕ icon in the top right corner and select Expense.
Fill in all the details and click Save.

# 3. Create expenses from cards

Navigate to Expense and click ➕ in the top right corner and click From Cards. Select the transaction you want to convert into an expense. Click Add Manually, enter additional details and click Save.

# 4. Record mileage expenses

Tap on the ⊕ icon on the dashboard and choose Mileage to record the mileage expenses manually by entering the distance travelled or the odometer reading. You can also track the distance using the GPS feature.
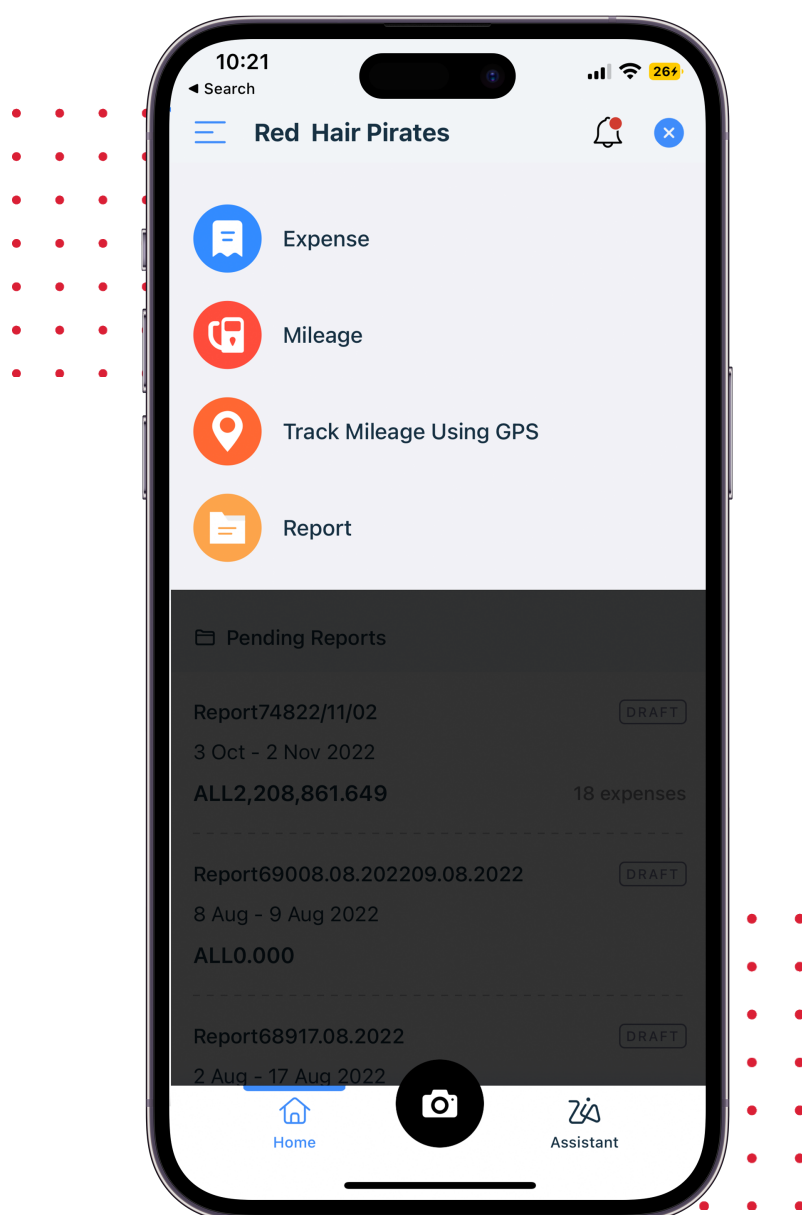
# The following are the different methods to calculate mileage expense:

### 📍 Enter the distance

Enter the distance traveled and the amount will be calculated based on the mileage rates configured by the admin.

### ⊙ Using GPS

Tap on the ⊕ icon on the dashboard and select Track mileage using GPS. Tap on Start at the beginning of the journey and Stop at the end of the journey. The distance and amount will be automatically calculated based on the configured mileage rate.

### ◎ Odometer reading

Fill the start reading and the end reading fields to auto-calculate the expense amount.

### 🗺 Using Maps

Just enter the from and to locations to auto-calculate the expense amount.

# 5. Add expenses to a report

To create a new report, click 🔴➕ icon on the dashboard and select Report. Enter all the details. Next, you can either add a new expense or include unreported expenses. Click Save.
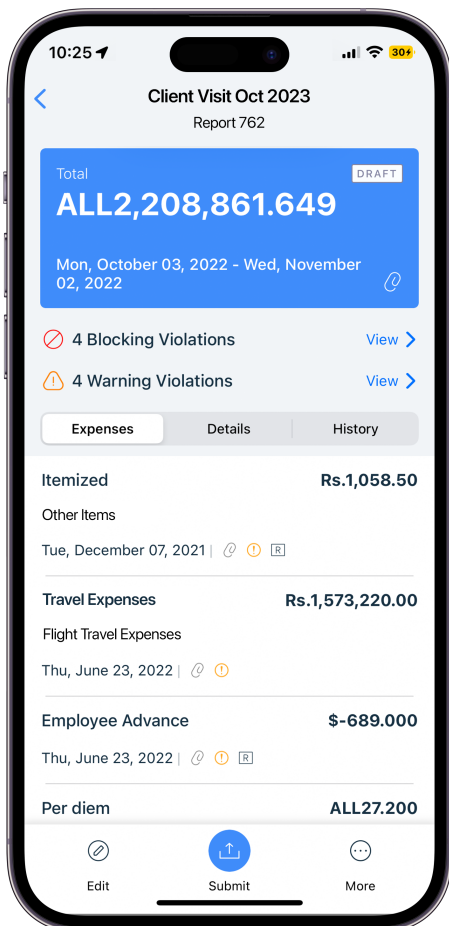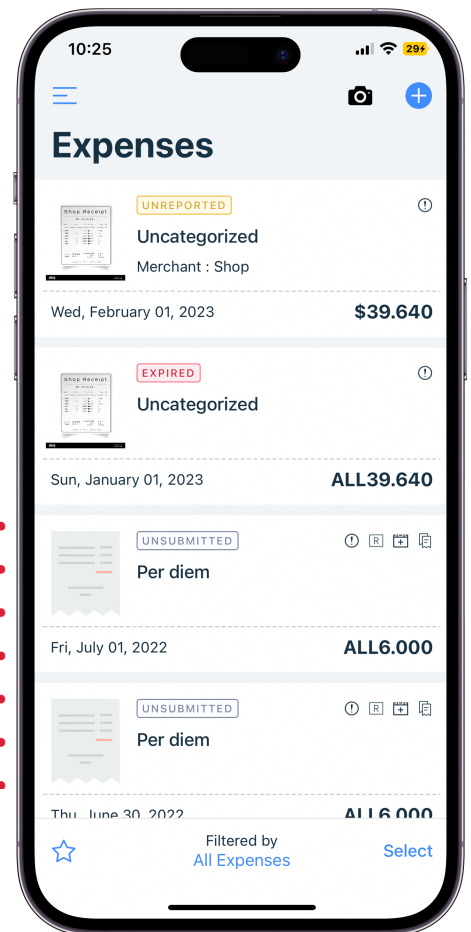


# 6. Submit a report for approval

Navigate to Report. Go to the report you want to submit for approval and click Submit.

**ZOHO** Expense