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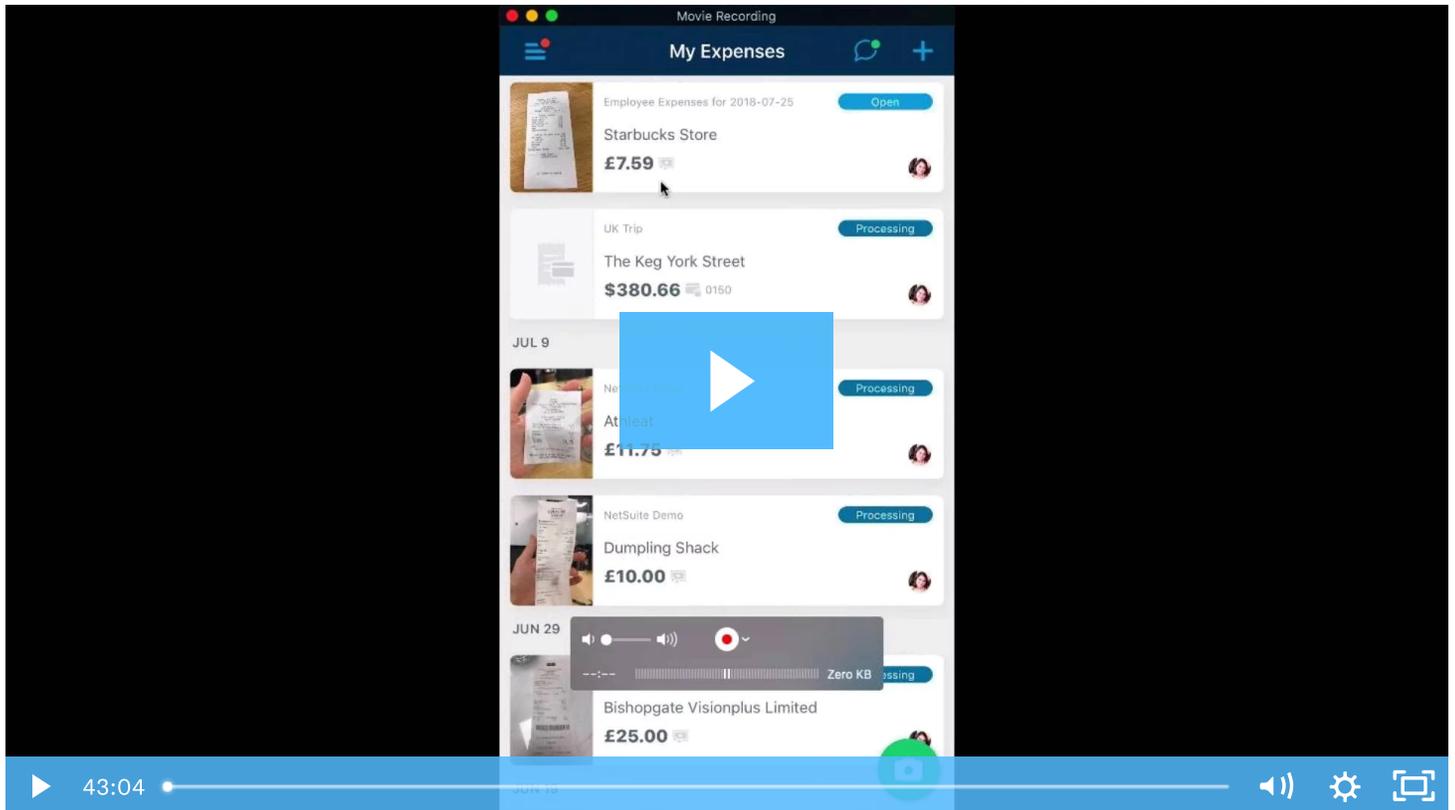
Are you receiving SNAP/EBT benefits? The [Expensify.org/SNAP-VAX](https://www.expensify.org/SNAP-VAX) campaign is live and accepting new members. Learn more about receiving \$50 for submitting a SNAP receipt and \$50 for getting your COVID-19 vaccine [here](#) and join today!

## Overview - The Employee Training Webinar



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### The Employee Training Webinar



### This covers:

- Using the Expensify Mobile App
- Your Expensify Web Account
- Creating Expenses
- Organizing Expenses
- Reporting Expenses
- Getting in Touch

## Using the Expensify Mobile App

The Expensify mobile app is the ultimate tool for entering expenses on the go and day-to-day expense tracking. Using the app, you can view your expenses in the palm of your hand and [SmartScan](#) new receipts with the click of a button! You'll also be able to create [time-based expenses](#) and [mileage and GPS expenses](#) wherever you are.

Expensify is supported on iOS and Android devices. Click below for Expensify download links to the Google Play store and the App Store:



### Feature Spotlight: SmartScan

SmartScan is simple on the outside and complex on the inside. When you SmartScan a receipt, we'll read the Merchant, Date, and Amount of the transaction, create an expense, and add it to your Expensify account automatically!

**To learn more about using the mobile app, check out these help docs:**

[SmartScan 101](#)

[Upgrading to Unlimited SmartScans](#)

[Mobile App FAQ](#)

[Mileage and GPS Expenses](#)

[Trips](#)

## Your Expensify Web Account

Where the mobile app is meant for on-the-go expense tracking, your web account has the tools to organize and manage those expenses for easy reporting and filing.

### ✓ **Configuring your account**

You'll configure your account using the Settings tab, under the Your Account tab. Your Account is where you'll handle personal account details, import a personal credit card or enter reimbursement information.

### ✓ **The Expenses page**

Your Expenses page is where you will see a running total of your expenses. You can search, sort and group these expenses using the Filters at the top of the page.

You'll also be able to choose between a few different views here, including the [Analytics](#) view. This analytics view is what will allow you to view graph representations of your spend, as well as see a list of totals based on Category, Tag, credit card and more.

The screenshot displays the Expensify Expenses page for user Stephanie Elliott. The interface includes a sidebar with navigation options: Inbox, Expenses, Reports, and Settings. The main content area is titled 'Expenses' and features a 'New Expense' button. Below the title are various filters: 'From' and 'To' date pickers, a 'Merchant' search field, and dropdown menus for 'All', 'Billable', 'Reimbursable', 'All types', 'My expenses only', 'All categories', 'All tags', and 'All cards'. A status filter bar shows options: Unreported, Open, Processing, Approved, Reimbursed, and Closed. The 'Analytics' view is selected, showing a pie chart titled 'Categories' with segments for Travel, Meals and Entertainment, Rent, and many smaller categories like Fees, Taxes, Labor, etc. Below the chart is a table summarizing the data.

| CATEGORY                | TOTAL      | # OF EXPENSES | AVERAGE  | VIEW RAW DATA                 |
|-------------------------|------------|---------------|----------|-------------------------------|
| Travel                  | \$6,519.36 | 16            | \$407.46 | <a href="#">View Raw Data</a> |
| Meals and Entertainment | \$4,200.33 | 121           | \$34.71  | <a href="#">View Raw Data</a> |

**Check out these resources learn more about configuring your account and using the tools on the Expenses page!**

[Personalizing your Account](#)

[Expenses Page Filters and Analytics](#)

## Creating Expenses

If you're using Expensify to report expenses to your company, accurately tracking and organizing spend will save time and maximize your reimbursements. Expensify makes it easy to enter expenses into your account, so you can take the

focus off managing a pile of receipts and on to spending your time doing what you enjoy.

## ✓ SmartScan

**SmartScan** is a powerful ally in making sure each and every receipt has been documented and added to your Expensify account. When you SmartScan a receipt, we'll transcribe the merchant name, date and total of the expense, will categorize it and will add it to your **Expenses** page with an image of the receipt- all you'll need to do is snap a photo!

No photo? No problem - if you have a PDF or image file of the receipt, just forward it to [receipts@expensify.com](mailto:receipts@expensify.com) from an email address associated with your account, where it will be processed via the regular SmartScan route. If you'd like to forward in receipts from your personal email address, you can add it to your company account as a **Secondary Login** to allow you to forward your receipts from that address.

## ✓ Receipt Integrations

Expensify has **receipt integrations** with several travel providers, car services and food delivery services. For receipts from these providers, we'll automatically import the expense into your Expensify account so you don't have to worry about tracking them down later.

### HOW IT WORKS

Let us do your expense report for you!

Expensify automatically imports receipts from:



## ✓ Credit Card Import

You can [connect personal credit card](#) or have your admin connect your company credit card to automatically import transactions into your Expensify account. Once you establish the connection, posted transactions flow into your Expensify account and will merge with any SmartScanned expenses in the account. For any expenses under \$75 without a matching receipt, we'll generate an IRS-compliant [eReceipt](#) (excluding lodging expenses and for US based users only).

## ✓ Manually Create Expenses

On your Expenses page, you'll be able to manually create general, time-based and distance expenses. Just select New Expense and choose the type of expense you would like to create.

The screenshot displays the Expensify 'Expenses' page for user Stephanie Elliott. The interface includes a sidebar with navigation options like 'Inbox', 'Expenses', 'Reports', and 'Settings'. The main area shows a list of expenses with columns for Date, Merchant, Amount, Category, and Tag. A 'New Expense' button is visible in the top right, which has opened a dropdown menu with options for 'EXPENSE' (Manually Create, Scan Receipt, Create Multiple, Time) and 'DISTANCE' (Manually Create, Create from Map).

| DATE   | MERCHANT                        | AMOUNT   | CATEGORY | TAG      |
|--------|---------------------------------|----------|----------|----------|
| Aug 1  | Petco 2887 63528871 Parkville   | \$39.33  | Rent     | Personal |
| Jul 27 | American Airlines               | \$329.59 | Travel   | Business |
| Jul 27 | American Airlines               | \$329.59 | Travel   | Business |
| Jul 23 | Staples 00101113 Baltimore      | \$33.91  | Rent     | Personal |
| Jul 21 | Int*in *second Chance Baltimore | \$127.20 | Rent     | Personal |

Learn more about creating expenses using the links below:

[Time-Based Expenses](#)

[Creating, Editing and Deleting Expenses](#)

[Receipt Integrations](#)

[eReceipts](#)

[Personal Cards: Import via direct bank connection](#)

[Personal Cards: Import via CSV](#)

## 💡 Feature Spotlight: eReceipts

No receipt? No problem! Expensify [eReceipts](#) are full digital replacements of paper point-of-sale receipts for purchases of \$75 or less. These receipts are populated for automatically imported transactions that are in US Dollars. Expensify eReceipts meet the requirements for IRS Documentation as per [Publication 463](#).

## Organizing Expenses

Once you're entering and importing expenses regularly, you'll need a way to efficiently organize them. Categories and Tags will allow you to classify and label expenses in Expensify for easy filing.

### ✓ Categories and Tags

Categories and Tags are used to classify expenses. They are managed by your company admin so if you have any questions about which ones you should be using, reach out to your admin and they should be able to help you out!

## Applying Categories and Tags to Expenses

Hate manually coding your expenses? Let Expensify do the work for you! Here's how:

### ✓ Implicit Categorization

Over time, Expensify will learn how you categorize certain merchants and then [automatically apply that category](#) to the same merchant in the future. This means that if a specific vendor is usually coded a certain way, Expensify will 'learn' that preference and start applying those categories automatically.

### ✓ Default Categorization

If you're importing card transactions, [Default Categorization](#) will automatically code expenses to the proper category based on its Merchant Category Code (MCC).

### ✓ Expense Rules

If you have recurring expenses or frequently shop with the same merchant, you can create an Expense Rule to automatically apply the Category or Tag based on the merchant name.

### ✓ Manually Edit Expenses

For one-off expenses or to modify coding, you can edit the expense details right from the list on the Expenses page, or click the expense to open it and view more details.

The screenshot shows the Expensify Expenses page for user Stephanie Elliott. The interface includes a sidebar with navigation options: Inbox, Expenses (selected), Reports, and Settings. The main area displays a list of expenses with filters and a category dropdown menu open for the first expense.

**Expenses Page Filters:**

- From: 2018-01-01, To: 2018-06-30
- Merchant: (Searchable)
- Types: All, Billable, Reimbursable
- Categories: All categories, Business
- Tags: All types, My expenses only
- Cards: All cards
- Status: Unreported, Open, Processing, Approved, Reimbursed, Closed, Deleted

**Expense List:**

| DATE   | MERCHANT                             | AMOUNT   | CATEGORY    | TAG      | COMMENT |
|--------|--------------------------------------|----------|-------------|----------|---------|
| Jun 29 | Bill Dube Ford Toyota Dover Nh       | \$387.33 | Advertising | Business |         |
| Jun 29 | Boomerang For Gmail Mountain View Ca |          | Advertising | Business |         |
| Jun 29 | Airbnb * Hmxdw92dx9 415-800-5959 Ca  | \$       | Advertising | Business |         |
| Jun 28 | Membership Fee Jun 18-may 19         |          | Advertising | Business |         |
| Jun 28 | 99rrant 10065ccrd-d Concord Nh       | \$44.24  | Home Office | Business |         |

**Category Dropdown Menu:**

- Uncategorized
- Advertising (checked)
- Benefits
- Car
- Equipment
- Fees
- Home Office
- Insurance
- Internet

To learn more about applying Categories and Tags to your expenses, check out these links:

- [Implicit Categorization](#)
- [Default Categorization](#)
- [Expense Rules](#)
- [Editing Expenses](#)

## Reporting Expenses

Consistency in SmartScanning and categorizing expenses pays off! On your [Expenses](#) page, you'll be able to easily locate a specific expense and add it to a report to submit for approval and reimbursement.

### ✓ Locate a specific expense

You can use the filters on the Expenses page to locate a specific expense.

The screenshot shows the 'Expenses' page in the Expensify interface. The user is Kadie Alexander. The page displays a list of expenses with columns for DATE, MERCHANT, AMOUNT, POLICY, CATEGORY, and DESCRIPTION. The first expense is Starbucks for \$57.00 on Jan 14. Other expenses include Bubbles, iStore, Wendy's, McDonald's, Uber, and NZ Post. The interface includes filters for 'From', 'To', 'Merchant', 'All categories', 'All tags', 'All policies', and 'Cash/Other'. There are also buttons for 'Unreported', 'Open', 'Processing', 'Approved', 'Reimbursed', 'Closed', and 'Deleted'.

Once you're ready to report your expenses, select the checkbox next to the expenses you wish to report, and select your reporting option from the Add To Report drop-down.

The screenshot shows the 'Expenses' page with one expense selected: Starbucks for \$57.00 on Jan 14. The 'Add To Report' dropdown menu is open, showing options: 'Auto-Report', 'New Report', 'None', and three 'Open' options with expense IDs and amounts. The 'Add To Report' button is highlighted with an orange arrow. The 'Settings' button in the left sidebar is also highlighted with an orange arrow.

## ✓ Submitting a report

Do a final check that all of your expenses are properly coded, fix any violations that might be present on your report, and click Submit to send your report to your approver. You're done! Now your manager will approve and process your report.

Next Step:  
Waiting for you to submit these expenses.

Open RETRACTED ID: 61075083 Type: Expense Report Policy: k.alexander

**Kadie's Expenses #61075083** **NZ\$141.74**

From: Kadie Alexander Tax: NZ\$3.00  
Date: Feb 18, 2020 to Jul 9, 2020

Meals and Entertainment - NZ\$33.00

| DATE  | MERCHANT  | AMOUNT    | TOTAL      |
|-------|-----------|-----------|------------|
| Jul 9 | Starbucks | NZ\$33.00 | NZ\$33.00* |
|       |           |           | NZ\$33.00  |

Uncategorized - NZ\$108.74

| DATE   | MERCHANT | AMOUNT  | TOTAL                        |
|--------|----------|---------|------------------------------|
| Feb 18 | Telstra  | \$70.00 | 1.5534 USD/NZD<br>NZ\$108.74 |
|        |          |         | NZ\$108.74                   |

Policy Violations  
\* Receipt required

Notes  
\* Tax rate was modified

## ✓ Have questions about what's happening with your report?

If you have any questions on when your report has been approved or when you should expect a reimbursement, check out the Report History & Comments section. This section lists all the actions that a report has gone through. If you're waiting for a reimbursement you can find the admin who's currently working on your report here and reach out to them for more info on the next steps.

Undo Submit Take Control

1 of 18 reports

Uncategorized - NZ\$108.74

| DATE   | MERCHANT | AMOUNT  | TOTAL                        |
|--------|----------|---------|------------------------------|
| Feb 18 | Telstra  | \$70.00 | 1.5534 USD/NZD<br>NZ\$108.74 |
|        |          |         | NZ\$108.74                   |

Policy Violations  
\* Receipt required

Report History & Comments

10 minutes ago  
You created this report

< 1 minute ago  
You submitted this report to Kadie Alexander (k.alexander@expensify.com)

Write something...

Receipt Thumbnails  Include full page images in PDF

Documents

## Get in Touch

Finding that you need some assistance to get your account set up just right? We can help! Expensify offers several support platforms to get you the help you need.

- If you'd like to see the recording of the [Employee/User Training Webinar](#) you can find it in the Webinars category on the Community!

- You can access our help docs on the Community. Check out the How-to, Deep Dive, and FAQ categories. Here, you can find help docs that provide step-by-step instructions for pretty much anything in your account, as well as troubleshooting guides.
- Concierge does more than guide you through report review and walks you through policy setup - it's also an Expensify expert! Concierge has the answers to Expensify users' most frequently asked questions and she is always available to help. You can email Concierge and the Success Team at [concierge@expensify.com](mailto:concierge@expensify.com), or send a message through the Expensify mobile app. We'll do our best to respond to you as soon as possible!

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