

Xero Expenses

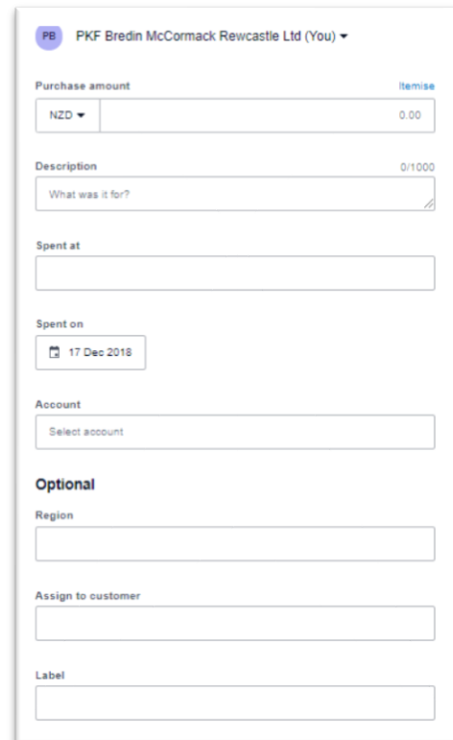
Entering Expense Claims

From a computer

Business > Expense Claims > New Expense

Fill in the relevant information of the transaction. If you have a receipt you can either upload it or drag and drop

- Amount of transaction
- Description (optional)
- Spent at - where you spent the money
- Spent on – date of transaction
- Account – expense account to be coded to
- Tracking category (if relevant)
- Assign to customer
- Label (if relevant)



PKF Bredin McCormack Rewcastle Ltd (You)

Purchase amount: NZD 0.00

Description: What was it for?

Spent at:

Spent on: 17 Dec 2018

Account: Select account

Optional

Region:

Assign to customer:

Label:

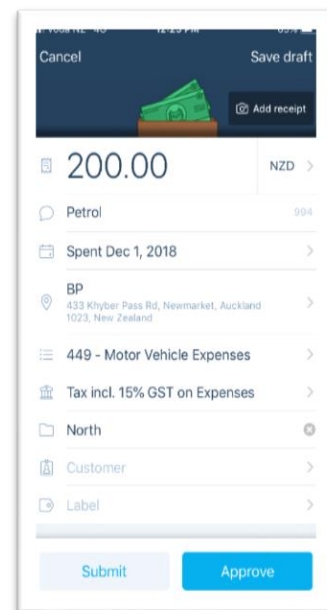
From the app

Login to Xero expenses app

+ Symbol

Take a photo of the receipt or press No receipt

Fill in relevant details required



Cancel Save draft

200.00 NZD

Petrol 994

Spent Dec 1, 2018

BP
433 Khyber Pass Rd, Newmarket, Auckland
1023, New Zealand

449 - Motor Vehicle Expenses

Tax incl. 15% GST on Expenses

North

Customer

Label

Submit Approve

Paying Expense Claims

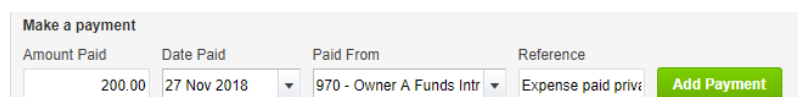
Once you have entered all the information you can save as a draft, submit for approval or approve it. This will then create a transaction under your items to pay.

Either paying from bank account:

1. Make the payment for the claim
2. When the payment shows, match this to the expense claim

Or claim as capital introduced:

1. Find the expense claim in Business > Bills to Pay
2. At the bottom is a Make a Payment section. Fill this in and ensure the Paid From is Capital/Funds Introduced



Make a payment

Amount Paid	Date Paid	Paid From	Reference
200.00	27 Nov 2018	970 - Owner A Funds Intr	Expense paid priv

Add Payment