

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)

PB PKF Bredin McCormack Rewcastle Ltd	(You) 🔻
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🖬 17 Dec 2018	
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From the app

Login to Xero expenses app

+ Symbol

Take a photo of the receipt or press No receipt

Fill in relevant details required

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 priva	Add Payment	

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