

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 Newcastle Ltd (You) ▾

Purchase amount Itemise

NZD ▾

Description 0/1000

What was it for?

Spent at

Spent on

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

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 >

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
<input type="text" value="200.00"/>	<input type="text" value="27 Nov 2018"/>	<input type="text" value="970 - Owner A Funds Intr"/>	<input type="text" value="Expense paid priv"/>