How to Manage Expense Reports With Nexonia – YouTube

Homepage: https://system.nexonia.com/assistant/showSignin

Training Video: https://youtu.be/Ko30jo1b0QY

Help Files: https://help.nexonia.com/hc/en-us

Training Notes (from Desktop):

- Credit Card Expenses - All credit card monthly reports for expense purchase transactions incurred must be assigned to a ministry category with a description for the purchase by using the Nexonia online portal or the Mobile App.
- Home – Dashboard
- Click “EXPENSES”
  - Select “Reports” Tab
  - Click “Add Report”
    - Title: Month_Year_Expense Report (i.e.., December 2021 Expense Report)
    - Click “Save”
- Click “Add from Card Transaction”
  - Complete the following for each line by allocated the expense to the correct: Category, Class (only if applies), Location, Ministry
  - Click check box next to item
  - Click “Create”
  - In “Memo” box, enter in a brief but clear explanation of the expense
  - Click “Add Receipts”
  - Click “Upload” then “Save”
  - Click “Save and Close”
  - Repeat for each expense line
- Click “Create and Close” once all line items have been categorized and necessary receipts have been uploaded
- Click “Submit” once your report is completed for the month and your “subtotal” and “company paid” totals match
- Report will be approved by your designated approver.