Getting started - Administrator

**Expense Management.
Simplified. For you.**

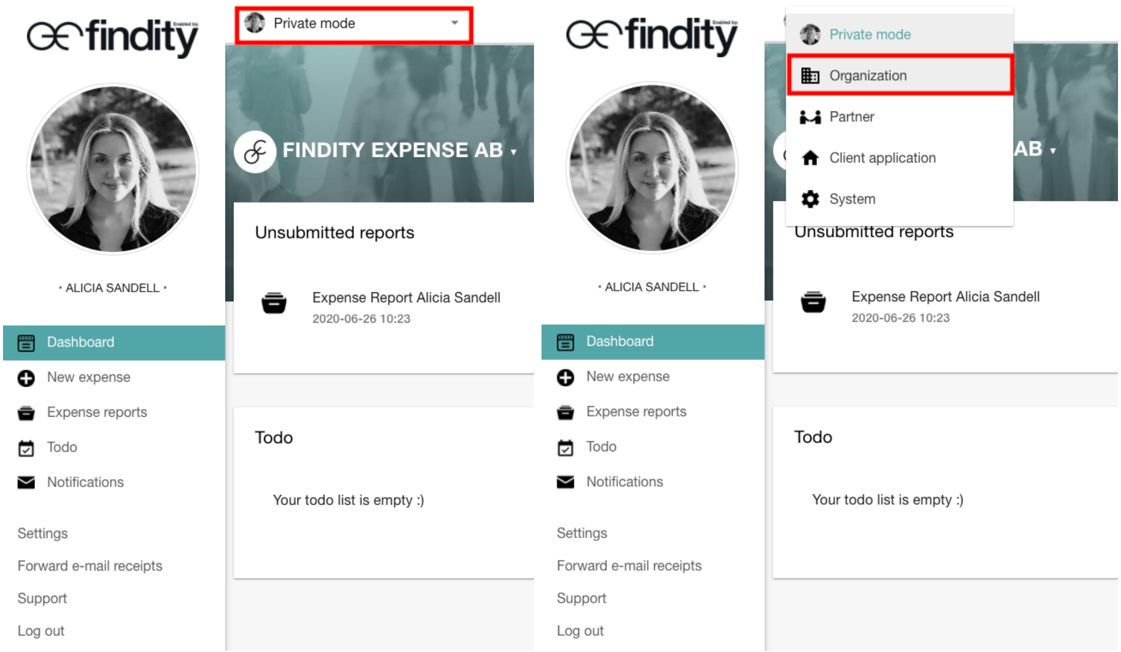
Getting started - For Administrators

As a Findity administrator, you can customize expense processes to suit both you and your company. Whenever you need to, you can change what to include in an expenses process, what the user interface looks like, and which users can do what.

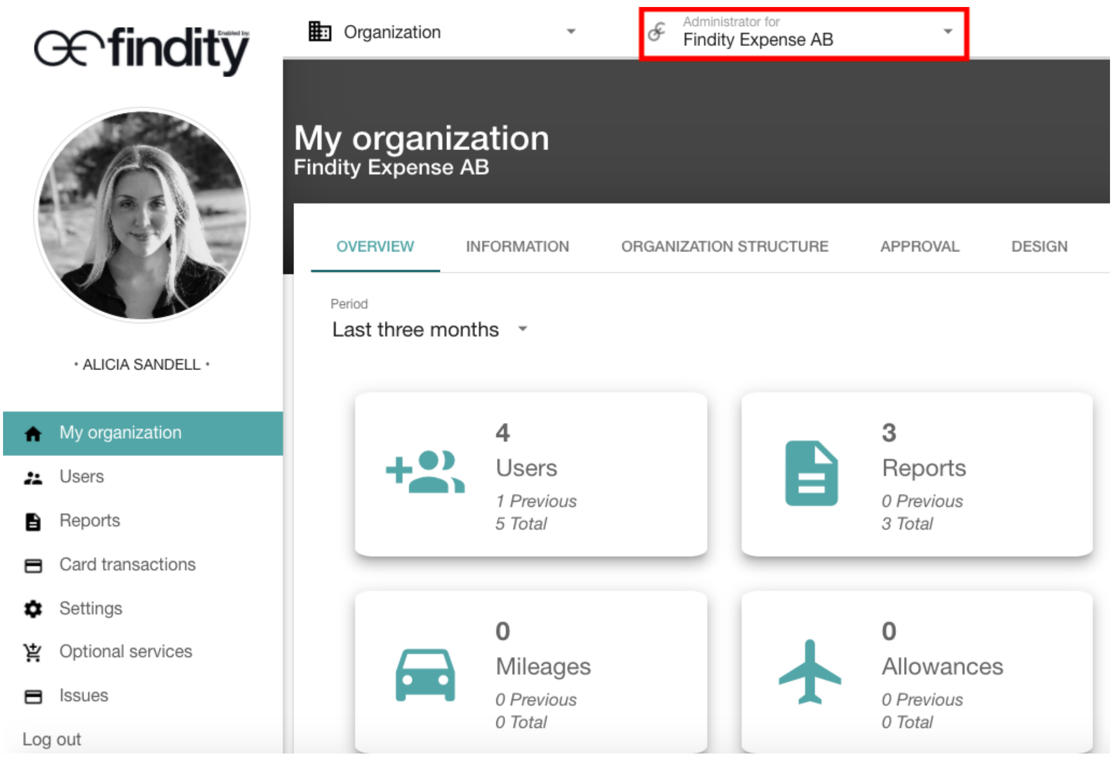
Change between administrator mode and private mode

Even though you are a Findity administrator, whenever you log in to Findity, you are logged in in Private mode.

Click on the drop-down list to switch to an organization for which you are the administrator. The organizations that you manage are displayed in the drop-down list in the upper left corner.



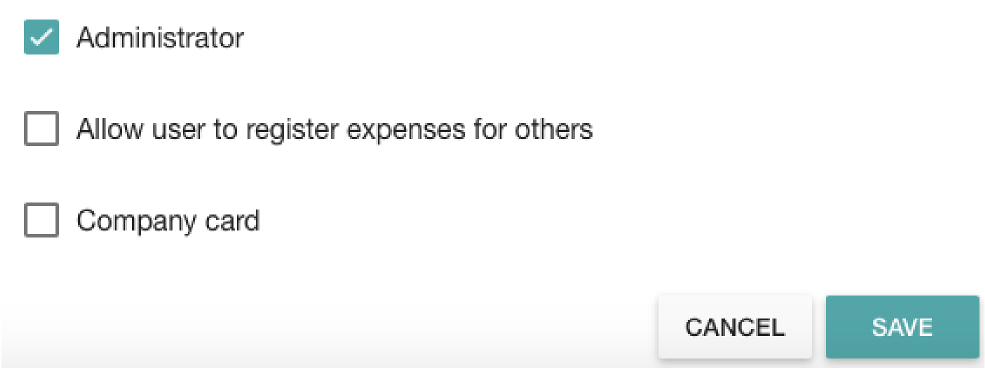
Click on the second drop-down list to switch to another organization.



Assign administrator privileges

As a Findity administrator, you can assign administrator privileges to other Findity users.

To do this, in Administrator mode and in the organization the user will administer, click on Users. Click on the user you want to assign administrator privileges, this can be a regular user or an accounting consultant, and select Administrator.



FINDITY

Managing the expense process

Expense processes depend on which report recipient Findity is linked to.

Findity can be integrated with most accounting and payroll systems and you can choose from multiple file formats when generating expense reports.

An expense process has a set of default settings that you can edit and customize for your company and you can find these settings by going to Settings. The following sections provide brief descriptions of the settings available, for complete instructions see our Settings guide.

My organization

From My organization, you can manage, among other things, approval processes, and app design. You can also generate balancing reports to monitor your expense processes.

From Overview, you get a view of the number of reports and expenses in the past month and you can see how many active users there are in your organization. This is also where you can generate a balancing report at any time. Findity generates these reports in xlsx format.

Under Organization Structure and Attestation, you configure your organization's approval process. See our guide on approval settings for more information.

From Design, you can select icons and background images to be displayed in our app and on our website when your users access them.

Settings

As an administrator, and before you start using Findity, there are a number of settings you must review in order to customize an expense process to suit your requirements.

From Settings, you access settings for reports, expense categories, payment methods, processes/flows, approvals, cost centers, and projects. Click the information and question mark icons to learn about each function.

FINDITY

Here are some things to consider when configuring Findity:

• Determine how expense reports are to be sent, for example, to your accounting system or your payroll system; this determines which report recipient to specify.

• Decide if you want edit mode enabled. When edit mode is enabled, approved reports are held for an administrator to review before being sent to the report recipient.

• Determine which payment methods users should be able to choose (this only applies when the report recipient is the accounting system).

• Decide which expense categories users can choose from.

• Decide which expense category is posted to which account.

• Decide whether to activate projects and/or cost centers so users can select them.

• Decide if you want to activate approvals and, if you do, who should approve reports.

• Select which fields users can see and which fields must be completed.

Users

From Users, you can see all users in an organization. If your company is registered as a partner, for example. as an accounting firm that administers a company's accounts, there may be a tab where you see your assigned accounting consultants.

From Users, you manage, among other things, users' employee numbers, if they have a company card, if they can report expenses for another user, and which department they belong to. You use this information when setting up an approval process.

Marketplace services

So that you can further automate and simplify expense processes, you can connect Findity to your company cards and mileage apps. You can also register the fuel benefits that apply to your organization. You can find all of these under the marketplace section.