Getting started - Users

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Findity enables you to report your business and travel expenses using your web browser and our mobile app. Findity also gives you an overview of all your reports, messages, and personal settings.

Creating an account

When your organization invites you to use Findity, you receive your invitation in a welcome email which contains some background information and a link you use to activate your user account. The invitation comes from the person who administers the organization to which you will be submitting expense reports.

In the email, click Activate account.

Welcome Alicia

Niclas Gunnarsson has added you as a Findity Expense user managing
expenses for Findity Expense AB.

Activate account

When prompted, enter your first and last names and a strong password. Click Create account. Findity creates your account and signs you in. You will receive an email containing a link to help you download the Findity app for your mobile device.

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556838-8200
findity.com
info@findity.com

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Download the app

You can download our Findity app from Apple's App Store or Google Play. When you've downloaded and installed it, open the app and sign in with your Findity user credentials.

If you belong to more than one organization, you can easily switch between organizations by swiping sideways at the top of the screen.

Email receipt

From here you can forward any receipts you receive by email to **expense@findityexpense.com**. Keep in mind that you must send the receipt from an email address associated with your Findity user account. You can add more email addresses by using your web browser to sign in to Findity and going to Settings and entering them in Additional email addresses.
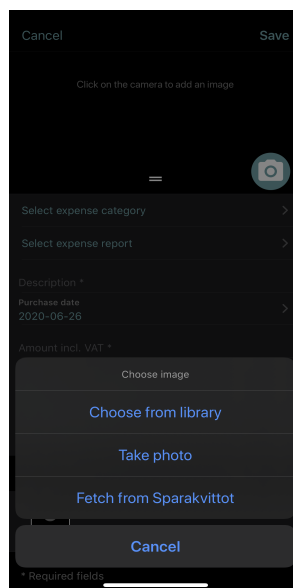
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Creating expenses, mileages and per diem allowances
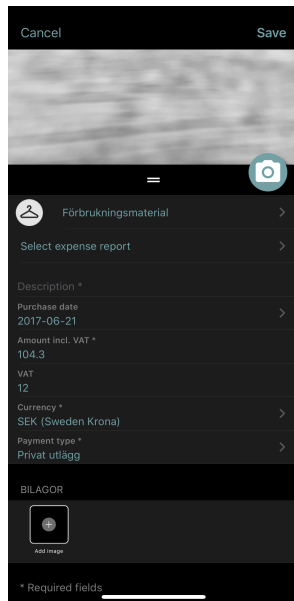
Creating expenses

Tap Plus and select New expense.

Findity starts your device's camera so you can take a photo of your receipt. If you only want a photo of your receipt and not the background it's on, tap Crop, position the crop outline over your receipt, and then take a picture.

You can add an image of your receipt later or add one you've already received and saved in your image library. To access these options, tap Cancel or the back arrow when your camera starts.

Findity analyzes your receipt and automatically suggests the amount, VAT, date and currency.

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Check that the app has scanned the information correctly. If you need to make a change, tap on the field you want to change and enter the information manually.

If the app hasn't already done so, complete any further information needed and select the expense category.

The administrator for your organization determines which fields you must complete.

NOTE! If your organization uses control numbers, a unique number for each receipt will be visible in your camera view. Make a note of that number on your receipt before you photograph it.

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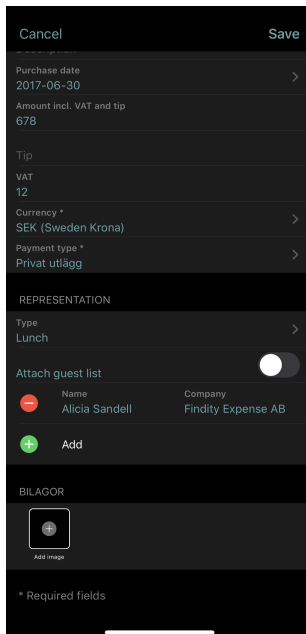
Creating entertainment / hospitality

Tap Plus and select New expense.

Add the receipt as described above.

Check the information the app suggests and select the correct expense category based on whether it is internal or external entertainment/hospitality.

Specify the type of entertainment/hospitality your expense relates to for, example, lunch, dinner, coffee, or something else.

Enter how many guests were there. Tap Plus to add more guests. You can also attach a guest list if you don't want to enter each guest's details manually. You do this by adding an attachment (Bilagor) at the bottom of the screen.

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Creating mileages

Tap Plus and select New mileage.

Enter your trip's details.

Your organization determines compensation per kilometer and the vehicle types you can select.
Is the compensation wrong or is your vehicle type not available? Let your organization's administrator know.

Creating domestic per diem / subsistence allowances

Tap Plus and select New subsistence allowance.

Select Domestic.

Enter your trip's details. For domestic allowances, you need to specify your destination and when your trip started and ended.

Under Food and accommodation, enter any expenses your company paid directly so that your allowance can be calculated correctly for tax. Companies often pay for accommodation and that's why it is already selected.

Creating international per diem / subsistence allowances

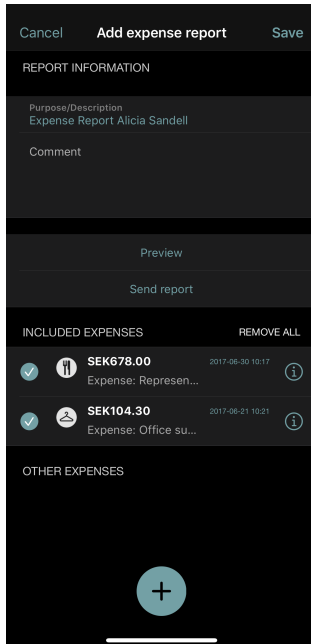Tap Plus and select New subsistence allowance.

Select International.

Enter your trip's details. When traveling abroad, you need to specify when your trip started in your home country, where you traveled to and at what time you arrived at your destination. Finally, enter at what time you left the country you visited and when your trip ended in your home country. You can add multiple destinations if you have visited more than one country.

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Submitting expenses to your employer

You can find your expenses on Overview, under Not submitted expenses.

Tap Plus and select Create expense report.

Enter a name for your expense report and select the expenses you want to include in it.

Click Preview to see your report before you submit it. Check that all the information and images are correct.
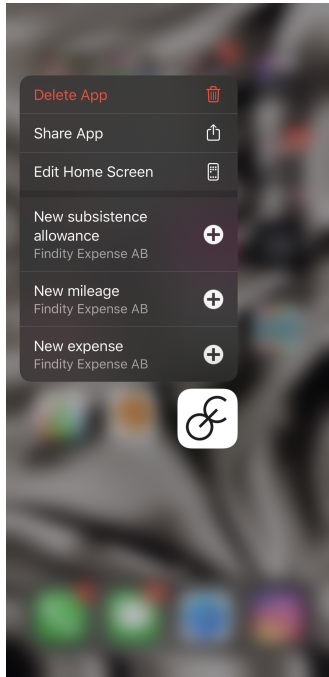
If you want to submit it later, click Save. You can find your saved reports on Overview under Not submitted reports.

To submit your expense report immediately, click Submit. Findity submits your report to your organization for processing.

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Reporting by using 3D touch

This feature applies to iPhone users. You can use 3D touch to create an expense without opening our app.

Press firmly on the Findity app to access new expense options.

Once you've tapped on the type of expense you want to add, your camera starts and you can take a photo of your receipt. When you are done, save your receipt. You can find it under Not submitted expenses.

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