

Administrator Training: Nexonia Expense Features

This table lists the more commonly used Nexonia Expense Features. These can be accessed only by Administrators, or those roles with an access level that grants them edit rights to Configuration > Company.

Features are found under **Settings > Company > Features**.

Feature	Description	Notes	Default ?	Keyword
Allow multiple Projects in a report	Controls whether you can have multiple projects in an expense report or limited to just one project per report.		Y	Expense Report
Enable multiple receipts per page	When you view the Expense Report as a PDF, this controls whether each receipt image is shown as a separate page or multiple receipts on a single page.		Y	Reporting, PDF
Violation popup	Creates a pop up warning on the web when an expense policy violation is triggered			Expense Policy
Track Value Added Taxes	If you wish to track taxes, this field must be enabled	Once enable, you'll now see Tax Codes and Tax Profiles appear under Settings > Company > Financial		Financial
Disable "None" as an option for tax profiles	If taxes are being used, should "None" be an option?			Financial
Track Card Transactions	Allows credit card transactions to be used in the expenses modules		Y	Credit Cards
Add expenses items only from Card Transactions	Limits expenses to credit card only, no out of pocket/reimbursable expense creation options			Credit Cards
Prevent personal cards from being created as company paid	Prevents employees from adding a personal credit card that would be treated as company paid.		Y	Credit Cards
Automated Corporate Card Transactions	Allows automated credit card transaction feeds to be set up on the profile.		Y	Credit Cards
Automated Personal Card Transactions	Allows employees to add a personal credit card to Nexonia via automated bank feed.		Y	Credit Cards
Automatically find categories for card transactions (statistics on previous associations)	Auto-suggestion of expense categories for credit card transactions, based on most frequently used selection for the transaction merchant code.	This starts to occur after the 5th time a particular merchant code is categorized with the same expense type.	Y	Credit Cards
Disable deleting card transactions	Prevents personal credit card transactions from being deleted from the transaction feed.			Credit Cards
Enable Item editor from card 'Create' button	When viewing the credit card transaction editor (list of all the charges), when you		Y	Credit Cards

	hit "Create", this causes the Item Editor to appear for the expense transaction.			
Support Imaging <input type="checkbox"/> Manual Upload <input type="checkbox"/> Fax <input type="checkbox"/> E-mail <input type="checkbox"/> Camera (webcam)	This enables the ability to add receipts to expenses. You can uncheck any of the boxes to remove that specific method from the receipt options.		Y	Receipts
Enable split expenses	Enables the ability to split an expense item	Disabling this will remove the "Split Item" button from the expense item interface.	Y	Expense Item
Show totals by expense category in summary	In the expense report, under the "Summary" tab, the totals will be grouped by expense category		Y	Reporting
Support Medical Attendees	Allows users to access the USA CMS National Physical Payment database to select physicians and teaching hospitals as attendees	Used by companies that must comply with the Sunshine Act .		Attendees
Title is mandatory for attendees	Requires a title for all attendees			Attendees
Company is mandatory for attendees	Requires a company for all attendees			Attendees
Hide 'Add attendee'	Hides option to add additional attendees			Attendees
Anonymous attendees	Allows anonymous attendees without contact details			Attendees
Guest attendees	Allows attendees to include unnamed guests - "+2" for example			Attendees
Employees as attendees	Allows users to access the organization's Nexonia user (employee) list as a searchable list for attendees.			Attendees
Filter Projects by Region	Limits which projects may be chosen, based on region.	Filter driven by user's region, and the region of the project.		Filter
Filter expense categories by Region	Limits expense category options based on region.	When enabled, the option to check off which regions can use that category can now be set at the bottom of each expense category (Company > Expenses > Category).		Filter
Filter expense categories by Project	Limits expense category options based on project.	When enabled, there will now be an "Expense Categories" tab under each project record. Only the values checked off will appear as options when this project is selected.		Filter
Filter expense categories by Project type	Limits expense category options based on project type.	When enabled, this option is filtered in each expense category. You'll see an option to check off which project types can use that category		Filter

		towards the bottom of the expense category settings (Company > Expenses > Category).		
Filter expense categories by user	Limits expense category based on users	When enabled, this option is set inside the settings for each expense category. When you edit a category, you'll see a tab called "Users" where you grant permission.		Filter
Split Expense by Percentage	When splitting an expense item, this gives the user the option to split by percentages.		Y	Expense Item
Payment Issued Status	Enables the ability for administrators to record when a payment is issued on an expense report.	Option to record a payment issued is located on the Action link for each expense report.	Y	Expense Report
Payment Received Status	Enables the ability for a user or administrator to record payment has been received on an expense report.	Option to record a payment issued is located on the Action link for each expense report.	Y	Expense Report
Show Signature in PDF	Includes the user (employee and approver) signature on the PDF generated for the expense report.	Requires an image of the user's signature to be saved under the user's settings.		Reporting
Bulk Create	Allows administrators to bulk create expense reports on behalf of multiple users			Expense Report
Force items with receipts to have a linked image	When an expense item is created and a receipt is uploaded into it, the system defaults to linking that receipt to the expense.			Expense Item
Prevent adding entries to a report once a payment is issued	Once payment has been issued on an expense report, no other expense items can be added to that report.			Expense Report
Prevent adding entries to a report once all entries have been submitted	Once all expense items within the report have been submitted, no additional expense items can be added to that report.			Expense Report.
Prevent adding entries to a report once some entries have had their final approval	Once at least one expense item in a report is fully approved, no additional expense items can be added to that report.			Expense Report
Don't allow to add entry where one or more entries has already been approved or submitted	Once at least one expense item has been approved or submitted, no additional expense items can be added to that report.			Expense Report
Only send completely approved report to the next approver	An expense report will only advance to the next approver once all items in the report are approved by the current approver.			Approvals
Don't show "Approve" and	Removes the ability to approve or reject			Approvals

"Reject" in the approvals report listing	reports at the approval reporting level. - this means you can't select multiple reports and approve with one click, you must approve the expense report by selecting the individual line items.			
Hide "Save and Copy"	Removes "Save and Copy" button from the Expense Item creation window.			Expense Item
Show policies inline in edit dialog	Display the expense policy text in line on the expense item on the web.	Triggered by selecting an expense category and shows the policy text for that category.		Expense Policy
Allow only one month in an expense report	Prevents expenses from multiple months to be added in the same report.			Expense report
Pre-Approval	Enables the pre-approval function, which can be used to request pre-approval on an expense..	Once enabled, pre-approvals need to be configured under Company > Expenses > Pre-Approvals		Pre-approval. Expense Items
Allow to create expense based on pre-approval item	If Pre-Approvals are enabled, this allows the user to convert the pre-approval item into an expense item.			Pre-approval. Expense Items
Duplicate detection	Flags submitted expenses with the same date and amount to the approver - this status is only visible to the approver, who can then investigate whether this is a true duplicate expense.	Options reflect where it's looking for the duplicate: <ul style="list-style-type: none"> ● Within individual users ● Expenses with the same category, as well as date and amount ● Within the entire region ● Within the entire company 		Approvals
Enforce one card statement date per report	For corporate or business credit cards, this limits the ability to mix transactions with multiple statement dates in the same expense report.	If the statement is provided, you can allow it to be visible to the user by adjusting the layout: and enabling the Statement date: Settings > Company > Expenses > Layout		Credit Cards
Structured Customers	Creates a structured list of customers for the user to choose from when creating expenses. The subsequent selection would be driven by the use of a colon ":" in the customer name.	Example: Customer A: Sub Customer 1 Customer A: Sub Customer 2 User would choose "Customer A" and then see a second dropdown where they choose between Sub Customer 1 and Sub Customer 2.		Expense Item, Set Up
Structured Expense Categories	Creates a structured list of expense categories for the user to choose from when creating expenses. The subsequent selection would be driven by the use of a colon ":" in the expense name.	Example: Travel: Airfare Travel: Hotel Travel: Taxi		Expense Item, Set Up

		User would choose "Travel" and then see a second dropdown where they choose between Airfare, Hotel, Taxi.		
Taxes are linked to:	Allows administrators to configure tax values to link to accounts or expense categories.			Financial, Set Up
Map Card 'Description'	Credit card transactions import a value called "Description". This allows you to map which expense item field this value should appear in, if any.	Administrators can use custom fields for this value to appear in, or none at all if it's not necessary to retain this value.	Default is "Memo" field.	Credit Card
Map Card 'Reference'	Credit card transactions import a value called "Reference". This allows you to map which expense item field this value should appear in, if any.	Administrators can use custom fields for this value to appear in, or none at all if it's not necessary to retain this value.	Default is "Memo" field.	Credit Card
Map Card "Vendor"	Credit card transactions import a value called "Vendor". This allows you to map which expense item field this value should appear in.	Administrators can use custom fields for this value to appear in, or none at all if it's not necessary to retain this value.	Default is "Memo" field.	Credit Card
Mobile PIN requirement	By default, if a user acts as a proxy for another user on a mobile app, they're required to set a PIN as a security measure. This option can be enabled for all mobile users, even when acting for themselves.			Mobile
DCAA Compliance	Checking this box automatically enables features to enforce Defense Contract Audit Agency (DCAA) compliance rules: Submit and Approve Expense by Report: Yes, no Add/Delete Provide a reason when editing approved entries.			Approval, Set Up
Submit and Approve Expense by Report:	Removes ability to submit, approve, or reject selected line items in the expense report. Administrator may have the ability to add or delete individual expense line items.			Expense Reports, Approvals
Prevent submission of an item with transaction date later than the submission	Can either flag or block an expense from being submitted with a transaction date later than the submission date.			Expense Reports, Approvals
Respect Project start and end dates	If a project has a start and end date, this function prevents the project from being selected by a user if the project has not started or has expired.	Start and Finish date can be set in the project record.		Projects
Close report after submission	User is prevented from adding any additional expenses once the report is			Expense Reports,

	submitted.			Approvals
Hide entries that are pending approval by other users	In the approval process, this setting would limit approver to only see the line items which they are able to approve.			Approvals
Maximum character length for memo	Limits how many characters may be entered in the expense item memo field. 1500 characters is the default, but can be lowered or raised.	This can help limit the length of a memo if there is a character limit in the reporting system this is being exported to.		Expense Item
Allow users to recall a report after submitting	Allows users to recall an expense report if it's in Submitted status. A comment is required from the user when they recall.	If enabled, you can enable the notification that would send an email to the approver.	Y	Expense Reports, Approvals
Chart of Accounts	If customer is maintaining a chart of accounts in Nexonia, this feature needs to be enabled to allow access to it.	Settings > Company > Financial > Chart of Accounts		Set up, Financial
Customer Types:	Sets whether customer are external, internal, or both.	If "Internal" is selected, the value "Customer" is automatically relabelled "Department".		Set up
Internal Contacts	This is a user filter: this can be used to filter which users can access specific customers or projects.	If selected, you can select which customers or projects the user can access either in the Customer/Project, or in the User record.		Filter
Filter currencies by User	This allows users to select which currencies they see in their expense item currency options.	Users will only be able to filter currencies as enabled by the administrator under Settings > Company > Financial > Currencies		Filter
Temporary Approval Proxies	Allows approvers to assign a temporary approver and effective dates.	Approvers can set this proxy under their own account settings. Administrators can also set it in the User record.	Y	Approvals
Create "General" Projects	Automatically creates a "General" project for any Customers without a project.	The expense configuration requires at least 1 Customer and 1 Project, even if it's a placeholder and a hidden field from the users.		Set up
Single Sign-On	Enables set up of Single Sign On configuration for web access.	Roles can be set to limit whether the user group can only use SSO, or may use SSO or individual login.		Set up
Uber enabled	Allows users to choose whether to integrate uber with their Nexonia profile to generate Uber receipts directly in their expense reports.			Expense item