Launching Nexonia Expenses

Administrator Guide to Nexonia Expenses (QuickBooks Online)

NEXONIA RESOURCES – AN OVERVIEW

Once you've successfully integrated your Nexonia Expenses account with your QuickBooks environment, you can use this guide to assist launching Nexonia with your users, as well as options for further configuring your account.

TRAINING YOUR NEXONIA USERS

Nexonia provides several live and pre-recorded options for training your users on how to use Nexonia expenses.

TRAINING WEBINARS

Nexonia hosts free recurring webinars for training new users, approvers and administrators on Nexonia Expenses. Each webinar will be led by a Nexonia Product Education Specialist who will guide the class through using the product and also allow time for live Q&A. Recordings of each webinar will be sent to registrants the next business day after the session.

Our registration pages are available to you and your trainees at help.nexonia.com under Nexonia Training Webinars. We'll be keeping the schedule up to date 5-6 weeks in advance.

TRAINING GUIDES AND VIDEOS

Training guides and videos can be found at help.nexonia.com under Getting Started: Expenses 101. These resources will help users get started on using Nexonia effectively on the web and mobile applications.

GO LIVE – LAUNCHING NEXONIA

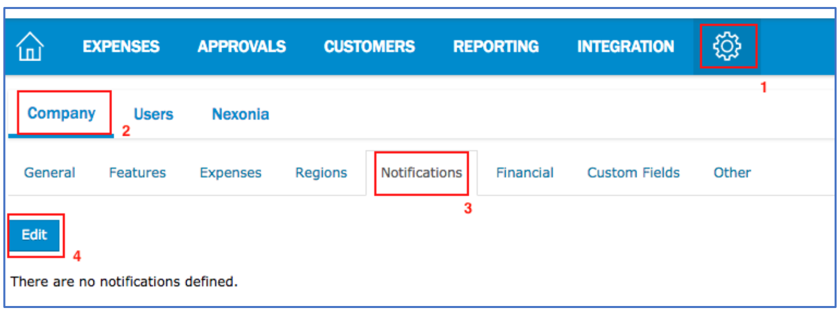
When you're ready to launch Nexonia with your organization, you'll want to enable notification emails and then grant your users access to Nexonia.

ENABLE NOTIFICATION EMAILS

As you Go Live, you'll want to turn on the Nexonia notification emails. These let your users know when expenses are submitted to them for approval, and when expense reports have been rejected or approved.

To enable the notification emails:

Navigate to **Settings** ⚙ (1) > **Company** (2) > **Notifications** (3), and click the **Edit** (4) button.



You'll now see the notification settings. We recommend enabling the following basic notifications:

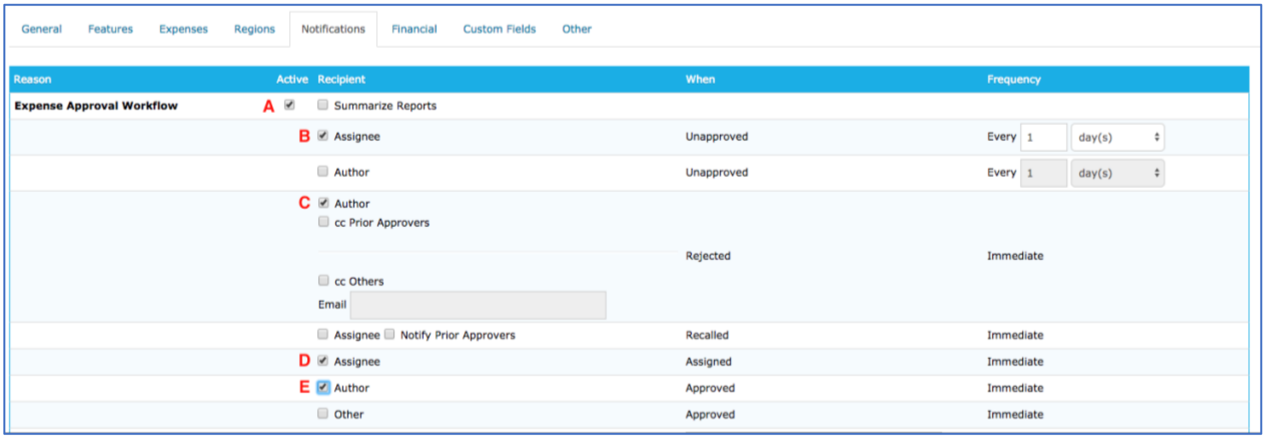
A. Expense Approval Workflow – check the Active box

B. Assignee, Unapproved – reminder for approvers if they haven't actioned submitted expenses after 1 day.

C. Author, Rejected – notifies expense submitter if an expense has been rejected.

D. Assignee, Approved – notifies approver when an expense report has been assigned to them.

E. Author, Approved – notifies expense submitter if an expense has been approved.



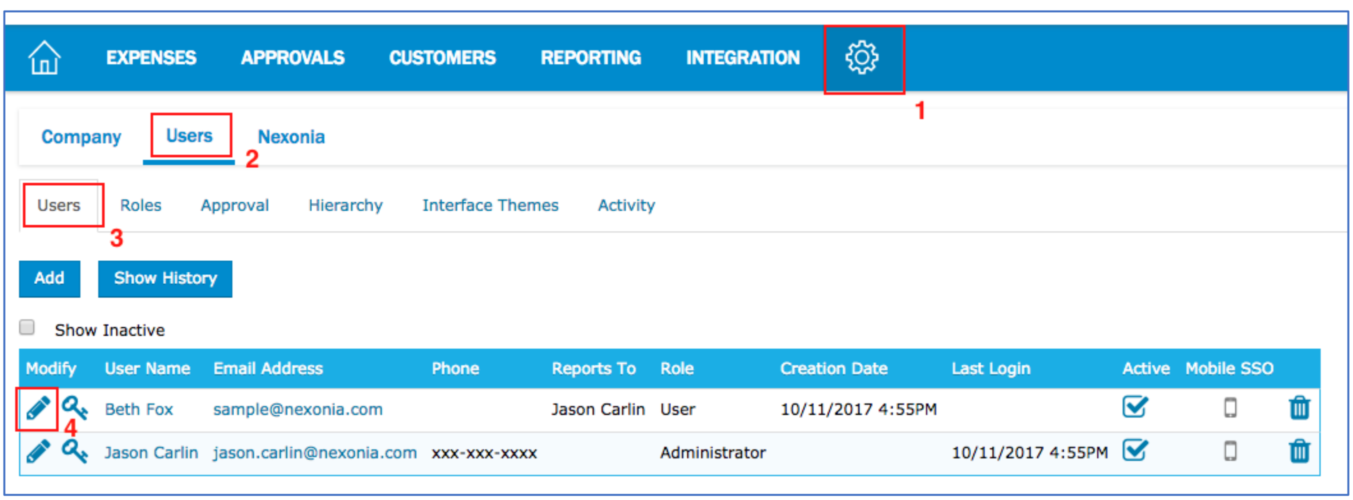
Once you've made your selections, scroll to the bottom and click the **Apply** button.

SENDING PASSWORD RESET EMAIL TO NEXONIA USERS

To notify your users they have access to Nexonia, you can send them a password reset email.

Users with Administrator access can trigger a password reset email notification to be sent to specific users, or all users that have yet to login to Nexonia.

To send a password reset email notification to **specific users**, regardless of whether they have logged-in previously or not, go to **Settings**⚙ (1) > **Users** (2) > **Users** (3), locate the user on the page > click the **Key** (4) "Reset Password" icon.



To send a password reset email notification to **all new users** all at once, go to **Settings**⚙ **> Company > Other > Maintenance** > click the **"Reset password for never logged-in users"** link**.**

This article walks users through accessing Nexonia: How to Log in to Nexonia for the First Time.

APPENDIX

APPENDIX: INTEGRATING CREDIT CARDS WITH NEXONIA EXPENSES

Business (Company Paid) Credit Cards can be integrated with Nexonia by administrators, providing daily automated credit card feeds directly to your users. Automatically capturing credit card transactions in Nexonia allows you to conveniently link credit card transactions directly into your expense reports.

Once the expense report is approved, Nexonia can export these charges to the Cash Management or QuickBooks Accounts Payable module.

Detailed instructions on integrating a company paid card are available on help.nexonia.com:

Integrating Business Credit Cards to Nexonia Expenses

These instructions apply to integrating a business credit card issued by your financial institution with Nexonia. These instructions will assist with integrating your Business Credit Cards with Nexonia:

1. Configuring the Credit Card Transaction Source
2. Entering Your Credit Card Credentials
3. Initiate the First Transfer
4. Assigning the Credit Card Feed to a Nexonia User Profile
5. Administration for Company Paid Credit Cards: Filtering Out Old Transactions

For a true Corporate Credit Card program, issued by a credit card provider, please contact help@nexonia.com for assistance with the initial integration.

Q: How can I tell what type of card we use?

A: Corporate credit card programs are typically issued directly by credit card providers and will say “Corporate” somewhere on the card’s branding. “Commercial” or “Purchasing” card programs would be treated as corporate cards. These are common to medium to enterprise level businesses.

Business credit cards are common for small to medium-sized businesses, typically issued by a financial institution. They’ll usually say “Business” somewhere on the branding.

EXPORTING CREDIT CARD CHARGES TO QUICKBOOKS ONLINE

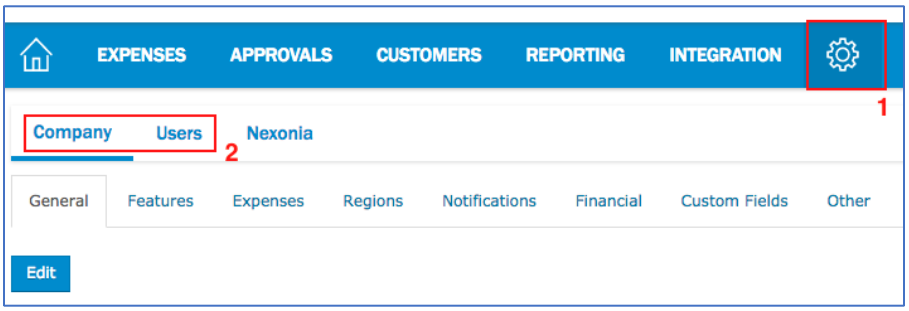
Instructions are available on help.nexonia.com on how to update your configuration to export the credit card transactions to QuickBooks.

Mapping Company Paid Credit Cards to QuickBooks Online

APPENDIX: ADDITIONAL NEXONIA CONFIGURATION

Nexonia's online Knowledge Base help.nexonia.com has articles and guides to assist you with any further configuration and training users on Nexonia. We'll cover a few tips and resources to consider as you launch Nexonia with your organization.

Your Nexonia account settings can be found under **Settings** ⚙(1). Here are the main sections where you'll find information – Company and Users (2).



COMPANY SETTINGS

Company – these are settings for your Nexonia Expenses module:

- **Features** – these are the Nexonia features we've enabled on your account. We don't recommend turning things on without knowing what they do, as this may cause unexpected configuration behavior or incur billing. If there are features you're interested in, consult help.nexonia.com for more details and instructions.
- **Expenses** - this is where you'll find your **Expense Categories**, as well as **Credit Card** administration would be managed.
    - **Link:** Creating Expense Categories and Configuring Rules and Policies
    - **Link:** Assigning New Company Credit Cards to Users
- **Regions** – this is where your Regions are created in Nexonia. Users are linked to Regions, which define their default currency and can be used for category filtering.
- **Notifications** – this is where you'll manage the email notifications for your users.
    - **Link**: How to Enable Email Notifications for Expense Approval
    - **Link**: How to Enable Email Notifications for Credit Card Transactions
- **Financial** – this is where a copy of the Chart of Accounts will be populated from your QuickBooks environment. Please note this is only for viewing all changes for this must take place in your QuickBooks account. You can also add any foreign currencies for your expense users to use in currency conversions.

Custom Fields – custom fields can be used in Nexonia to capture additional details from expense reports or expense items, or add details to user records or projects. There are two types of custom fields:

- Custom Fields created via the QuickBooks integration such as Class. The values are non-editable in Nexonia and are populated from QuickBooks via the configuration sync.
- Custom Fields created by the administrator directly in Nexonia. These fields are non-integrated and can capture additional details on expenses. Details on this can be found here: Creating Custom Fields in Nexonia Expenses

USER SETTINGS

Users – these are settings that manage users, including role permissions and user workflows:

- **Users** – list of Nexonia users.
  - **Link:** How to Add New Users in Nexonia (QuickBooks Online Integration)
  - **Link:** Deactivating a User in Nexonia
- **Roles** – roles for your users. Every Nexonia account is created with the standard roles for both Administrator and User. Additional roles can be added or configured.
  - **Link:** Configuration Guide to Roles and User Permissions
- **Approvals –** this is where the approval workflow(s) are configured. By default, a new Nexonia environment uses a manager hierarchy-based approval workflow. You can modify this existing workflow or add new ones if needed.
  - **Link:** Configuration Guide to Nexonia Approvals
  - Link: Creating Approval Workflow Step: Fixed Approver

    (commonly used to add a Finance Approver as the main or second approver)
- **Hierarchy** – this is where you can see the manager hierarchy as defined by the user records.
- **Interface Themes** – this is where the Nexonia profile interface is configured with branding, color scheme and field labels for your users. You can modify the interface theme to reflect your organizations branding as needed.
  - **Link:** Managing Your Interface Theme - Logo, Color Scheme and Labels