



## Introduction

In this training, we'll be going over how to manage some general company settings in Nexonia. This includes things like Notification Settings, your Chart of Accounts and Corporate Card Assignments. To do this, we'll log in as an Administrator and cover a few areas dedicated to these functions.

## Logging In

In order to log into Nexonia, navigate to Nexonia.com and press the "sign in" button in the upper right-hand corner. You'll then populate your login credentials in the "email" and "password" fields and press the green "sign in" button to log into your account.

## Home Page

When you first sign into Nexonia, you'll get taken to the home page. Here, you can access all of the modules assigned to you, as well as your personal and company account settings. To access your company account settings, go to the navigation bar at the top and press the little "cog" icon.

## Configuring General Company Settings

The first area we'll cover is: Company > General (subheading). Here, you can edit some general account information in Nexonia. This includes things like how your company's name appears in the system, your address and what the timeout session period is for your employees when they're using the platform.

To edit this information, click the "edit" button on the left. Once you've finished your edits, make sure to click "apply" to save your changes.

Along with that section, you also have the "features" tab beside it. This is where you can turn on and off specific functionality related to each module in Nexonia like Timesheets, Time Off and Expense. This is definitely a "look, don't touch" area because making changes here can negatively affect historical data, user access and general functionality. If you're looking to make functional changes to your Nexonia account, please reach out to your Customer Success Manager, Implementation Specialist, or the Nexonia Support team for assistance.

## Setting Up Notifications

The "notifications" tab is where you can control what kind of notifications are sent to users and when they're sent. In order to configure them, click the "edit" button on the left and this will open a table of all the possible notifications you can control.

One of the most common ones that is used is "expense approval workflow". This notification sends an email reminder to your approvers if they have any outstanding expense reports to review. To turn on the notification, check off the first box under the "active" column. Then, mark off the



“assignee” box so that the approver is the recipient of the notification. Finally, indicate the frequency of the notifications on the far right under the “frequency” column.

Another useful notification is “unsubmitted expenses reminder”. This notification will remind users to submit any outstanding expenses that are sitting in their profile. You’ll want to check off the “active” box to turn it on like before. Next, mark off the “author” checkbox so that the notification is sent to the employee. Then, set up the date range for what you would consider an old or outstanding expense and the frequency of the notification on the right.

As always, once your notifications are set up, make sure to scroll down and click “apply” to save your changes.

## Managing Currencies and Chart of Accounts

To access your currencies and chart of accounts, navigate to the “financial” tab.

The first subheading within, “currencies”, is where you can control what kind of currencies your users can map on their expenses. All of your currently active currencies will be listed in the table below. To manage them, click the “edit” button on the left. From here, simply check off the box on the left for whichever currency you’d like to be active.

In this section, you can also determine what your currency conversion source is. The dropdown menu at the top gives you three options: XE.com, OANDO and the European Central Bank along with XE.com. Once everything is set up accordingly, scroll down to the bottom and click “apply” to save your changes.

To manage your chart of accounts, move over to the “chart of accounts” subheading. If your Nexonia account is integrated with Intacct, NetSuite or QuickBooks, your chart of accounts will get synced in automatically. However, if you don’t integrate an accounting platform with Nexonia or don’t use one at all, you can manage the list manually here as well.

As with any other section, all of your accounts will be listed in the table below. To add new ones or edit existing ones, click the “edit” button on the left. This will open a box at the top where you can add new accounts or edit your existing ones in the table below.

## Assigning Corporate Cards to Users

To view and manage your corporate card assignments, navigate to: Company > Expenses > Corporate Cards. Corporate card feeds are typically set up during the implementation of your account. That being said, sometimes new cards will be added to your program so you’ll need to assign them to their corresponding users.

All of the cards in your program, including both parent and child cards, will be listed in the table here. If a card is already assigned to a user, you’ll see their name under the “users” column. If the card is not assigned yet, you’ll see “unassigned” listed in that column instead. To resolve that and assign the card to a user, click on the “unassigned” button. This will open a pop-up menu where you



can select the employee you'd like to assign the card to from a dropdown menu at the top. Once you've selected them, click the "add" button on the right and then "save" to finalize the assignment.

## **Editing the Appearance of Your Nexonia Interface**

To edit the specifics of how your Nexonia interface looks like, navigate to: Users > Interface Themes (subheading).

In this section, you can change things like the color scheme of your Nexonia account, the terminology of the terms that appear in the navigation bar at the top and more. To do this, click the "pencil" icon in the table and go through all of the available fields.

## **Help & Support**

If you'd like to access our Help Center to see all of the articles and videos we have available, navigate to the "Help" icon in the upper right-hand corner of the screen. Clicking this will take you directly to our Nexonia Help Center.

To contact our support team directly, click the "Contact Support" button in the middle of the navigation bar at the top of your screen.

That brings us to the end of our training session. Thank you all very much for watching and enjoy using Nexonia!