Introduction

In this training, we'll be going over how to set up and maintain your Regions and Custom Fields in Nexonia. 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 Regions

The first area we'll cover is: Company > Regions (subheading).

If you're not familiar with regions, they give you the ability to group your employees by the location that they work in or division they're a part of. If you synchronize Nexonia with an accounting platform like Intacct or NetSuite, that list of regions will sync into your account automatically. The terminology of the field may be different, like being called locations or subsidiaries, but the functionality will remain the same between the two systems.

In this section, all of the regions you already have will be listed in the table below. To create a new one from scratch, click the "add" button on the left. To edit your existing regions, click on its name under the "region" column in the table. Once you do so, there will be three subsections where you can edit the region including "general", "administrators" and "language and formats".

Under the "general" tab, you'll find the basic information pertaining to the region. This includes things like the name, default currency and standard workdays. If you scroll down to the bottom, you can also upload any time or expense policy documents in those respective sections. Once complete, click the "apply" button at the bottom left to save your changes.

In the "administrators" tab, you can indicate who the internal system administrators should be for the users in this region. To do this, click the "edit" button. In the first section at the top, check off the names of the employees that you'd like to assign as the administrators for this region. Below that, enter the email your employees should use to contact them with. This information will be listed on the homepage for all of your users to see so if they require assistance, they'll be able to reach out to the administrators directly.

The final tab, "languages and formats", is a bit of an extension of the "general" tab. Here, you can set up the default language for all users in this region as well as the date, time and number formats. You can edit this the same way as before by clicking "edit", making your changes and clicking "apply" to save them.

Configuring Custom Fields

To access your custom fields, navigate to: Company > Custom Fields (subheading).

Custom fields can be synced in from your accounting platform or created in Nexonia manually. You can also create them to be specific to a module like Timesheets or Expenses. To create a new custom field, click the "add" button on the left.

Upon doing so, you'll open a standard interface to fill out the relevant information pertaining to the custom field. First, you'll enter a name. Next, in the "type" section, you can determine what kind of field this will be in Nexonia. For example, if you'd like this to be a free-text field for your users to type into manually, select the "text" option from the dropdown. Alternatively, if you'd like it to be a predetermined list that they select from, use the "select a name and value" option instead. After you choose that, there will be an additional field at the bottom called "choices". Within that section, you can click on the "edit as text" button and that's where you can create the options for the dropdown list.

Another option you have with custom fields is the ability to filter them by specific parameters. In the "filter by" section, the dropdown allows you to filter the custom field by project, expense category, user and so on. Your choice here will depend on the function you want to use the custom field for. The only thing to note is that whichever option you choose will come with additional steps where you'll go into each project or user profile and enable the custom field for selection.

Finally, you can set if your custom field is a required entry in the "required" dropdown. Once you've finished your configuration, make sure to click "apply" to save your custom field.

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.

One article that may be particularly useful to reference when setting these things up is: Creating and Configuring Custom Fields in Nexonia Expenses.

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!