

neo

How to Auto create an expense report *Neo user guides*



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How to Create an expense

Neo User Guides



EXPENSE

Create expense
report

No pending expenses

Pending expenses

Expense reports list

Bill Validation

Select
“Create a
report”.

Pending expenses

Customize the expense report name, and if needed the reason for the expense (a short explanation for your supervisor).

Expense templates

Billing history

Billing

Expense reports list

Create expense report



Expense report name

January 2025

* Required field

Reason for expense

Confirm

January 2025

N# Expense



List

+ Add expense

Expense box

Received

Rejected

Deleted

Summary

#785067

Mr Vernon BEAR

Approval and history

Draft

Anomalies

Compliance issues



No expense line

Click the 'Add expense' button to add your expenses to this report



To create a new expense, you can also drag and drop your receipt here or

Upload receipt

Tip: you can also drop your receipt in the list view when there are expenses

To create your expense line, click on “Add Expense” to add expenses to this report. You can also drag and drop a receipt.

Select expense type

 Search

Favorites

Add your preferred expense types by clicking on the star

Subsistence



Breakfast



Dinner



Lunch



Meal

Choose your
expense type.
Add favorite
expense types
by clicking on the
star next to the
expense icon.



Expense line



Meal

Change type

Required

Location

Paris (PAR), Paris, Île-de-France Region, France

Start Date

January 2, 2025



22 ▼

: 30 ▼

End Date

January 2, 2025



22 ▼

: 30 ▼

Amount

61.60

EUR

Any Business
Any Address
Paris, FranceSALE
01/02/2025 05:32 PM
BATCH #:04F06
APPR #:FBA2E
TRACE #: 9
CASH
1

€55.00

SUBTOTAL: €55.00
TAX: €6.60
TOTAL: €61.60

TIP: _____

TOTAL: _____

APPROVED
THANK YOU
CUSTOMER COPY☐ VAT on Receipt

Itemize

Confirm and new

Confirm

Next, add information concerning your expense, and if you haven't already, add a receipt.



January 2025 (2)



List

+ Add expense

<input type="checkbox"/>	N#	Expense	Taxes	Authorized	Reported
<input type="checkbox"/>	1	Meal January 2, 2025 — January 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt	VAT Tax benefit	0.00 EUR 61.60 EUR	61.60 EUR
<input type="checkbox"/>	2	Breakfast February 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt	VAT Tax benefit	0.00 EUR 13.44 EUR	13.44 EUR

Expense box

Received

Rejected

Deleted

Your expense line is now created. You can then add another expense line by clicking on Add Expense. Or, you can submit your expense, duplicate it or see further information concerning the expense.

Reported amount


75.04 EUR

Reimbursable amount









75.04 EUR

Duplicate

Submit

January 2025 (2)  Actions  List 


+ Add expense

<input checked="" type="checkbox"/>	N#	Expense	Taxes	Authorized
<input checked="" type="checkbox"/>	1	 Meal  January 2, 2025 — January 2, 2025  Paris (PAR), Paris, Île-de-France Region, France  Image receipt	VAT Tax benefit	0.00 EUR 61.60 EUR
<input checked="" type="checkbox"/>	2	 Breakfast  February 2, 2025  Paris (PAR), Paris, Île-de-France Region, France  Image receipt	VAT Tax benefit	0.00 EUR 13.44 EUR


Select the
expenses to
add to your
claim.

Expense box

Reported

 Received

61.60 EUR

 Rejected Deleted

13.44 EUR

Summary

785068

Mr Vernon BEAR

 View PDF

Draft

Draft

Draft

Draft

Draft

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Draft





Reported amount

75.04 EUR


Reimbursable amount

75.04 EUR

 Duplicate Submit

January 2025 (2)   SavedActions  List  Add expense

Expense box

 Received Rejected Deleted

Summary

#785068

Mr Vernon BEAR

 View PDF

Approval and history

Draft

Anomalies

Compliance issues






Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR Duplicate Submit

Select the
expenses to
add to your
claim.

☒ N# Expense☒ 1  Meal January 2, 2025 — January 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt☒ 2  Breakfast January 2, 2025 — January 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt

Taxes

Authorized

Reported

VAT

0.00 EUR

61.60 EUR

61.60 EUR

Tax benefit

-

VAT

0.00 EUR

13.44 EUR

13.44 EUR

Tax benefit

-

By clicking on
Submit, your
expense
report will then
submitted for
approval.

HOMEAPPROVALARRANGERTRAVELMORE...

?

1

Mr Vernon BEAR

Working for yourself

Powered by Neo

January 2025 (2)

Actions

⚙️

☰

List

+

Add expense

	Taxes		Authorized	Reported
<div><div>1</div><div><div>Meal</div><div>January 2, 2025 — January 2, 2025</div><div>Paris (PAR), Paris, Île-de-France Region, France</div><div>Image receipt</div></div></div>	VAT	0.00 EUR	61.60 EUR	61.60 EUR
	Tax benefit	-		
<div><div>2</div><div><div>Breakfast</div><div>February 2, 2025 — February 2, 2025</div><div>Paris (PAR), Paris, Île-de-France Region, France</div><div>Image receipt</div></div></div>	VAT	0.00 EUR	13.44 EUR	13.44 EUR
	Tax benefit	-		

Expense box

Received

Rejected

Deleted

Summary

#785068

Mr Vernon BEAR

View PDF

Approval and history

Draft

Anomalies

Compliance issues

Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR

Duplicate

Submit

You can then confirm the submission of your expense report.

Expense report review: January 2025 (2)

Reimbursable amount

Reported amount

75.04 EUR

Reimbursable amount 75.04 EUR

Confirm Submission

Cancel

✓ Submit

January 2025 (3)

You will then
be brought
back to the
expense
page.

Expenses can
be viewed in a
list view, week
view or month
view.

The screenshot displays the expense management interface. At the top, a navigation bar includes links for HOME, APPROVAL, ARRANGER, TRAVEL, and MORE..., along with user information for Mr Vernon BEAR. The main content area is titled 'Taxes' and features a large illustration of a receipt with icons for a gas pump, a fork and knife, and trees. Below this, the text 'No expense line' is displayed, followed by the instruction: 'Click the 'Add expense' button to add your expenses to this report'. A blue dashed box highlights a section at the bottom with a download icon and the text: 'To create a new expense, you can also drag and drop your receipt here or Upload receipt'. A tip at the bottom states: 'Tip: you can also drop your receipt in the list view when there are expenses'. On the right side, a sidebar contains an 'Expense box' with options for Received, Rejected, and Deleted, and a 'Summary' section showing report #785079 for Mr Vernon BEAR. Other sections in the sidebar include 'Approval and history' (Draft), 'Anomalies', and 'Compliance issues'.

Navigation menu options: List, Week, Month.

Buttons: Add expense, Upload receipt.

Expense box options: Received, Rejected, Deleted.

Summary: #785079, Mr Vernon BEAR.

Approval and history: Draft.

Anomalies.

Compliance issues.

January 2025 (3)  

February 2025



Today

Month 

+ Add expense

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

26

27

28

29

30

31

1

+



Breakfast - 13.44 EUR

3

4

5

6

7

8

9

10

11

12

13

14

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16

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18

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21

22

23

24

25

26

27

28

1

Any expenses waiting approval will be shown in grey on the month view or week view.

To add expense line, drag a receipt over the calendar or click the date

January 2025 (3) ✎

N# Expense

The Expense Box will provide you a view of all received, rejected or deleted expenses.



List ▾

+ Add expense

List

Week

Month

Expense box

Received

Rejected

Deleted

Summary

#785079

Mr Vernon BEAR

Approval and history

Draft

Anomalies

Compliance issues

Taxes

Reported



No expense line

Click the 'Add expense' button to add your expenses to this report



To create a new expense, you can also drag and drop your receipt here or

Upload receipt

Tip: you can also drop your receipt in the list view when there are expenses

By clicking on the arrow next to Summary, you can view further details about on your expense report or even view a PDF version of the report.

January 2025 (2)

#785068 - Mr Vernon BEAR

Updated on 2nd February 2025 at 22:39:48

Reported amount

75.04 EUR

Personal expenses

0.00 EUR

Business expenses

75.04 EUR

Authorized expenses

75.04 EUR

Other deductions

Company paid

0.00 EUR

Cash advance

0.00 EUR

Reimbursable amount

75.04 EUR

Expense box

Received

Rejected

Deleted

< Summary

#785068

Mr Vernon BEAR

 View PDF

✓ Approval and history
Draft

✓ Anomalies

✓ Compliance issues

Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR

 Duplicate

✓ Submit

The information under approval and history will let you see the status of your expense report.

APPROVALARRANGERTRAVELMORE...

?

1

Working for yourself

January 2025 (2)

SundayMondayTuesday

262728

23

2425

Approval and history

Expense report statusDraft

Approval status:Draft

Level 1: Waiting for the previous level

Level 2: Waiting for the previous level

Level 3: Waiting for the previous level

Accounting status:Draft

History

Created:02/02/2025 22:28Mr Vernon BEAR

Expense box

Received

Rejected

Deleted

Summary

#785068

Mr Vernon BEAR

View PDF

Approval and history

Draft

Anomalies

Compliance issues

Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR

Duplicate

Submit

If there are any issues, such as missing receipt

APPROVALARRANGERTRAVELMORE...

January 2025 (2)

February 2025

Today

Month

+ Add expense

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2	3	4	5	6	7	8
		12	13	14	15	
16	17	18	19	20	21	22
23	24	25	26	27	28	1

Expense box

Received

Rejected

Deleted

Summary

#785068

Mr Vernon BEAR

View PDF

Approval and history

Draft

Anomalies

Compliance issues

Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR

Duplicate

Submit

If there is any anomaly, a red number will appear next to anomaly, and by clicking on the arrow, the details of the anomaly will be detailed.

APPROVALARRANGERTRAVELMORE...

January 2025 (2)

Tuesday

1 issue found

Missing information (Blocking)

Dinner

Feb 3, 2025

The digital receipt is missing on line 3

1000.00 EUR

Expense box

Received

Rejected

Deleted

Summary

#785068

Mr Vernon BEAR

View PDF

Approval and history

Draft

< Anomalies

1

Compliance issues

Reported amount

1075.04 EUR

Reimbursable amount

75.04 EUR

Duplicate

Submit

Click on the expense icon to be brought back to the expense line details, where you can add a receipt...

Expense line #3

Change type

Required

Location

Paris (PAR), Paris, Île-de-France Region, France

Date

February 3, 2025

Time

19 : 00

Amount

1000.00 EUR

Comments

New comment (2000 characters left)

History details

Move to

Delete

Add my receipt

You can drag and drop your receipt here

☐ VAT on Receipt

Duplicate

Confirm and new

Confirm

..or click on the three dots, where you can then see the history of the expense line, move it, or delete the expense line.

Expense line #3

Change type

Required

Paris (PAR) Paris, Île-de-France Region, France

Date

February 7, 2025

19 : 00

You cannot select a date in the future

Amount

1000.00 EUR

Comments

1000 characters left

< > 3 of 3

No receipt

Add my receipt

You can drag and drop your receipt here

☐ VAT on Receipt

History details

Move to

Delete

...

Duplicate

Confirm and new

Confirm

By clicking on
Submit, your
expense
report will then
submitted for
approval.

HOMEAPPROVALARRANGERTRAVELMORE...

?

1

Mr Vernon BEAR
Working for yourself

Powered by Neo

January 2025 (2)

Actions

⚙️

List

+ Add expense

	Taxes		Authorized	Reported
1 Meal January 2, 2025 — January 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt	VAT Tax benefit	0.00 EUR -	61.60 EUR	61.60 EUR
2 Breakfast February 2, 2025 Paris (PAR), Paris, Île-de-France Region, France Image receipt	VAT Tax benefit	0.00 EUR -	13.44 EUR	13.44 EUR

Expense box

Received

Rejected

Deleted

Summary
#785068
Mr Vernon BEAR
View PDF

Approval and history
Draft

Anomalies

Compliance issues

Reported amount
75.04 EUR

Reimbursable amount
75.04 EUR

Duplicate

Submit

After clicking on “Submit” you can then view the reported amount and reimbursable amount, then confirm or cancel.

HOME APPROVAL ARRANGER TRAVEL MORE...

February 2025 < > Today Month + Add expense Expense box



Tuesday Wednesday Thursday Friday Saturday

Expense report review: January 2025 (2) X

Reimbursable amount	75.04 EUR
Reported amount	75.04 EUR

Confirm Submission Cancel

Submit

January 2025 (2)  

February 2025



Today

 Month 

+ Add expense


Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2 	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	1

Your expense will now appear on the calendar or list view in black. If you need to modify it again, click directly on the icon.

Summary

#785068

Mr Vernon BEAR

 View PDF

Submitted, Pending accounting approval

Anomalies


Compliance issues

Reported amount

75.04 EUR

Reimbursable amount

75.04 EUR

 Duplicate

Travel and Expense. Simplified.

