Transcript - User Interface Refresh - Expense Module 1

0:01 **VOICE:** Hello. And thank you for viewing the first two CentreSuite Expense Module Tutorials.

0:07 **VOICE:** We hope that this tour of exciting new design elements will be beneficial.

0:11 **VOICE:** You will quickly see how the updated navigation will facilitate creating and submitting expense reports.

0:18 **VOICE:** We hope that this tour will aid you in communicating details of the CentreSuite User Interface refresh to your commercial customers.

0:26 **VOICE:** To set the stage, I'd like to point out that this will be a high-level overview, focusing on areas that have changed as a result of the updates.

0:34 **VOICE:** Let's get started. I will provide a brief simplified overview of some of the changes users will see within the expense module.

0:43 **VOICE:** The core functionality and navigation will not change within the system.

0:47 **VOICE:** Users will see the enhanced responsive design in all areas of the module.

0:53 **VOICE:** The Manage Expense Report options within the expense module will provide same functionality as it does today.

0:58 **VOICE:** Enhancements have been made to create expense report wizard by adding a step for users to attach receipts.

1:05 **VOICE:** The wizard will also display our new chevron tool to indicate which step of the process the user is completing.

1:12 **VOICE:** When creating expense reports, the number of steps will depend on the users enabled permissions and features for their company.

1:20 **VOICE:** In step 1, users will provide report information including the report name and date-range.

1:30 **VOICE:** The next two steps match current functionality to attach card transactions and create out-of-pocket transactions.

1:37 **VOICE:** The fourth step, when enabled, will allow users to attach receipt images.

1:46 **VOICE:** The final step allows the user to provide allocation information and to split transactions if needed.

1:53 **VOICE:** Options to print, save and submit expense reports display at the bottom of the screen.

2:01 **VOICE:** The Manage Expense Reports screen displays as it does today. Displays depend on the user's options and permissions.

2:09 **VOICE:** The potential options include unassigned, in progress, for your approval and/or recently approved.

2:17 **VOICE:** Our new standard detail icon will display in any one of the sections, which will allow the user to view specific information about an expense report.

2:26 **VOICE:** Also, users can continue to view notes and receipt images from this screen.

2:32 **VOICE:** Tabs will display to view unattached transactions or search for expense reports.

2:37 **VOICE:** The output log will function as it does today, with the options to download and unmap files, followed by the file name.

2:46 **[Graphic]** This concludes this update. Click the video to replay, or click on CentreSuite in the trail above this video to return to the previous page.

END