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# Xero Me Expenses App User Guide

## Introduction

The Xero Me Expenses app is a powerful tool designed to help employees easily track and submit business expenses for reimbursement. Whether you need to capture receipts, track mileage, or view your claim history, this guide will walk you through every step to maximize your use of the app.

Expenses are approved every Tuesday in the office. Please ensure your previous weeks expenses are filed within Xero Me ready for approval by midnight Sunday to ensure they are paid out correctly.

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## Key Features of Xero Me Expenses:

- **Capture Receipts:** Quickly take photos of receipts and link them to an expense claim.
- **Submit Claims:** Submit expenses for approval and reimbursement.
- **View Claim History:** Check the status of your submitted claims at any time.
- **Track Mileage:** Log mileage claims for business trips in your own vehicle using the in-app mileage calculator.

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## Download and Set Up the Xero Me Expenses App

### **Step 1: Download the App**

- For iPhone/iPad: Go to the App Store and search for "Xero Me".

- For Android: Go to the Google Play Store and search for "Xero Me".
- Download and install the app on your device.

## **Step 2: Log in to Your Account**

- Open the Xero Me Expenses app.
  - Enter your Xero Me login details (email and password).
  - Complete the setup by following any on-screen prompts if it's your first time using the app.
  - You will have received an invite for this app when setting up your payroll and leave requests, please contact the admin team if you cannot access Xero Me.
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## **Submitting an Expense Claim**

### **Step 1: Add a New Expense**

- Tap the '+' button or 'Add Expense' to create a new expense claim.
- Choose the type of expense from predefined categories like Travel, Meals, Office Supplies, etc.
- Add the date of the expense, typically the purchase date.
- Select where it has been paid from (your company Amex account or your own money, to be reimbursed)

#### *Note List of Accounts*

- 310 Cost of Goods Sold for any materials, hire equipment, consumables related to jobs
- 429 General Expenses – Parking or anything you can't assign elsewhere
- 449 Motor Vehicle Maintenance – Tyres, oil, repairs, etc
- 451 Motor Fuel – Fuel
- 493 Travel National – Hotels, staying over allowance, train, taxis, etc

### **Step 2: Attach a Receipt**

- Use the app's camera feature to take a photo of the receipt, or upload an image from your device.
- The app may automatically extract information such as the amount, vendor, and date from the receipt. You **must** manually adjust these fields if needed and add the correct rate of VAT.

### **Step 3: Enter Additional Information**

- Add a description to the expense, including the business purpose of the expense.

### **Step 4: Submit the Expense Claim**

- Review the entered details to ensure accuracy.
  - Tap 'Submit for Approval' to send your claim.
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### **Tracking Mileage (for using your own vehicle outside of the Fylde Coast)**

#### **Step 1: Start a Mileage Claim**

- Tap the '+' button and select 'Mileage' as the expense type.
- Enter the start and end locations of your trip. The app may calculate the distance automatically or allow you to enter it manually.
- Choose the purpose of the trip (e.g., client meeting, business travel).

#### **Step 2: Submit the Mileage Claim**

- Review the mileage details.
  - Tap 'Submit for Approval' to complete your claim.
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### **Viewing Expense Claim History**

#### **Step 1: Access Your Claims**

- Tap the 'Claims' or 'History' tab.
- View all your expense claims, including approved, pending, or rejected ones.
- Tap on a claim to view detailed information and its current status.

#### **Step 2: Edit or Delete Claims**

- To edit a submitted claim (if allowed), open the claim and update the details.
  - To delete a draft claim, select it from the list and tap 'Delete'.
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### **Notifications and Reminders**

- Receive notifications for claim approvals, rejections, or when further information is required.
  - Get reminders to submit claims before the deadline if your organization has set submission timeframes.
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### **Frequently Asked Questions (FAQs)**

**Can I use Xero Me Expenses for personal expenses?**

No, the app is exclusively for submitting business-related expenses.

**What if my expense type is not listed?**

Contact the office to request adding a new expense category.

**How will I know if my claim is approved?**

You will receive a notification within the app and can track the status in the 'Claims' section.

**When will my reimbursable expenses be paid?**

In the following Thursday payroll

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**Conclusion**

The Xero Me Expenses app streamlines business expense management by enabling easy submission and tracking. Follow the steps in this guide to make the most of the app's features. If you need assistance, reach out to your organization's finance or HR team.

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## **Employee Use of the American Express Company Credit Card**

**Introduction**

The company-issued American Express (Amex) credit card is provided to employees to facilitate business-related purchases. It is essential to use this card responsibly and adhere to the guidelines outlined in this document. Misuse of the card or failure to follow the procedures may result in deductions from wages or administrative charges.

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**Guidelines for Using the Amex Card**

1. **Acceptance of American Express:**
  - Not all merchants accept American Express. It is recommended to choose businesses that do accept Amex to avoid complications.
  
2. **When Amex Is Not Accepted:**

- For purchases under £50: You will need to pay out of pocket and submit a reimbursement claim through the Xero Expenses app.
- For purchases over £50: Contact the office at **01253 486868**, and we will make the payment over the phone.

### 3. **Business Use Only:**

- The Amex card is strictly for business expenses. Any unauthorized or personal use of the card will incur administrative charges and may result in the cost being deducted from your wages.

### 4. **Receipts and Documentation:**

- All transactions must be accompanied by a valid receipt, which must be logged in the Xero Expenses app. Failure to provide a receipt will result in the transaction being treated as a personal expense and deducted from wages.
  - If you encounter issues obtaining a receipt, it is your responsibility to **immediately contact the office** and inform us of the situation. Communication and transparency are essential to avoid complications.
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