

Expense Management uses a simplified setup wizard to guide you through the initial configuration.

Select the <b>"magnifier"</b> to find the Expense Management Setup Wizard.	Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.
Enter the text <b>"Expense Management Wizard</b> " to start searching.	TELL ME WHAT YOU WANT TO DO     27     X       expense management wizard     Go to Pages and Tasks       > Expense Management Setup Wizard     Administration
Select "Expense Management Setup Wizard".	TELL ME WHAT YOU WANT TO DO
	expense management wi Go to Pages and Tasks  Expense Management Setup Wizard Administration
Expense Management uses a simplified setup wizard to guide you through the initial configuration. In " <b>Action</b> " you see a dropdown list of options that the wizard can assist you with. "Import Configuration". Import configurations from the default setup file or configurations previously exported. "Export Configuration". Export configurations to use in another company or stored as backup. "Set up Company". Set up configurations in the current company.	OCU       EXPENSE MANAGEMENT SETUP WIZARD $\checkmark$ X Bar This wizard helps you to import or export Expense Management configurations and to set it up. Action Import Configuration Import from Import from Setup Company Import Configuration Setup Company Setup Company Setup Company Import Configuration Setup Company Import Configuration Setup Company Setup Company Setup Company Setup Company
The first time you run the Expense Management Setup Wizard, the wizard suggests " <b>Import</b> <b>Configuration</b> ". This action will import the standard configuration, which is an excellent starting point in a customer implementation.	Docu       EXPENSE MANAGEMENT SETUP WIZARD



Next, you must select where to import the configuration from. Under " <b>Import from</b> " you have the option to choose to import from either " <b>Online</b> " or "File". The option " <b>Online</b> " will import setup file from Continia Online. The option "File" will import setup file from a local storage.	Docu       EXPENSE MANAGEMENT SETUP WIZARD
By choosing the action <b>"Online</b> ", the wizard will smoothly apply the default configuration from Continia Online.	Pocu       EXPENSE MANAGEMENT SETUP WIZARD
If you want to import a backup or a configuration from another company, choose the option " <b>File</b> ". This enables you to select your configuration file.	Instruction       Import from
Once you have chosen the option you want to run, click " <b>Next</b> " to continue.	Back Next Finish Next
In this step, you import standard configuration, which is needed to use Expense Management. You can exclude a table by unticking " <b>Include</b> ". You can change the configuration in NAV/Business Central later and then export your configuration. This makes it easier to move from a Test environment to a Production environment. The configuration file is downloaded as EM-Setup-config.x	EXPENSE MANAGEMENT SETUP WIZARD  You can exclude a table by unticking 'Include'.  Manage  TABLE  Expense Management Setup Expense Type



Now you must go through a general setup for Expense Management.	EXPENSE MANAGEMENT SETUP WIZARD Please specify general Expense Management settings below.				
		6424244			
		6421341 ENU			
	Setup Bank Agreement				
	Setup bank Agreement				
	Document Storage Type	Databas			
	Archive File Path	\\Server			
	Create Expense Management Role Center				
A <b>"Company Code</b> " is a unique code used by Expense Management to separate companies when	EXPENSE MANAGEMENT SETUP WIZARD				
using the Web Approval Portal, or the Expense	Please specify general Expense Management settings below.				
Management Portal. This code will indicate to which	Company Code	6421341			
company the attachments belong to in the file system.	Default Web/App Language	ENU			
	Setup Bank Agreement				
	Document Storage Type	Databas			
	Archive File Path	\\Server			
	Create Expense Management Role Center				
The "Default Web/App Language" is the language in	EXPENSE MANAGEMENT SETUP WIZARD				
the Expense app and on the websites. The user can change their settings afterward.	Please specify general Expense Management settings below.				
onange then settings alterward.	Company Code	6421341			
	Default Web/App Language	ENU			
	Setup Bank Agreement				
	Document Storage Type	Databas			
		\\Serverl			
	Create Expense Management Role Center				
Under "Setup Bank Agreement" a wizard step will	EXPENSE MANAGEMENT SETUP WIZARD				
show how to set up a bank agreement.	Please specify general Expense Management settings below.				
The setup of a Bank agreement is only necessary for the automatic import of credit card transactions.		6421341			
If the bank agreement is not in place at this stage, you		ENU			
can set this up in "Bank Agreements" later.	Setup Bank Agreement				
	Document Storage Type	Databas			
	Archive File Path	\\Server			
	Create Expense Management Role Center				
In <b>"Document Storage Type"</b> you can chose where to store files.	EXPENSE MANAGEMENT SETUP WIZARD				
"File System" will store files in a physical location	Please specify general Expense Management settings below.				
defined by the "Archive Path".	Company Code	6421341			
Database will store files in a virtual location, in the database.	Default Web/App Language	ENU			
	Setup Bank Agreement				
	Document Storage Type	Databas			
	Archive File Path	\\Server			
	Create Expense Management Role Center				



"Archive File Path" will define a root location for file	EXPENSE MANAGEMENT SETUP WIZARD				
storage for all attachments linked to documents.	Please specify general Expense Management settings below.				
	Company Code 6421341				
	Default Web/App Language · · · · · · ENU				
	Setup Bank Agreement				
	Document Storage Type Databas				
	Archive File Path \\Server				
	Create Expense Management Role Center				
Under "Create Expense Management Role Center"	Please specify general Expense Management settings below.				
you enable the option to create the Expense Management Role Centre.	Company Code				
Management Noie Gentre.	Default Web/App Language ENU				
	Setup Bank Agreement				
	Document Storage Type Databas				
	Archive File Path \\Serveri				
	Create Expense Management Role Center				
	Set as Default Role Center · · · · · · · · · · · · · · · · · · ·				
Under "Set as Default Role Centre" you define if you	Please specify general Expense Management settings below.				
want the Role Centre for Expense Management as default.	Company Code 64213-				
uelault.	Default Web/App Language EN				
	Setup Bank Agreement				
	Document Storage Type Databas				
	Archive File Path				
	Create Expense Management Role Center				
	Set as Default Role Center				
In this step of the wizard you must specify the setup, if you will be using the " <b>Continia Web Approval</b>	)OCLI EXPENSE MANAGEMENT SETUP WIZARD				
Portal".	Ba Please specify if you want to use the Continia Web Approval Portal.				
When approving documents, you can use the streamlined approval portal to handle any document	Enable Web Approval				
type. The Continia Web Approval Portal is available	SPECIFYWEBPORTAL				
either as services in the cloud. Or as an On-Premises	Web Portal				
installation.	Use Continia Online Web Portal · · · · · •				
	Local Domain Name				
	T Windows Web Service URL				
"Enable Web Approval" allows you to use either the	Docu EXPENSE MANAGEMENT SETUP WIZARD				
on-premises Continia Web Approval Portal included in the installation package. Or the cloud Web Approval	Bar Please specify if you want to use the Continia Web Approval Portal. Jser				
Portal provided by Continia Online.	Enable Web Approval				
When enabling the web approval, the Expense	SPECIFYWEBPORTAL				
Management Setup Wizard fills in values in all the fields below, based on the current installation. These	Web Portal ·····				
settings are changeable if needed.	Use Continia Online Web Portal				
	Local Domain Name				
	T Windows Web Service URL · · · · · · AND				



The " <b>Web Portal Code</b> " is the name of the record in the Web table, that holds the configuration for the web approval portal. You can either select an existing web portal or create a new one. The wizard automatically creates the web portal with the given code, if it does not already exist.	)ocu Bar		27	× 	Jser 
	ज	Windows Web Service URL			
"Use Continia Online Web Portal" toggles whether you wish to use the Continia Online Web approval portal, hosted by Continia Online. Or an On-Premises website, that you must install and maintain on a locally installed web server.	ocu Bar	EXPENSE MANAGEMENT SETUP WIZARD Please specify if you want to use the Continia Web Approval Portal. Enable Web Approval · · · · · · · · · · · · · · · · · · ·	2	×	Users
		Web Portal			
		Use Continia Online Web Portal			
	T I	Local Domain Name			ANDL
Fill in the "Local Domain Name" under whom you					N I I I I I
have created the Windows users. This is only relevant	Docu		2	$\times$	
for NAV versions, that do not include the domain name as a part of the user-ID in NAV.	Bar				Jser
		Enable Web Approval			
		SPECIFYWEBPORTAL Web Portal			
		Use Continia Online Web Portal			
		Local Domain Name			
	ат	Windows Web Service URL			
The "Windows Web Service URL" is the URL for the	)ocu	EXPENSE MANAGEMENT SETUP WIZARD	2	×	
Business Central web services. This URL points to the ServiceTier, which authenticates the users with	Bar	Please specify if you want to use the Continia Web Approval Portal.	ĸ		User
Windows credentials.		Enable Web Approval			
Remember that if all users in Business Central are		SPECIFYWEBPORTAL			
Windows users, you only need to fill out this URL. However, if the users have mixed authentications, you		Web Portal			
need to set up two different ServiceTiers and enter	_	Use Continia Online Web Portal			
the URL for both Windows Web Service and Database Web Service.		Local Domain Name			
Database web Service.	т	Windows Web Service URL			
The <b>"Database Web Service URL"</b> is the URL for the Business Central web services, that points to the ServiceTier. This authenticates the users with database logins (or NavUserPassword). If all users in Business Central are database users - you only need to fill out this URL.		Enable Web Approval · · · · · · · · · · · · · · · · · · ·			
However, if the users have mixed authentications, you					
need to set up two different ServiceTiers and enter the URL for both Windows Web Service and	ST	Windows Web Service URL       Windows         Database Web Service URL       Windows			DX
Database Web Service.		Web Site URL			



"Web Site URL" is the URL of the website that you want to use. Document Capture provides the URL automatically if the Continia Online Web Portal was chosen earlier in the wizard.	ат —	Enable Web Approval       Image: Continuation of the second
Select "Next" to continue the wizard.		Use Continia Online Web Portal
	T _	Windows Web Service URL     ANDL       Database Web Service URL     Database       Web Site URL     Database
		Back Next Finish
In this step, you must set up the details if you are enabling the automatic import of credit card	Jocu	EXPENSE MANAGEMENT SETUP WIZARD $2^7$ $\times$
transactions.	Bar	Please chose a bank agreement for Expense Management. Jser Bank Code
		Bank Code
		Bank Agreement ID · · · · · · 1111111111
	ज	AND
" <b>Bank Code</b> " is used for identifying file format for credit card transaction import. Here you can find a list	Docu	Expense management setup wizard $ u^7 \times $
of banks that are supported in Expense Management.	Bar	Please chose a bank agreement for Expense Management. Jser
<b>"Bank Name"</b> will automatically be filled in once Bank Code is chosen.		Bank Code · · · · · · · · · · · · · · · · · · ·
In demo environments, a default TEST bank code is		Bank Name Continia Test Bank Bank Agreement ID
set.	ST	
" <b>The Agreement ID</b> " is received from the bank, when the integration is done. This is a unique identifier for	)ocu	EXPENSE MANAGEMENT SETUP WIZARD
the partnership between the bank and the company.	Bar	Please chose a bank agreement for Expense Management. Jser
This will ensure that credit card transactions are downloaded to the right company.		Bank Code · · · · · · · TEST ···
		Bank Name Continia Test Bank Bank Agreement ID
	π	AND



In this step of the wizard, you define if you would like to " <b>Setup demo data</b> ". This step creates demo data, so the system is ready immediately after running the setup wizard. A summary for the date created will be shown after the execution. Please note that Demo data should only be generated	Docu Bar	EXPENSE MANAGEMENT SETUP WIZARD	×	User
in pre-production environments, not in production.				
	бΤ			
In this step, you can also choose the action <b>"Open screen to configure Continia Users"</b> . This action will open a new screen that allows configuring Continia Users right away.	Docu Bar	EXPENSE MANAGEMENT SETUP WIZARD	×	Jser
	ы			AND
Select "Next" to continue the wizard.				
	Τ	Back Next Finit	sh	
The setup of Expense Management is completed, and you are ready to start using the solution. Select " <b>Finish</b> " to close the wizard.		Back Next Finis	h Finish	