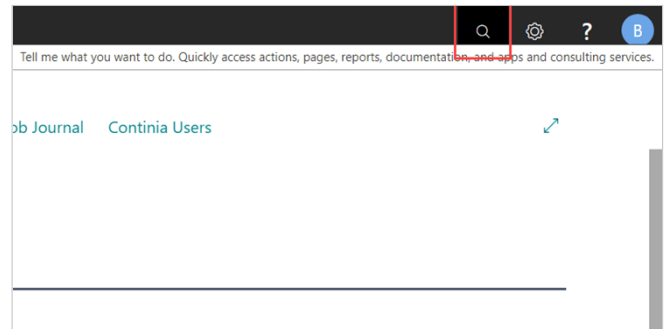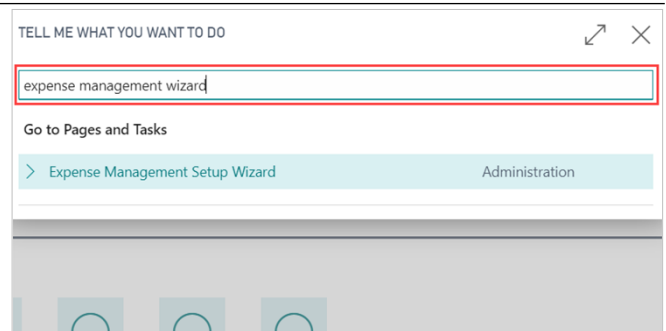Expense Management uses a simplified setup wizard to guide you through the initial configuration.
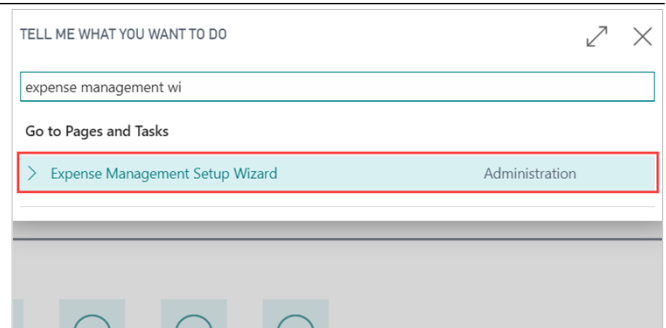
Select the "**magnifier**" to find the Expense Management Setup Wizard.

Enter the text "**Expense Management Wizard**" to start searching.

Select "**Expense Management Setup Wizard**".

Expense Management uses a simplified setup wizard to guide you through the initial configuration.
In "**Action**" 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.
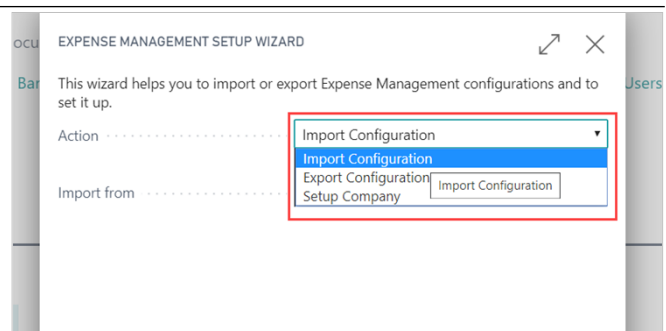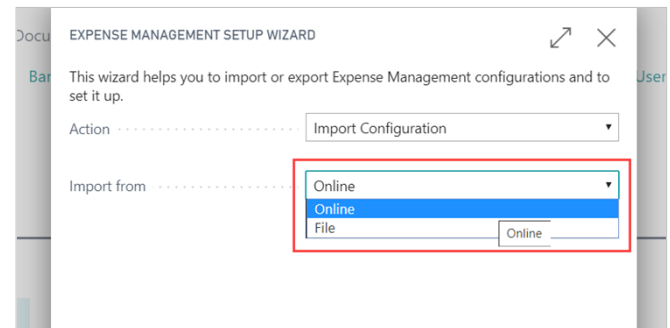
The first time you run the Expense Management Setup Wizard, the wizard suggests "**Import Configuration**".
This action will import the standard configuration, which is an excellent starting point in a customer implementation.
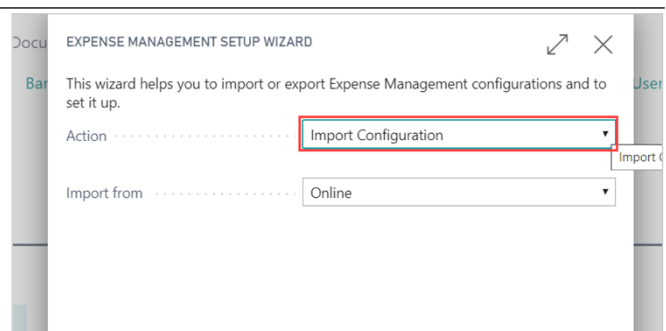
Next, you must select where to import the configuration from.
Under "**Import from**" you have the option to choose to import from either "**Online**" or "File". The option "**Online**" will import setup file from Continia Online. The option "File" will import setup file from a local storage.
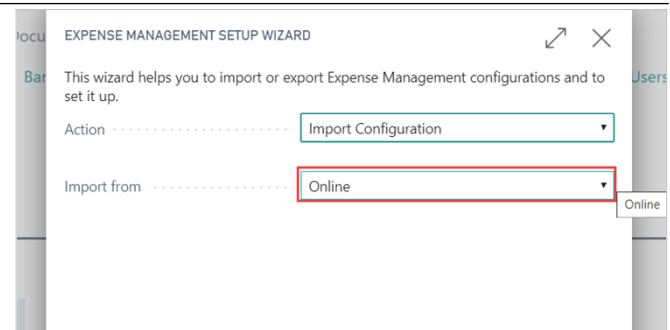
By choosing the action "**Online**", the wizard will smoothly apply the default configuration from Continia Online.

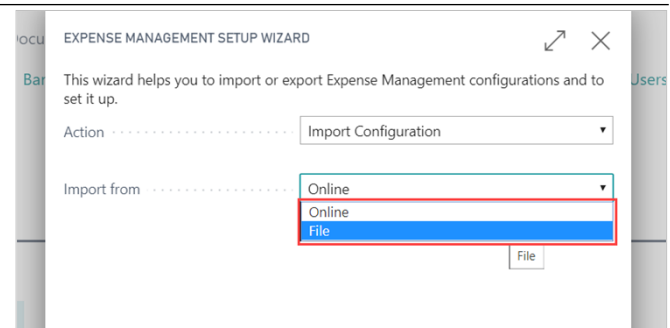If you want to import a backup or a configuration from another company, choose the option "**File**". This enables you to select your configuration file.
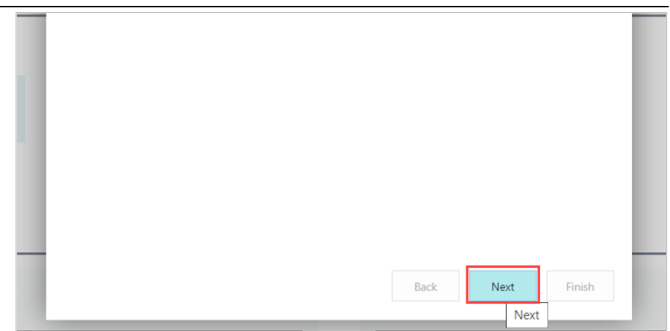
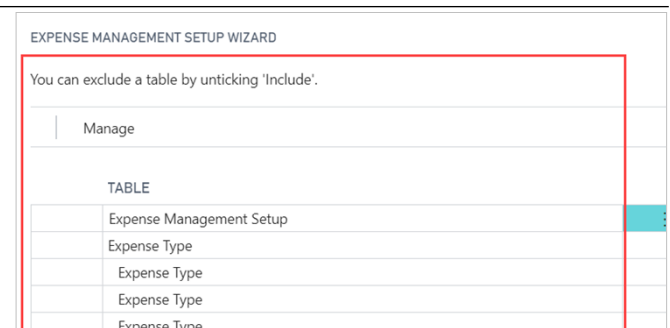Once you have chosen the option you want to run, click "**Next**" to continue.

In this step, you import standard configuration, which is needed to use Expense Management. You can exclude a table by unticking "**Include**".
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

Continia

Now you must go through a general setup for Expense Management.

EXPENSE MANAGEMENT SETUP WIZARD

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	

A "**Company Code**" is a unique code used by Expense Management to separate companies when using the Web Approval Portal, or the Expense Management Portal. This code will indicate to which company the attachments belong to in the file system.

EXPENSE MANAGEMENT SETUP WIZARD

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	

The "**Default Web/App Language**" is the language in the Expense app and on the websites. The user can change their settings afterward.

EXPENSE MANAGEMENT SETUP WIZARD

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 "**Setup Bank Agreement**" a wizard step will show how to set up a bank agreement.
The setup of a Bank agreement is only necessary for the automatic import of credit card transactions.
If the bank agreement is not in place at this stage, you can set this up in "Bank Agreements" later.

EXPENSE MANAGEMENT SETUP WIZARD

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	

In "**Document Storage Type**" you can chose where to store files.
"File System" will store files in a physical location defined by the "Archive Path".
Database will store files in a virtual location, in the database.

EXPENSE MANAGEMENT SETUP WIZARD

Please specify general Expense Management settings below.
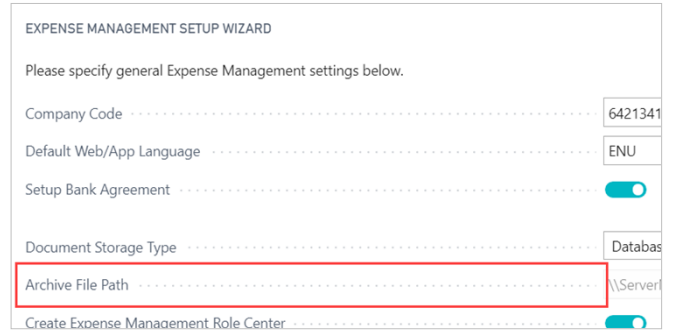
Company Code	6421341
Default Web/App Language	ENU
Setup Bank Agreement	
Document Storage Type	Databas
Archive File Path	\\Server
Create Expense Management Role Center	

"**Archive File Path**" will define a root location for file storage for all attachments linked to documents.
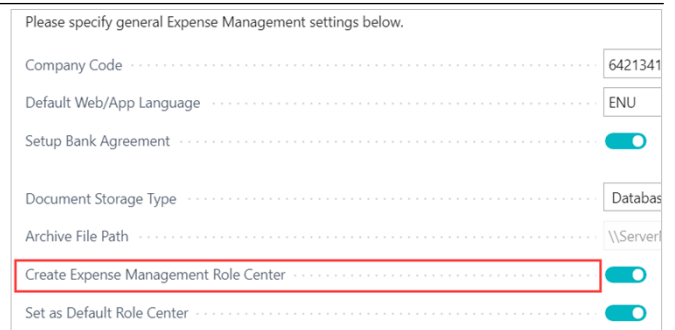
Under "**Create Expense Management Role Center**" you enable the option to create the Expense Management Role Centre.
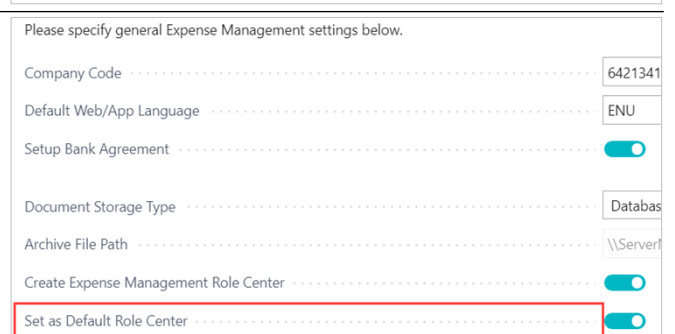
Under "**Set as Default Role Centre**" you define if you want the Role Centre for Expense Management as default.

In this step of the wizard you must specify the setup, if you will be using the "**Continia Web Approval Portal**".
When approving documents, you can use the streamlined approval portal to handle any document type. The Continia Web Approval Portal is available either as services in the cloud. Or as an On-Premises installation.
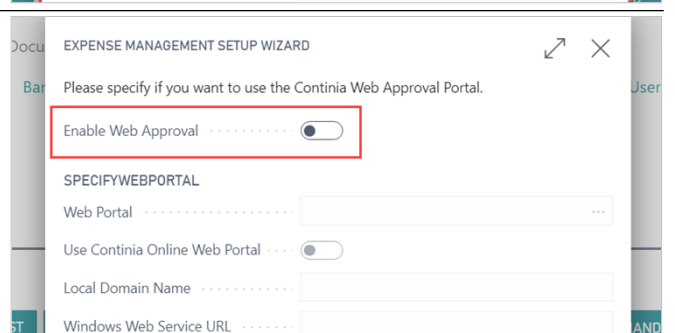
"**Enable Web Approval**" allows you to use either the on-premises Continia Web Approval Portal included in the installation package. Or the cloud Web Approval Portal provided by Continia Online.
When enabling the web approval, the Expense Management Setup Wizard fills in values in all the fields below, based on the current installation. These settings are changeable if needed.
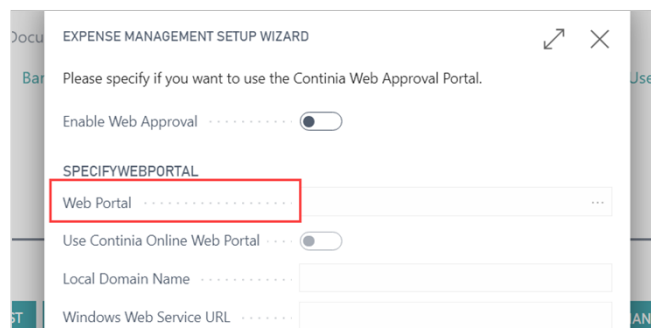
The "**Web Portal Code**" is the name of the record in the Web table, that holds the configuration for the web approval portal. You can either select an existing web portal or create a new one. The wizard automatically creates the web portal with the given code, if it does not already exist.

"**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.
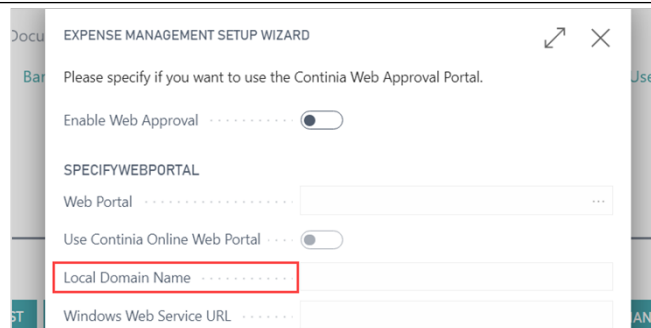
Fill in the "**Local Domain Name**" under whom you have created the Windows users. This is only relevant for NAV versions, that do not include the domain name as a part of the user-ID in NAV.
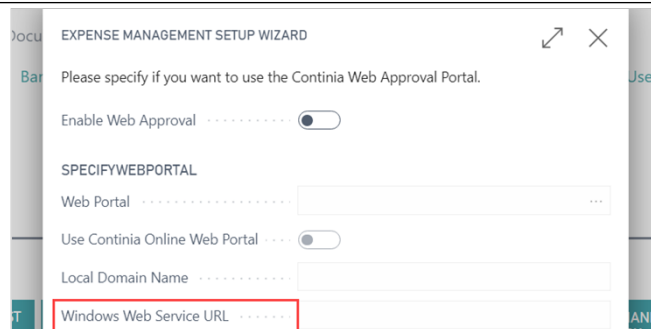
The "**Windows Web Service URL**" is the URL for the Business Central web services. This URL points to the ServiceTier, which authenticates the users with Windows credentials.
 Remember that if all users in Business Central are Windows users, you only need to fill out this URL. However, if the users have mixed authentications, you need to set up two different ServiceTiers and enter the URL for both Windows Web Service and Database Web Service.
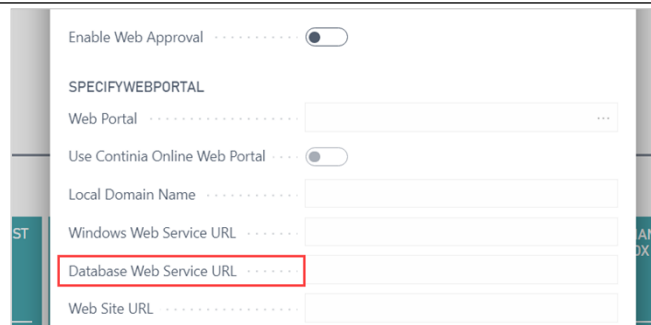
The "**Database Web Service URL**" is the URL for the Business Central web services, that points to the ServiceTier. This authenticates the users with database logins (or NavUserPassword).
If all users in Business Central are database users - you only need to fill out this URL.
However, if the users have mixed authentications, you need to set up two different ServiceTiers and enter the URL for both Windows Web Service and Database Web Service.

"**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.
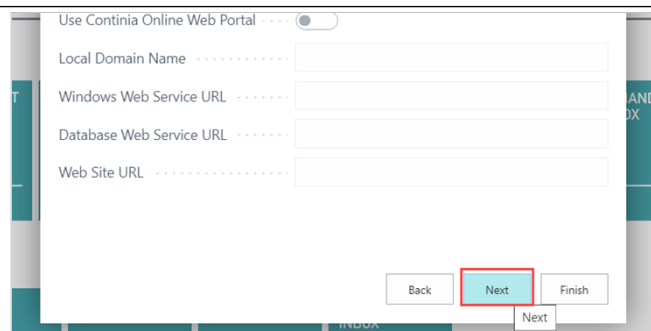
Select "**Next**" to continue the wizard.

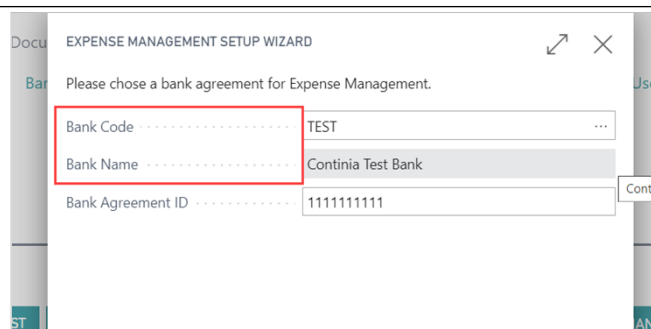In this step, you must set up the details if you are enabling the automatic import of credit card transactions.

"**Bank Code**" is used for identifying file format for credit card transaction import. Here you can find a list of banks that are supported in Expense Management. "**Bank Name**" will automatically be filled in once Bank Code is chosen.
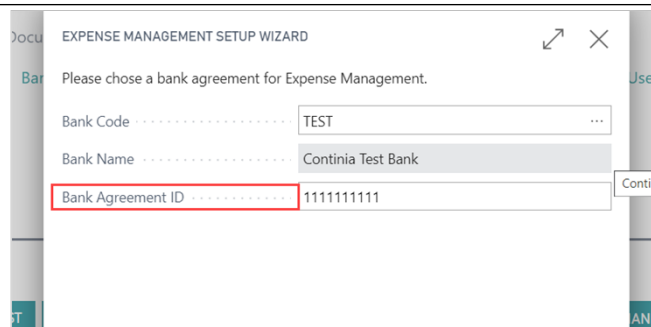In demo environments, a default TEST bank code is set.

"**The Agreement ID**" is received from the bank, when the integration is done. This is a unique identifier for the partnership between the bank and the company. This will ensure that credit card transactions are downloaded to the right company.

In this step of the wizard, you define if you would like to "**Setup demo data**".
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.
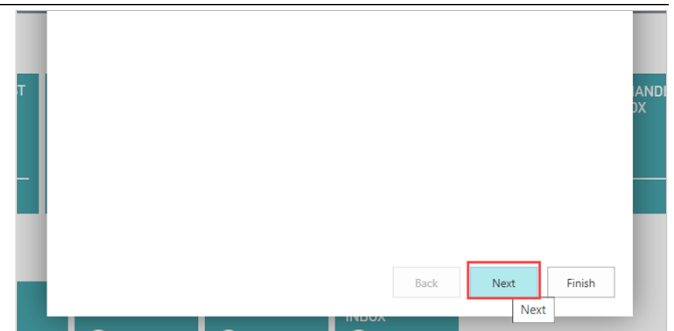Please note that Demo data should only be generated in pre-production environments, not in production.
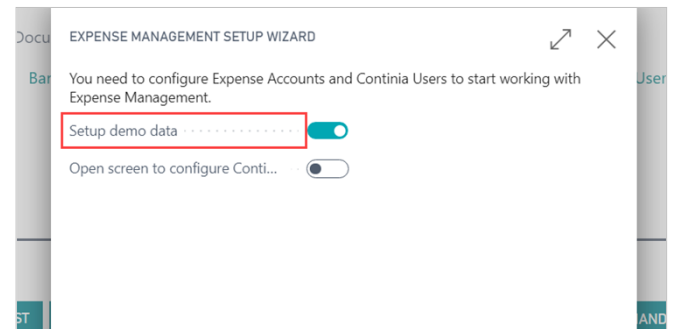
In this step, you can also choose the action "**Open screen to configure Continia Users**". This action will open a new screen that allows configuring Continia Users right away.
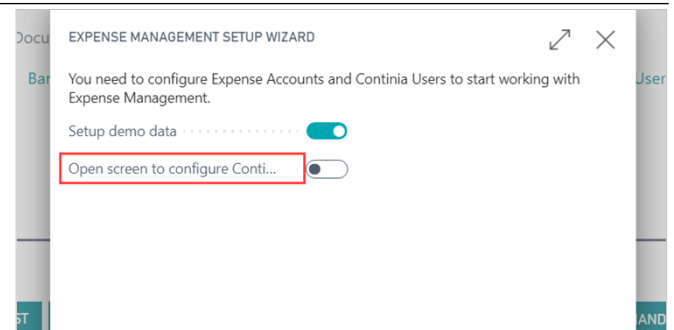
Select "**Next**" to continue the wizard.

The setup of Expense Management is completed, and you are ready to start using the solution.
Select "**Finish**" to close the wizard.