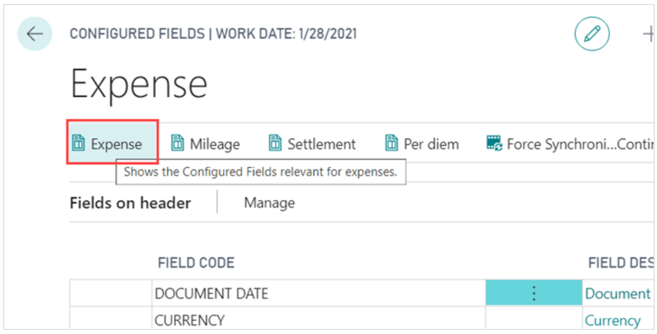
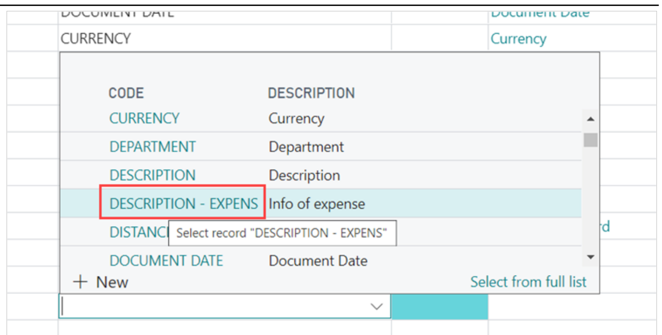
1 Field Types - Configured fields

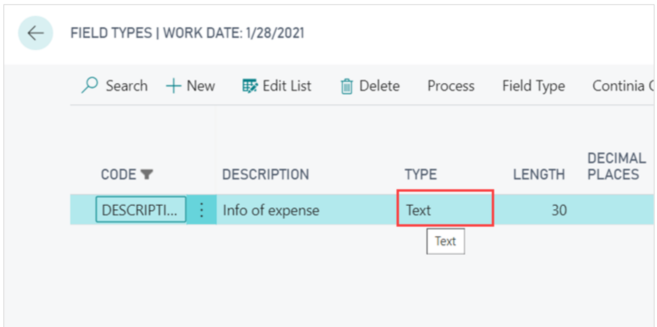
Configured Fields is where you define which fields should be visible for the expense user and the approver. There is a separate page for each type of documents. You simply go to the page that you want to amend or add fields to.



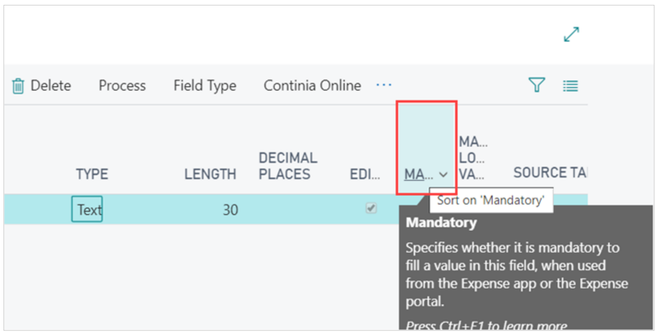
The order of fields shown here is the same order shown for the expense user and the approver.



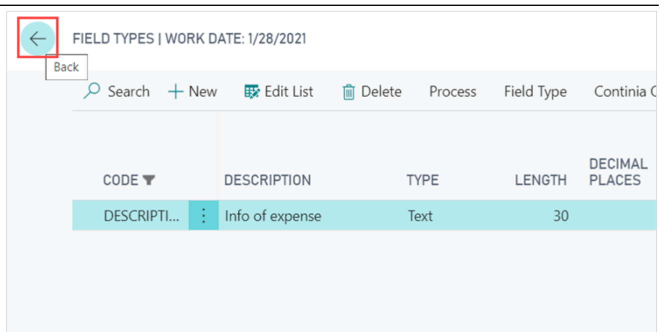
If you want to amend the field type, choose the Description of the field, and this will open a new window with details for the field.



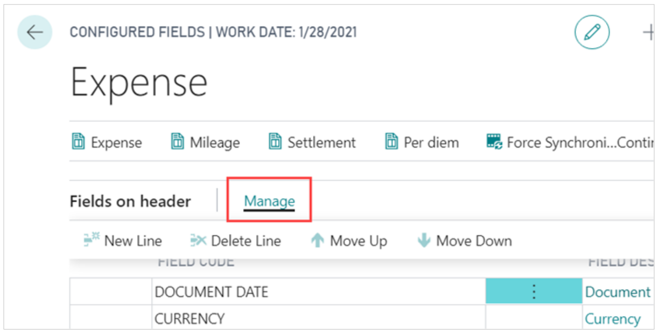
Here you can change details and set the field as mandatory, meaning that the field will be marked with a red star in the Expense App and marked in red in the Expense Portal.
Mandatory fields are to be filled in before submitting. This way you can force the user to add important information.



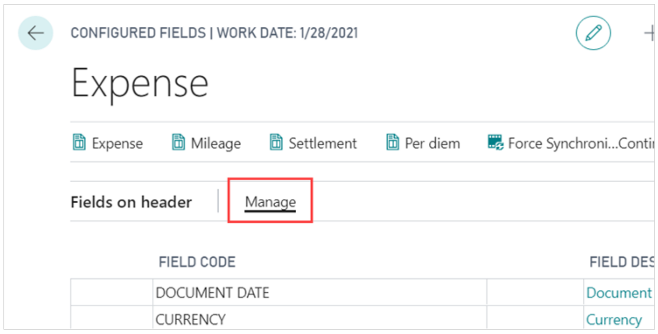
When you are finished amending the field type, you can go back.
Changes will automatically be saved.



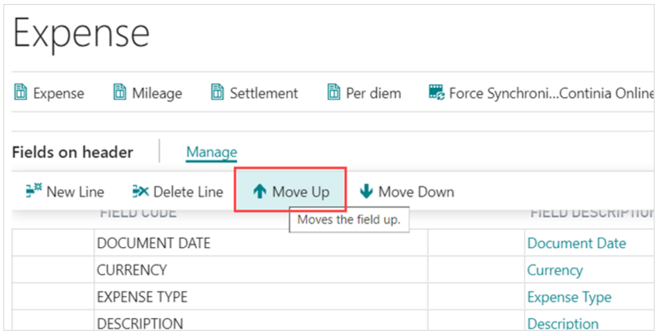
If you want to change the order of fields, go to "**Manage**".
Here you can create new lines and delete lines.



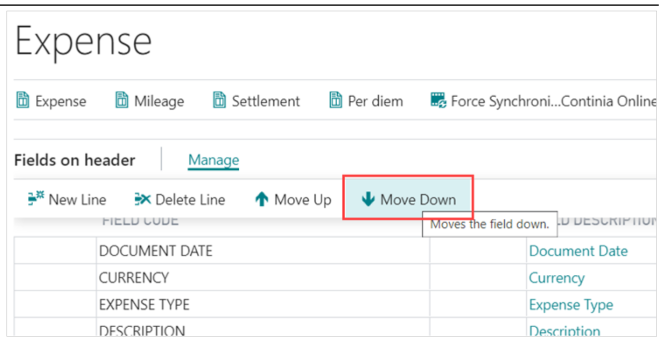
Click on the navigation menu item popup **Manage.**



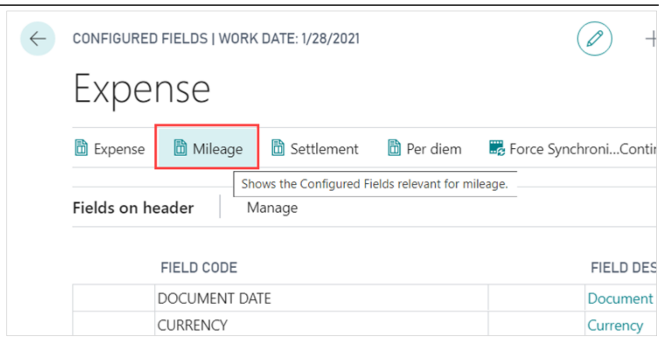
You can change the order of the field by choosing "**Move Up**".



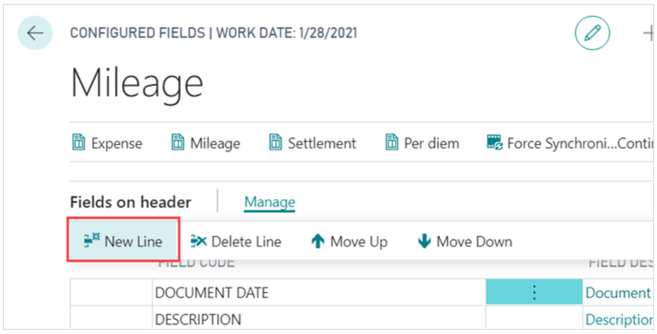
Or choose "**Move Down**".



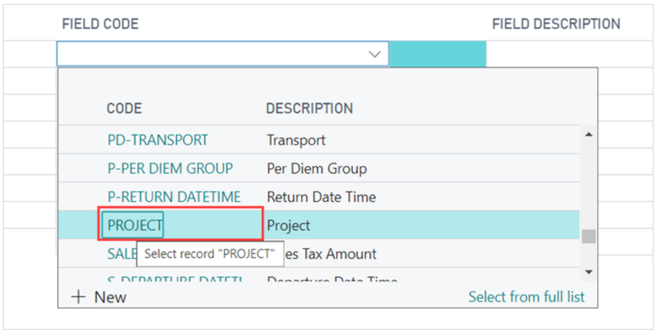
To define fields showing and the order for a Mileage, choose that page in the top ribbon.



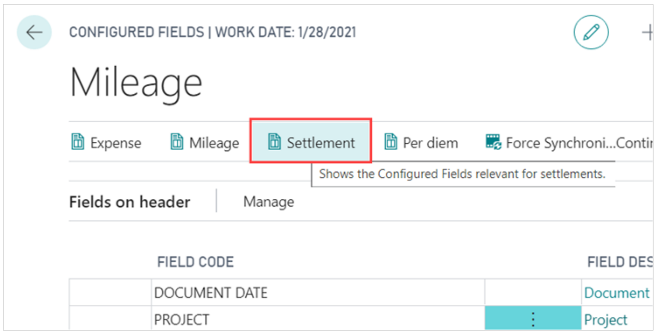
If you wish to add a new field to your mileage, choose "**New Line**".



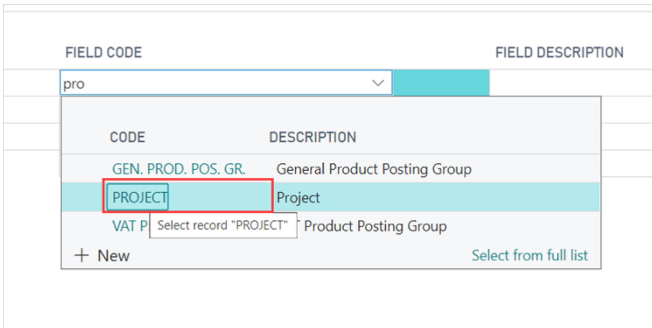
Now a list of all fields will be presented.
These fields are all available for you to add.



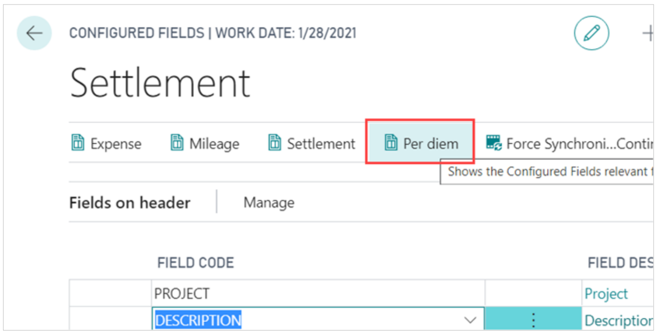
To add or amend fields for a "**Settlement**", choose it in the top bar.
If you add fields to a settlement, it will help the user when creating expenses, mileages and Per Diem. If the field is present on the settlement and the field is also present on a document, they only need to fill in the field on the settlement. This field will automatically be filled in when creating a new document.
The purpose of this is that the user only has to fill in this field once and not on every single document.



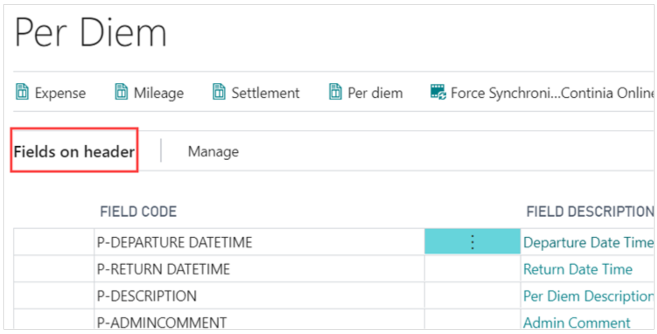
As an example, if adding the field Project to a settlement and this field also is available on the expense page. Then the user only have to fill in Project when creating a new settlement. Every new expense will now have Project filled in taken from the settlement.



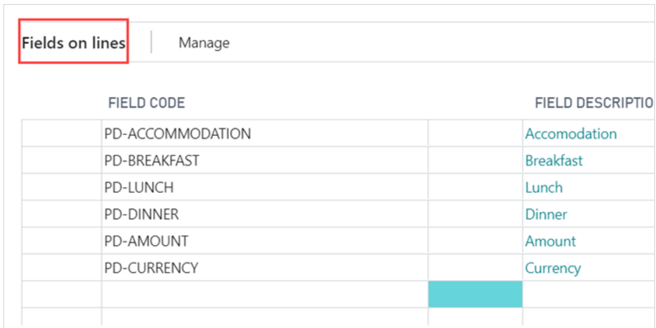
The setup for "**Per diem**" is split into fields for the header and the lines.



Fields for the header are used to assure that the user gives information for details, in general, related to the Per Diem. This could as an example be department, project, or other information that the company has decided should be reported.



The line fields showing are related to the rules of allowances available.



Once you have done all your amendments to fields on documents, and you want to push it to the users immediately, choose "**Force Synchronize with Continia Online**". Otherwise it will be updated and pushed to the users at the next synchronization.