weel

Getting started guide

For team members

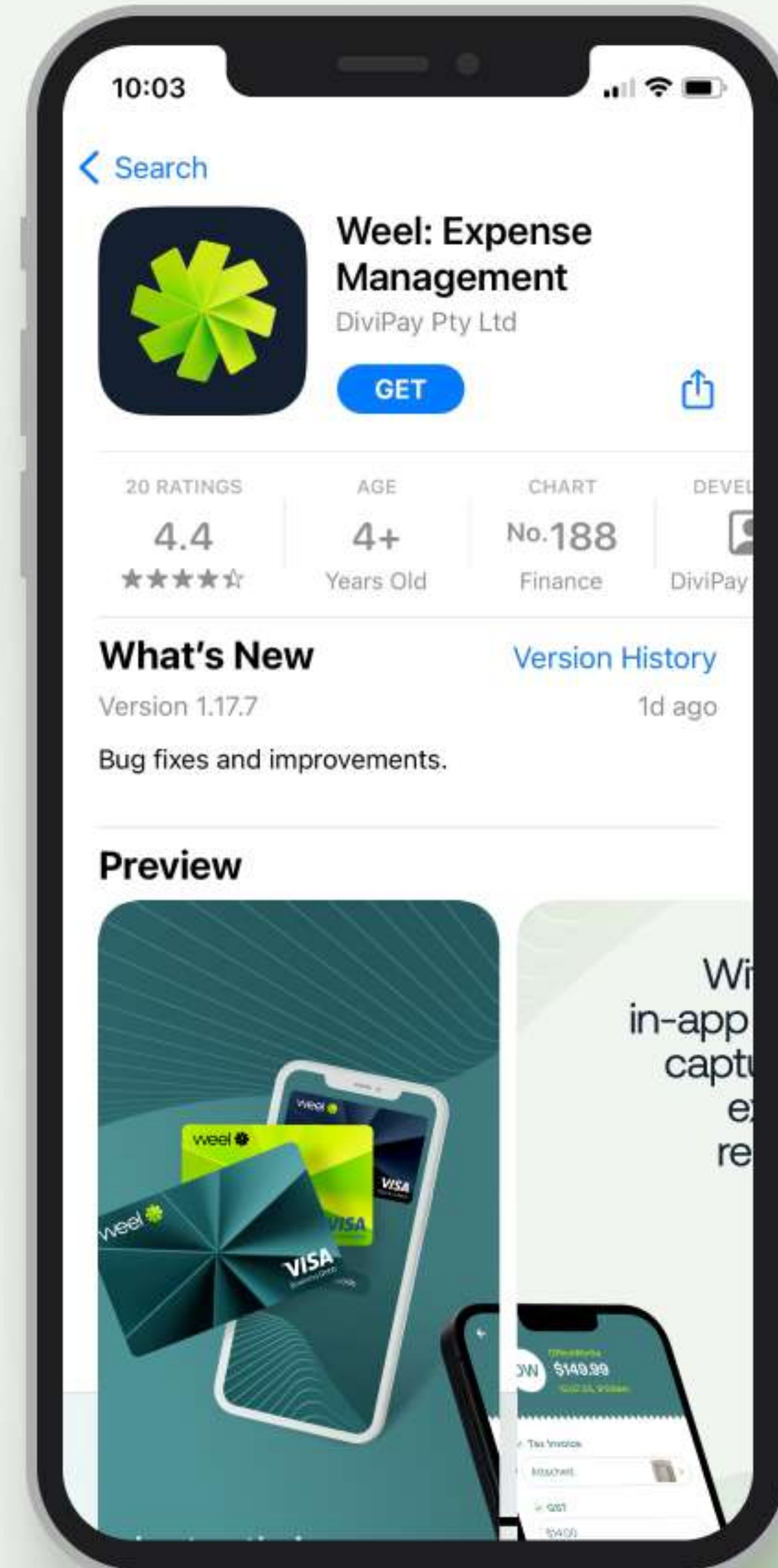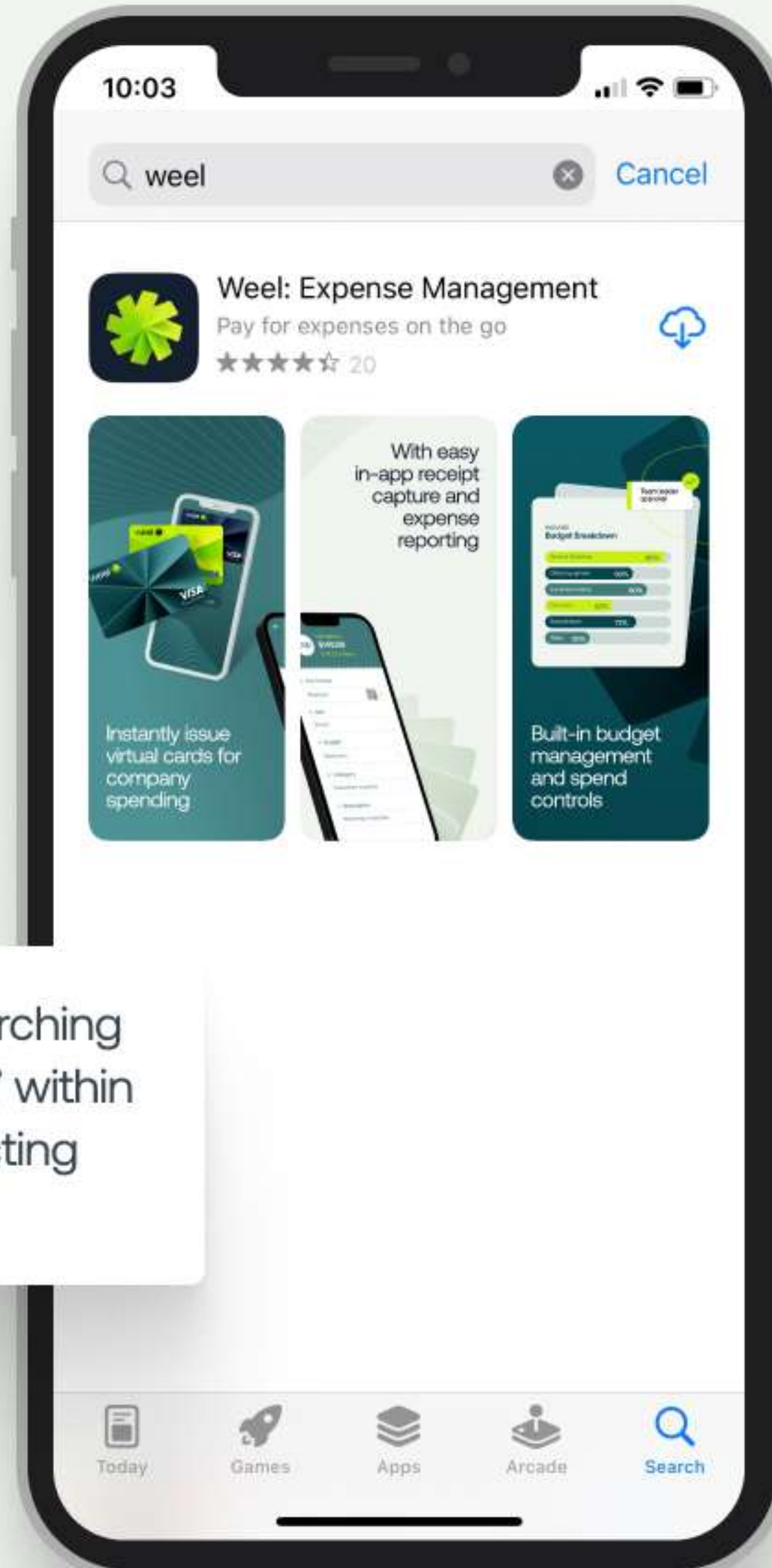letsweel.com

Contents

letsweel.com

Download the Weel App

Once you have been invited to join your company's Weel account, downloading our mobile app is a great place to start.

Tip: You can do that through searching for 'Weel: expense management' within your devices app store and selecting 'Get' to download
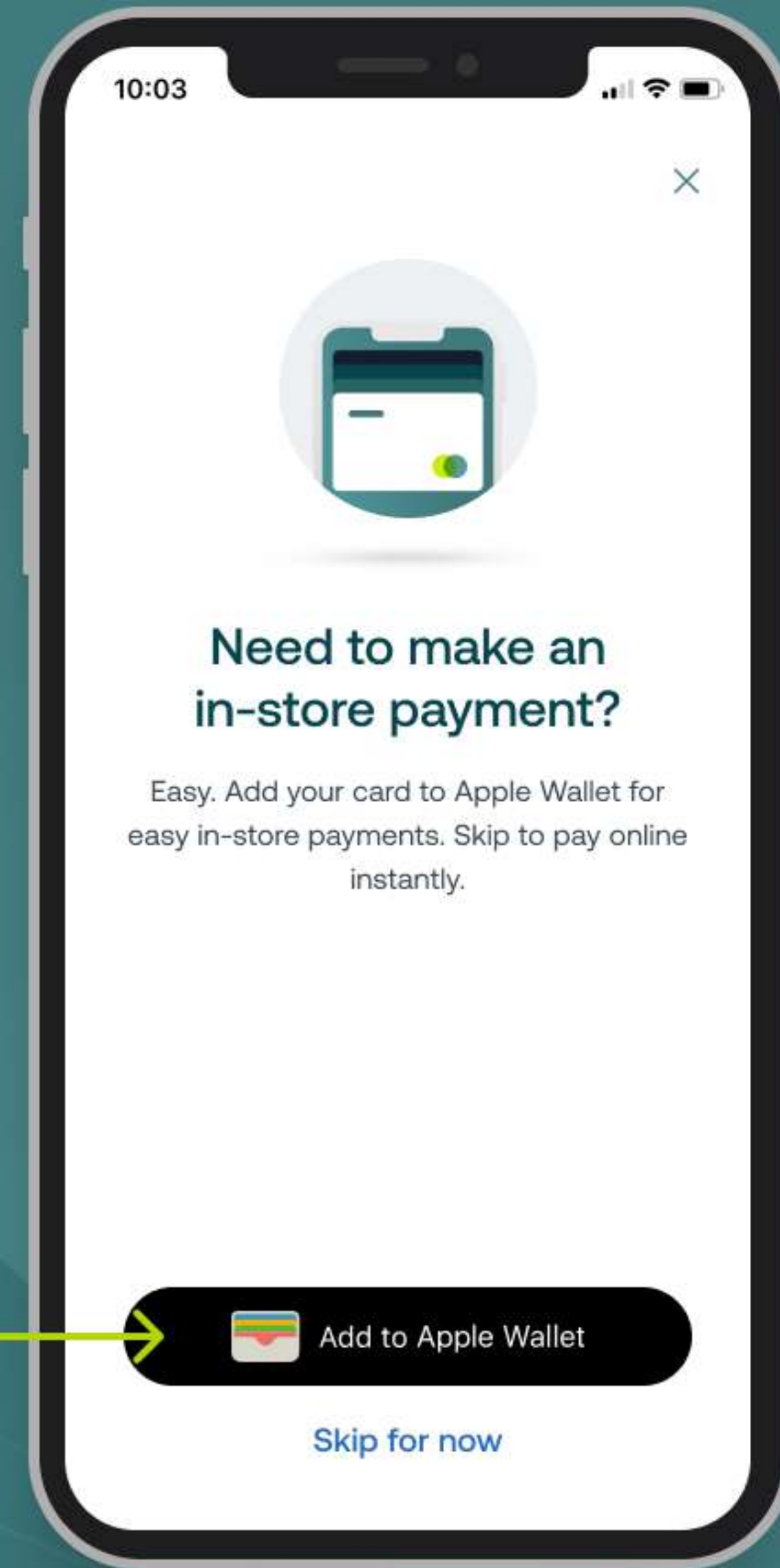
How to add to wallet

Once you're assigned to a budget, you'll receive an easy step by step prompt to walk you through setting up your card in Apple Wallet.

Tip: Tap 'let's go' followed by 'add to Apple Wallet'

10:03

Hurrah! You've been issued a Weel card

Let's setup your card and get you ready to make payments in just a few steps

Let's go

Skip for now

10:03

Need to make an in-store payment?

Easy. Add your card to Apple Wallet for easy in-store payments. Skip to pay online instantly.

Add to Apple Wallet

Skip for now
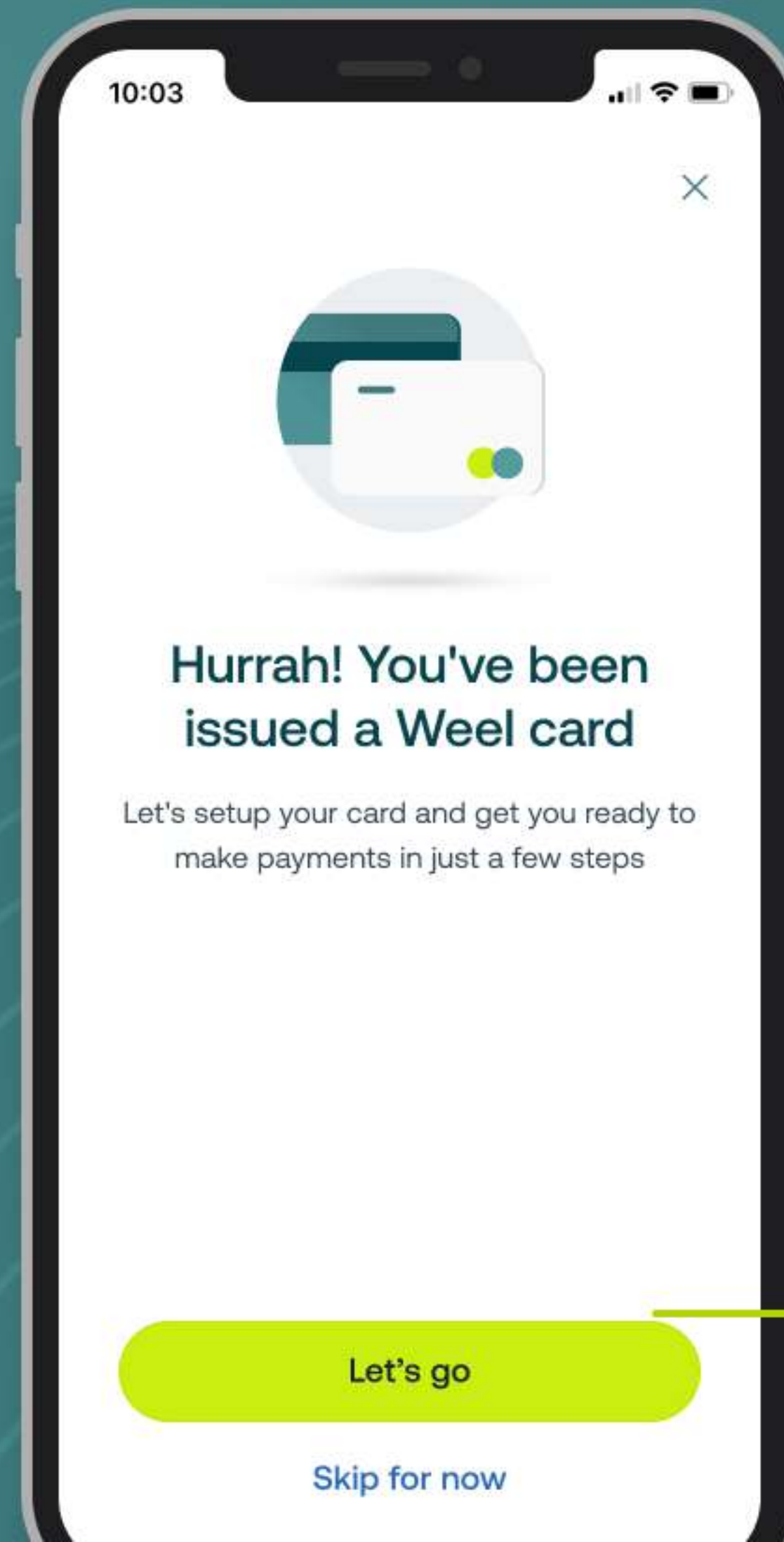
How to add to wallet (cont.)
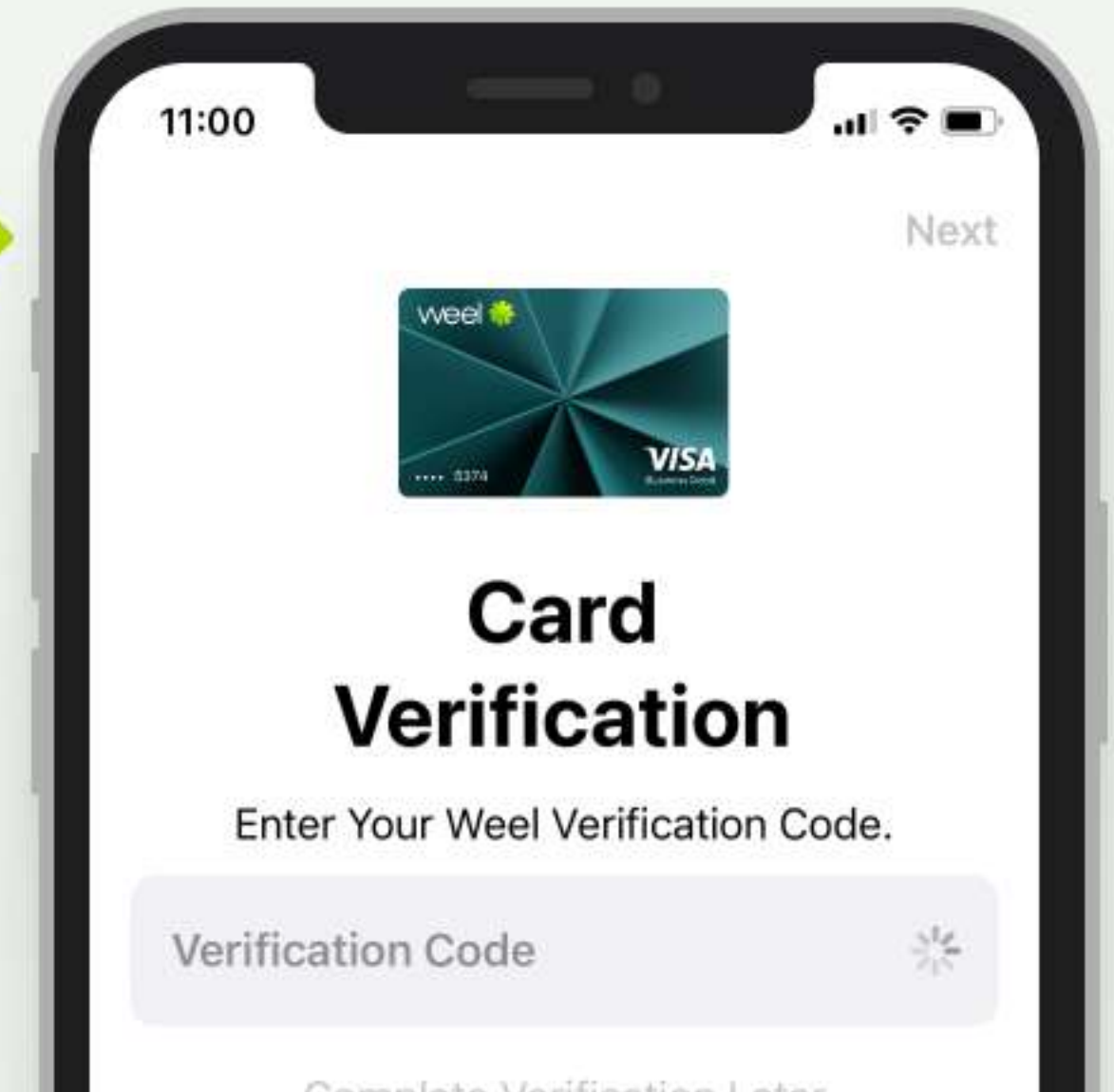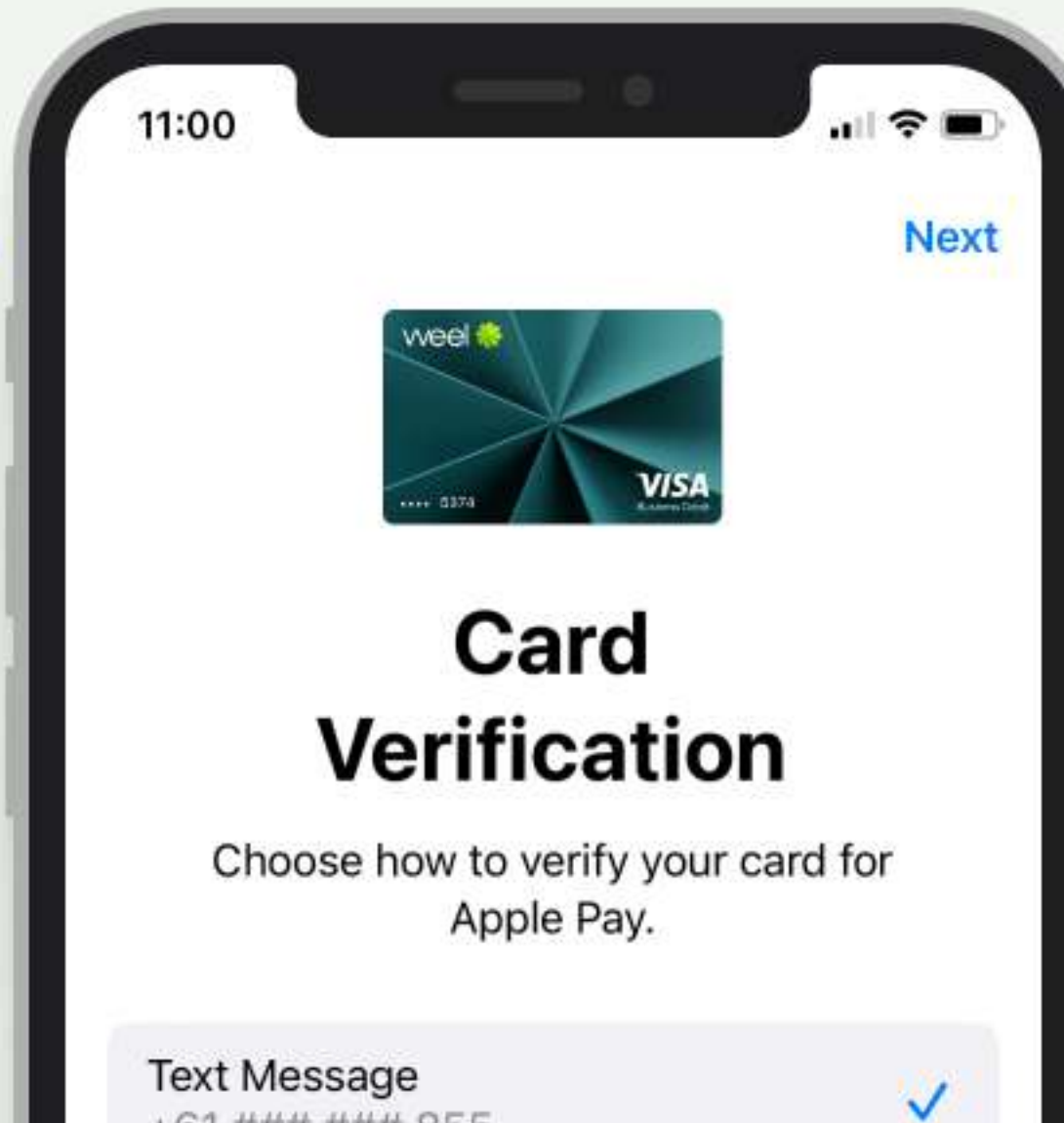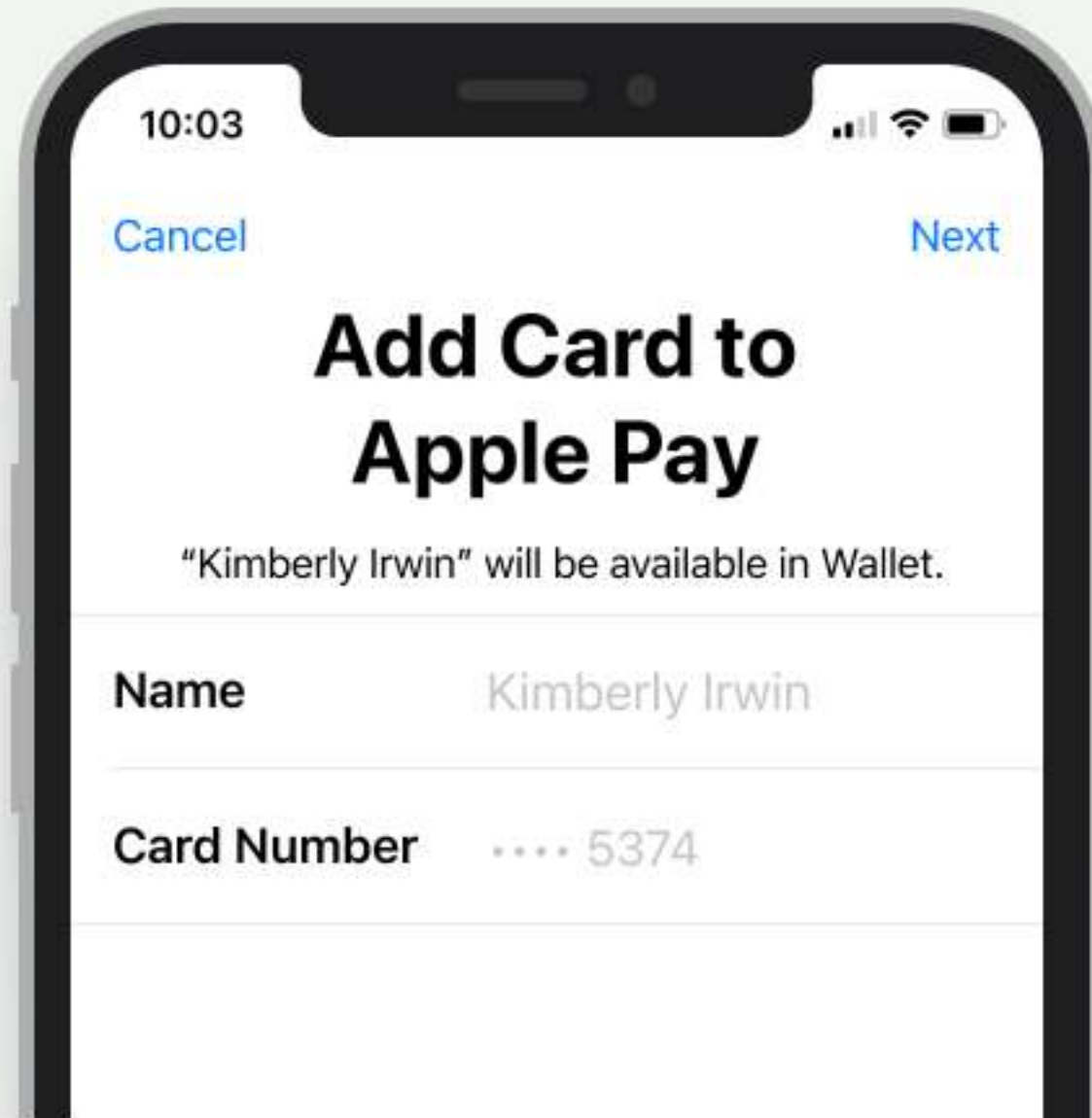
Tip: Continue to follow the prompts from Apple Wallet to finalise adding your card

Screen 1 — Add Card to Apple Pay

Cancel Next

Add Card to Apple Pay

"Kimberly Irwin" will be available in Wallet.

Name — Kimberly Irwin

Card Number — •••• 5374

Card-related information, location, and information about device settings and use patterns may be sent to Apple and may be used together with account information to provide assessments to your card issuer or payment network to set up Apple Pay and prevent transaction fraud. See how your data is managed...

Screen 2 — Card Verification

Next

Card Verification

Choose how to verify your card for Apple Pay.

Text Message
+61 ### ### 855 ✓

Email
k**y@e***.com

Complete Verification Later

Screen 3 — Card Verification

Next

Card Verification

Enter Your Weel Verification Code.

Verification Code

Complete Verification Later
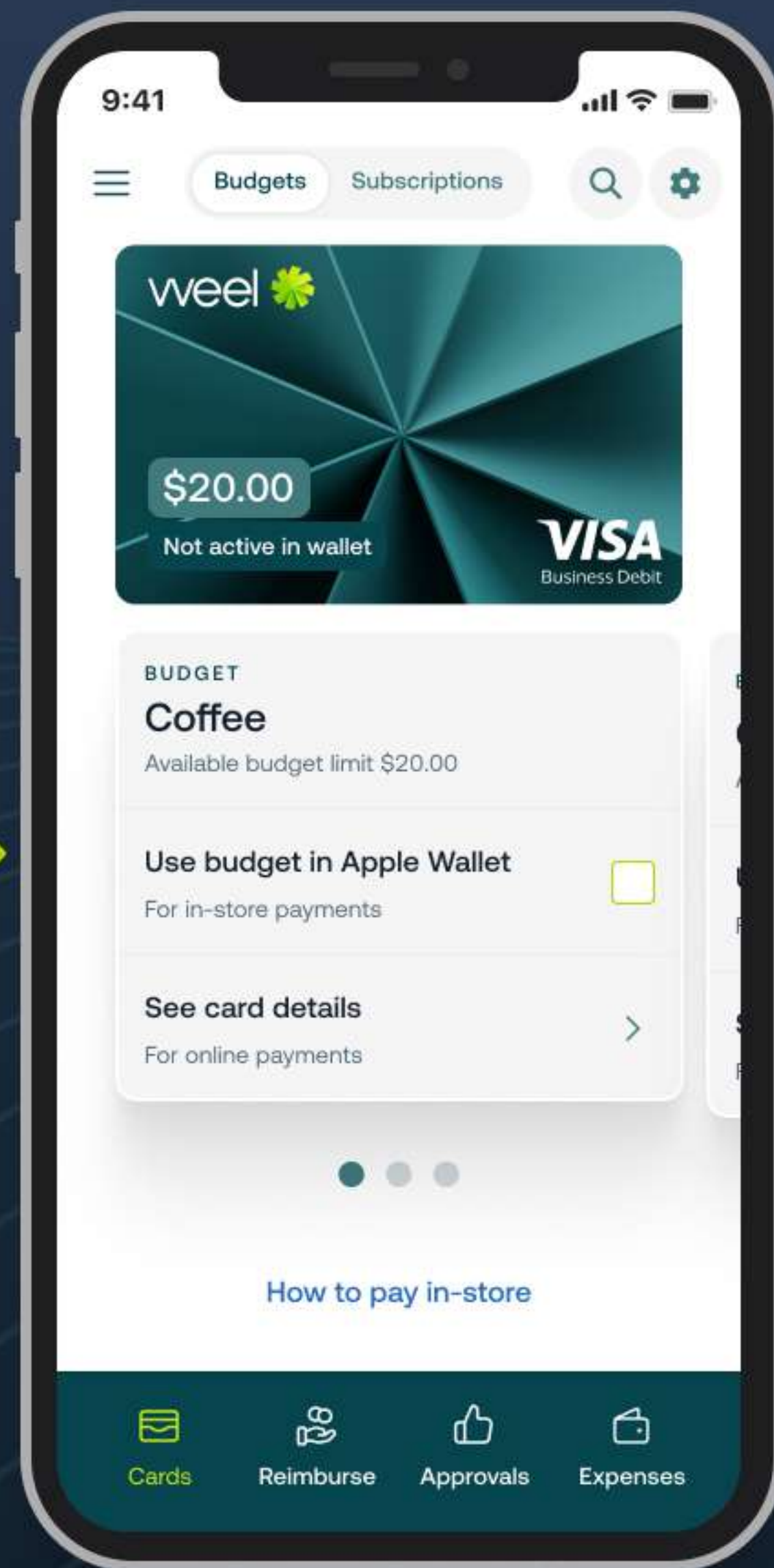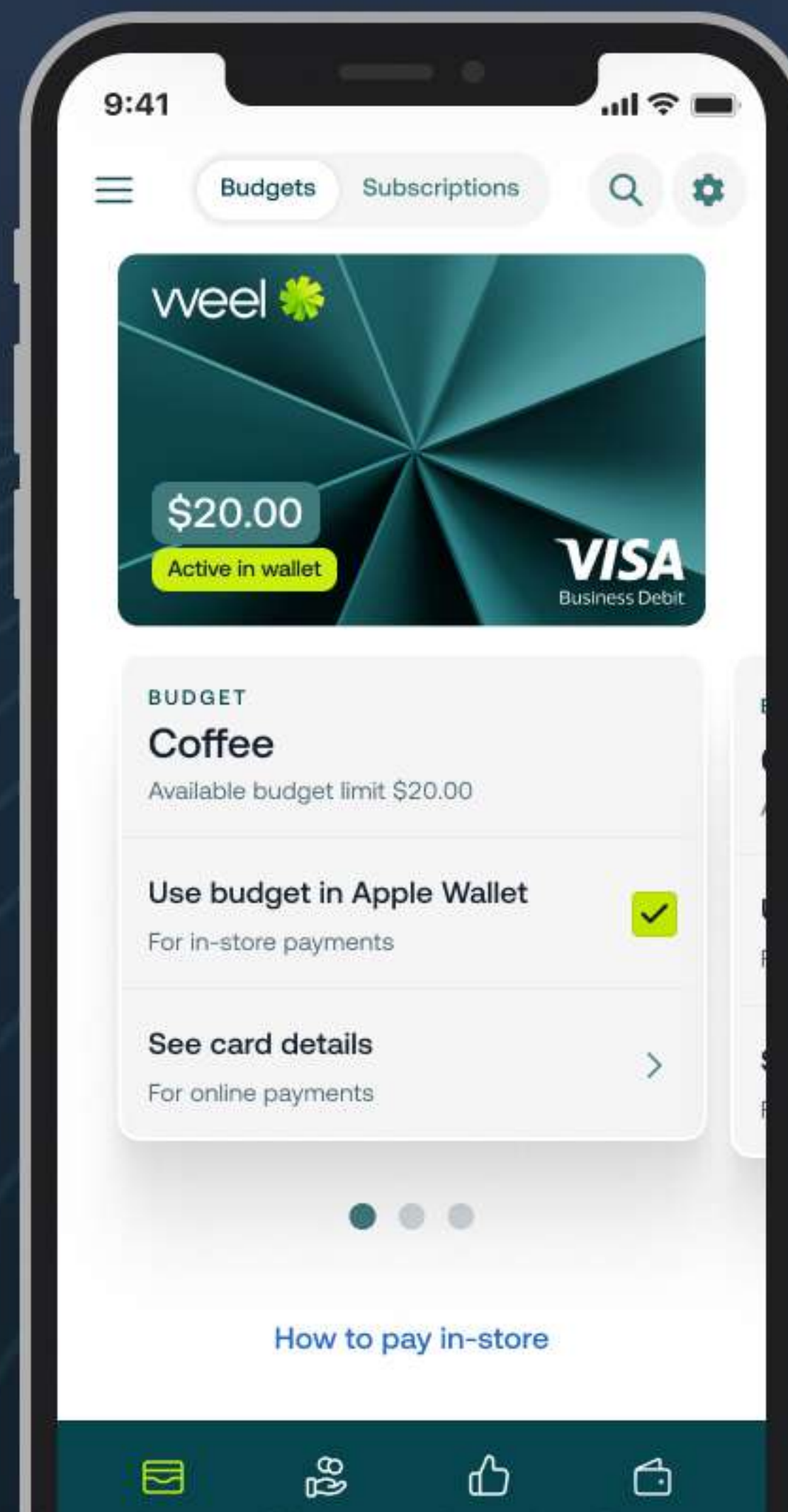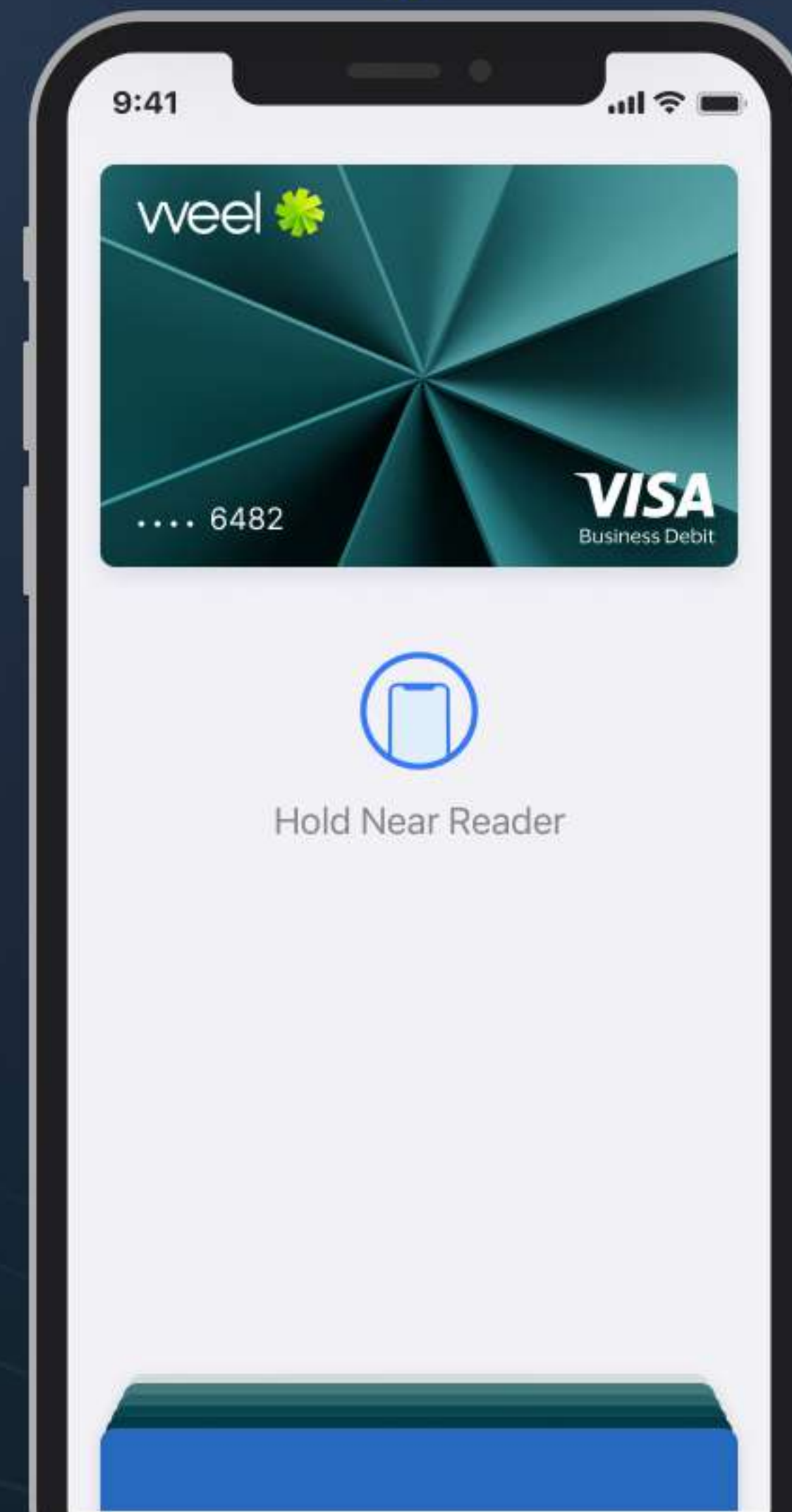
4

How to pay online

Paying online is easy with all the card details you need at your fingertips.

Step 1: Swipe to your required budget and select 'see card details' (you don't need to activate in Apple/ Google Wallet).

Step 2: Copy your card details by tapping the copy icons.

5

How to make a top-up request

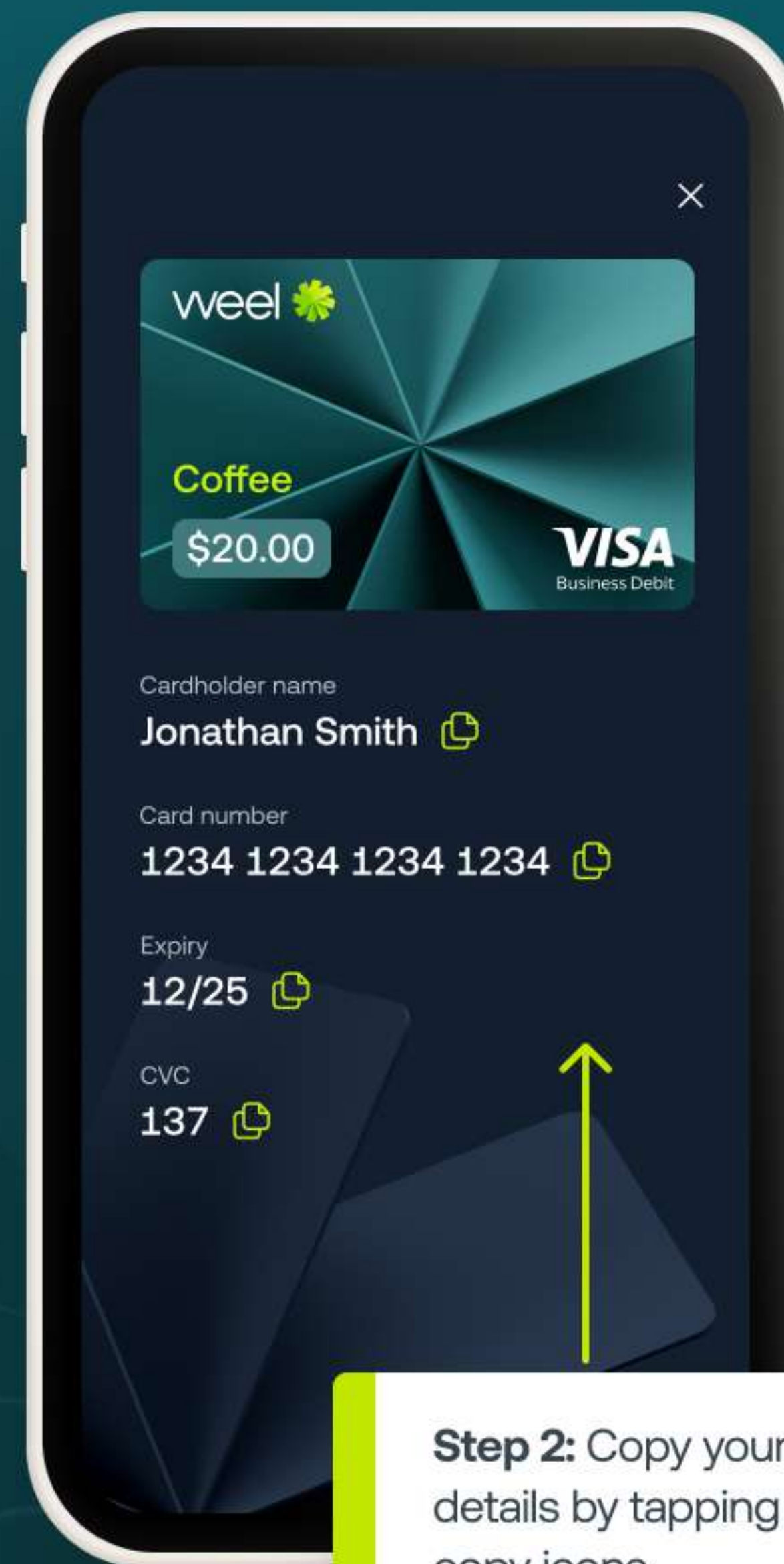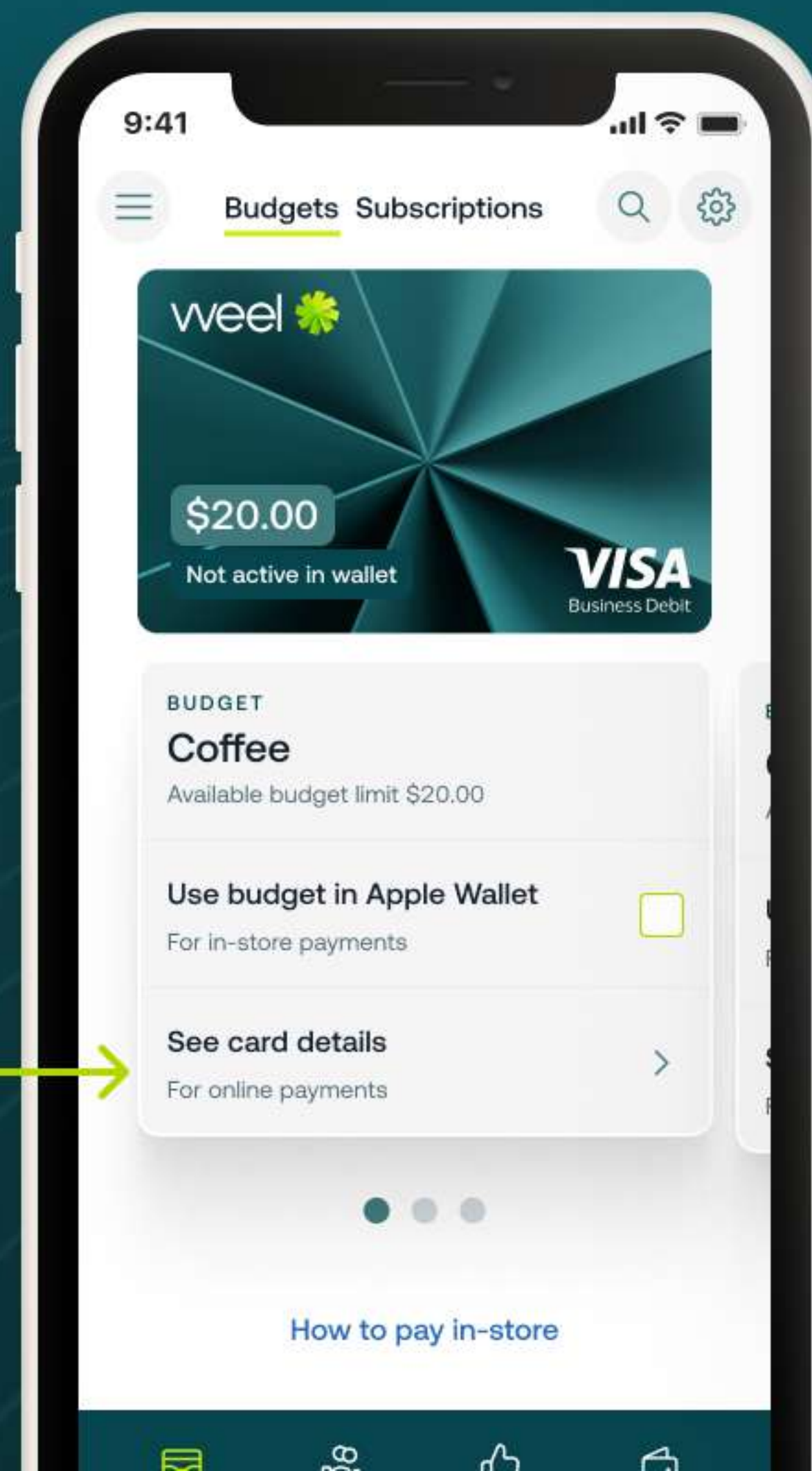For greater flexibility and easy sign-off, or if a budget is running low, you can request a top-up, detailing what you need it for.

Tip: Tap the floating 'plus' icon in the lower right hand side to request and enter your request details

9:41

Pending   History

No pending requests

Tap the ⊕ button when you need to request additional funds for your card

+

Cards   Reimburse   Approvals   Expenses

9:41

Request additional funds ✕

How much?

$

What for?

Select budget

Request will be sent to Russel Martin

Request
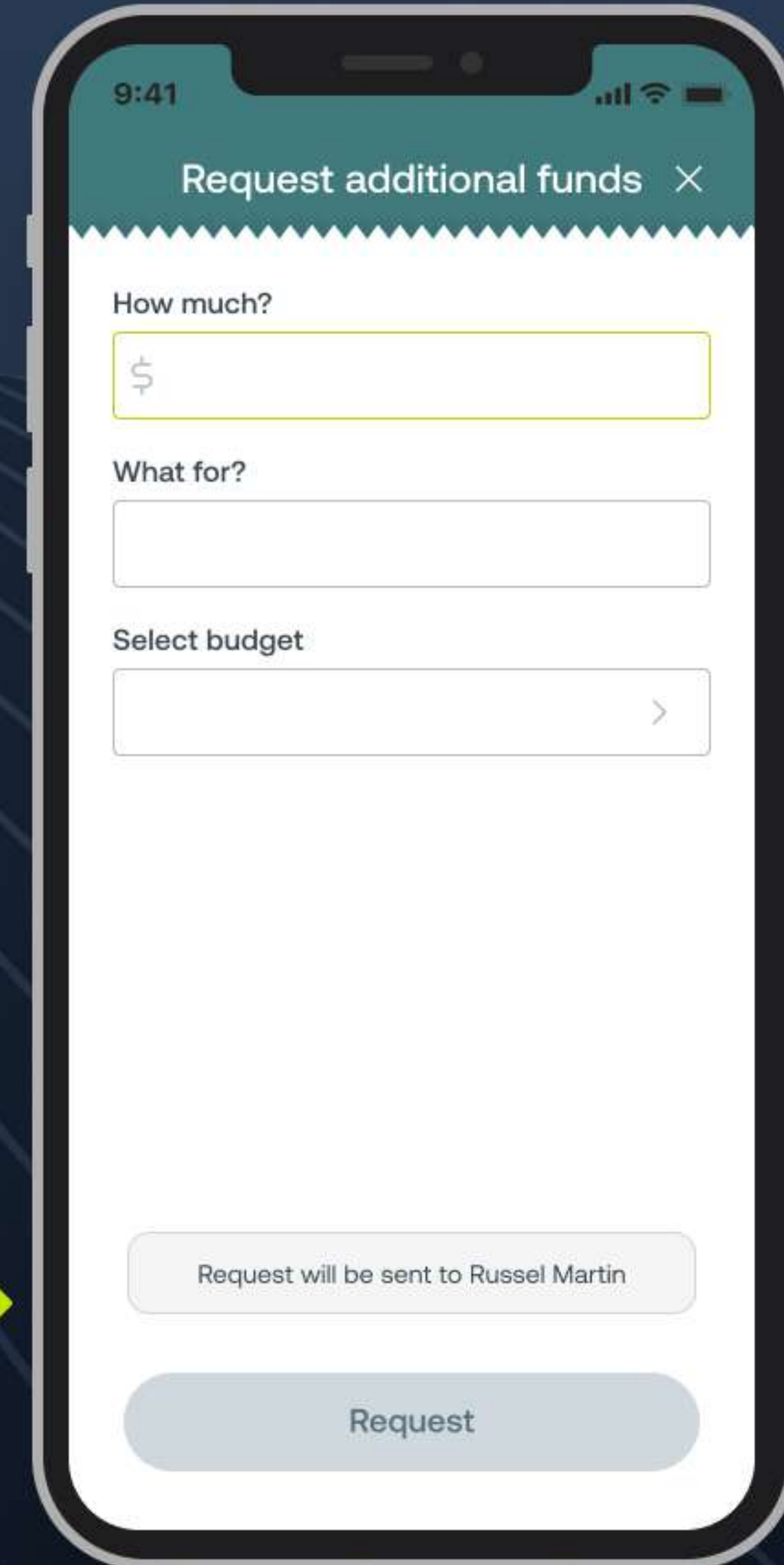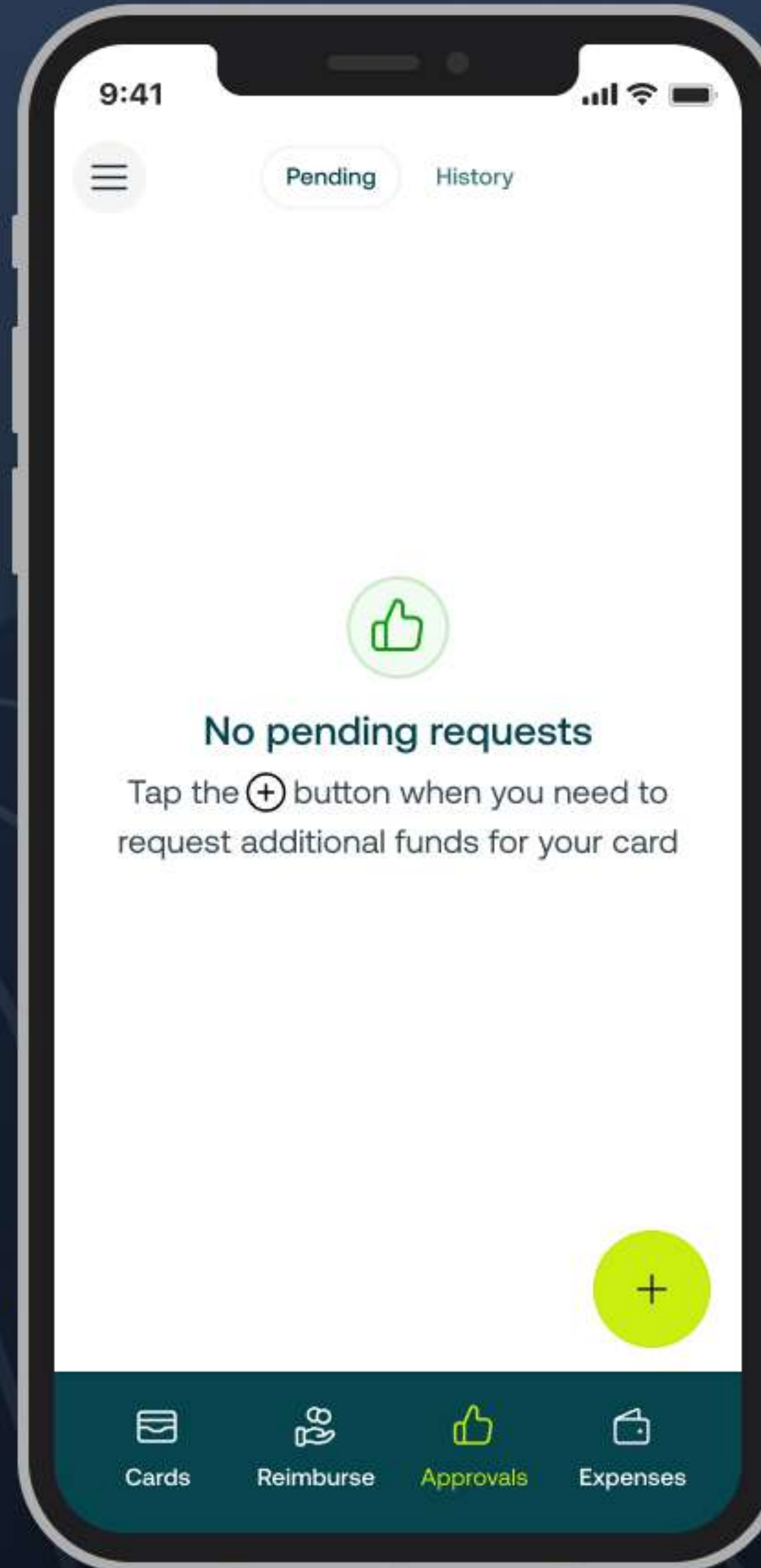
6

How to complete an expense

The days of crumpled paper receipts are over. With Weel, you can capture receipts in real time, adding any missing details.

Tip: Tap the incomplete expense and fill required fields in the expense details form.

Incomplete (1) — Complete

Z **Zendesk**
22.07.22 — $50.00 >

Cards — Reimburse — Approvals — Expenses

← **Zendesk**

Amount — **$950.00** AUD

Date and time — 12.10.20, 9:09am

Complete

Tax invoice ⊘
No tax invoice >

GST ⊘
$ 0.00

Budget ⊘
Sales Team >

Category ⊘
Food and snacks

Description ⊘
Not required

Attendees ⊘
No attendees present >
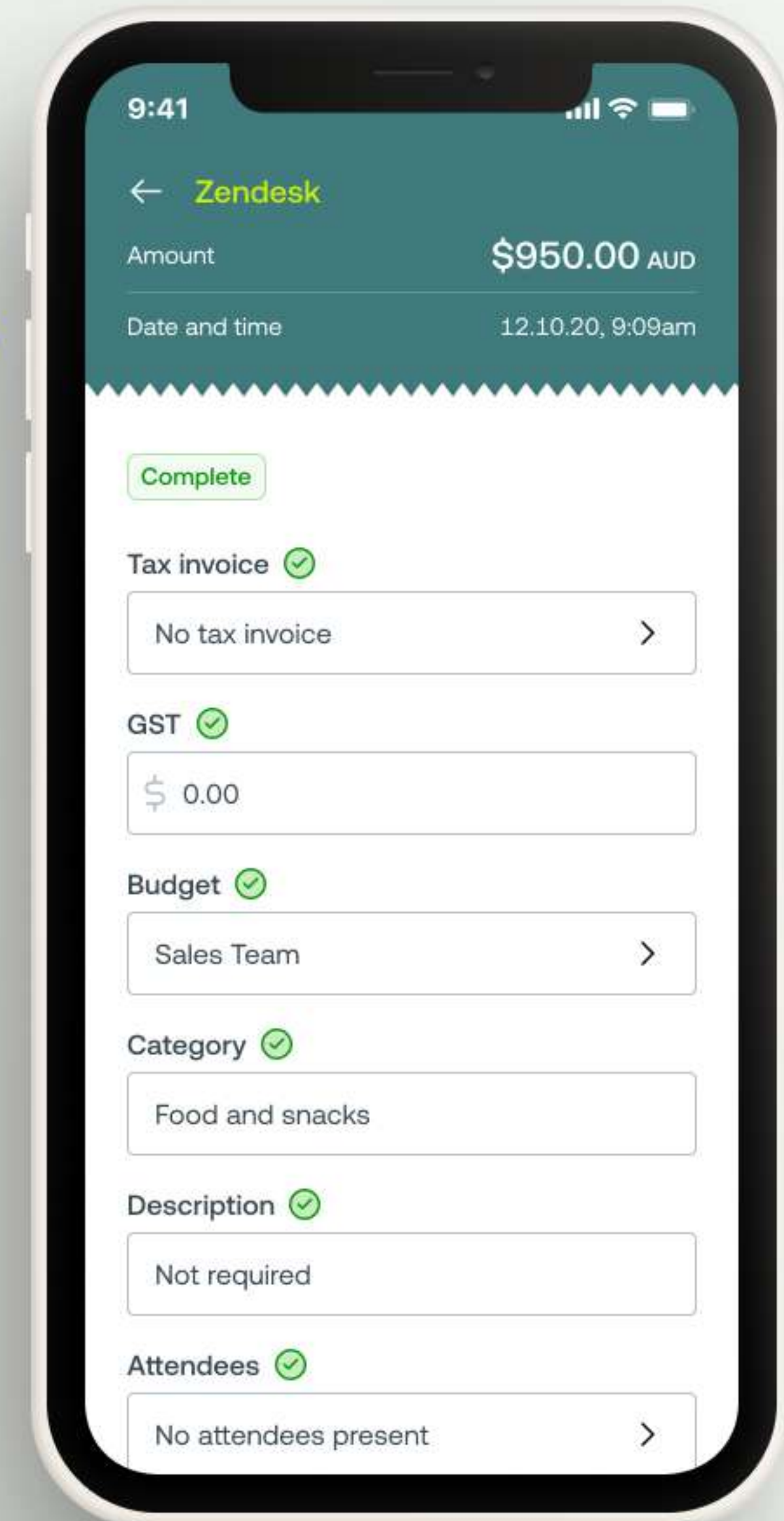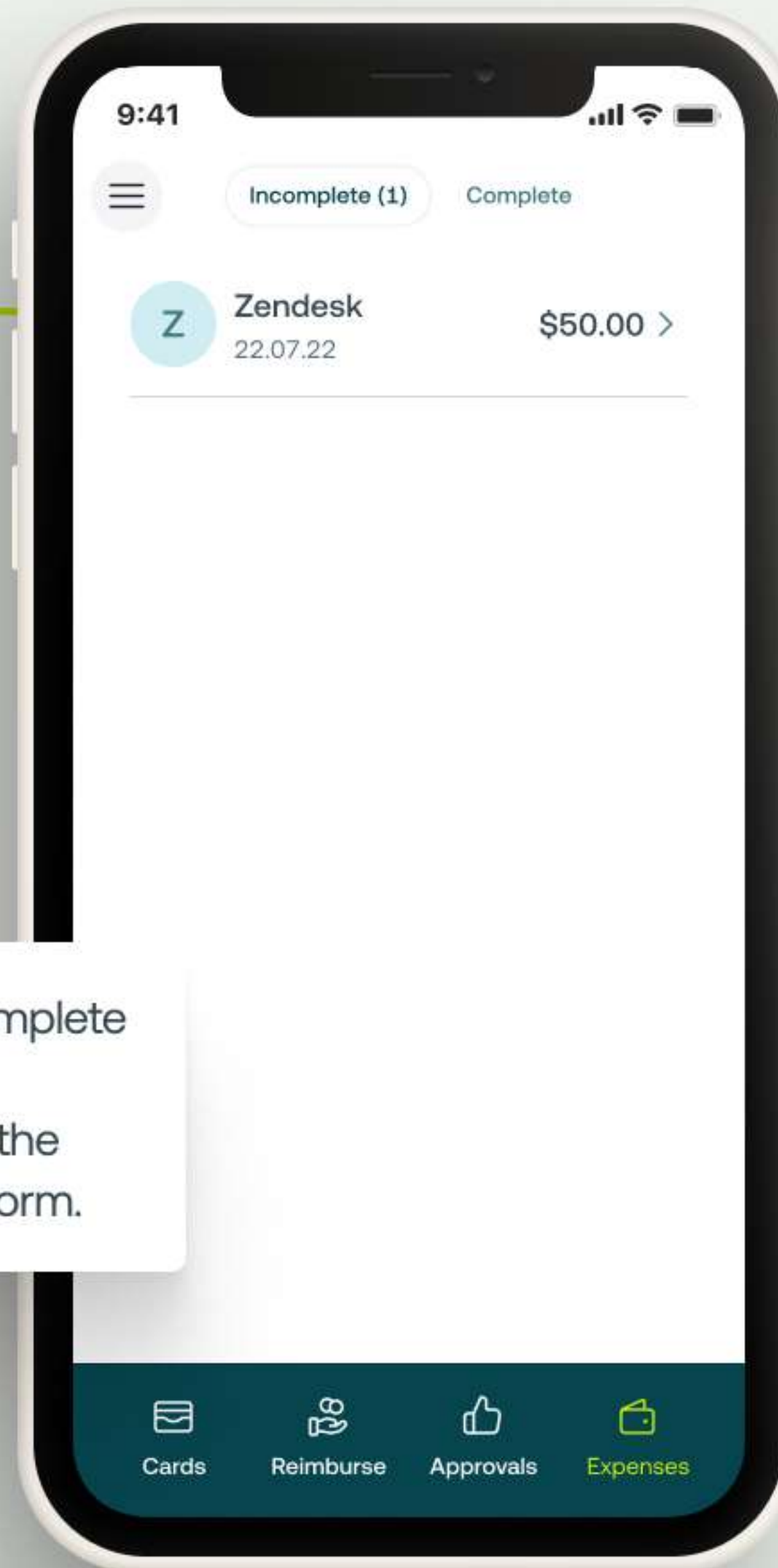
How to add an invoice

You can also complete an expense on our web platform, by uploading your invoice directly via our transaction table.

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Atlassian
Atlassian

$1,250.00

Incomplete expense

Kimberly Irwin   06.02.23, 17:23 pm

✂ Split Expense

Budget/Subscription

Atlassian

GST

$0.00

Category

Software

Update   Cancel

Tax Invoice Missing

Drag and drop or choose a file to upload tax invoice.

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Account Balance
$3,538.25

Getting Started ⌄   Payments ⌄   Spend Management ⌄

👤+ Invite people   🔔1 ⚙ | Kimbiz

Budgets   Transactions   Approvals BETA   Custom Workflows BETA

🔍 Search   Filter ⌄   Export

	Transactions	Opening	Closing ⓘ
	28	**$0.00**	**-$6,461.75**

Date	Status	Merchant	Category	Amount	GST	Tax Inv
06.02.23	Incomplete expense	Atlassian	Software	-$1,250.00	$0.00	
06.02.23	Incomplete expense	Sendgrid	Business Services	-$64.75	$0.00	
06.02.23	Incomplete expense	Sendgrid	Business Services	-$64.50	$0.00	
06.02.23	Incomplete expense	Sendgrid	Business Services	-$65.00	$0.00	
06.02.23	Incomplete expense	Google	General Expenses	-$255.00	$0.00	

Tip: Tap the incomplete expense and fill required fields in the expense details form

Need more help?

Learn, implement and get help with Weel.

Help centre

Learn how to implement, use and get help with Weel.

Go to help centre →

Online training courses

Complete an online training course and become a Weel expert.

Complete online training →

Contact support

Talk to the Weel support team and get help when you need it.

Contact support →

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Visit letsweel.com to find out more