



zeno

Zeno Expense Knowledge Base Portal

Document History

Version	Description	Author	Date
V1.0	Document Creation	Client Success Expense Team	01/07/2020
V1.1	Document Updates	Client Success Expense Team	20/05/2021
V1.2	Document Updates	Client Success Expense Team	14/02/2022

Copyright© 2020 Serko Limited

All rights reserved.

Information in this document is subject to change without notice. Serko Limited assumes no responsibility or liability for any errors or inaccuracies that may appear in this document. No part of this document may be copied, reproduced, transmitted, translated in any form or reduced to any electronic medium or machine-readable form without the prior written consent of Serko Limited.

Serko Limited
PO Box 47-638, Ponsonby
Auckland
New Zealand
Phone: +64 (9) 309-4754

All trademarks mentioned are the products of their respective owners.

Table of Contents

Document History 2

Zeno Expense Knowledge Base..... 4

 Landing Page..... 4

 Getting Started 5

 Training Resources 6

 What’s New? 7

 Other Resources 7

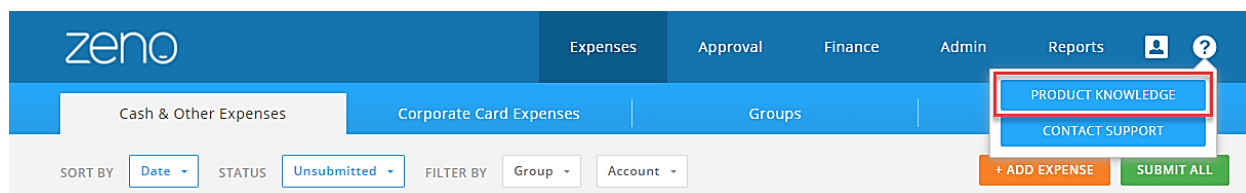
 Submit a Request..... 8

Zeno Expense Knowledge Base

The new Zeno Expense Knowledge Base is now live with up-to-date information, resources, training videos, and product updates for all things Zeno Expense!

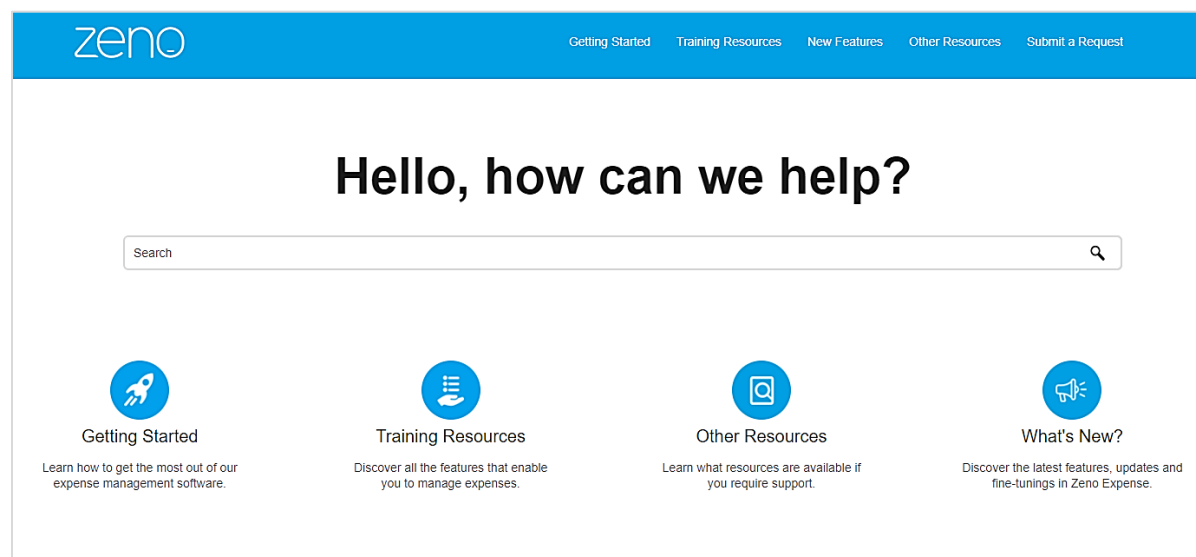
The Knowledge Base is directly accessible from the question mark icon in the top right corner of the Zeno Expense web application. In addition to the role-based user guides, the Knowledge Base will be used to store high-level updates about the latest features and enhancements as they become available in Zeno Expense. All registered users will have access to this portal by default.

To access the Knowledge Base, click on the (?) icon, then click "Product Knowledge".



Landing Page

The Landing Page displays four icons as shown below. You can navigate to the topic of your choice by clicking on the icons or section headers in the top menu bar.



You can search for topics of interest by typing keywords into the search field and the system will list pages with relevant content.

The screenshot shows the Zeno Expense website with a blue header. The search bar contains the word "delegate". Below the search bar, the results show "Your search for 'delegate' returned 6 result(s)". Two results are visible: "Delegate" and "Approvers".

Delegate
Setup As an approver, you have the ability to delegate your approval rights to an alternative approver within your organisation. Once you have delegated your approval authority the person you have assigned will continue to receive items from your claimants until you delegate authority back to ...
[articles/approver/Delegate.htm](#)

Approvers
In some situations, it may be necessary to change a claimant's Approver on a temporary or permanent basis. Admin users can redirect claims by adjusting the Approvers settings in Zeno Expense. The Approvers section displays a list of approvers configured in Zeno Expense for you, as shown in the ...
[articles/admin/approvers.htm](#)

Getting Started

This section contains lots of tips to help you get up and running quickly with Zeno Expense. On the Claimant/Approvers tab, find out how to set your default screen view in the Desktop Application section or get information about choosing the email frequency that works best for you in Auto-Notification Emails. Visit the Email Receipts page if you want to know how to forward tax invoices through email straight into Zeno Expense. On the Administrators/Finance tab view troubleshooting tips in Common Issues and login options for the mobile and desktop website in Accessing Zeno Expense. There are many different articles for you to explore.

The screenshot shows the Zeno Expense website with a blue header. The "Getting Started" tab is highlighted in the navigation bar. The main content area is titled "Getting Started" and "Zeno Expense Overview". It includes a welcome message and a list of links to various sections. A sidebar on the right lists the navigation menu items.

Getting Started

Zeno Expense Overview

Welcome to Zeno Expense, your new and easy way to claim back company expenses, fast! Zeno Expense makes it quick and easy for you to submit all types of company expense claims, using the Zeno Mobile app, a MacBook or PC.

Once you've entered your expenses, you'll be automatically kept up to date as your claim progresses through your company's approval system, so you won't need to chase your manager or finance team for status updates!

To take the grind out of submitting expenses, we've worked hard to make our software simple to use, but the following information should ensure you get off to a flying start.

How to get started with Zeno Expense?

Important Note
Before you begin, ensure your browser meets our browser guidelines.

- Google Chrome™ browser latest version.
- Microsoft Edge latest version.

Zeno Expense might work on non-supported browsers but it's behaviour could be compromised. As an example, text might not line up or visual cues could render differently than intended.

Claimants/Approvers | **Administrators/Finance**

[Accessing Zeno Expense](#)
[Desktop Application](#)
[Mobile App](#)
[Email Receipts](#)
[Auto-Notification Emails](#)
[Uber Integration](#)
[Understanding User Roles and Permissions](#)

Getting Started
Login Options
Desktop Application
Mobile App
Email Receipts
Auto-Notification Emails
Uber Integration
Add a New Corporate Card Data Feed
Common Issues
Understanding User Roles and Permissions
Training Resources
New Features
Other Resources
Submit a Request

Training Resources

This section contains information about all aspects of Zeno Expense and details about the functionality that is available to you, according to your user role. If you would prefer to watch recorded expense training sessions, our Expense General Claimant and Approver Training and Expense General Admin and Finance Training can be accessed under "Videos". Answers to FAQs and information about various topics are also available in this section. In PDF Guides, you can download detailed user guides for each feature in Zeno Expense.

zeno Getting Started **Training Resources** New Features Other Resources Submit a Request

Enter your search query...

You are here: Training Resources

Training Resources

Zeno Expense Menu

Welcome to the Zeno Expense Menu - the starting point for you to learn all there is to know about Zeno Expense.

Note
Your [User Roles / Permissions](#) will determine which options are applicable to you.

Claimants Approver Finance/Admin

Expense Submission

- [Capturing Expenses](#)
- [Submitting Expenses](#)
- [Uber Integration](#)

Reporting

- [Reporting](#)

Claim Status and Workflows

- [Claim Status](#)
- [Claim Workflows](#)

[Back to top](#)

Getting Started
Training Resources

- Top Navigation Options
- How to capture expenses?
- Submitting Expenses
- Approving Expenses
- Finance Tools
- Admin Tools
- Reporting
- Automating Data Imports & Exports
- Claim Status
- Claim Workflows
- Frequently Asked Questions
- PDF Guides
- Videos
- New Features
- Other Resources
- Submit a Request

What's New?

This option is most relevant for Finance and Admin users because it contains high-level information about new product features as they are released in Zeno Expense. When you click on this option, it will take you to the most current page, however, by selecting the "New Features" option in the top menu, you can also see new features from previous years.

Many new features are available on an opt-in basis, allowing you to simply create a support request when there is a new feature that your company would like enabled.

zeno

Getting Started Training Resources **New Features** Other Resources Submit a Request

Enter your search query....

You are here: New Features > New Features in 2021

What's New?

December 2021

New Features and Enhancements

Policy Manager Enhancements

Zeno Expense has updated Policy Manager functionality. This enhancement allows Admin users to link a policy to multiple GL codes and specify which account type the policy would apply to. In addition to this there are options to select whether the policy should display as a Policy Breach (with the option to prevent item submission completely) or as a Warning. For detailed instructions, please refer to the [Policy Manager](#) article.

If you have any questions, please raise a ticket for the Client Success team via the [Zeno Expense Support Centre](#).

New Features
[New Features in 2021](#)
[New Features in 2020](#)

Other Resources

This option contains articles about using the knowledge base and security details. You can also view our privacy policy as well as copyright information.

zeno

Getting Started Training Resources New Features **Other Resources** Submit a Request

Enter your search query....

You are here: Other Resources

Other Resources

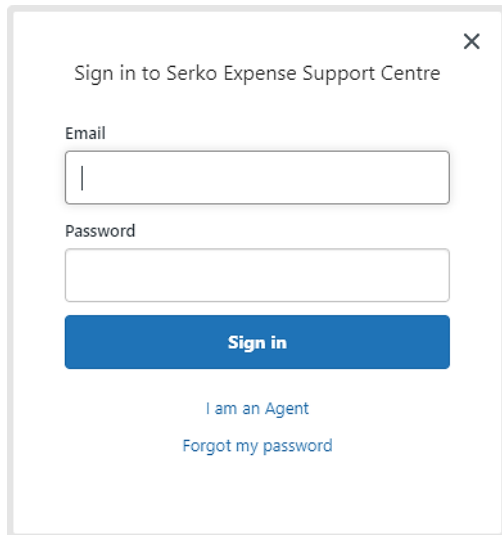
[Using the Knowledge Base](#)
[Privacy and Security](#)
[Copyright and Disclaimer](#)

Getting Started
 Training Resources
 New Features
Other Resources
 Using the Knowledge Base
 Privacy and Security
 Copyright and Disclaimer
 Submit a Request

[Back to top](#)

Submit a Request

This is a direct link to the Serko Expense Support Centre to create a Zendesk ticket. All registered Zeno Expense Administrators and Finance users are eligible to use the Serko Expense Support Centre. When a user clicks on the option "Submit a request" it will take them to the Serko Expense Support Centre website to log in. It is requested for clients to use this portal as the main channel of contact for technical queries. Each query that is raised in the Serko Expense Support Centre is assigned a unique ticket number, which can be easily tracked as the request progresses through the system.



The image shows a login form for the Serko Expense Support Centre. The form is titled "Sign in to Serko Expense Support Centre" and includes a close button (X) in the top right corner. It features two input fields: "Email" and "Password". Below the "Password" field is a blue "Sign in" button. At the bottom of the form, there are two links: "I am an Agent" and "Forgot my password".

Sign in to Serko Expense Support Centre

Email

Password

Sign in

[I am an Agent](#)

[Forgot my password](#)