

Elite Expense Management

Mobile App Quick Start Guide



This guide provides basic steps for submitting expenses using our Elite Expense Management platform. Please contact your program administrator if you need additional guidance or have questions about policies and expectations (ex: required fields, receipt capture).


Note: Your company may or may not have all of these features enabled.

Expense Management registration

1. Download the Smart Data mobile app for iOS or Android.
2. Select “Cardholder Self-Registration.”
3. Enter your account number (number printed on your commercial card) and the company registration code provided by your manager or program administrator.

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Sign In to Smart Data

*User ID

*Password/Passcode



* All fields required

Sign In



Forgot Password/PIN?

Cardholder Self-Registration

Language

Start over as a different user

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CARDHOLDER SELF-REGISTRATION

ACCOUNT INFORMATION

* Account Number

* Company Registration Code

Next

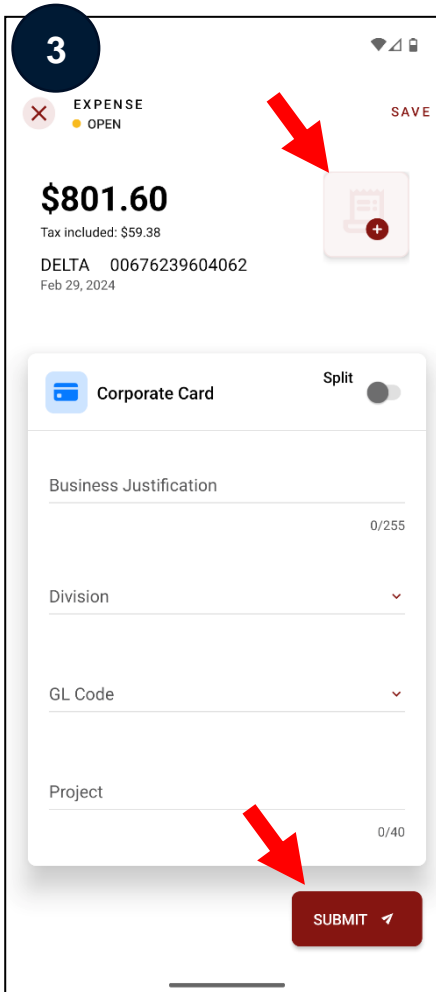
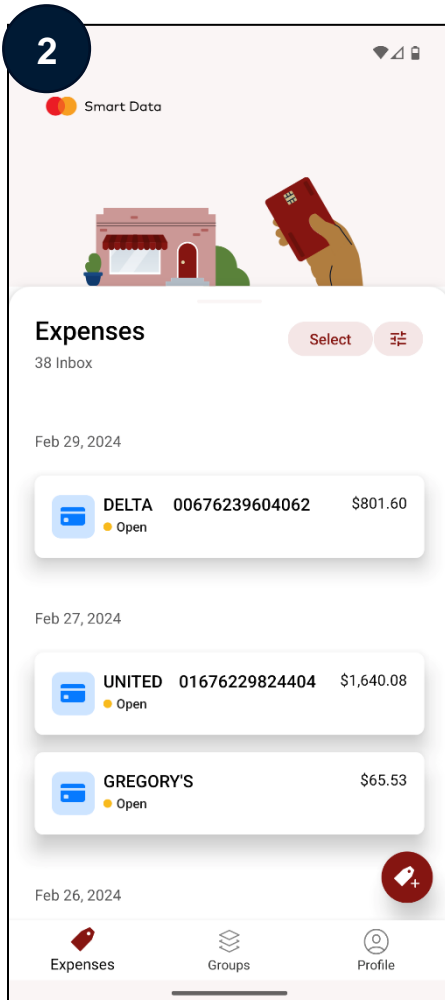
Cancel

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Start over as a different user

Expense submission

1. Log in to the mobile app.
2. After logging in, you will see posted transactions displayed.
3. Click on a transaction to fill in necessary or required fields.
 - a. Click the add receipt icon in the upper right of the screen to take a photo of the receipt using your mobile device, or to add it from your mobile device's image gallery.
 - a. Please contact your program administrator if you have questions about your company's policies and expectations.
 - b. Click "Submit" to submit the expense.



Adding out-of-pocket and mileage expenses

1. Click the add expense icon in the lower right to add an out-of-pocket or mileage expense.
2. Fill in the required fields and then click "Create."
3. After clicking "Create," fill in necessary or required fields.
 - a. Click the add receipt icon in the upper right of the screen to take a photo of the receipt using your mobile device, or to add it from your mobile device's image gallery.
 - b. Please contact your program administrator if you have questions about your company's policies and expectations.
 - c. Click "Submit" to submit expense.

