BusinessClaims: Getting Started

Stop leaving money on the table after a business trip.

BusinessClaims keeps your trip receipts in one place, shows what you can still spend against your company's limits, and builds a claim pack you attach in your company's expense system. No account, no sign-in. Your receipts and policy stay on your device.

Part 1: Set it up about 5 minutes

Open the app and tap **Set up step by step**. It asks one thing on each screen:

1. **What your company pays.** The only step that is needed. Choose your policy document, a .claimpolicy file, type your limits, or say there are none.
2. **Deadline and name**, for reminders and the claim report.
3. **Keep your trips safe** in a folder of your own iCloud Drive. It says why that is better, and how.
4. **Connect your mail**, with a link to get the app password.
5. **How your trips are booked**, with examples of what to type.
6. **Receipts to look for**, with examples of what to type.
7. **How automatic it is.**
8. **Reminders.**
9. **Your Mac.**

Everything but the first can be skipped. Tap **Finish later** at any time: it remembers where you were, and **Continue** is on the Trips tab. To go through it again, open **Settings** and tap **Set up step by step**.

> A limit is the most your company reimburses, not an allowance. You claim what you actually spent, up to the limit, with a receipt.

A second device: tap **I already use it on another device** instead, and choose the same folder.

The **Settings** tab has the same things, as steps 1 to 5. More about each:

Settings step 1: Your plan optional

Your first trip is free. Have a code? **Settings > Redeem a code**.

Settings step 2: Load your company's policy optional, and worth it

1. Save your travel policy (PDF) to the Files app.
2. In **Settings**, step 2, tap **Read my policy document**, then **Choose a policy file**.
3. If it has limits by grade, type your grade and tap **Find**. Pick your country, or switch on **I travel to several countries** and tick each one.
4. Under **Rules found**, read each sentence and switch on the ones that are right.
5. Tap **Use these numbers**, or **Use these countries**. The first tab becomes **Policy**.

The document is read on your device and never sent to us. Check every number: your company's policy is the final word.

My own limits and expense types, in the same step, is for limits you type yourself and your own types: rides, parking, laundry, Wi-Fi and more.

Settings step 3: Keep your trips in iCloud optional

In **Settings**, step 3, tap **Keep my trips in iCloud Drive** and choose a folder, or make one.

A second device: tap **I already use it on another device** when the app first opens, then choose the same folder. Your policy, limits and what to look for fill in by themselves. The app passwords come too, through iCloud Keychain, when **Passwords and Keychain** is on in the iCloud settings of both devices.

Settings step 4: Connect your mail optional

1. In **Settings**, step 4, connect the mailbox your bookings and receipts come to. You can add more than one. It asks for an **app password**: a separate one made for this app only, not your login password. **Get an app password** on that screen shows how to make one.
2. Open **What to look for**. Switch on how your trips are booked, such as SAP Concur or Navan.
3. Tell it the rest in your own words, one at a time, and tap **Set it up**, then **Save**: "Trips come from Orbitz", "Look for mails from City Cabs for taxi receipts", "Ignore DoorDash".

A sender it does not know yet. It finds bookings and paid travel receipts from new senders by itself. The first one is always shown to you: "First email from Orbitz. Is this right?" Tap **Check it**. If something is wrong, change it, or say it in your own words, such as "the start date is after Travel begins, and the city is Pune", and tap **Correct it**. Then tap **Yes, remember this**. The next email of that kind is read the same way. If the sender changes its emails, you are asked again. Not a trip or an expense? Tap **leave it alone** at the bottom.

It missed one. Tap **Something missing? Tell me** and describe it. If several emails from one sender are found and all of them are right, tap the line at the top, such as **All 4 from City Cabs are right**. Otherwise tap the one you meant and check what it read.

Everything it has learned is under **What to look for**, where you can make it forget any of it.

Settings step 5: Choose how automatic it is optional

In **Settings**, step 5: **Add new trips without asking** and **File receipts without asking** are both off to begin with.

A Mac as well: run BusinessClaims on a Mac with the same iCloud folder and mailbox, and it checks your mail every two hours by itself. In step 5 on the Mac, switch on **Open BusinessClaims when I log in**.

Part 2: Use it

Start a trip

If your mail is connected, a booking appears on the **Trips** tab by itself: tap **Add**. Otherwise tap **+**. Type the city and dates, or fill them from a travel confirmation: paste the email, choose a file, scan a printout, or find it in your mailbox. Check every field, then tap **Start trip**. Going to more than one city? Tap **Add another city**, and each day uses the limits of the city you are in.

Your first trip is free. After that you can buy one more trip or a yearly plan with unlimited trips, or redeem a code in Settings. Past trips always stay available.

To change a trip later, open it, tap the **menu (three dots)** and choose **Edit trip**.

Add receipts as you go

Option	Use it for
Scan	A paper receipt, with the camera
Photo	Pictures already on your phone. Choose several to join them into one receipt
File or PDF	A hotel bill or invoice from Files
Paste email	Copy a receipt email from any mail app and paste it. It is kept as a PDF
Type it	Anything with no receipt, such as mileage
Collect receipts from my mail	Searches your connected mailbox for this trip. Tick what is yours

From another app: in Photos, Mail, Files or a browser, tap **Share** on a picture, a PDF or the text of an email and choose **BusinessClaims**. Pick the trip, and say whether several pictures are pages of one receipt. Next time you open the app, tap **Add the shared receipt** in that trip and check it. The first time, you may need to tap **More** at the end of the row of apps to find it.

The amount, date, merchant and currency are read on your phone. **Always check them.** Tap a page to see it full size. On each receipt you can set:

- the **type**, and who was there for a meal with others
- **Paid with**: your own money or a company card. Company card receipts are in the report but not in what you are owed
- the **currency on the receipt**. Tap **Get the rate for that day**, or type the amount from your card statement
- tax, project, billable, refund and a note

The app warns you about a limit or a date outside the trip.

The same receipt twice. If you scan a paper receipt and the same one also comes by email, it asks: **You may already have this**. **Same one** keeps one receipt with both papers. **Different, add it** keeps both. It does not add a likely duplicate without asking.

Read the trip

- **Left to spend**: what remains against each limit, day by day
- **No limit, claimed at actuals**: everything else
- **You are owed**: your own money, less anything over a limit. A booked hotel counts once you add its receipt
- **Still missing**, after the trip: days with no meal, no hotel bill, or details to fill in

Ask Aura

Tap the round Aura button and ask, by typing or speaking: "How much can I spend on food today?", "What am I owed?", "When is my claim due?", "What is still missing?" She answers on your device.

A nicer voice: in **Settings**, under Aura, tap **Aura's voice** and download one, once.

She heard a word wrong? Say "No, I said claim". After you correct the same word twice, she gets it right by herself. **Words Aura has learned**, in Settings, lists them and lets you remove any.

Lost a receipt?

Tap **Write to a vendor for a receipt**. Pick the receipt and what to ask for, type the vendor's address, read the message and send it. Nothing is sent until you tap Send.

Make the claim

Tap **Export claim pack**. You get a **report** (PDF), the **report with every receipt behind it** in one PDF, a **spreadsheet** (Excel), a **CSV**, and each receipt as its own numbered file. Share them, email them to yourself, or save them to Files. Then submit in your company's system.

Afterwards set **Claim status** to Submitted. The reminders stop, and the trip keeps the limits it was made under. Set it to Paid back when the money arrives, and archive the trip from the menu.

Deleted something?

A deleted trip stays under **Recently deleted** for 30 days. A deleted receipt is gone for good.

Good to know

- BusinessClaims helps you claim everything you actually spent and are allowed to claim. It adds only what you enter or confirm, or what you choose to have filed without asking.
- Your employer's policy is the final word on what is reimbursed.
- No account, no ads, no tracking. See the Privacy Policy.
- Support: shinethementalist@gmail.com