



# Helios APP Operation Manual USA Demo

# Demo Scenario



User Name	Role	Password
<a href="mailto:adam@gmail.com">adam@gmail.com</a>	Department Manager	hly123456
<a href="mailto:paul@gmail.com">paul@gmail.com</a>	Sales Person	hly123456
<a href="mailto:nina@gmail.com">nina@gmail.com</a>	Financial department	hly123456

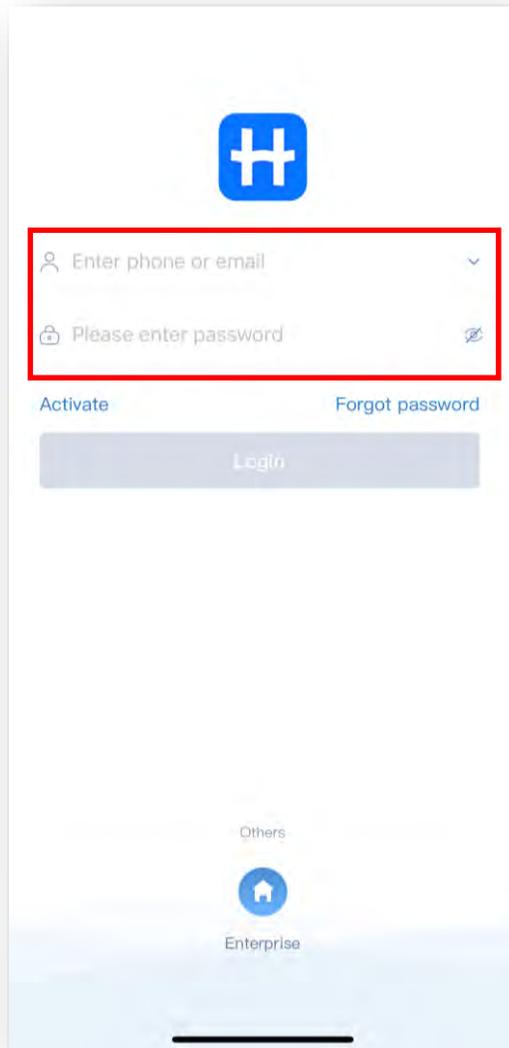
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- 03 Create a Reimbursement Form
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# 01 Installation and Activation

# Download and Log in

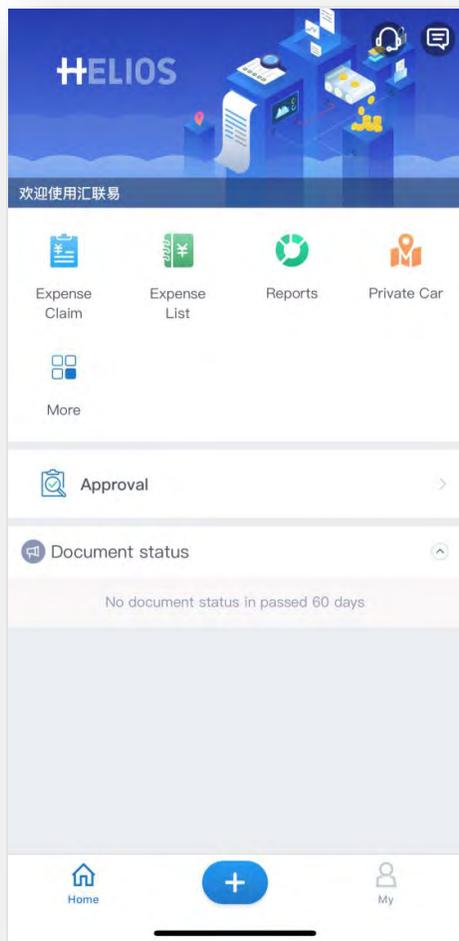


1. Download "Helios" from APP store
2. Enter email address
3. Enter password to log in

# Homepage



1



2

3

4

1. Company announcement

2. Functions and services

Expense Claim: Travel Reimbursement

Expense List

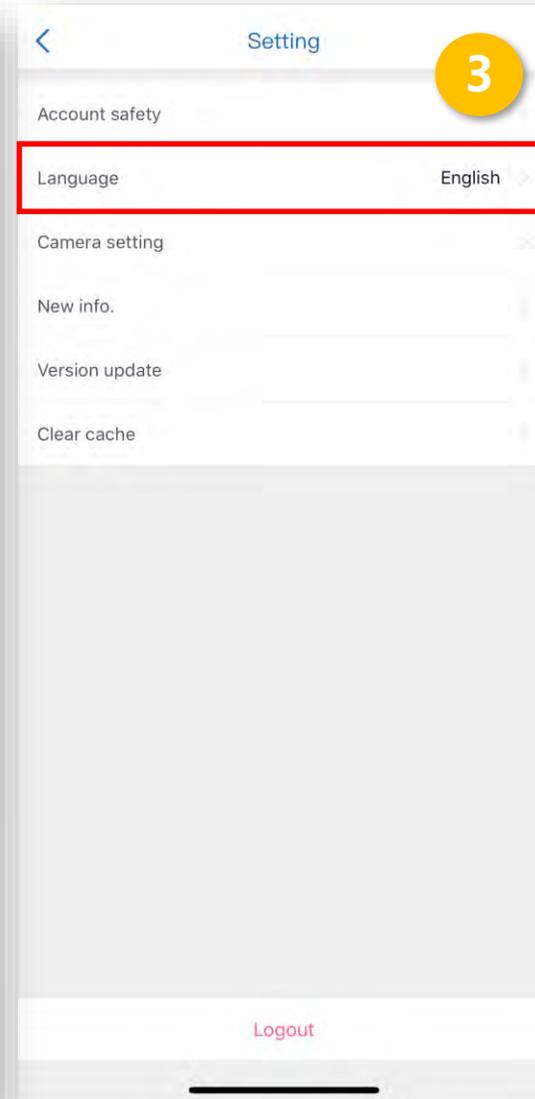
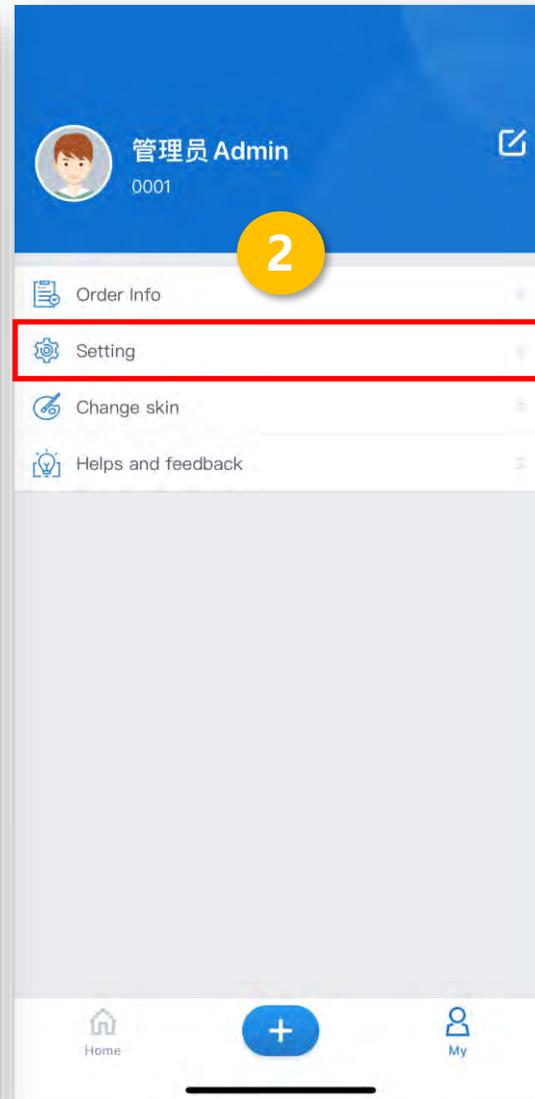
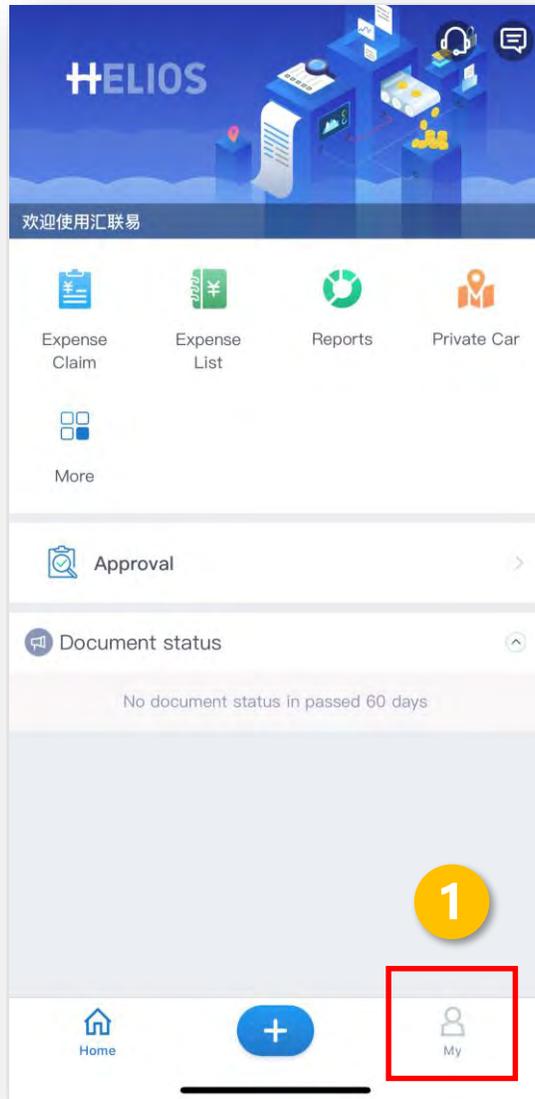
Reports: Click to check personal/department report

Private car

3. Approval

4. Quick start

# Change Language

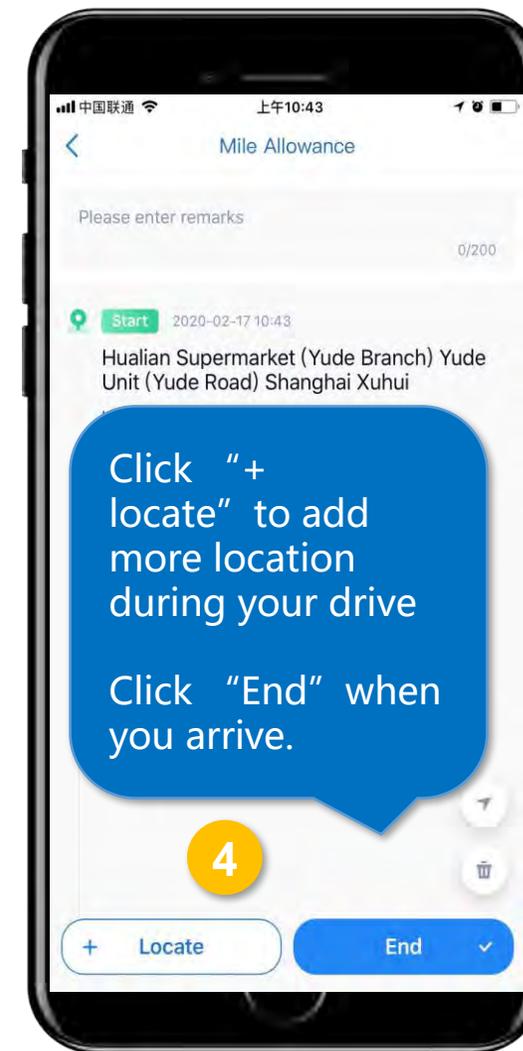
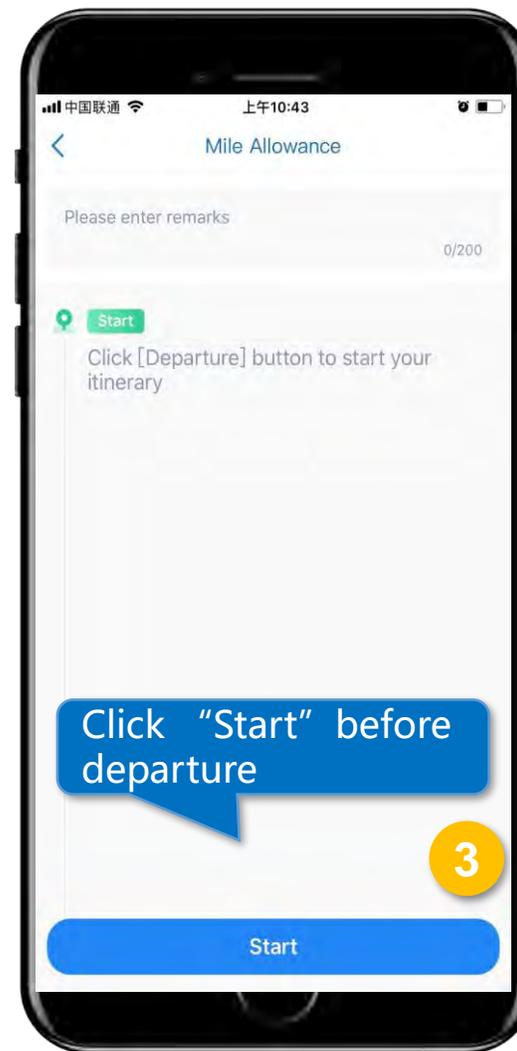
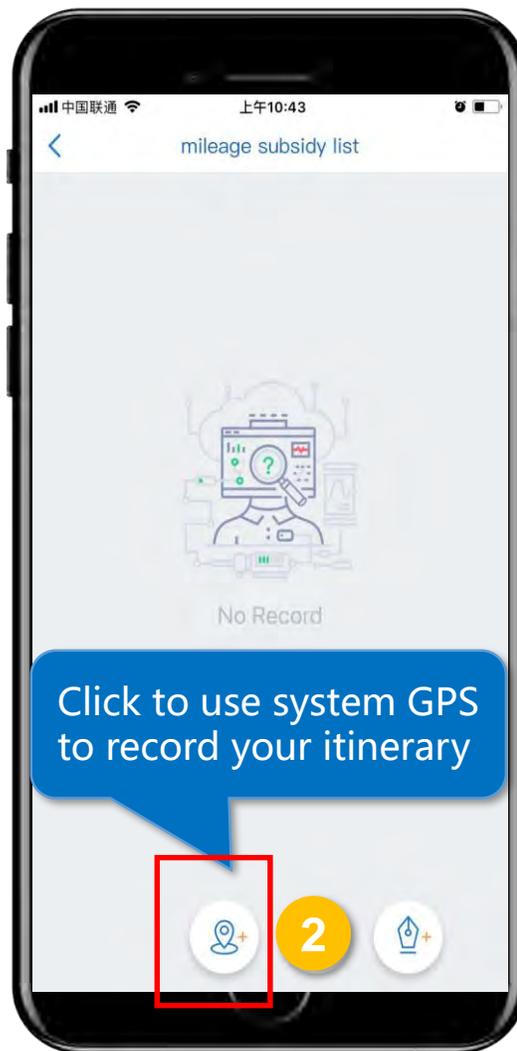
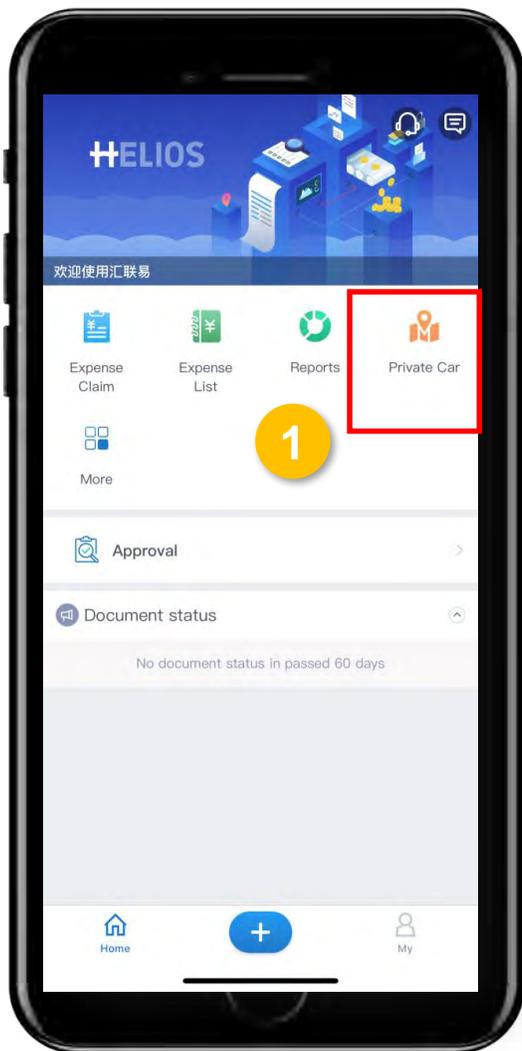


**Follow below steps to change language:**

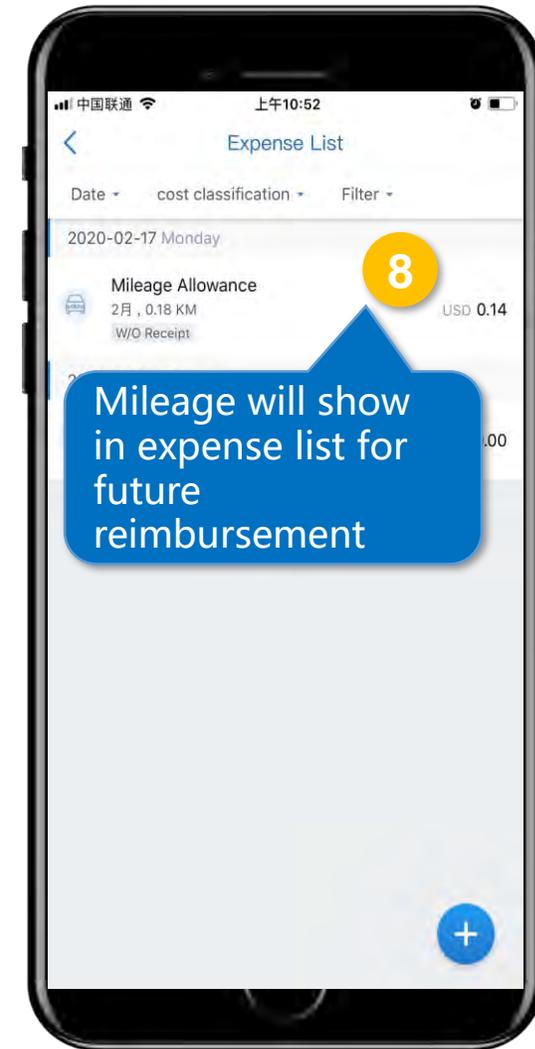
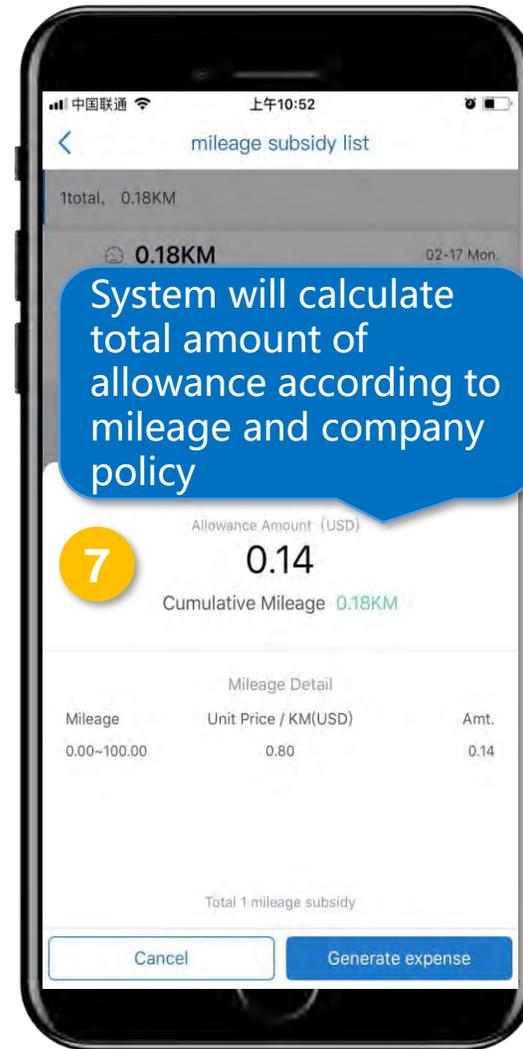
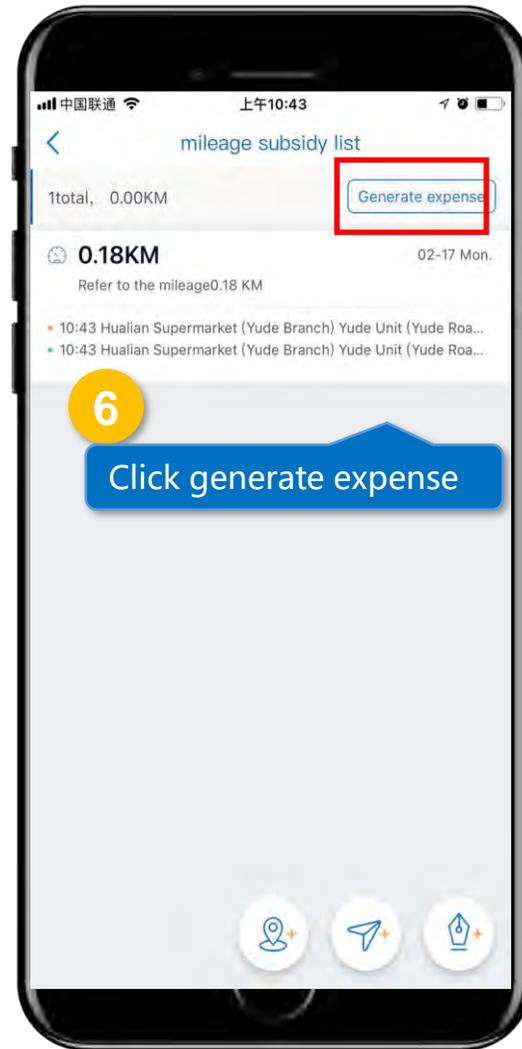
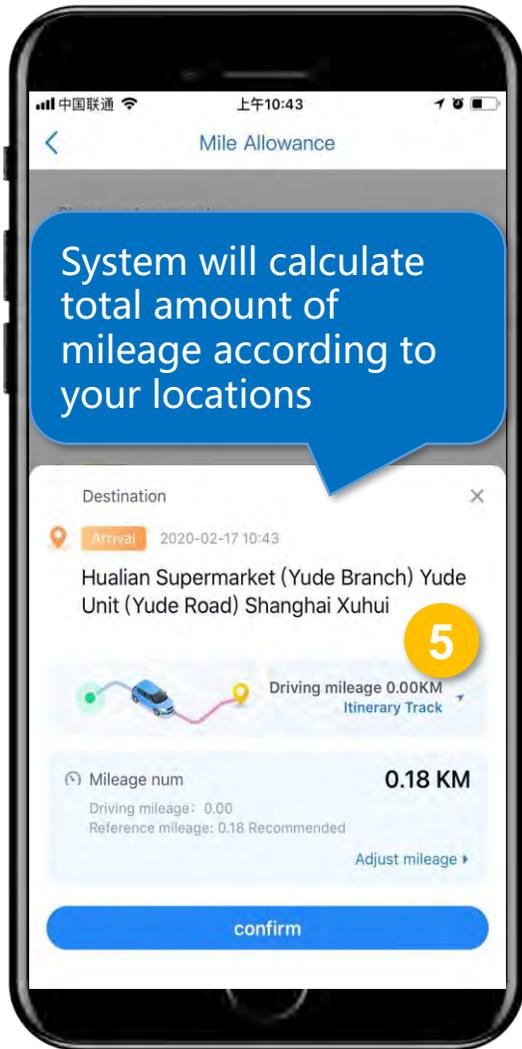
1. Click **【My】** ;
2. Click **【Setting】** ;
3. Click **【Language】** , then choose the language

# 02 Private Car Reimbursement

# Private Car Reimbursement

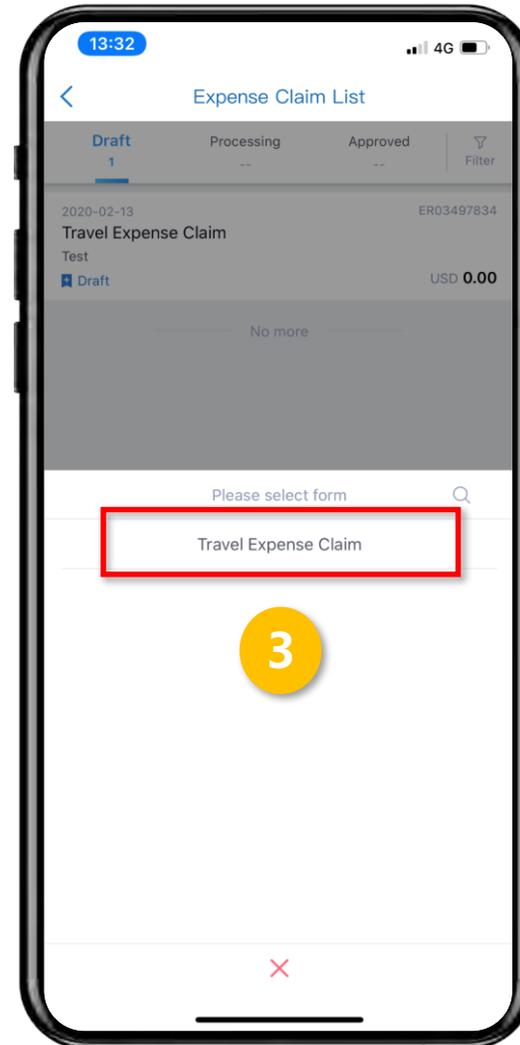
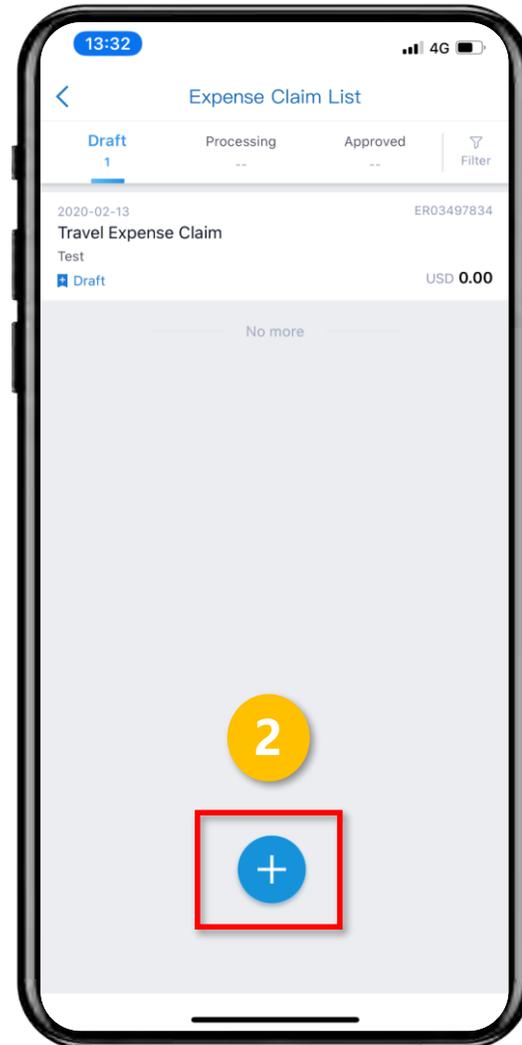
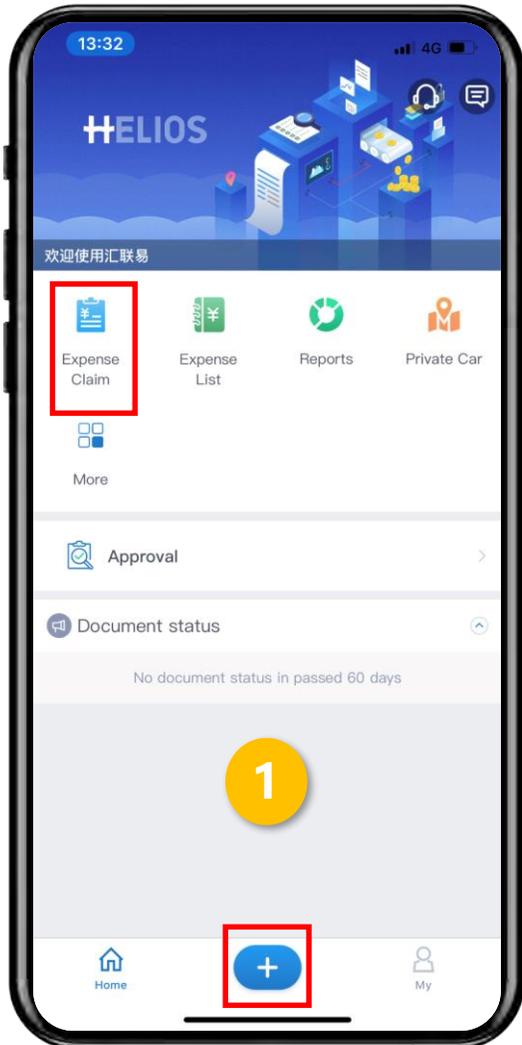


# Private Car Reimbursement



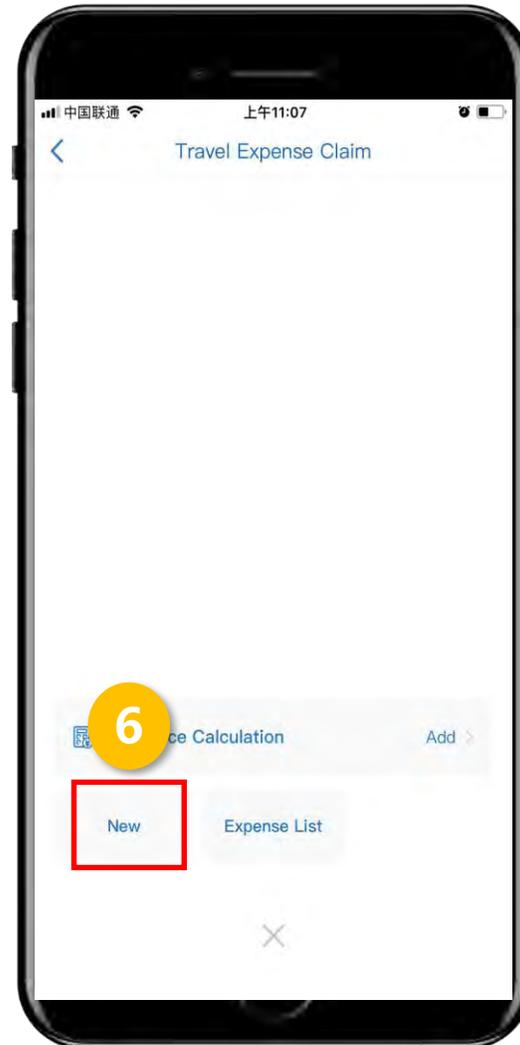
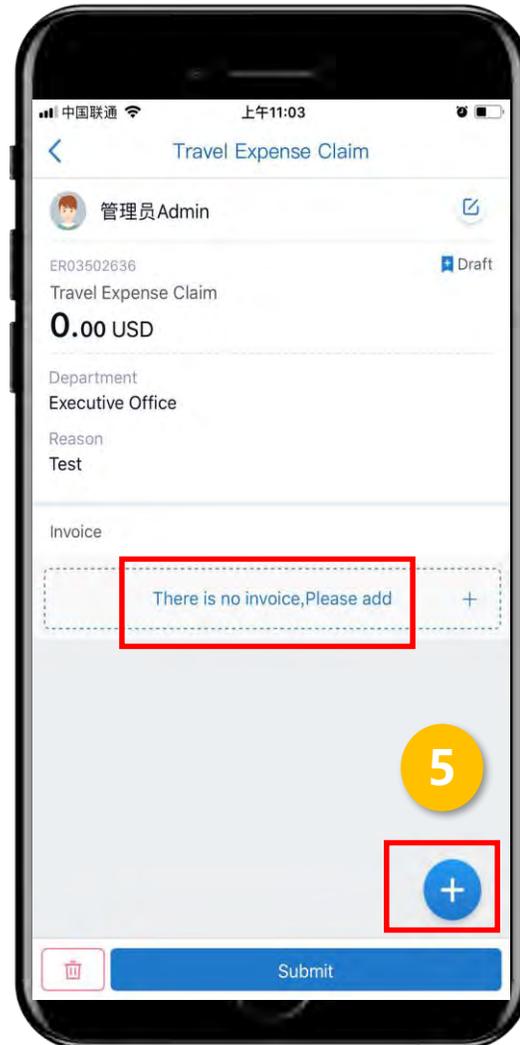
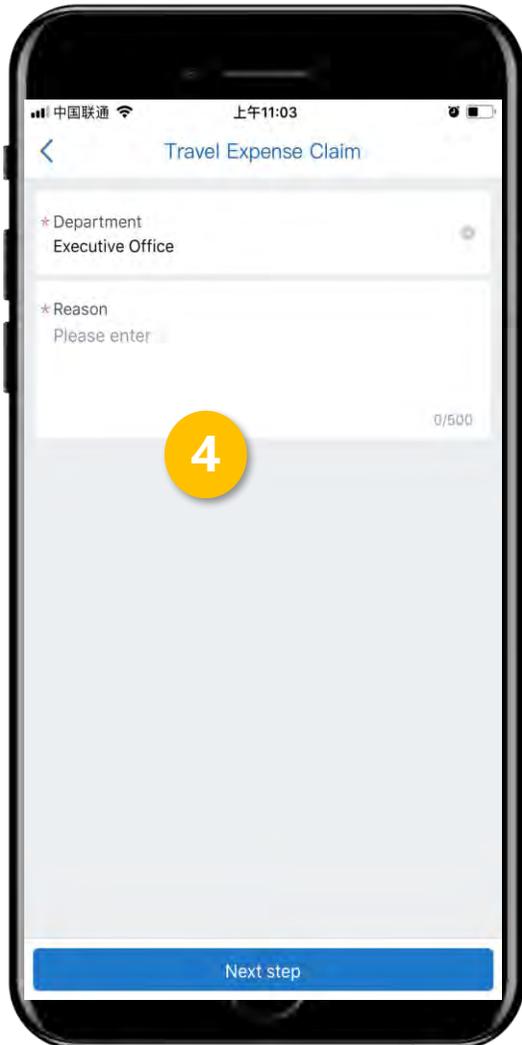
# 03 Create a Reimbursement Form

# Create a Reimbursement Form



1. Click "Expense Claim"
2. Click "+" to add new form
3. Chose 【Travel Expense Claim】

# Create New Expense

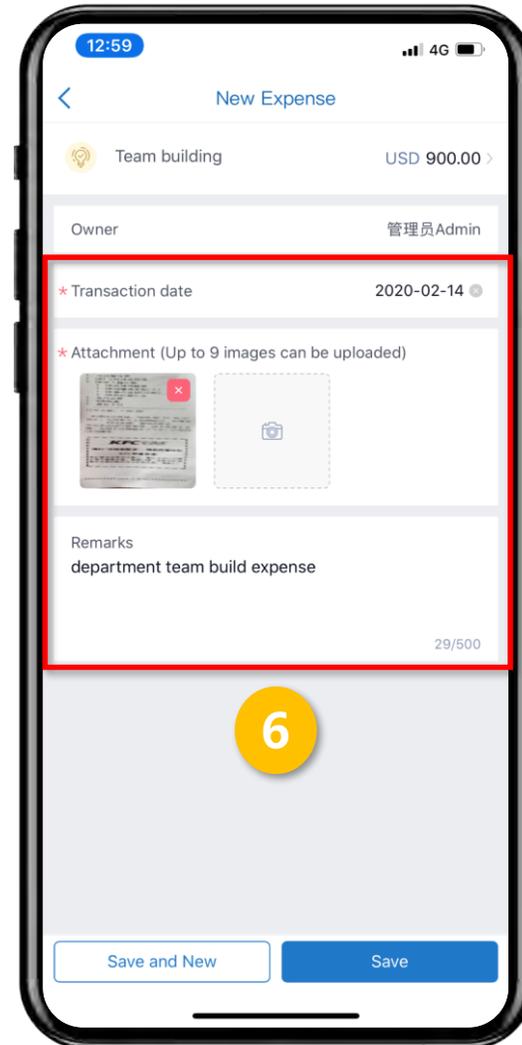
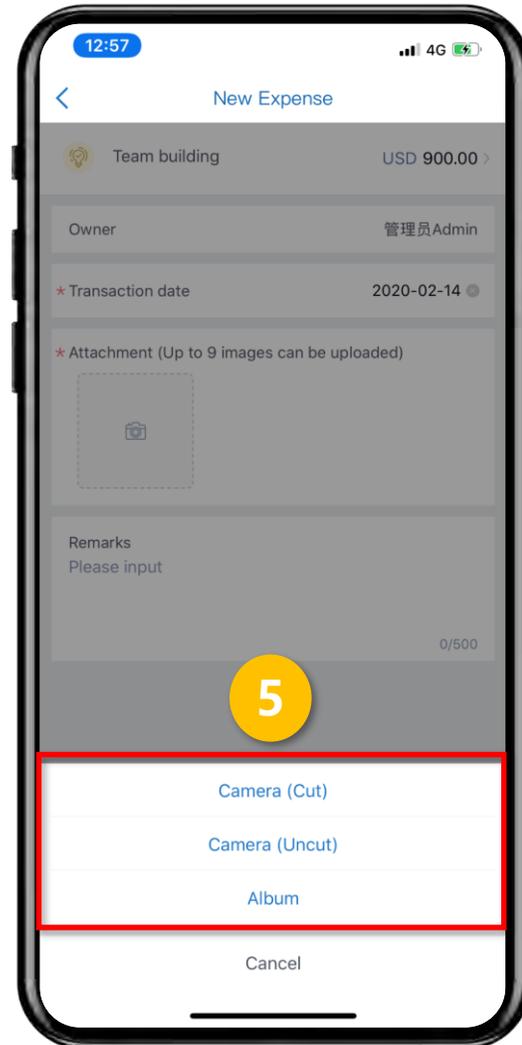
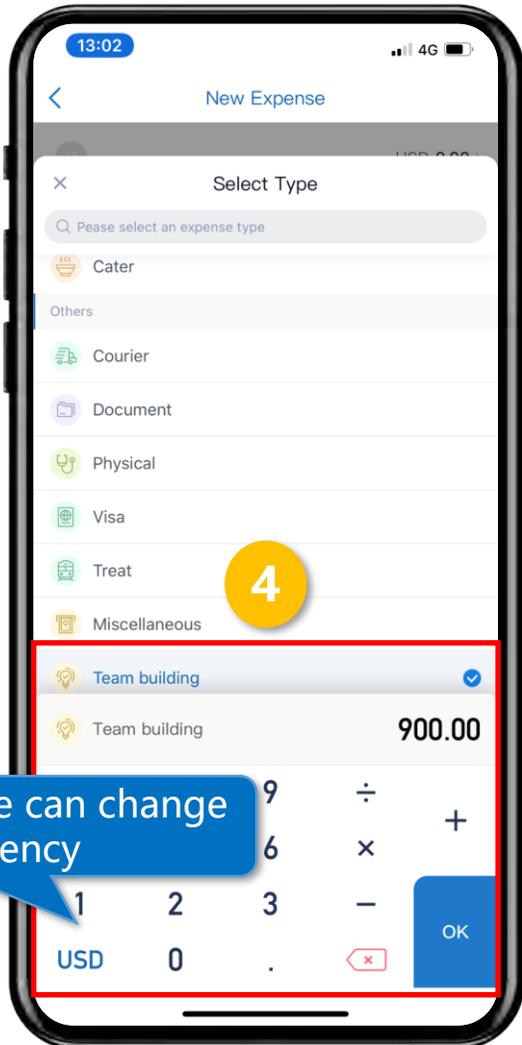


4. Fill in required fields

5. Click “+” to add expense

6. Click “New” to add new expense manually

# Create New Expense

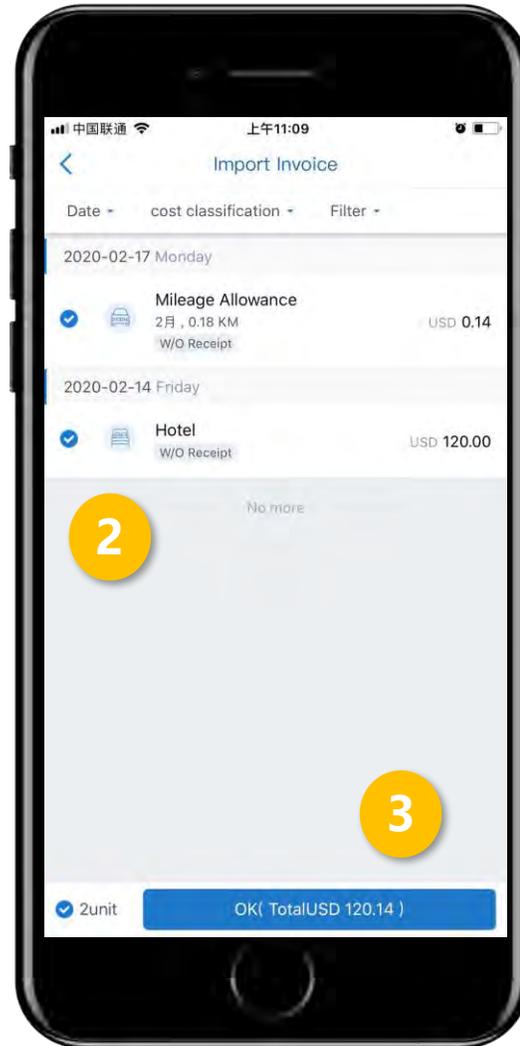
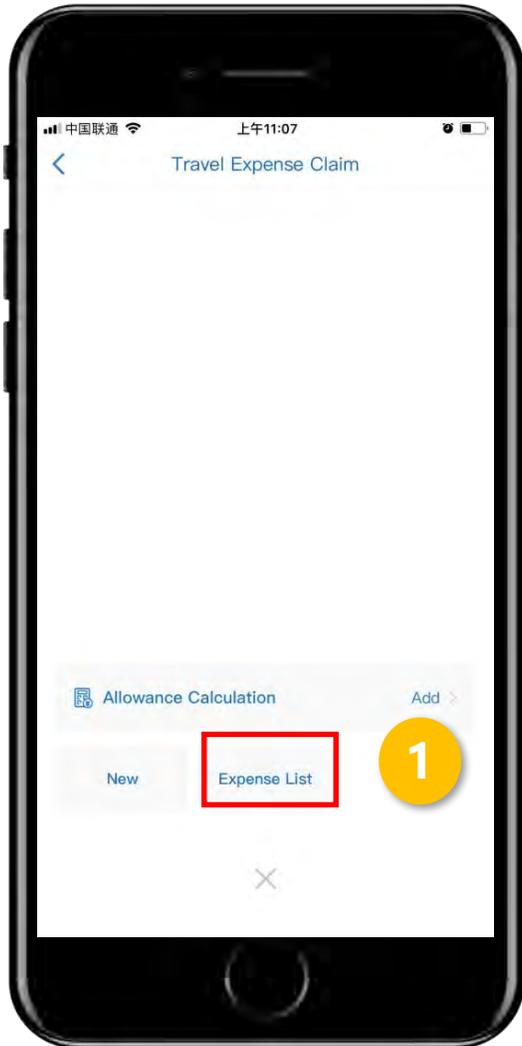


4. Choose an expense type -- fill in amount

5. Upload invoices photo from album or take a new picture

6. Add other essential information then click **【save】**

# Import Expense from Expense List

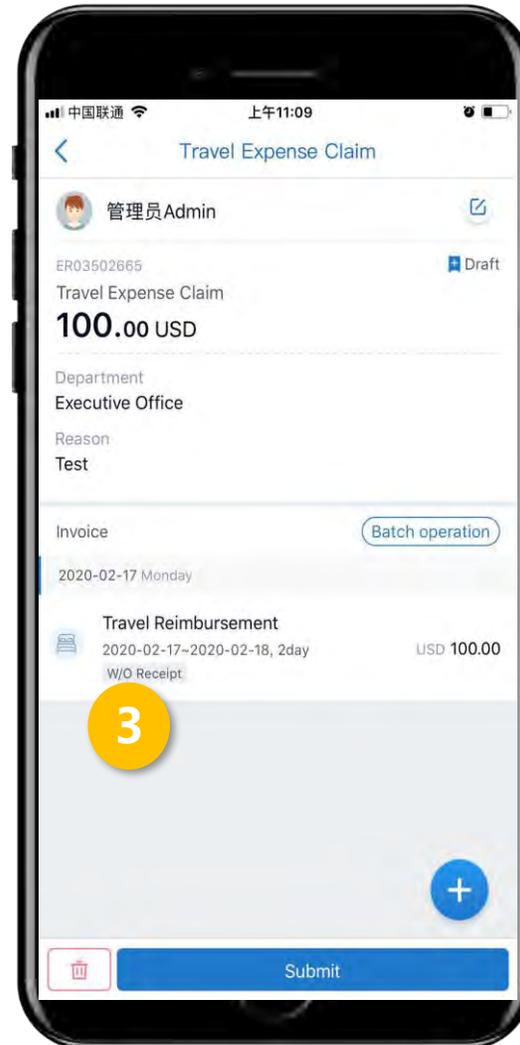
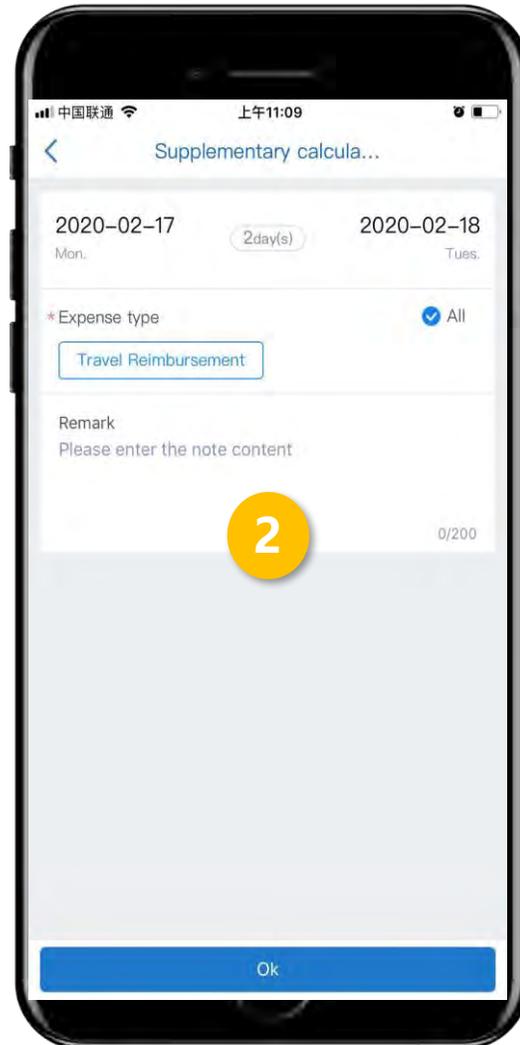
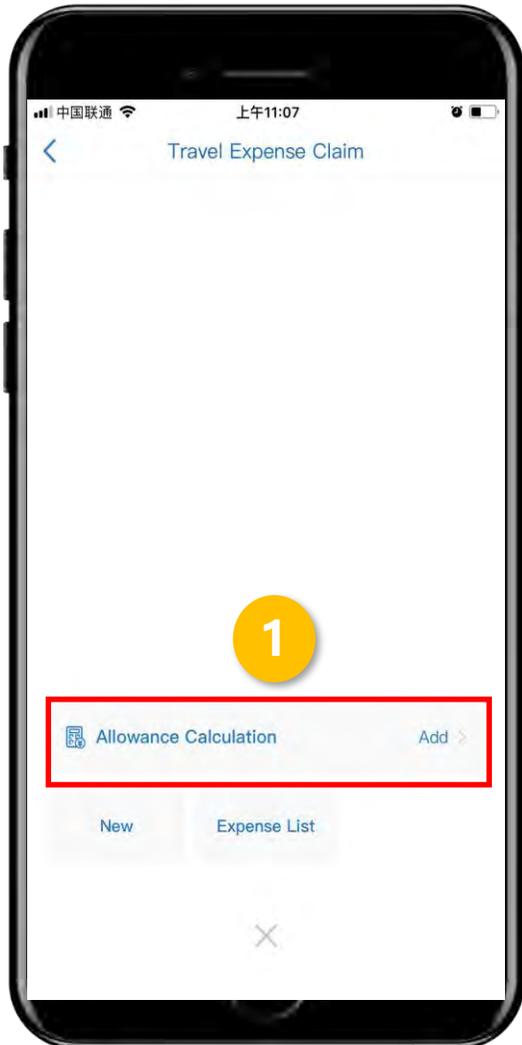


1. Click "expense list"

2. Select one or more expenses from the list

3. Click OK to import

# Calculate allowance



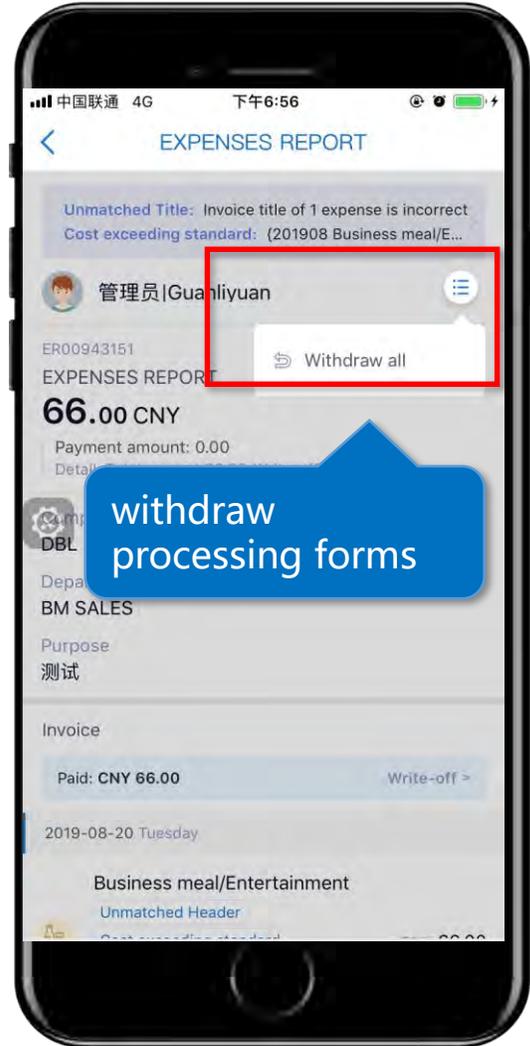
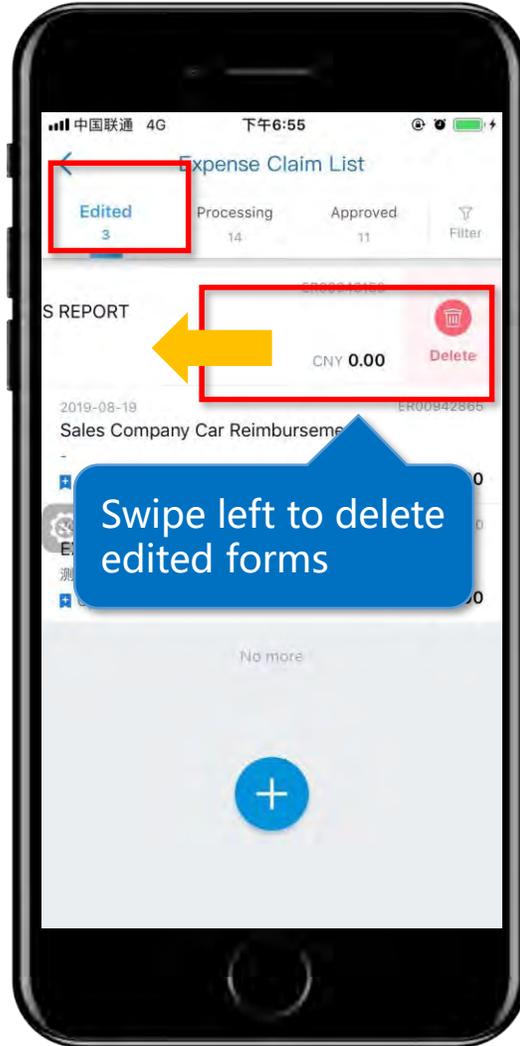
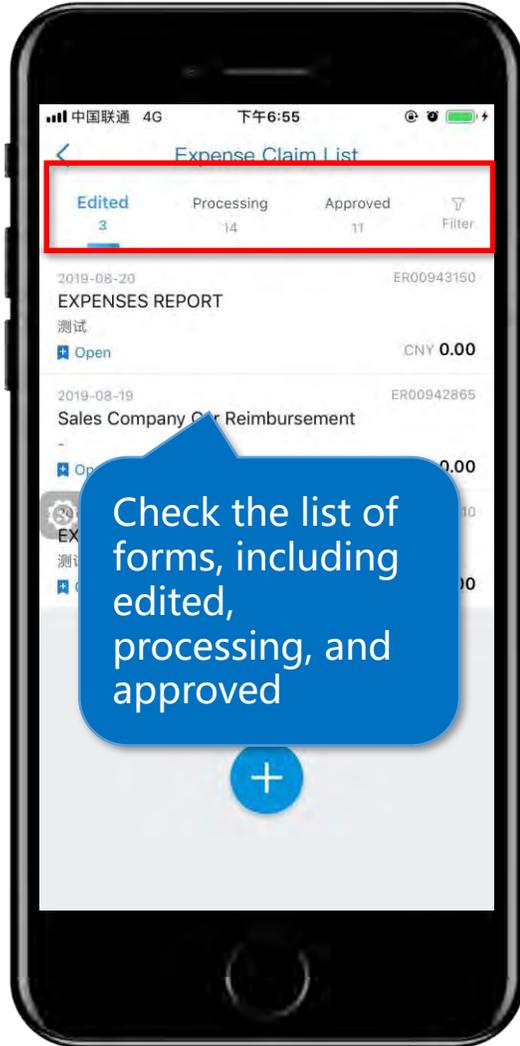
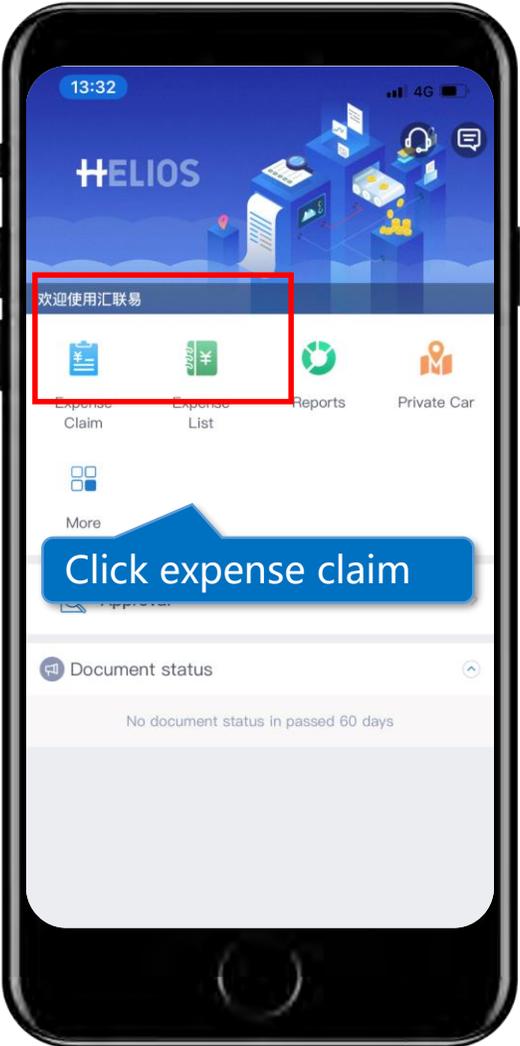
1. Click allowance calculation

2. Enter start-end date

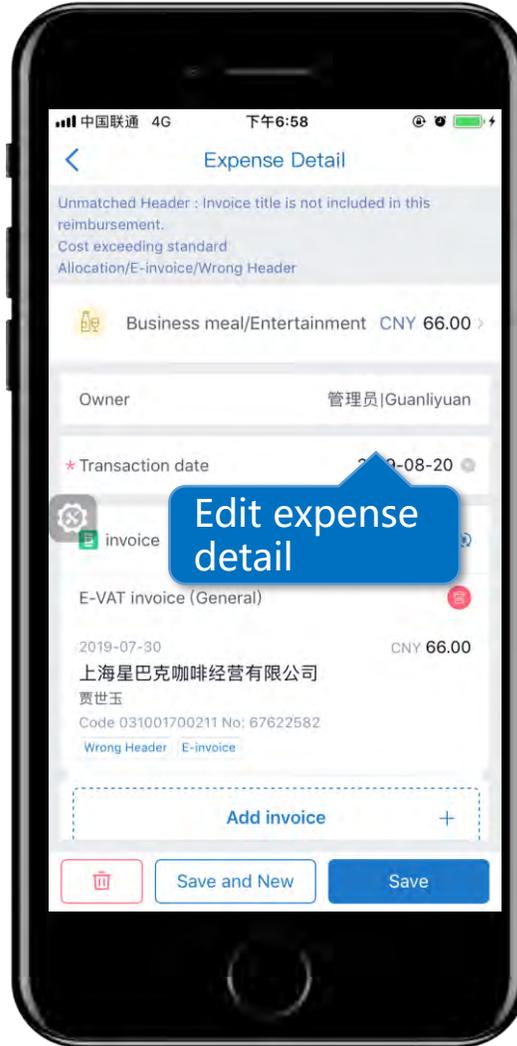
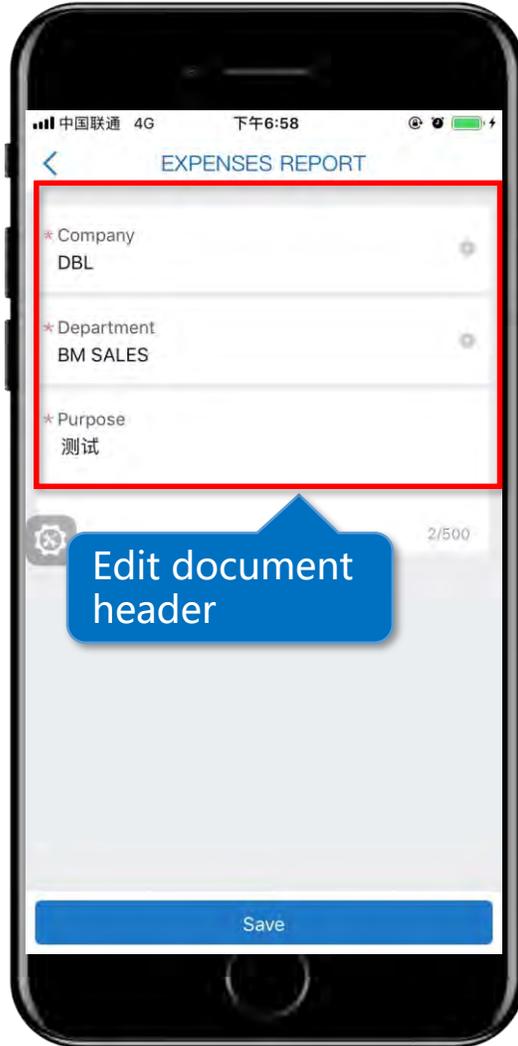
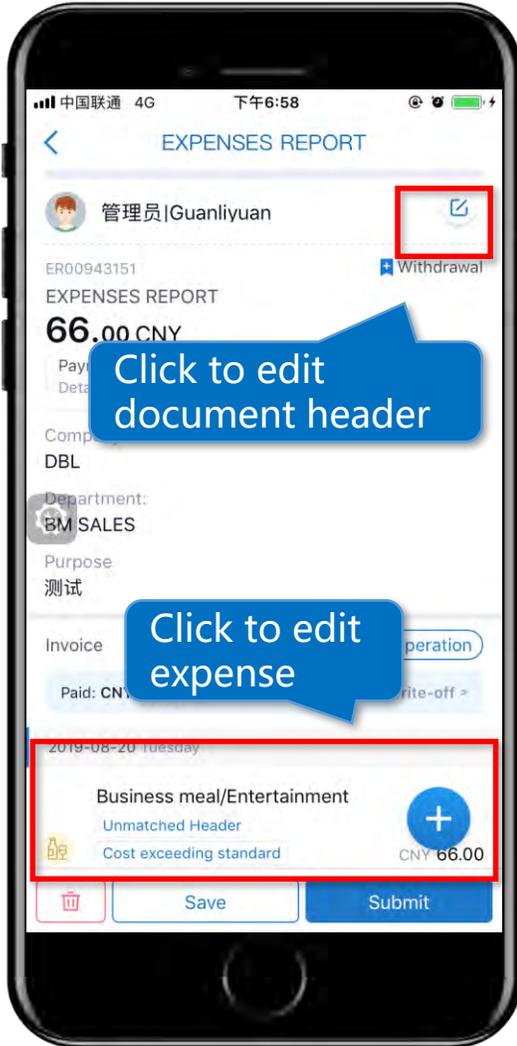
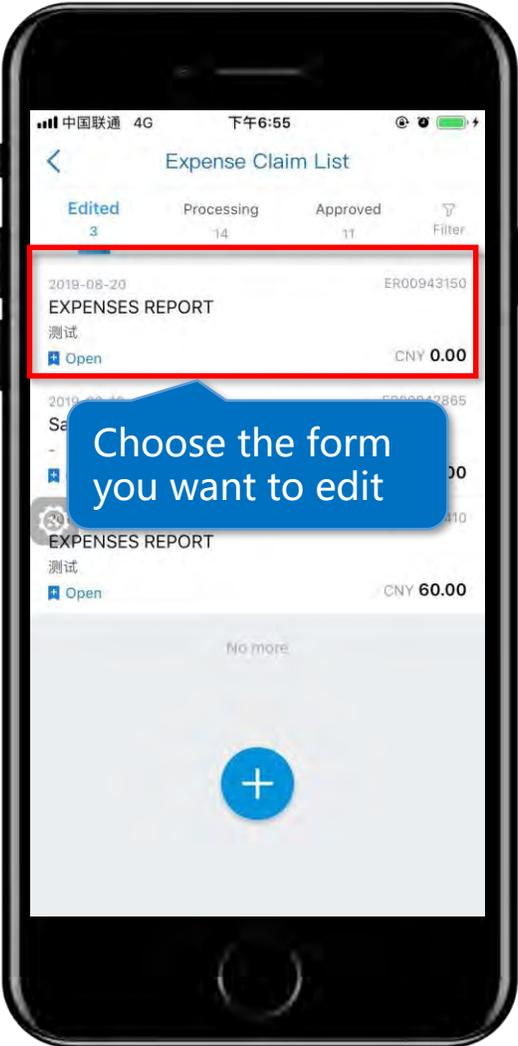
3. System will calculate allowance amount automatically according to dates and company policy

# 04 Withdraw / Edit / Delete Forms

# Withdraw / Delete Forms



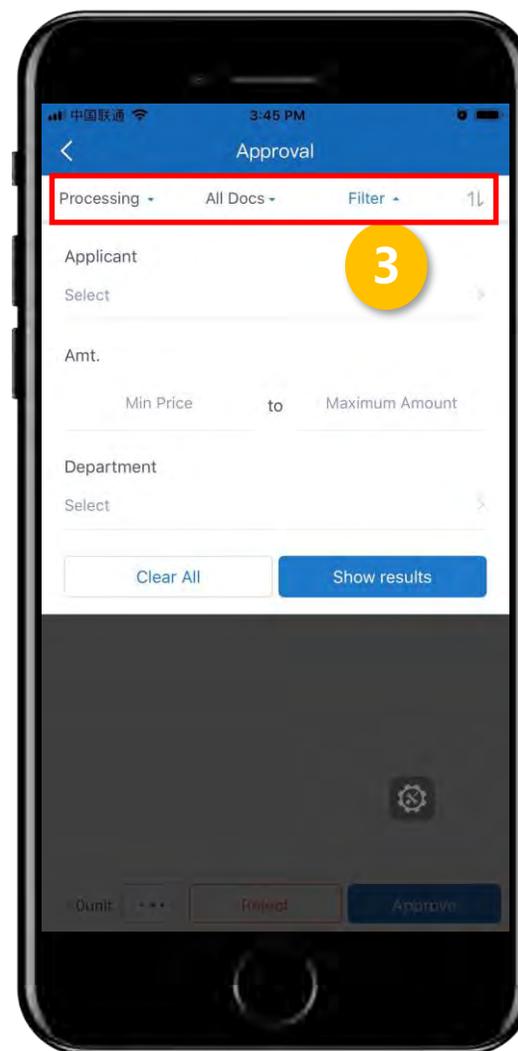
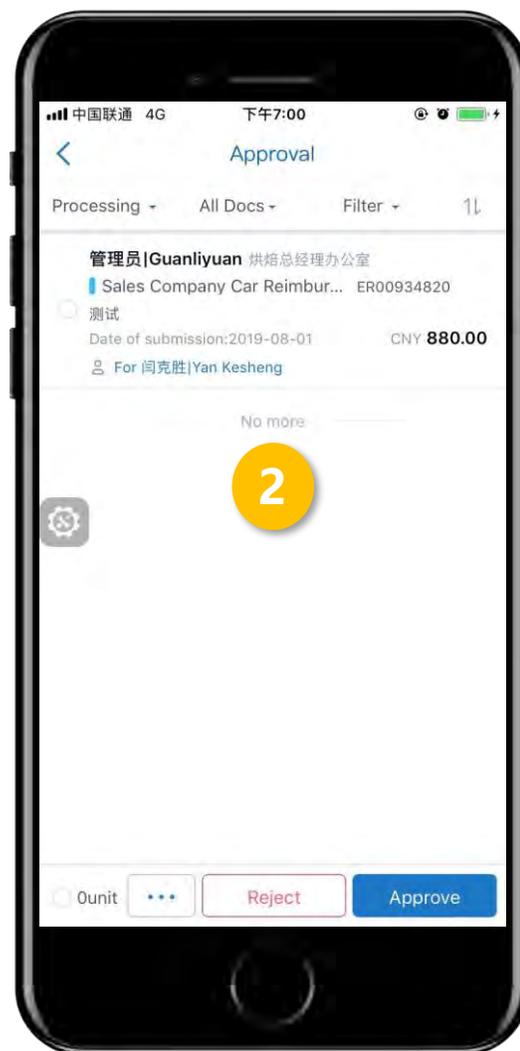
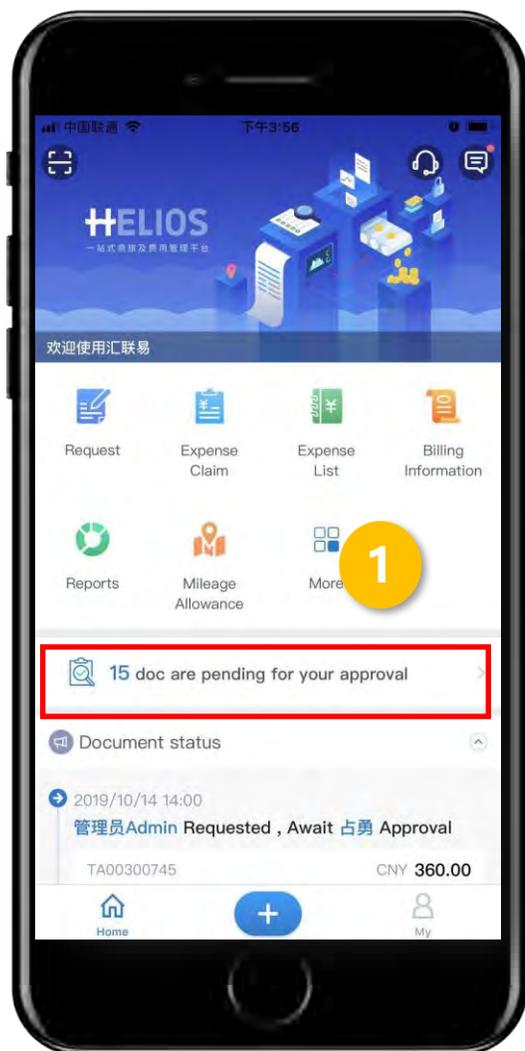
# Edit Forms



# 05 Approve/Reject a Form

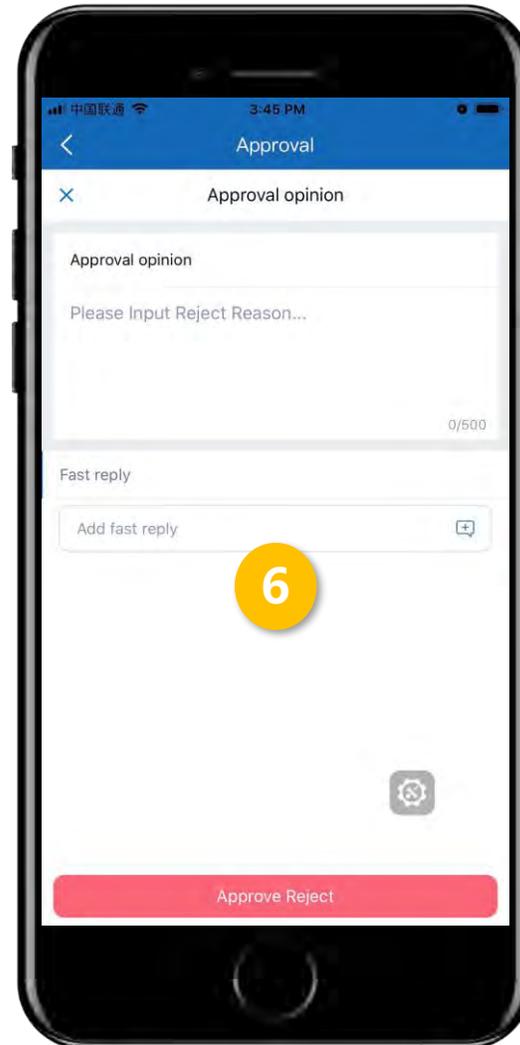
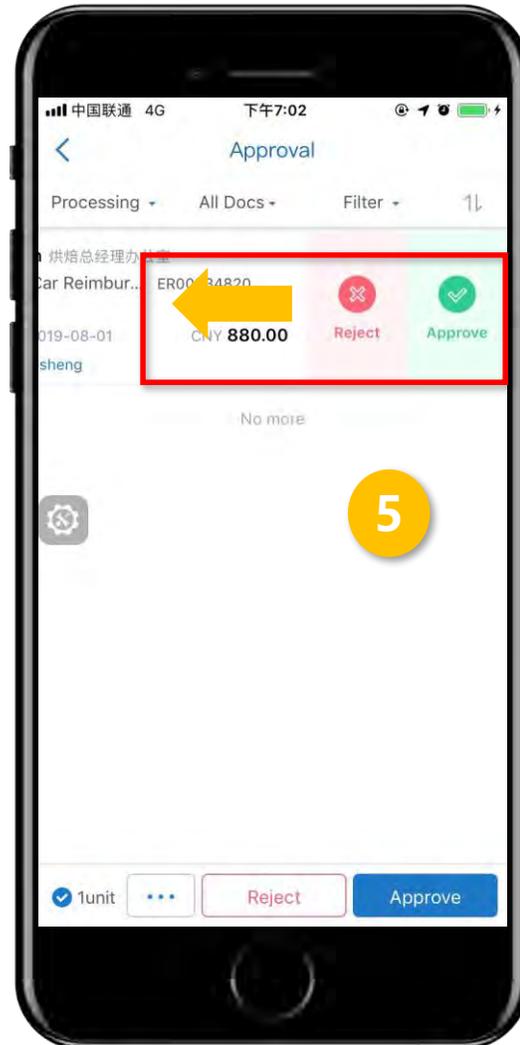
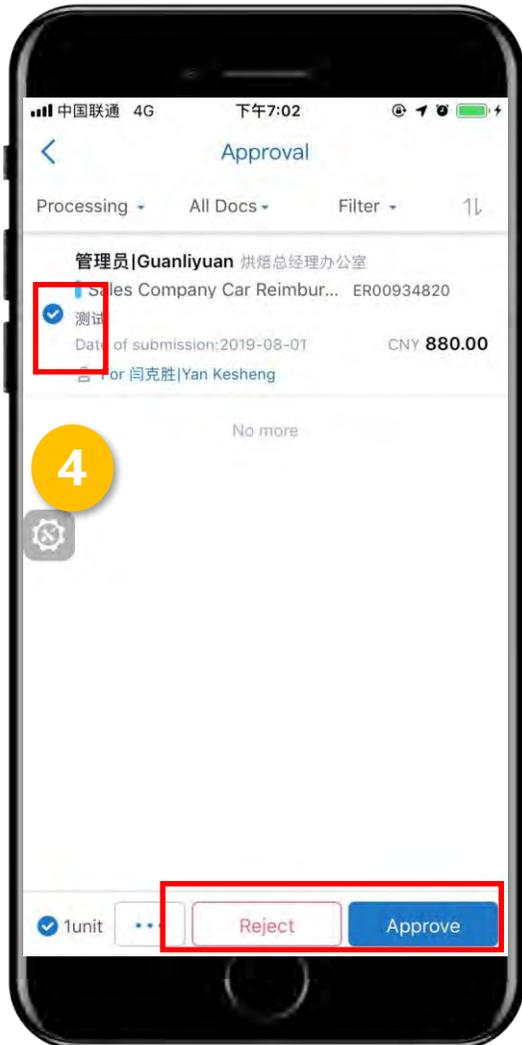


# Approve/Reject a Form



1. Number of document pending for approval
2. Document list
3. Filter by:
  - Form status
  - Form type
  - Applicant
  - Amount
  - Department

# Approve/Reject a From

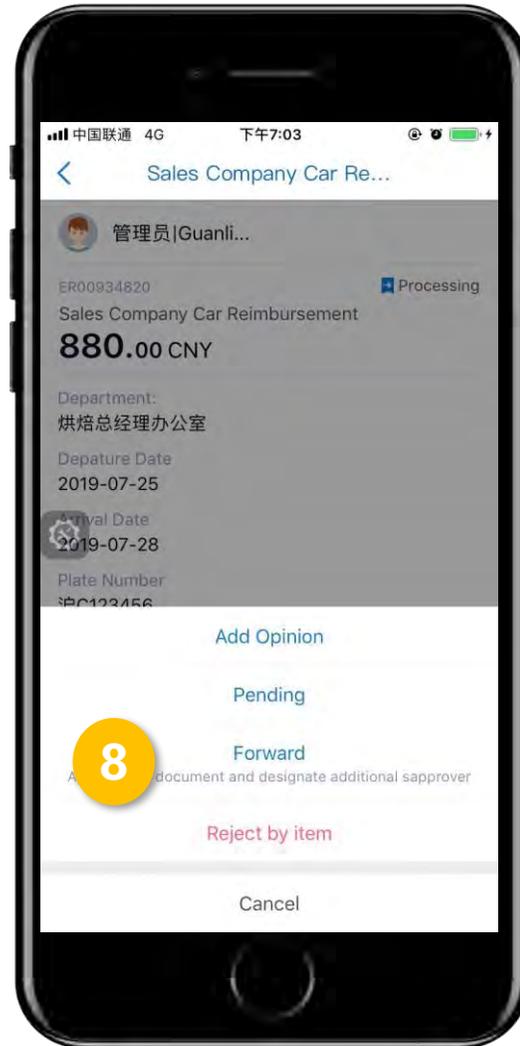
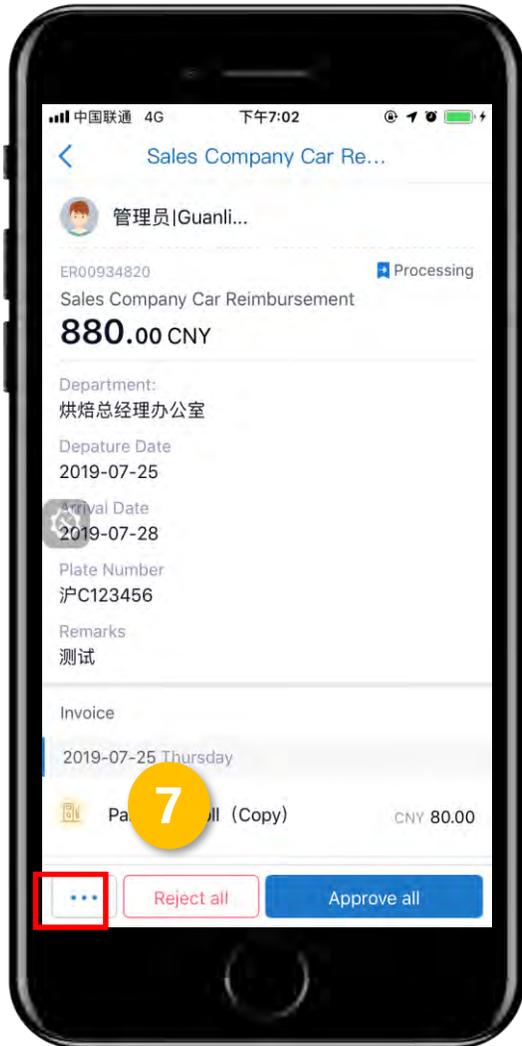


4. Select one or more forms to reject or approve all

5. Swipe left to reject or approve a form

6. Opinion is required to reject a from. It goes directly to the requester.

# Approve/Reject a From



7. Click a from to check details

8. Click “...” to see more options:

- Pending the form
- Reject by item
- Forward: add someone else to the approval flow
- Add opinion

# 06 Other Functions



# Finance- View Expenses



Trial

Gastro Medicare LLC

Please enter

Supplier

Request&Expense Claim

Workflow

Financial Management

View Bill

**View Expenses**

View Request

Basic Financial Settings

Data Analysis

Financial Management > View Bill > View Expenses

Nina

Reviewofreimbursementreport Batchdownload

Reviewofreimbursementreport Expand all conditions(21)

Name/Emp.No Doc.ID

Please enter Name/Emp.No Please enter

Status

Processing  Approved  Rejected  Processed  Review rejected  Paying  Paid

Search Reset

List Only documents with blank batch number can generate batch!

SN	Emp.No	Employee	Submissi...	Doc.Typ...	Doc.ID	Comment	Amount...	Cu...	Proof No.	Batch p...	付款日期	Status	Op...
----	--------	----------	-------------	------------	--------	---------	-----------	-------	-----------	------------	------	--------	-------

No data

Export data Generate batch

Total 0 20 / page Goto

# Finance - Manage Exchange Rate



Trial

Gastro Medicare LLC

Please enter

Supplier

Request&Expense Claim

Workflow

Financial Management

View Bill

Basic Financial Settings

**Currency & Exchange...**

Data Analysis

Financial Management > Basic Financial Settings > Currency & Exchange Rate

Nina

Please select the set of books:  Base currency:

Maximum exchange rate deviation:10%->warning,20%->unable to save.

Enable automatic exchange rate:  Enabling exchange rate instructions:   
*This automatic exchange rate information is for reference only, and Helios does not assume any responsibility for the results of using the exchange rate data.*

Currency name	Co...	Effective Date	Current Rate	Automatic exchange rate	Status
US Dollar	USD	-	-	<input checked="" type="checkbox"/> enable	<input checked="" type="checkbox"/> enable

1





Thanks!