

Soldo User Guide for Expense Approvers

Agenda

- How to login
- Review Expenses
- Soldo Help



Protect yourself from
those who pretend
to be Soldo:
read our security tips to
spot phishing attempts

[Learn more →](#)

Welcome to Soldo

If you access multiple accounts with the same email, [log in from here](#)

Email address

Password



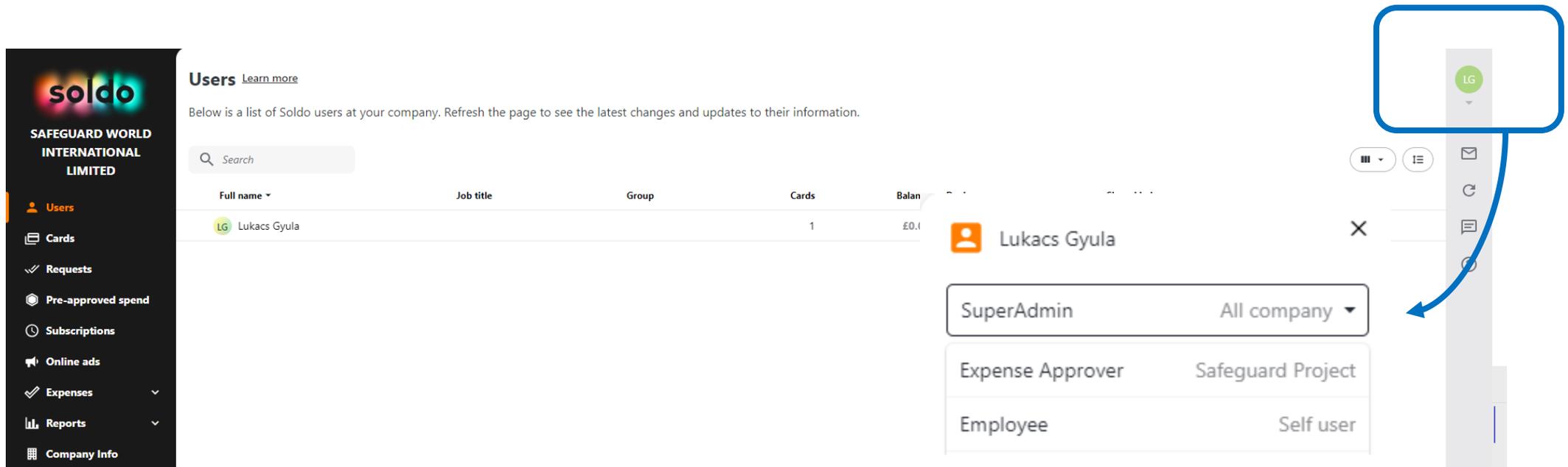
[Forgot password?](#)

Login →

No account yet? [Sign up](#)

1. How to login

- Use your login credentials following the instruction e-mail received by Soldo via e-mail by accessing manage.soldo.com
- Since everyone with a License for Soldo is an Employee (Self user) as well, for the first time you need to change your profile from Employee to Expense Approver – role created for you to review expenses of your assigned employees on the platform. You can do this by accessing the green circle on the top right corner with your initials.



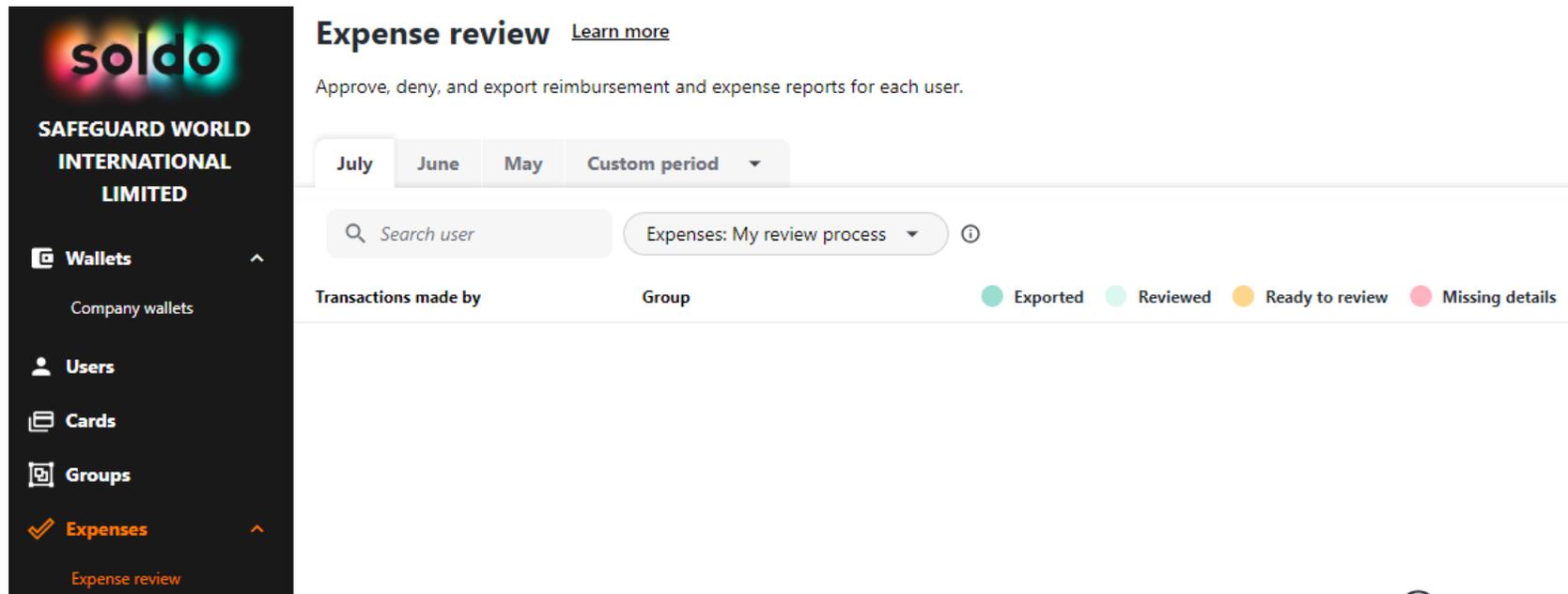
The screenshot displays the Soldo user management interface. On the left is a dark sidebar with the Soldo logo and navigation options: Users, Cards, Requests, Pre-approved spend, Subscriptions, Online ads, Expenses, Reports, and Company Info. The main content area is titled 'Users' and includes a search bar and a table of users. The table lists one user, Lukacs Gyula, with 1 card and a balance of £0.1. To the right, a profile dropdown menu is open for Lukacs Gyula, showing three roles: SuperAdmin (All company), Expense Approver (Safeguard Project), and Employee (Self user). A blue box highlights a green circle with the initials 'LG' in the top right corner of the interface, with a blue arrow pointing to the 'Expense Approver' role in the dropdown menu.

Full name	Job title	Group	Cards	Balan
LG Lukacs Gyula			1	£0.1

SuperAdmin	All company
Expense Approver	Safeguard Project
Employee	Self user

2. Review Expenses

- Individual Employees will be submitting all necessary documentation against each of their expenses. Adding extra notes is an option to cater your individual needs of reporting.
- In order to pull detailed reports of expenses you need to review them in Soldo. You can approve/decline or request more information on each expenses.
 - Please note that approving/declining expenses is always post purchase and more used for reporting purposes
 - In case of a declined expense please inform Safeguard as well to facilitate the repayment of the expense to your Company Wallet (Employees should reimburse declined expenses to the same wallet you fund in Soldo)
- You can access the Expense review panel by clicking on the Expenses – Expense review on the left menu



The screenshot displays the Soldo Expense review interface. On the left is a dark sidebar menu for Safeguard World International Limited, with 'Expenses' selected and 'Expense review' highlighted below it. The main content area is titled 'Expense review' with a 'Learn more' link. Below the title is a description: 'Approve, deny, and export reimbursement and expense reports for each user.' The interface includes a month filter (July, June, May, Custom period), a search bar for users, and a dropdown for 'Expenses: My review process'. A legend at the bottom identifies transaction statuses: Exported (teal), Reviewed (light blue), Ready to review (yellow), and Missing details (pink).

2. Review Expenses

- You can review expenses one-by-one or do it in bulk selecting all expenses at once
- From the Expenses dropdown – select All

Custom period ▾

Expenses: All ▾ ⓘ

My review process

All (circled)

To review now

● Exported ● Reviewed ● Ready to review ● Missing details

17 6 23 Total transactions

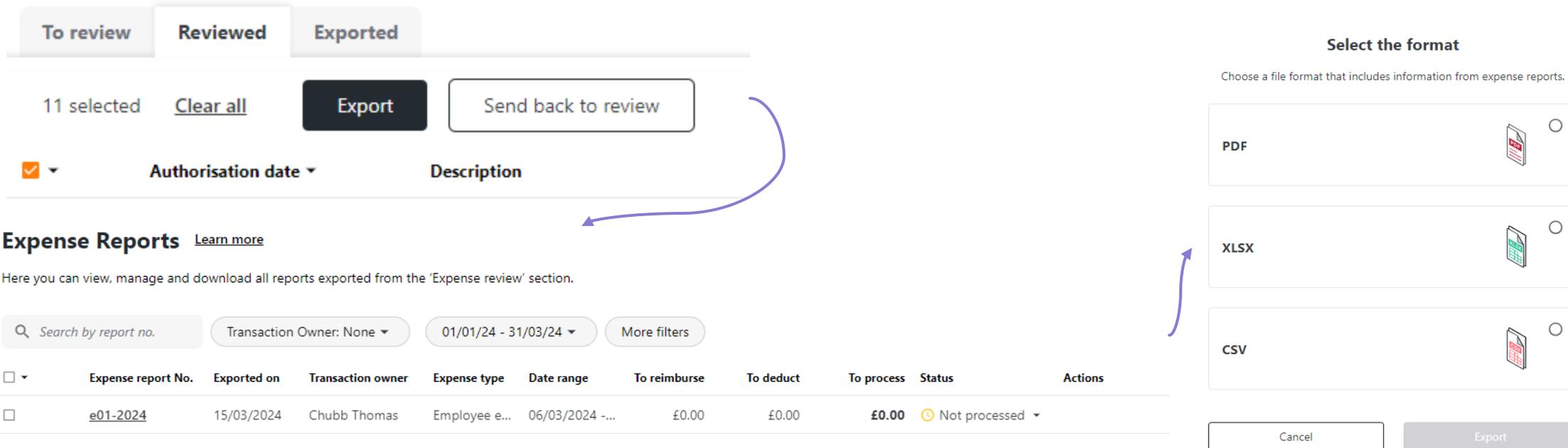
To review Reviewed Exported

11 Selected [Deselect all](#) [Approve](#) [Deny](#) [Request info](#)

✓ ▾	Authorisation date ▾	Description	Amount	Expense policy	Expense type	Lists	Details	Foreign currency am...	Exchange rate
✓	26/06/24 - 5:01 a.m.	🚗 Transport for London - ...	-€26.60		Travel & Entertain...	🕒	Missing	-£22.20	£1.00 = €1.20
✓	25/06/24 - 6:50 p.m.	🍜 Wagamama	-€40.65		Travel & Entertain...	🟢	Comple...	-£34.00	£1.00 = €1.20
✓	25/06/24 - 5:29 p.m.	🚗 Uber	-€30.57		Travel & Entertain...	🟢	Comple...	-£25.57	£1.00 = €1.20
✓	25/06/24 - 5:16 p.m.	📁 COLNBROOK\COLNBR...	-€2.69		Travel & Entertain...	🟢	Comple...	-£2.25	£1.00 = €1.20
✓	25/06/24 - 4:58 p.m.	🚗 Uber	€0.00		Travel & Entertain...	🕒			
✓	25/06/24 - 2:20 p.m.	☕ Costa Coffee	-€5.14		Travel & Entertain...	🟢	Comple...	-£4.30	£1.00 = €1.20
✓	25/06/24 - 11:31 a.m.	Marks and Spencer Sim...	-€7.17		Travel & Entertain...	🟢	Comple...	-£6.00	£1.00 = €1.20
✓	25/06/24 - 10:22 a.m.	🚗 Transport for London - ...	-€0.12		Travel & Entertain...	🕒	Missing	-£0.10	£1.00 = €1.20
✓	25/06/24 - 9:00 a.m.	🚗 Uber	-€40.59		Travel & Entertain...	🟢	Comple...	-£33.95	£1.00 = €1.20
✓	25/06/24 - 8:59 a.m.	☕ Costa Coffee	-€6.75		Travel & Entertain...	🕒	Missing	-£5.64	£1.00 = €1.20

2. Review Expenses

- Once the Expenses are approved/denied they are moved from the To review tab into Reviewed tab
- From here Expenses can be Exported or Sent back to review.
 - You need to Export expenses in order to download Expense reports from Soldo
 - You can still download Transaction reports from Soldo using the Reports menu on the left without Reviewing and/or Approving/Declining expenses
- Once Expenses are exported they appear on Exported tab and now they are ready for downloading in various formats



The screenshot shows the 'Expense Reports' section in the 'Exported' tab. At the top, there are three tabs: 'To review', 'Reviewed', and 'Exported'. Below the tabs, there are buttons for '11 selected', 'Clear all', 'Export', and 'Send back to review'. A purple arrow points from the 'Export' button to the 'Select the format' dialog box on the right. The dialog box has the title 'Select the format' and the instruction 'Choose a file format that includes information from expense reports.' It lists three options: PDF, XLSX, and CSV, each with a radio button and a corresponding icon. At the bottom of the dialog are 'Cancel' and 'Export' buttons. Below the dialog, a table of expense reports is visible.

<input type="checkbox"/>	Expense report No.	Exported on	Transaction owner	Expense type	Date range	To reimburse	To deduct	To process	Status	Actions
<input type="checkbox"/>	e01-2024	15/03/2024	Chubb Thomas	Employee e...	06/03/2024 - ...	£0.00	£0.00	£0.00	🕒 Not processed	

3. Soldo Help

- In case you have issues while working in Soldo you have the option to access Soldo Help directly from the application by clicking on the orange circle on the bottom right corner. Soldo provides live support Monday to Friday 9am to 5pm UK time. Outside of business hours there is an AI Agent to provide help and support.

