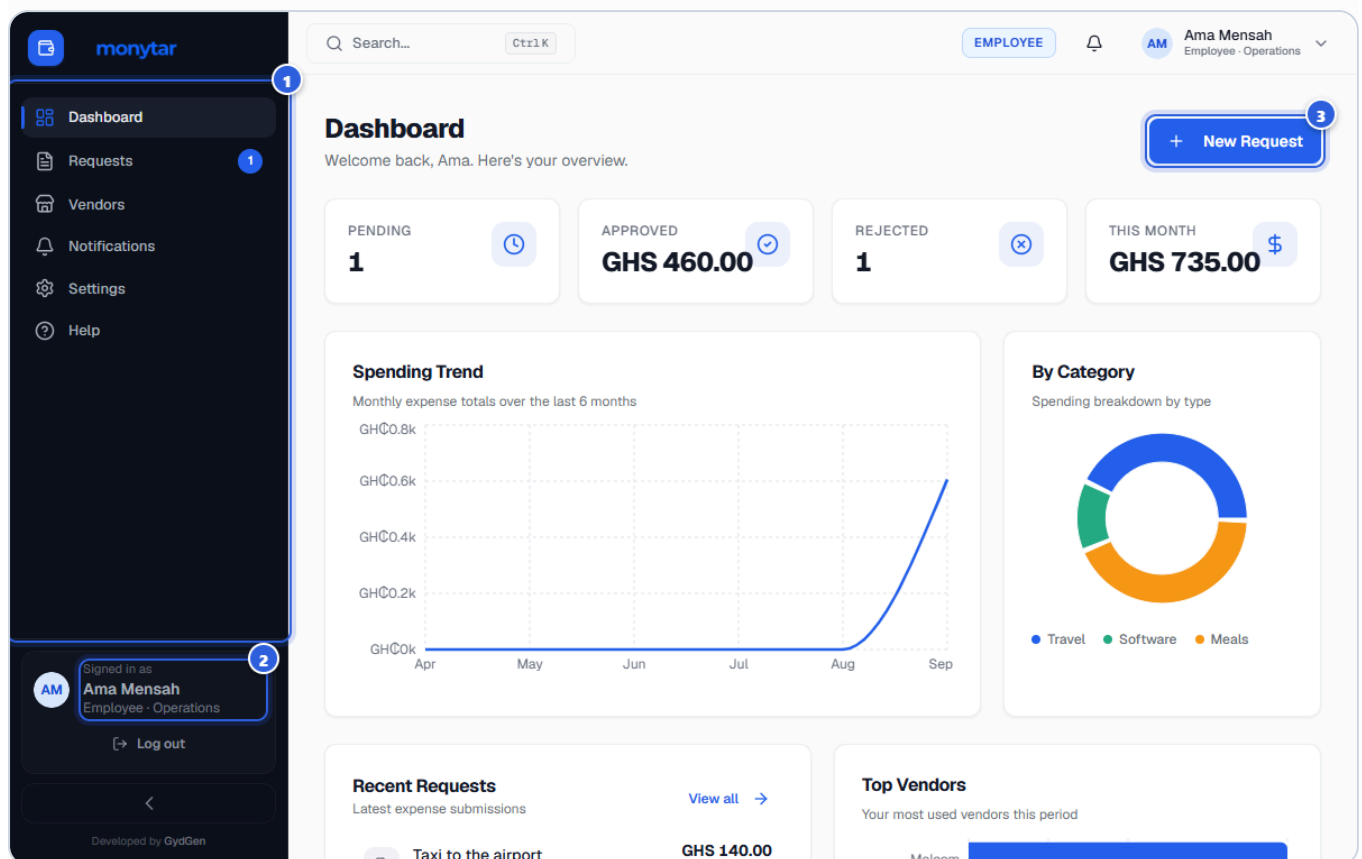


Expenses, from receipt to reimbursement.

A five-minute tour of how Monytar works — for the people who spend, the people who approve, and the people who keep the books.



Updated September 2026

How it works

STEP 1 · YOU

Submit

Say what you spent and why. Add the receipt.

STEP 2 · YOUR MANAGER OR FINANCE

Approve

A reviewer says yes — or asks for a change.

STEP 3 · FINANCE

Get paid back

Finance records the payment. You're done.

The four roles

Employee

Spends for work and wants it back.

- Add expenses
- Attach receipts
- Track status
- Fix and resubmit

Manager

Keeps a team's spending in check.

- Everything an Employee can
- Approve their department
- Watch team budgets

Finance

Keeps the books straight.

- Everything a Manager can
- Approve any request
- Record payments
- Run reports
- Set approval rules

Admin

Runs Monytar for the company.

- Everything above
- Invite and manage people
- Set up departments
- Company settings

How an expense moves

Draft

Started, not sent yet. Only you can see it.

Do: Finish it, then Submit for Approval.

Pending

Sent. Waiting for a decision.

Do: Nothing. You'll be notified. Small amounts may auto-approve.

Approved

A reviewer said yes.

Do: Finance records the payment.

Paid

Payment recorded. All finished.

Do: Nothing more to do.

Rejected? A reviewer said no, and left a reason. Open it, read the comment, click Edit, then Resubmit.

Rules, in plain English

Example amounts — every company sets its own.

- Under 50: approved automatically.
- 100 or more: a receipt is required.
- 2,000 or more: finance reviews as well as the manager.

Getting started

FOR THE PERSON OPENING THE ACCOUNT

Set up my company

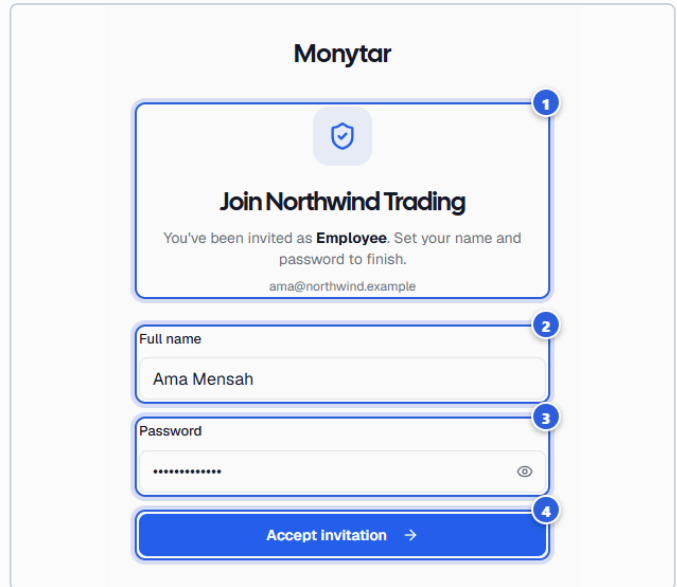
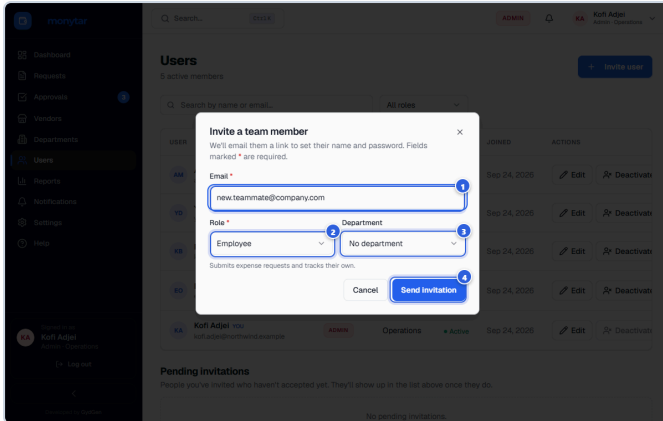
Four short steps, then invite your team. You become the Admin.

The image displays four sequential steps of the account setup process, each with a progress indicator at the top (1, 2, 3, 4). Step 1, 'Account Details', shows a form for 'Create your personal account' with fields for Full Name (Ama Mensah), Work Email (ama@northwind.example), and Password. Step 2, 'Organization', shows a form for 'Set up your organization' with fields for Organization Name (Northwind Trading) and Team Size (10-50). Step 3, 'Choose Plan', shows a selection of three plans: Free (up to 3 users), Starter (\$29/mo up to 10 users), and Professional (\$69/mo up to 50 users). Step 4, 'Get Started', shows a confirmation screen with a 'Check your email' message and a 'Go to Sign In' button. A small inset image on the right shows a confirmation email in a web browser.

1. **Your details.** Enter your name, work email and a password of at least 8 characters.
2. **Your organization.** Type your company's name. Team size is optional.
3. **Pick a plan.** Free is enough to start and covers up to 3 people. Paid plans add more people and continue to a payment step.
4. **Confirm your email.** We send you a confirmation link. Click it, then sign in.
5. **Invite your team.** Open Users, click Invite, then enter each person's work email, role and department.

I was invited

Two minutes, from the email to your dashboard.



1. **Your admin invites you.** They enter your work email and choose your role, then send the invitation. You get an email with a link.
2. **Open the link.** You'll see the company's name and the role you've been given.
3. **Add your name.** Type your full name.
4. **Choose a password.** Use at least 8 characters. You'll use it every time you sign in.
5. **Accept the invitation.** Click Accept invitation. If you're asked to confirm your email first, click the link we send, then sign in.

Step-by-step guides

FOR EVERYONE

Add an expense

The screenshot shows the 'New Expense Request' form in the Monytar application. The form is titled 'New Expense Request' with a subtitle 'Submit a new expense for approval'. It is divided into several sections: 'Amount & Category', 'Purpose & Details', and 'Receipts'. The 'Amount & Category' section has two fields: 'Amount (GHS) *' with the value '188' and 'Category *' with the value 'Software & Services'. The 'Purpose & Details' section has a 'Business Justification *' field with the text 'Fuel for the client visit in Kumasi', a 'Vendor (optional)' dropdown set to 'No vendor', a 'Priority' dropdown set to 'Medium', an 'Expense Date' field set to '24.09.2026', and a 'Due Date (optional)' field set to 'tt.mm.jjj'. There is also an 'Additional Notes' field with the text 'Any extra context...'. The 'Receipts' section has a warning message: 'A receipt is required for expenses of GH¢100 or more before this can be submitted for approval. Attach one below, or save as a draft for now.' Below this is a large dashed box for uploading receipts, with a button 'Click to upload receipts' and the text 'PDF, JPG, PNG, WEBP, HEIC up to 10MB'. At the bottom of the form are two buttons: 'Save as Draft' and 'Submit for Approval'. The form is numbered 1 through 5: 1 points to the Amount field, 2 points to the Category dropdown, 3 points to the Business Justification field, 4 points to the Receipts upload area, and 5 points to the Submit for Approval button. The left sidebar shows the Monytar logo and navigation links: Dashboard, Requests (with a notification badge), Vendors, Notifications, Settings, and Help. The top right shows the user profile: EMPLOYEE, Ana Mensah, Employee - Operations.

1. Type the amount you paid.
2. Pick the category that fits best.
3. Say what it was for and why.
4. Attach a photo or PDF of the receipt.
5. Click Submit for Approval — or Save as Draft to finish later.

Tip: Not ready? Save as Draft. Nobody sees it until you submit.

Track my expenses

My Requests
5 expense requests

1. Use the tabs to filter by status.

2. Search by number, purpose or vendor.

3. Need another one? Click New request.

REQUEST #	PURPOSE	CATEGORY	VENDOR	AMOUNT	DATE	STATUS
REQ-2026-00015	Taxi to the airport	Travel	Bolt	GHS 140.00	Sep 24, 2026	PAID
REQ-2026-00014	Printer paper and toner	Office Supplies	-	GHS 60.00	Sep 24, 2026	DRAFT
REQ-2026-00013	Domain renewal for the website	Software & Services	Vodafone Ghana	GHS 95.00	Sep 24, 2026	REJECTED
REQ-2026-00012	Team lunch after the product launch	Meals & Entertainment	Melcom	GHS 320.00	Sep 24, 2026	APPROVED
REQ-2026-00011	Fuel for the client visit in Kumasi	Travel	Shell Fuel	GHS 180.00	Sep 24, 2026	PENDING

Signed in as **Ama Mensah**
Employee - Operations
Log out

Developed by GydGen

1. Use the tabs to filter by status.
2. Search by number, purpose or vendor.
3. Need another one? Click New request.

Tip: Click any row to see its full history.

Fix a rejected expense

monytar

Dashboard

Requests 1

Vendors

Notifications

Settings

Help

Signed in as **Ama Mensah**
Employee - Operations

Log out

Developed by GydGen

Search... CtrlK

EMPLOYEE

REQ-2026-00013 **REJECTED** 1

Domain renewal for the website

GHS 95.00

Details

CATEGORY	PRIORITY
Software & Services	Medium
VENDOR	DEPARTMENT
Vodafone Ghana	Operations
EXPENSE DATE	DUE DATE
Sep 24, 2026 8:17 AM	N/A
PAYMENT STATUS	PAYMENT METHOD
Unpaid	N/A

Reviewer Comment 2

Please attach the invoice showing the renewal period.

Submitted By

Ama Mensah
ama.mensah@northwind.examp
e

Employee

Operations

Approval Chain

Manager approval
Rejected

Finance approval
Upcoming

Revise & Resubmit

This request was rejected. Address the reviewer's comment above, then resubmit it for approval.

Edit

Resubmit 3

Timeline

Created
less than a minute ago

Submitted
less than a minute ago

1. Rejected means the reviewer needs a change.

2. Read the reviewer's comment to see what.

3. Click Edit, fix it, then click Resubmit.

Tip: Resubmitting sends it back through approval from the start.

Find my way around

The screenshot shows the Monytar dashboard for a user named Ama Mensah, Employee - Operations. The interface includes a sidebar menu, a top navigation bar, and a main dashboard area with various widgets.

Callout 1: Points to the sidebar menu, which lists the following options: Dashboard, Requests, Vendors, Notifications, Settings, and Help.

Callout 2: Points to the user profile section in the sidebar, which displays the user's name (Ama Mensah), role (Employee - Operations), and a Log out button.

Callout 3: Points to the '+ New Request' button in the top right corner of the dashboard.

Dashboard Content:

- Search Bar:** Located at the top, with a placeholder 'Search...' and a 'Ctrl K' shortcut.
- Employee Role:** Displayed as 'EMPLOYEE' in the top right.
- Dashboard Header:** Includes the Monytar logo and a 'New Request' button.
- Summary Cards:** Four cards showing key metrics: PENDING (1), APPROVED (GHS 460.00), REJECTED (1), and THIS MONTH (GHS 735.00).
- Spending Trend:** A line chart showing monthly expense totals over the last 6 months (Apr to Sep). The y-axis ranges from GH¢0k to GH¢0.8k.
- By Category:** A donut chart showing the spending breakdown by type: Travel (blue), Software (green), and Meals (orange).
- Recent Requests:** A table showing the latest expense submissions, including 'Taxi to the airport' for GHS 140.00.
- Top Vendors:** A section showing the most used vendors this period, with 'Melcom' listed.

1. The menu lists every page your role can use.
2. Check your name, role and department here.
3. Add an expense from anywhere with this button.

Tip: Press Ctrl+K (⌘K on Mac) to search everything.

Approve or reject

Approvals
3 requests awaiting your review

Search by number, purpose or employee...

YD **Mobile data bundle for field work** **GHS 120.00**
REQ-2026-00017 · by Yaw Darko · less than a minute ago
Other · Vodafone Ghana · Medium Priority
[Approve](#) [Reject](#) [View Details](#)

YD **Client dinner at Osu** **GHS 450.00**
REQ-2026-00016 · by Yaw Darko · less than a minute ago
Meals & Entertainment · Medium Priority
[Approve](#) [Reject](#) [View Details](#)

AM **Fuel for the client visit in Kumasi** **GHS 180.00**
REQ-2026-00011 · by Ama Mensah · less than a minute ago
Travel · Shell Fuel Station · Medium Priority
[Approve](#) [Reject](#) [View Details](#)

Signed in as **Kwame Boateng**
Manager · Operations
[Log out](#)

Developed by GydGen

1. Search the requests waiting for you.
2. Click Approve if it looks right.
3. Click Reject — you must give a reason.
4. View Details to check receipts first.

Tip: Managers see their own department. Finance and Admin see everyone's.

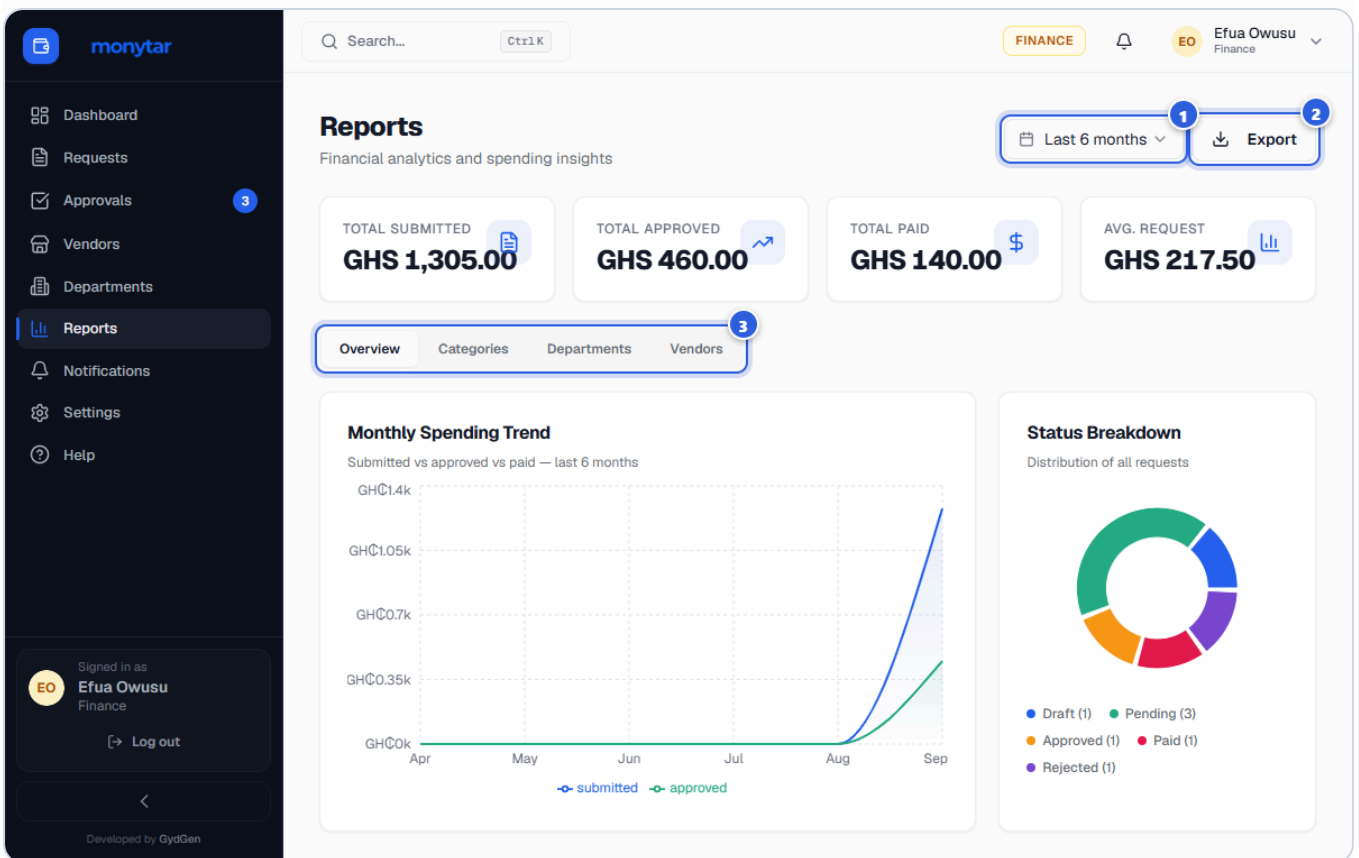
Pay an approved expense

The screenshot shows the Monytar web application interface. On the left is a dark sidebar with navigation links: Dashboard, Requests, Approvals (with a blue badge '3'), Vendors, Departments, Reports, Notifications, Settings, and Help. The main content area is titled 'REQ-2026-00012' with a status of 'APPROVED' and a value of 'GHS 320.00'. Below the title is a description: 'Team lunch after the product launch'. A modal window titled 'Process Payment' is open in the center, with a close button (X) in the top right. The modal contains the instruction 'Mark this expense as paid for GHS 320.00.' and two input fields: 'Payment Reference' (containing 'TXN-48214') and 'Payment Method' (with a dropdown menu showing 'Bank Transfer'). A blue 'Confirm Payment' button is at the bottom right of the modal. Numbered callouts 1, 2, and 3 point to the 'Payment Reference' field, the 'Payment Method' dropdown, and the 'Confirm Payment' button respectively. The background interface includes a search bar, a 'Click' button, and a 'FINANCE' tab. On the right, there are sections for 'Submitted By' (Ama Mensah, ama.mensah@northwind.example, Employee, Operations), 'Approval Chain' (Manager approval Approved, Finance approval Approved), and 'Timeline' (Created less than a minute ago, Submitted less than a minute ago). The bottom left shows the user is signed in as 'Efua Owusu Finance' with a 'Log out' button.

1. Enter the payment reference, like a transfer ID.
2. Choose how it was paid.
3. Click Confirm Payment. The request becomes Paid.

Tip: This records a payment you've already made. Monytar doesn't move money.

See reports



1. Pick the date range.
2. Export as CSV or print to PDF.
3. Switch tabs for categories, departments and vendors.

Check department budgets

The screenshot displays the 'Departments' section of the Monytar application. The sidebar on the left contains navigation links: Dashboard, Requests, Approvals, Vendors, Departments (highlighted), Users, Reports, Notifications, Settings, and Help. The top header includes a search bar, a 'Ctrl K' shortcut, an 'ADMIN' role indicator, a notification bell, and a user profile for 'Kofi Adjei' (Admin - Operations). The main content area is titled 'Departments' and shows '2 departments with budget tracking'. A '+ Add department' button is located in the top right corner. Two department cards are displayed: 'Sales' and 'Operations'. The 'Sales' card shows a budget of GHS 0.00 / GHS 12,000.00 with a green bar indicating '0% used'. It also shows 'No manager assigned' and '0 members'. The 'Operations' card shows a budget of GHS 460.00 / GHS 20,000.00 with a green bar indicating '2% used'. It shows 'Kwame Boateng' as the manager and '4 members'. Both cards have buttons for 'Members', 'Edit', and 'Archive'. The bottom of the sidebar shows the user is signed in as 'Kofi Adjei' (Admin - Operations) with a 'Log out' button. The footer of the sidebar mentions 'Developed by GydGen'.

1. Add a department, with a budget (Admin or Finance).
2. The bar shows spend against budget: green, amber, then red.
3. Members shows who's in the team.

Tip: Going over budget is flagged, never blocked.

Invite a teammate

The screenshot shows the Monytar 'Users' management interface. A modal titled 'Invite a team member' is open, guiding the user through the invitation process. The modal includes a text input for 'Email' (step 1), dropdown menus for 'Role' (step 2) and 'Department' (step 3), and a 'Send invitation' button (step 4). The background shows a list of users with columns for 'JOINED' and 'ACTIONS'.

Users
5 active members

Search by name or email... All roles

Invite a team member

We'll email them a link to set their name and password. Fields marked * are required.

Email *
new.teammate@company.com

Role *
Employee

Department
No department

Submits expense requests and tracks their own.

Cancel Send invitation

Pending invitations
People you've invited who haven't accepted yet. They'll show up in the list above once they do.

No pending invitations.

1. Enter their work email.
2. Choose their role.
3. Pick their department. Managers need one to approve.
4. Click Send invitation. They set their own password.

Tip: Email didn't arrive? Copy the invite link from Pending invitations.

Set approval rules

monytar

Dashboard

Requests

Approvals

Vendors

Departments

Users

Reports

Notifications

Settings

Help

Signed in as
Kofi Adjel
Admin · Operations
[Log out](#)

Developed by GygGen

Set the default currency for your organization. This affects how amounts are displayed across the platform.

Default Currency

GHS Ghanaian Cedi (GH¢)

Preview: Amounts will display as GHS 1,234.56

Expense Categories

Add your own categories alongside the built-in six on the Starter plan or higher.

EquipmentMeals & EntertainmentOtherSoftware & ServicesOffice SuppliesTravel

Upgrade to Starter or higher to add your own categories.

Approval Workflow

Set the thresholds and rules that decide how an expense request gets approved.

1Auto-approve under

50

Requests below this amount skip approval entirely.

2Receipt required above

100

A receipt must be attached above this amount.

3Finance review above

2000

Requests at/above this amount always get a finance review.

Manager approval required

Requests that don't auto-approve need direct manager sign-off

Finance review required

Finance reviews every request that doesn't auto-approve

Receipt requirement

Enforce the receipt threshold set above

4Save Changes

1. Amounts under this skip approval entirely.
2. Above this, a receipt is required.
3. At or above this, Finance always reviews.
4. Click Save Changes.

Five habits that make approval fast

1. **Snap the receipt now.** Photograph it while you're still holding it. It's the one thing people lose.
2. **Say why, not just what.** "Fuel for the Kumasi client visit" gets approved faster than "Fuel".
3. **Pick the closest category.** Good categories make reports useful later.
4. **Submit soon after spending.** Fresh expenses get approved quickly. Old ones raise questions.
5. **Check the status, don't chase.** Open Requests to see exactly where an expense is.

Quick answers

How do I create a Monytar account?

Choose Sign up, enter your name, work email and a password, name your organization, pick a plan and confirm your email. You become the Admin and can invite your team.

I was invited. How do I join?

Open the link in your invitation email, type your name, choose a password and click Accept invitation. You'll land on your dashboard.

My confirmation or invitation link doesn't work.

Links expire and work once. If your email is already confirmed, just sign in. If an invitation has expired, ask your admin to send a new one.

I paid for something myself

Add an expense and attach the receipt. Once approved, Finance records your payment.

My expense was rejected

Open it, read the comment, click Edit, then Resubmit.

I forgot my receipt

If it's still a Draft or Rejected, click Edit and add it. Once Pending, ask your reviewer.

I can't submit

Amount and reason are required. Over the receipt limit? Attach one, or Save as Draft.

Where is Approvals (or Reports, Users)?

Some pages depend on your role. Check your role at the bottom of the menu.

I can't approve a request

Managers only approve their own department's requests, and never their own.

How do I find an old expense?

Search on the Requests page, or press Ctrl+K anywhere.

Amounts show the wrong currency

Admin or Finance can change it in Settings → Organization → Currency.

I forgot my password

On the sign-in page, click Forgot? and we'll email you a reset link.

Is a department over budget a problem?

No. It's flagged in red, but nothing is blocked.

Words you'll see

Request

One expense you've recorded, from start to payment.

Draft

Saved but not sent. Only you can see it.

Auto-approve

Small amounts your company lets through with no review.

Department

A team with its own spending budget.

Reimbursement

Getting back money you spent for work.

Approval chain

Who must say yes: manager, then finance, or both.

Vendor

A company or person your business pays.

Payment reference

The ID of the payment, like a transfer number.

Ready to try it?

Your administrator adds you to Monytar. Once you're in, sign in and add your first expense — it takes a minute.