

Bitloom

Smart Expense Manager

for

Creatio

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1. Introduction

The Smart Expense Manager Application helps organizations manage employee expense claims efficiently using automated email processing and AI-based data extraction.

Employees can send their expense bills via email to the system mailbox. The application automatically:

- Reads incoming emails
- Identifies the employee based on the sender's email address
- Creates or updates the employee's monthly expense record
- Extracts bill information using AI (Gemini)
- Populates expense details automatically into the system

Each employee has one expense record per month, and all expense bills sent during that month are attached to that record.

Once expenses are added, the employee can submit the expense record for approval. Approval behavior is controlled through configurable rules defined by the organization.

2. Prerequisites

Before using the application ensure the following requirements are met:

- Access to Creatio platform
- Expense Management Application installed
- Required dependencies installed
- Email mailbox configuration available

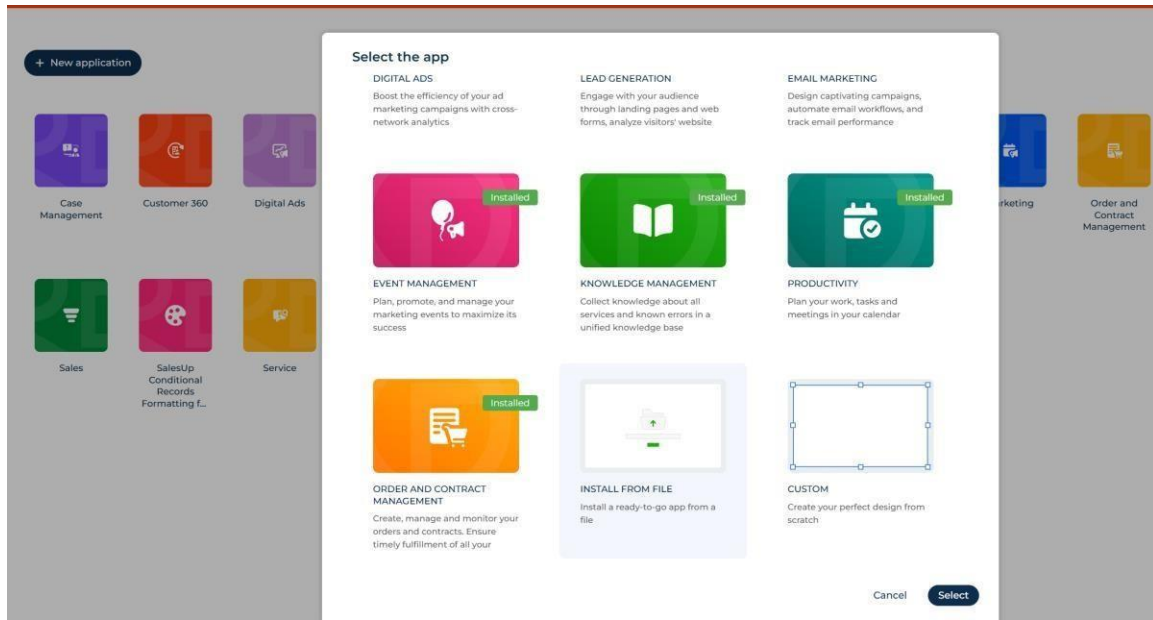
3. Installing the Application

Step 1 – Log in to Creatio

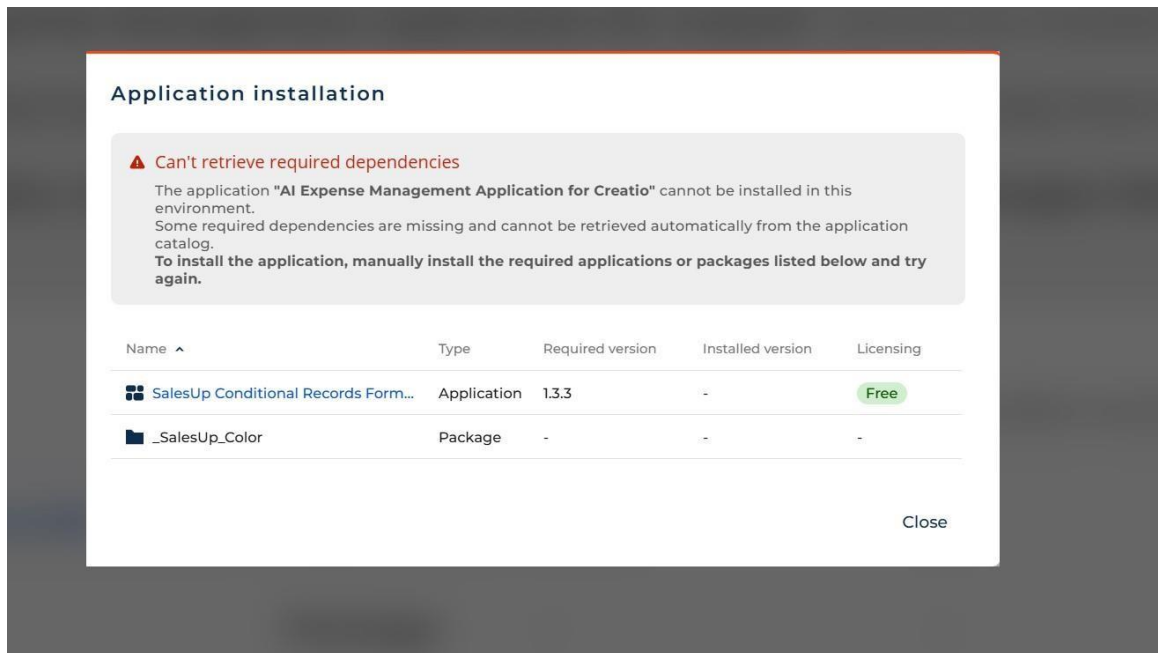
Log in to your Creatio instance using administrator credentials.

Step 2 – Install the application

Navigate to System Designer → Applications Hub → New application → Install from file

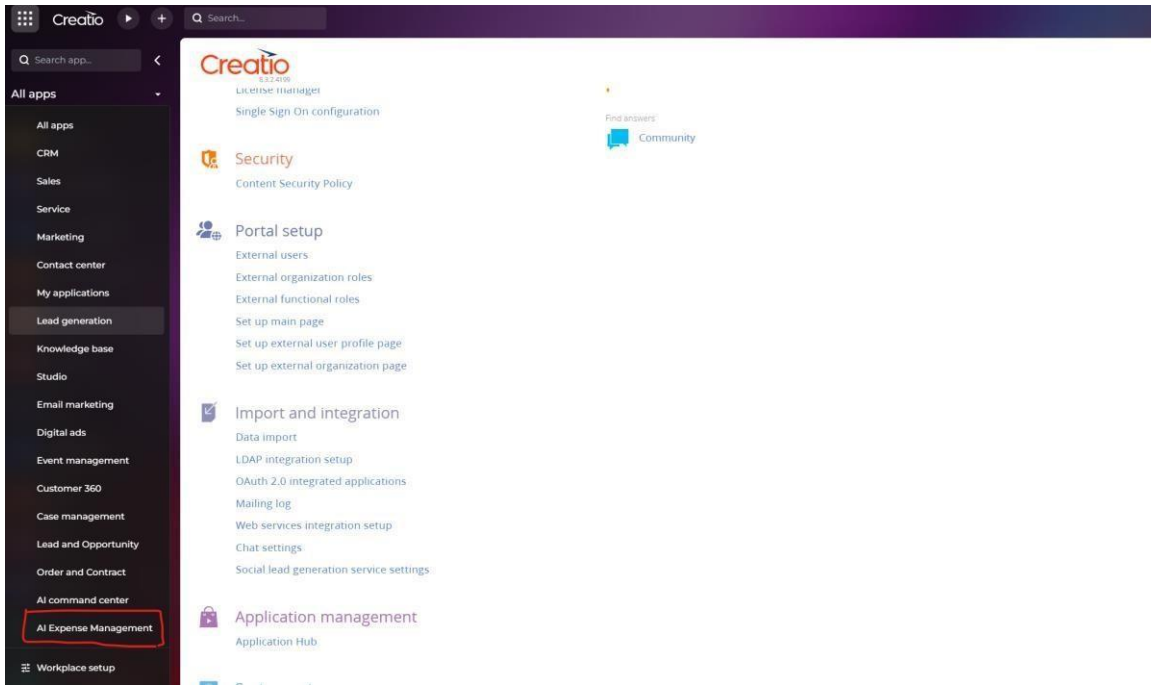


Install the dependencies from the marketplace: [Sales up: Conditional records formatting](#)

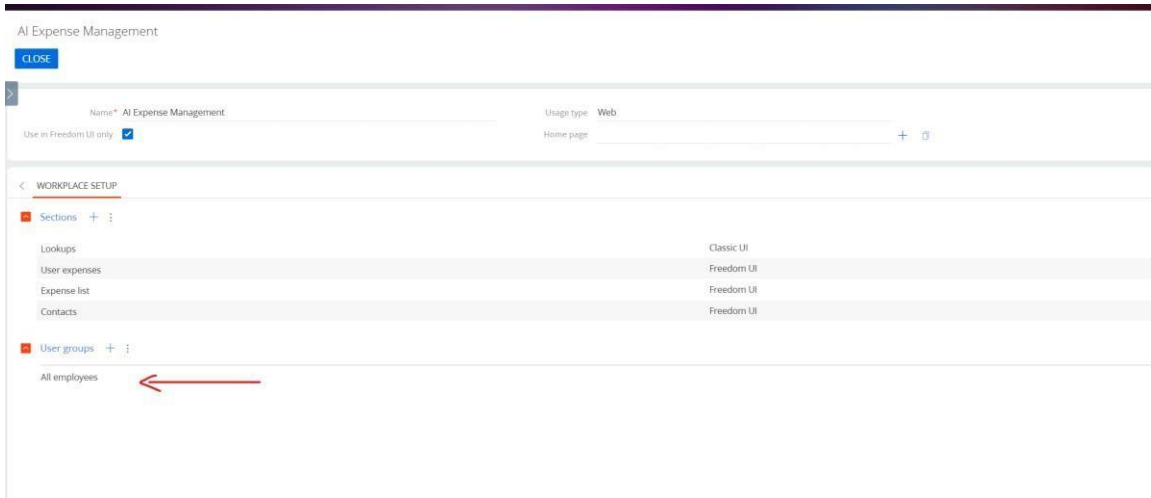


Step 3 – Complete Installation

After installation completes, refresh Creatio and verify the Smart Expense Manager workspace is available.



If it is not visible, then go to workplace setup in System Designer, you will find workplace there, you need to add user group accordingly.



4. Configuration

4.1 Mail Setup

The application relies on email integration to receive expense bills.

Steps:

1. Open the Communication Panel in Creatio.
2. Navigate to Mailbox Settings.
3. Add the system email account.
4. Enter the email address and app password.
5. Save the mailbox configuration.

Once configured, the system will begin monitoring incoming emails.

For more information, refer to Creatio Academy documentation for mailbox configuraton.

[Creatio Academy](#)

4.2 Gemini API Key Setup

Generate a Gemini API key and update the value in Creatio System Settings under '**Gemini api key**'.

You can generate your own gemini api key from here : [Generate Gemini api key](#)

Gemini api key

SAVE CANCEL

Name* Gemini api key

Type* Text (250 characters)

Default value

Description

Code* Brgeminiapikey

Cache* Save value for current user

Access for reading for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for modification for internal users ⓘ

- Allow for all
- Restrict for all
- Allow by operation

Access for external users

- Allow reading for portal users

4.3 Contact Configuration

Employees must exist in the Contacts section in Creatio.

The system identifies employees using their email address. Incoming expense bills are linked to the corresponding contact record.

Ensure the employee's email address matches the email used to send expense bills.

ID	Name	Type	Account	Mobile phone	Email	Country	Birth date
76	Samuel Melendez	Contact person	IT Plus	+12822 962 19 39	SamuelMelendregg@...	United States	4/27/1978
79	Sandy Lyden	Supplier		+128426 180 31 72	Sandy_Lyden@yahoo...	United States	1/21/1978
80	Sarah Margaret Richards	Employee	Our company	+44 782 257 7722	sarahrichardswork...	United Kingdom	7/31/1979
81	Scarlett Chapa	Supplier		+154566 556 25 14	SChapa@hotmail.co...	United States	11/5/1994
82	Scott Grammer	Contact person	Planet Soft	+128021 665 78 79	ScottGrammer@gma...	United States	12/12/1976
83	Scott Grammer	Customer		+128021 665 78 79	ScottGrammer@yah...	United States	12/12/1976
84	Scottie Elzside	Contact person		+128157 849 28 56	ScottieElzside@yah...	United States	4/27/1977
85	Sebastian Hall	Contact person	Insight Consulting	+44 (75) 5872 4370	shah@businessinvg...	United Kingdom	1/3/1989
86	Seymour Adaj	Supplier		+128061 421 88 63	SeymourA@yahoo.c...	United States	1/21/1977
87	Sharice Riddies	Customer		+154263 379 25 70	ShRiddies@hotmail...	United States	1/14/1994
88	Sharyn McCraney	Customer		+133867 209 93 76	SharynMcCraney@h...	United States	12/14/1992
89	Shauna Karls	Supplier		+13886 837 69 66	ShaunaK@hotmail.c...	United States	7/13/1987
90	Shaunta Langlois	Customer		+132950 623 50 90	Shaunta.Langlois@h...	United States	6/11/1990
91	Shaury Säema	Employee			shaurydesäema...		
92	Shavonne Polly	Supplier		+131460 520 98 83	ShavonnePolly@hot...	United States	5/13/1986
93	Shela Andry	Customer		+133965 385 54 37	Shela_Andry@hotm...	United States	4/11/1993
94	Shelby Beauchesne	Customer		+127655 728 33 45	S_Beauchesne@yah...	United States	12/12/1975
95	Sheldon Mallen	Supplier	Vertigo Systems	+127056 175 97 53	Sheldon.Mallen@ya...	United States	4/22/1974
96	Shella Lammers	Customer		+134015 771 35 47	ShellaLammers93@...	United States	5/11/1993
97	Shenita Windholz	Customer		+139822 134 38 75	ShenitaWindholz@b...	United States	5/10/1987
98	Sherie Muntz	Customer		+132886 815 80 96	SherieMuntz990@h...	United States	4/8/1990

4.4 Expense Rules Configuration

Approval rules are defined in lookup configurations and determine when expenses require manual approval. These can be changed as per organizational policy.

Expense type	Cost per item
Hotel/Accommodation	70.00
Phone and internet bill	20.00
Car rental	50.00
Gas fuel	50.00
Relocation expenses	50.00
Training cost	100.00
Medical expenses	100.00
Courier charges	20.00
Parking charges	20.00
Flight Travel	200.00
Food and Beverages	100.00
Petrol/Diesel bill	50.00
Train Travel	70.00
Miscellaneous	50.00
Office supplies	20.00
WFH setup	100.00

5. Navigating the Application

Workspace Name: Smart Expense Manager

Sections available: User Expenses, Expense List, Contacts and Lookups

5.1 User Expenses

This section displays the monthly expense records for employees.

Each record represents one employee's expenses for a specific month.

Information includes:

- Employee
- Start Date
- End Date
- Expense Status
- Total Expense Amount

Users may also add expense records manually depending on their permissions.

User expenses

Number	Start date	End date	Employee	Expense status	Created on
EXP-035	4/22/2026	4/22/2026	Test	Pending	4/16/2026 8:34 PM
EXP-034	4/13/2026	4/22/2026	Creatio Maintenance	Pending	4/15/2026 5:42 PM
EXP-036	4/13/2026	4/22/2026	Creatio ALM Integration	Pending	4/17/2026 12:52 PM

EXP-034

Number: EXP-034
 Employee: Creatio Maintenance
 Start date: 4/13/2026
 End date: 4/22/2026
 Expense status: Pending
 Expense total: 0.00

APPROVAL HISTORY

Number	Approval	Expense type	Amount(\$)	Reason for approval	Remarks
LINE-005		Flight Travel	59.50		

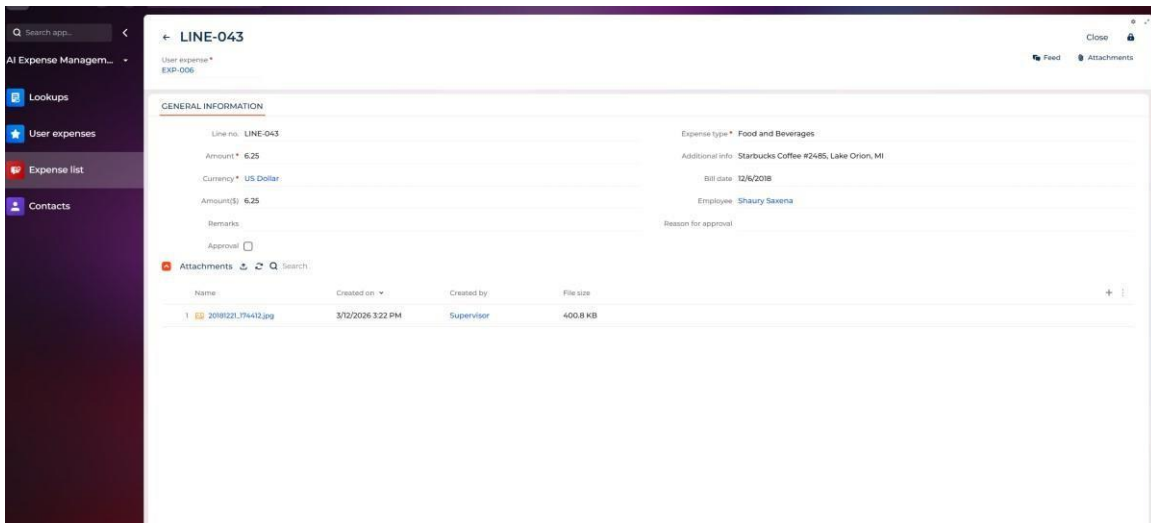
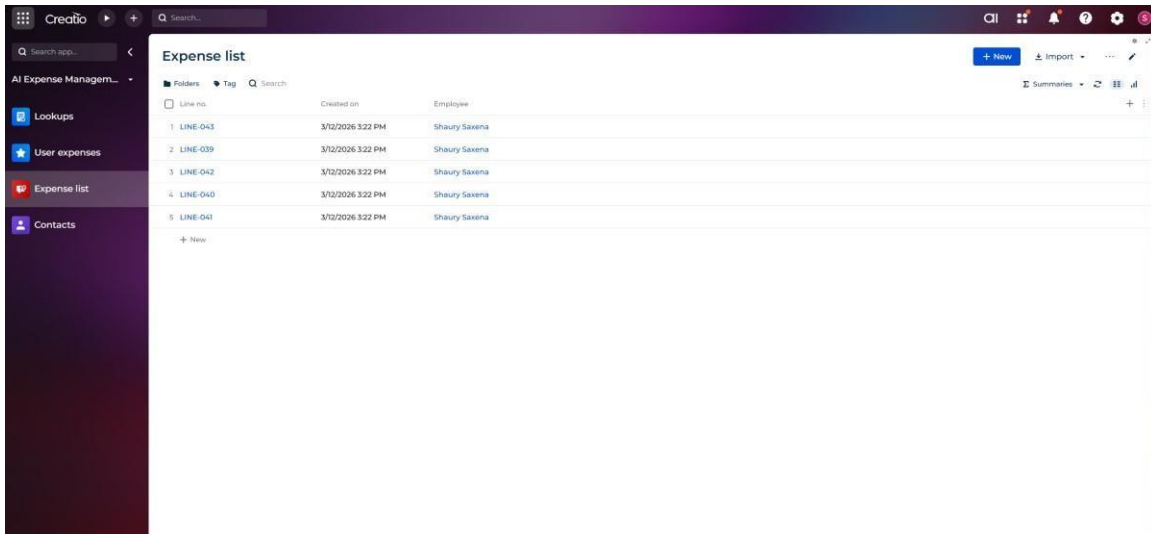
5.2 Expense List

This section contains individual expense bill entries.

Each entry represents a single bill or receipt.

These bills are automatically created when the system processes incoming emails with bill attachment.

Users can also manually create expense list entries if required.



6. Using the Application

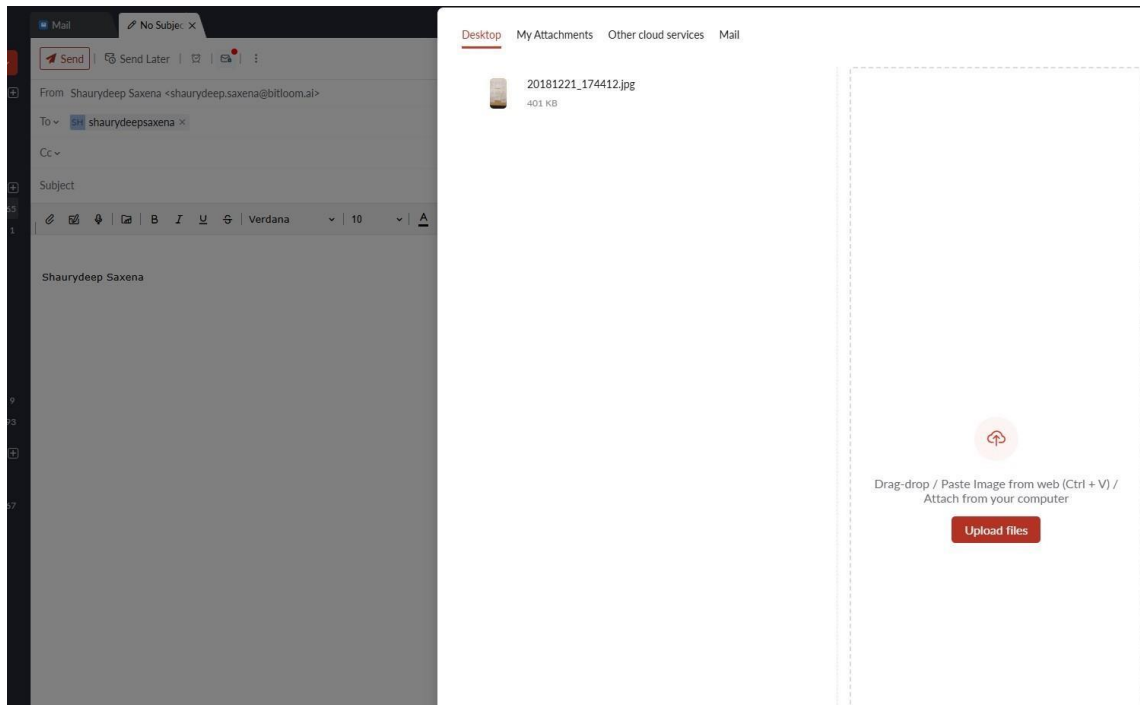
6.1 Automatic Expense Processing

Employees submit expenses by sending emails to the configured system email address.

Supported file formats:

- JPG
- PNG
- PDF
- Other common image formats

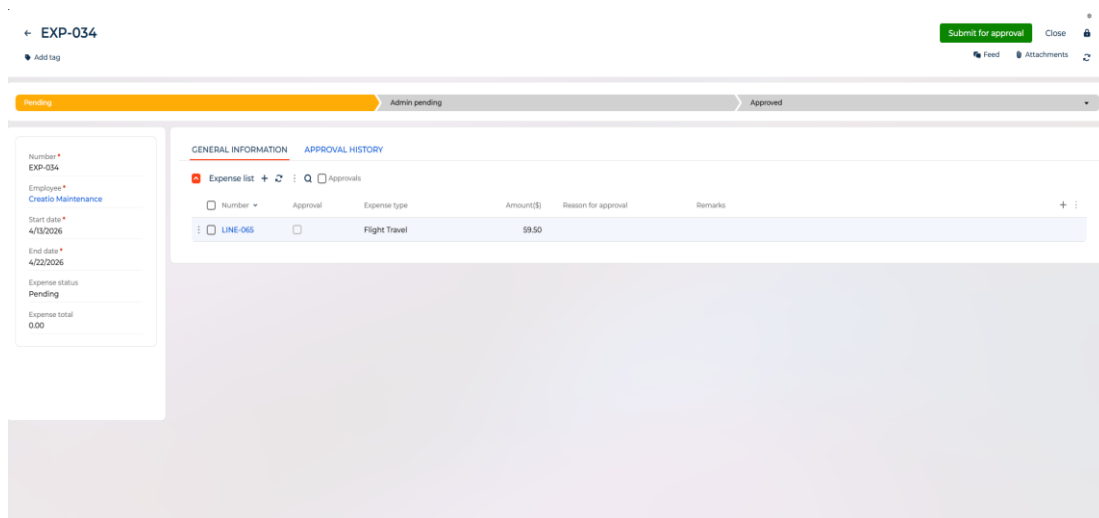
Emails may contain one or multiple bill attachments.



6.2 Automatic Expense Processing

When the system receives an email:

1. The system identifies the employee using the sender's email address.
2. The system checks whether a monthly expense record already exists.
3. If no record exists, a new monthly expense record is created.
4. All attached bills are stored in the Expense List section.
5. Bills are linked to the employee's monthly expense record.



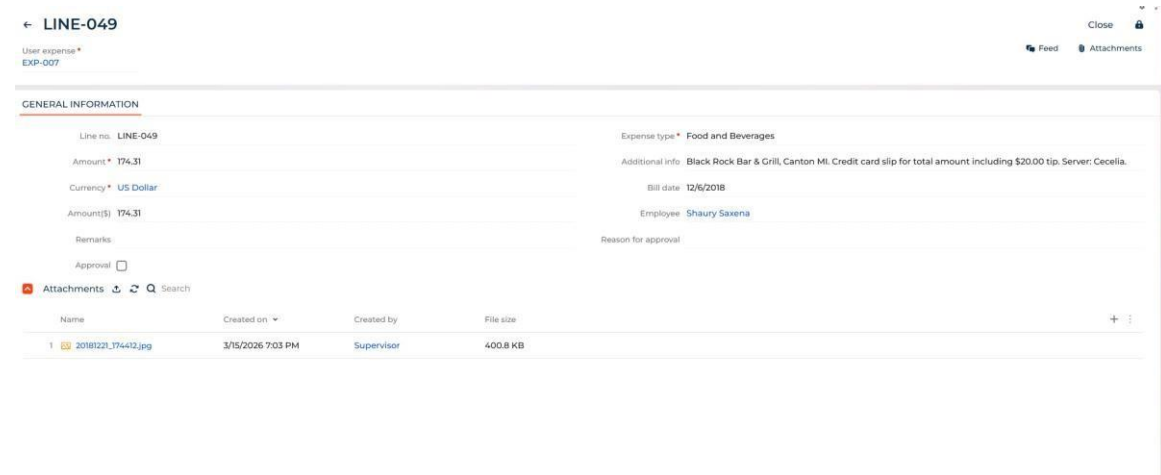
6.3 AI-Based Data Extraction

After bills are stored, the Gemini AI service processes the attachment.

It extracts key information such as:

- Expense amount
- Bill date
- Vendor information
- Expense type

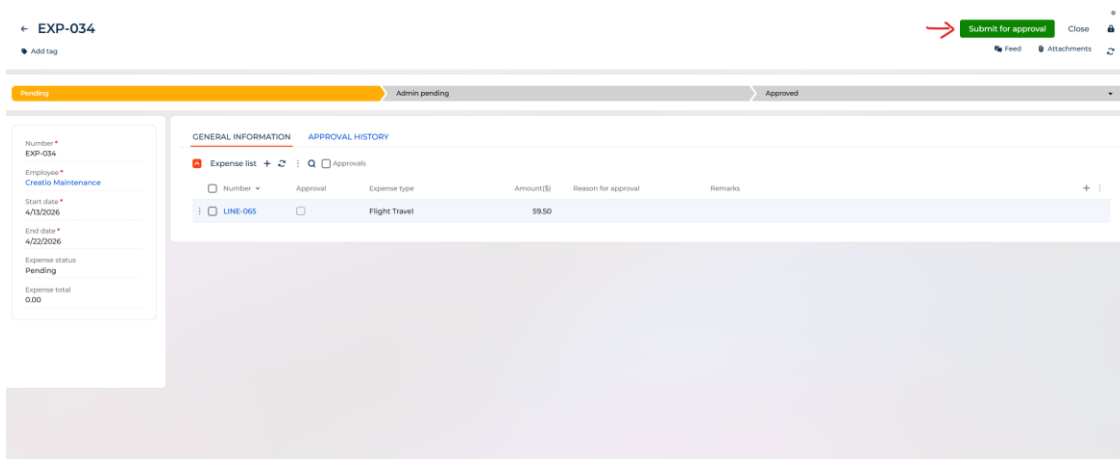
The extracted data is automatically populated into the expense list record.



6.4 Submitting Expenses for Approval

Steps:

1. Open the User Expenses record.
2. Review all expense line items.
3. Click Submit for Approval.



6.5 Approval Logic

The system evaluates rules defined in the Expense Type Lookup.

Examples:

- Expense amount exceeding the defined limit. -
- Bill date older than three months.

Automatic Approval:

If the expense satisfies all defined rules, it is automatically approved.

Manual approval:

Else the system will pass the record to Admin for manual approval.

7. Best Practices

- Send clear bill images or PDF documents.
- Ensure sender email matches employee contact email.
- Review expenses before submitting for approval.

8. Troubleshooting

If bills are not appearing in the system verify mailbox configuration and confirm the sender email exists in the Contacts section.

9. Support

For support regarding the Expense Management Application, you can contact Bitloom Support Team:

kunal.jr@bitloom.ai