HELP CENTER · SEPTEMBER 2026

Xplens User Guide

Everything you need to track expenses, scan receipts with AI, and get insight into your spending — in one place.

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01 Signing up

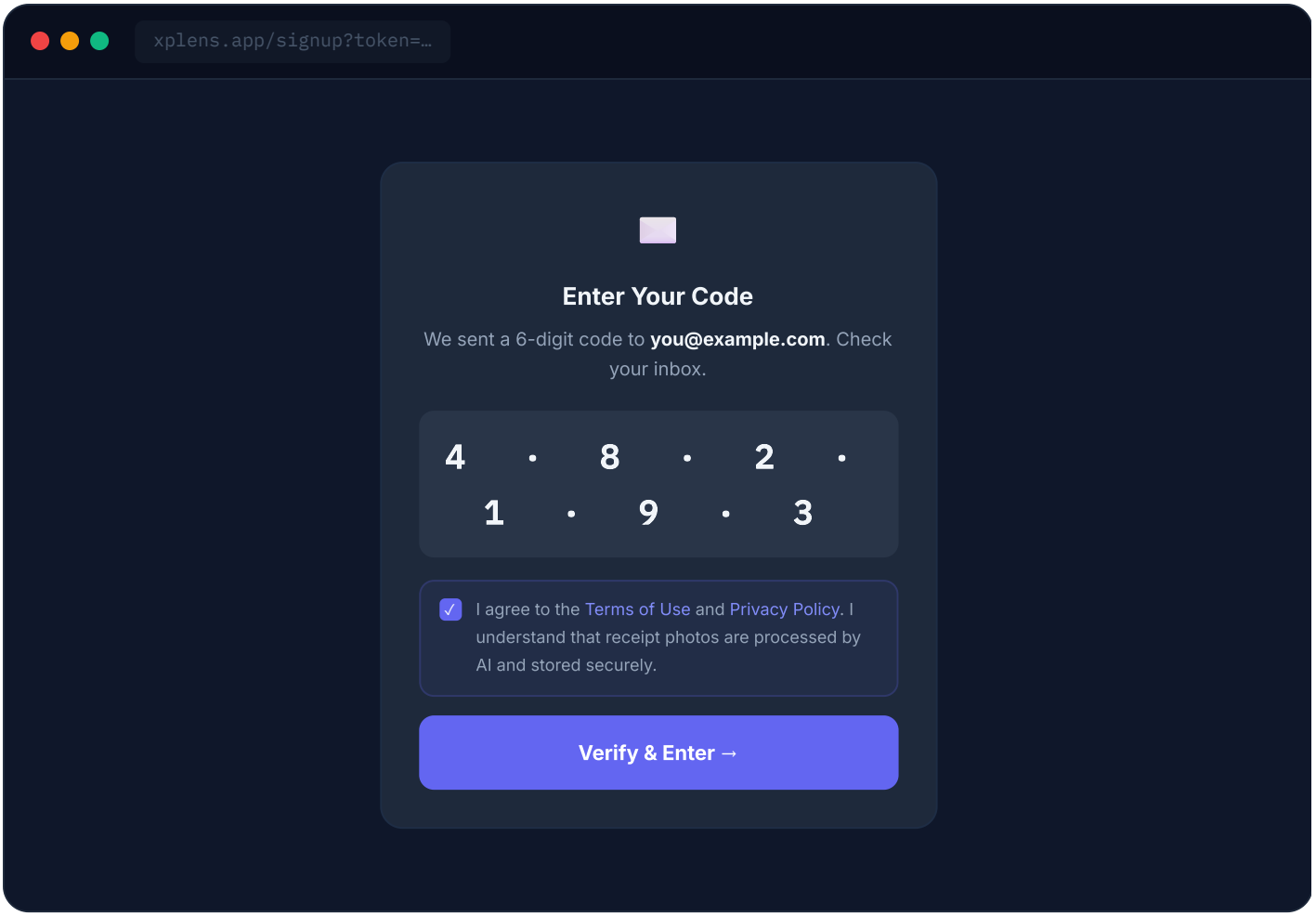
Xplens is an invite-only pilot. You receive an invitation email from your admin with a personal setup link. No app store download needed — everything runs in your browser.

Steps to create your account

1. **Open your invitation email**
   Look for "Xplens: account setup for [your name]" from noreply@xplens.app. Click the **Set Up Account** button — this contains your personal token and expires after 7 days.

2. **Request your verification code**
   Xplens sends a 6-digit one-time code to your email address. Check your inbox (and spam folder) for an email with subject "Xplens: your verification code".

3. **Enter the code & accept Terms**
   Type the 6-digit code, tick the Terms of Use checkbox, and tap **Verify & Enter**. Your account is now active.

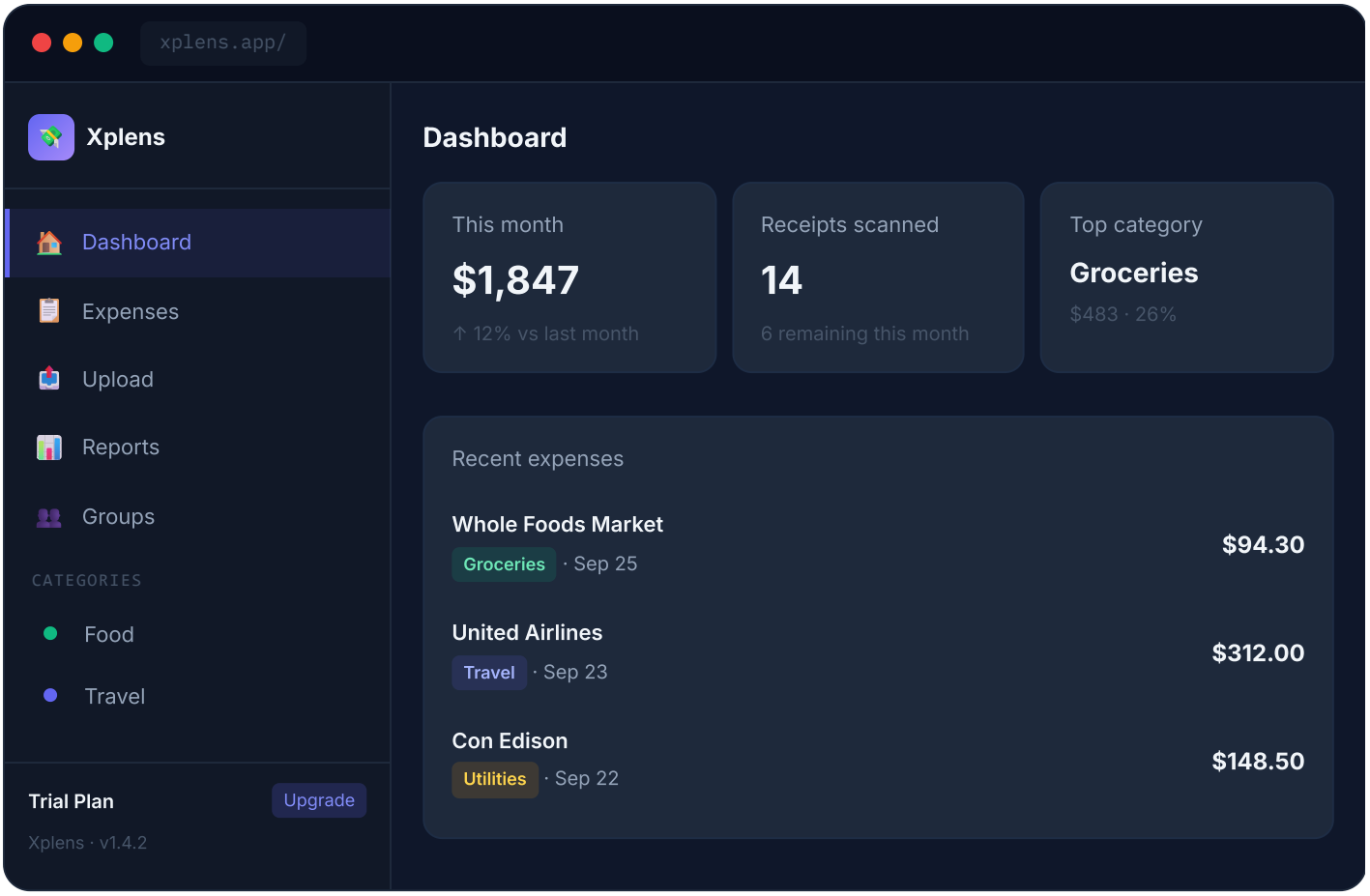


Tip: After signing in, you can set a password from your Profile page so future logins don't require a one-time code every time.

Note: If your invite link shows "Invalid Link", it has expired (7-day limit). Contact your admin to resend it.

02 Dashboard

The dashboard is your home base. It shows recent expenses, spending by category, alerts, and quick-access actions.



Sidebar navigation

The left sidebar shows your categories with spend totals. Click any category to filter expenses to that group. On mobile, tap ☰ to open the sidebar.

Plan badge

The bottom-left of the sidebar shows your current plan (e.g. **Trial Plan**) and an **Upgrade** button when you're on the trial. Tap it to view available plans.

03 Uploading receipts & statements

Xplens uses AI to read your receipts and bank statements and extract transactions automatically. No manual typing needed.

Supported file types

TYPE	FORMAT	MAX SIZE	NOTES
Receipt photo	JPG, PNG, HEIC, WebP	20 MB	Good lighting, all four corners visible
Receipt PDF	PDF	20 MB	No embedded JavaScript — most receipts are fine
Bank statement	PDF	20 MB	Silver / Gold plan required

1. **Go to Upload**

   Click **Upload** in the left sidebar, or drag a file anywhere on the page.

2. **Select your file**

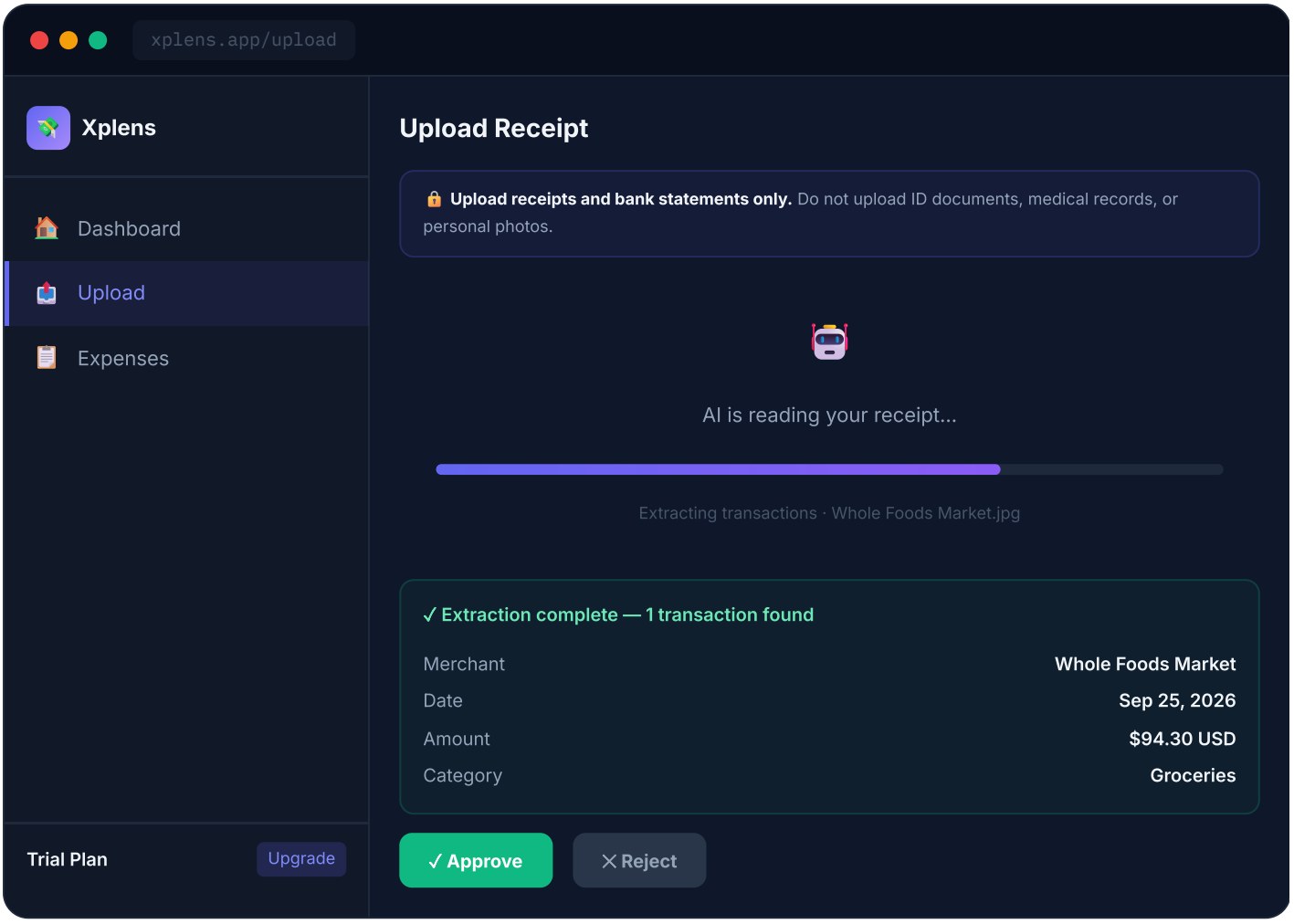
   Click "Choose a file" or drag and drop. A progress bar shows the AI extraction in real time — this takes 5–20 seconds.

3. **Review extracted data**

   Xplens shows you what it found: merchant, date, amount, currency, category, and line items. Check for any errors before approving.

4. **Approve or reject**

   Tap **Approve** to add the transactions to your expenses, or **Reject** to discard them. Approved data appears instantly on your dashboard.



Tip: For best results, photograph receipts on a flat, dark surface with the receipt fully in frame. Avoid glare from overhead lighting.

Duplicate detection: Xplens remembers file hashes. Uploading the same file twice will not create duplicate expenses.

04 Manual expense entry

For cash transactions or when you don't have a receipt, you can enter expenses manually in seconds.

1. **Click "Add manually" in the sidebar, or "Add transaction" on Receipts & Statements**
   Fill in the merchant, amount, date and currency. Manual entries show a "Manual" source in your list and never use up your receipt allowance.

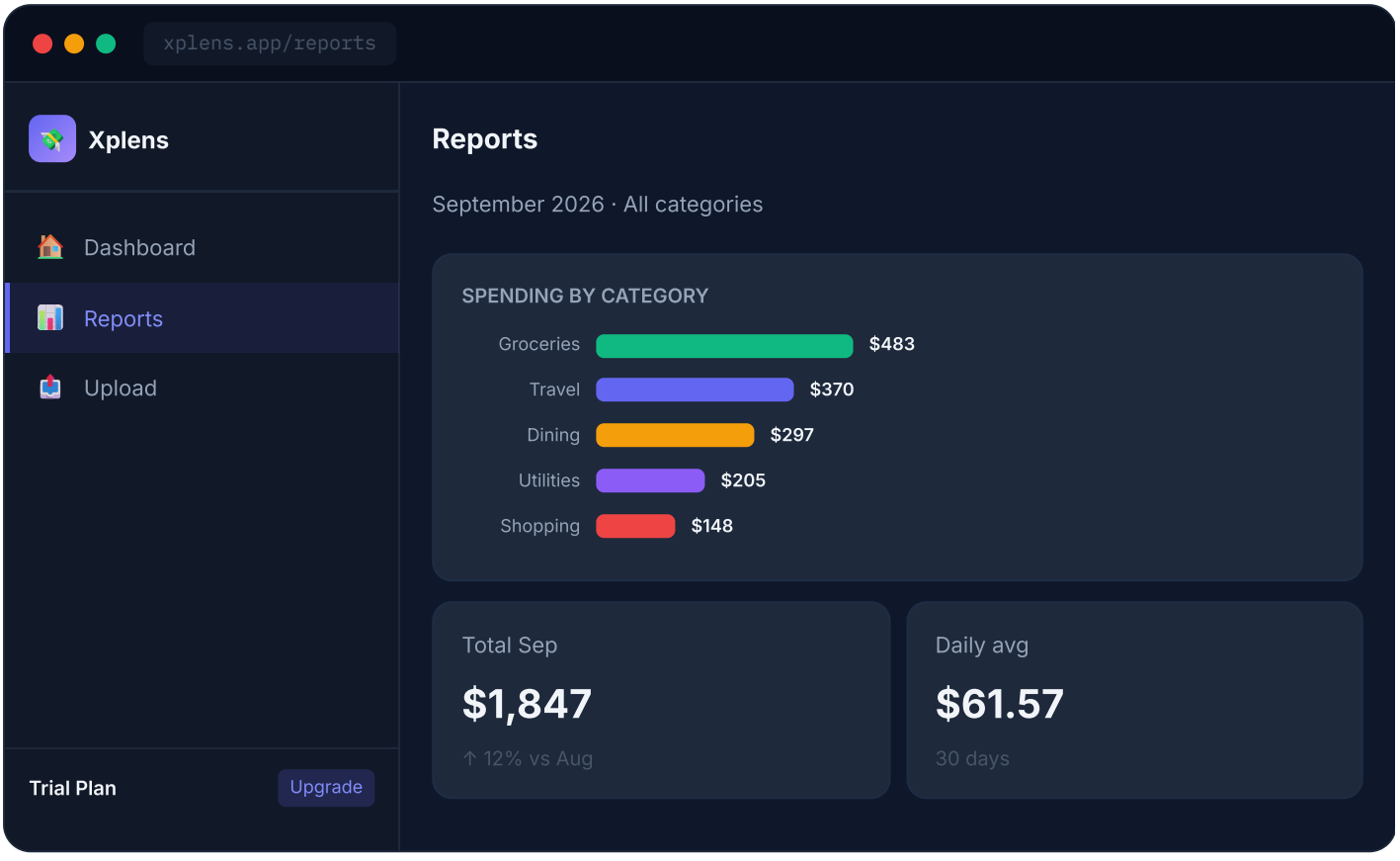
2. **Choose a category**
   Pick from Groceries, Dining, Travel, Utilities, Shopping, Healthcare, Entertainment, or Other. Xplens will suggest a category based on the merchant name.

3. **Add optional details**
   You can add a payment card (e.g. "Chase Visa ••4521"), tags (comma-separated), and notes. These help with filtering later.

> **Multi-currency:** Select any currency (USD, INR, GBP, EUR...) — Xplens converts to USD automatically using live exchange rates for reporting.

05 Reports & insights

The Reports page shows where your money went — broken down by month, category, merchant, and payment card.



Available report views

VIEW	DESCRIPTION
Monthly summary	Total spend per month with month-over-month change
Category breakdown	Horizontal bar chart of spend by category
Top merchants	Ranked list of where you spend most
Card spend	Spend by payment card (requires payment_card field on expenses)
Currency view	Original-currency totals alongside USD equivalent

> **Filter tip:** Use the category links in the sidebar to scope any report to a single spending category.

06 Family & groups

Share expenses with your family or team. Group members see each other's expenses in a combined view. Available on Silver and Gold plans.

1. **Create a group**
   Go to **Groups** in the sidebar and click **Create Group**. Give it a name (e.g. "Sharma Family").
2. **Share your invite code**
   Each group has a unique invite code. Share it with family members — they paste it on their Groups page to join.
3. **View shared expenses**
   Once in a group, the dashboard and reports aggregate everyone's expenses. You can filter to show only your own by toggling "My expenses only".

> **Privacy:** Individual expense notes are only visible to the person who added them. Amounts and categories are shared with the group.

07 Plans & upgrade

Xplens offers four plans. New accounts start on a 30-day Trial (20 receipts per month). Upgrading unlocks higher limits and additional features.

FEATURE	TRIAL	BRONZE	SILVER	GOLD
Receipts / month	20	50	100	200
Manual entry	✓	✓	✓	✓
AI receipt scan	✓	✓	✓	✓

FEATURE	TRIAL	BRONZE	SILVER	GOLD
Reports	✓	✓	✓	✓
AI insights & alerts	—	✓	✓	✓
Family groups	—	—	✓	✓
Bank statement scan	—	—	✓	✓
Google Drive sync	—	—	✓	✓
Monthly price	Free	$2.99	$4.99	$8.99

To upgrade, go to **Upgrade Plan** from the sidebar or email support@xplens.app. Online payments are coming soon.

08 Frequently asked questions

My verification code didn't arrive. What do I do?

Check your spam/junk folder for an email from noreply@xplens.app. If it's not there after 2 minutes, click "Start over" on the login page to request a new code. Codes expire after 10 minutes.

Can I use Xplens on my phone?

Yes — xplens.app is fully responsive and works in any mobile browser. A native iOS and Android app is in development.

What currencies are supported?

Xplens supports all major currencies. USD and INR are the most commonly used. All amounts are stored in their original currency and converted to USD for reporting using rates updated daily.

Is my data secure?

Yes. Files are stored in encrypted Amazon S3 buckets. The database uses RDS PostgreSQL with encryption at rest. Connections are HTTPS-only. AI extraction uses Anthropic's API — raw document content is not retained by Anthropic after each API call. See our Privacy Policy.

How do I delete my account?

Visit xplens.app/delete-account. Your account and all data are permanently deleted within 30 days.