

Expenses Online – Raising An Expense Claim Video Transcript



The core feature of the system is raising expense and mileage claims, these are handled as two separate claims as some employees may not need access both. In this example, we will look at raising an expense claim. As you will see, the process is very simple and user friendly. In front of us we can see an empty claim which is awaiting receipts to be uploaded, we can upload one or multiple receipts against a single claim, as the system will not allow unsupported claims to be submitted.

When a receipt has been uploaded we can enter the claim lines as they appear on the receipt document which will be subtotaled together. When we have entered all the necessary claim lines we save the receipt against the claim. Users can modify or add to claims whilst they are pending submission meaning they can raise claims on the go.

The claim is now ready to be sent for approval where it will be sent to a designated approval user based on the department code for each claim line.