Expenses Process

The expenses function allows you to process claims for reimbursement

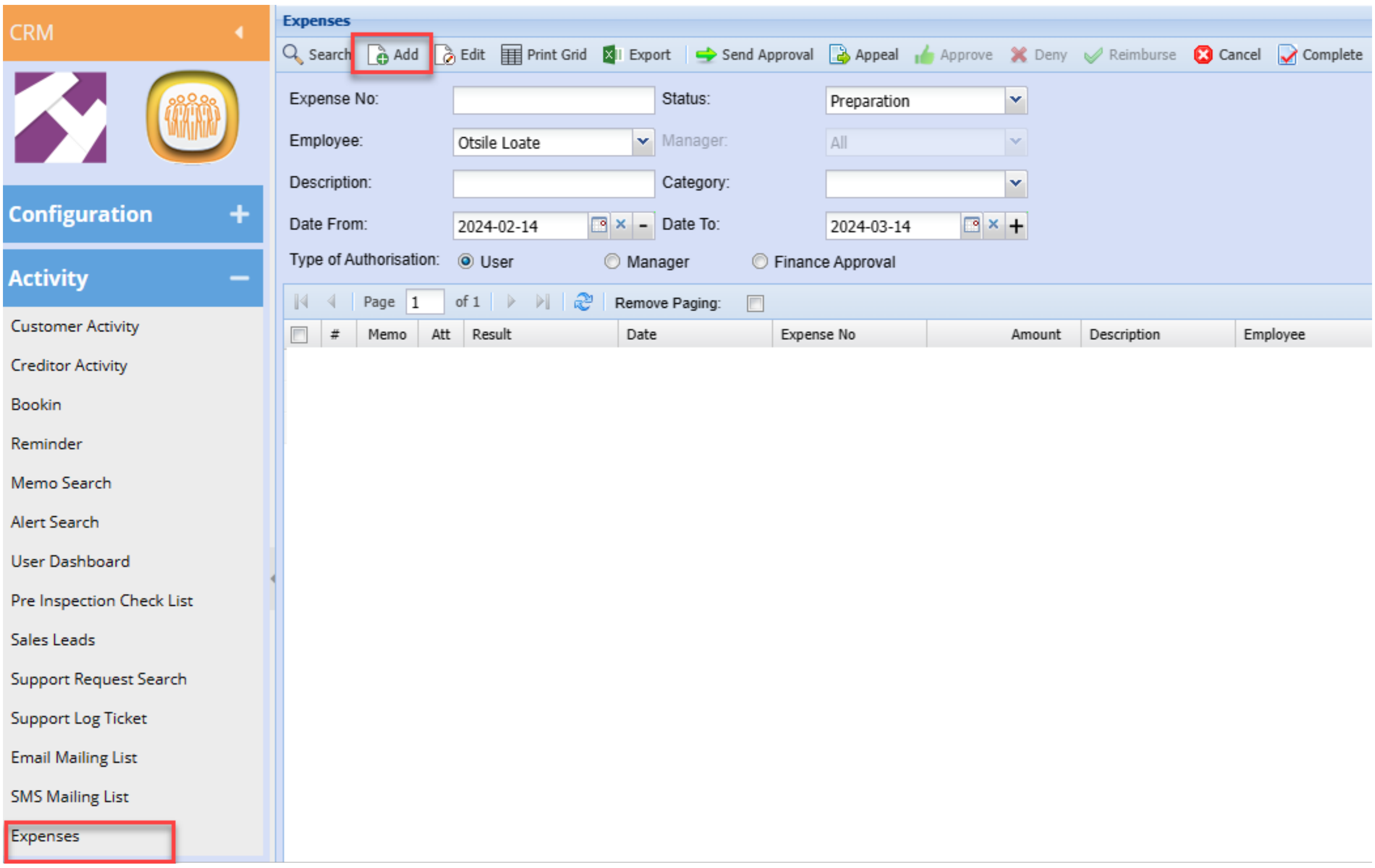
Benefits of Expenses:

- Accurate and timely expense claim routing
- Increase in organisational efficiency
- Faster expense processing
- Employee satisfaction
- Expense processing costs cuts
- Reduce errors and mistakes done by manual claim process
- Increased expense claim and transparency

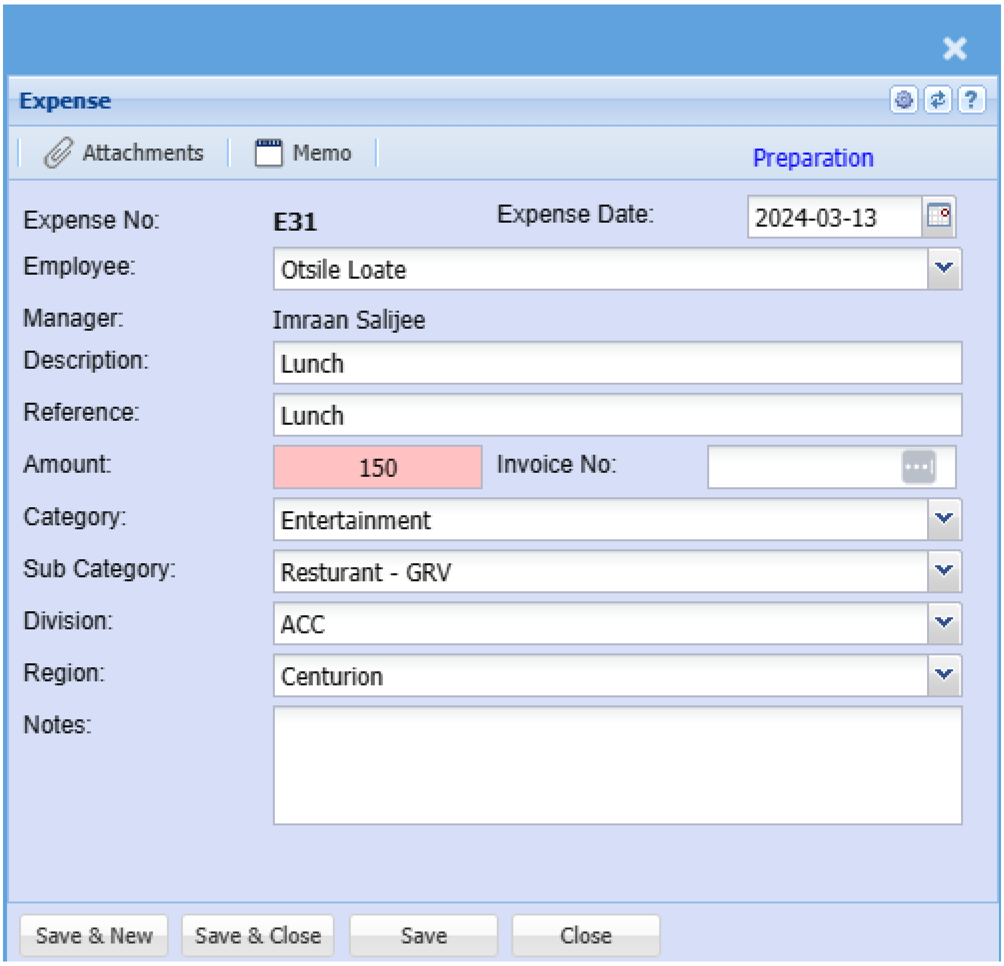
User

Go to CRM Module> Activity> Expenses

To add a new Expense Click add or click search to see a list of existing Expenses



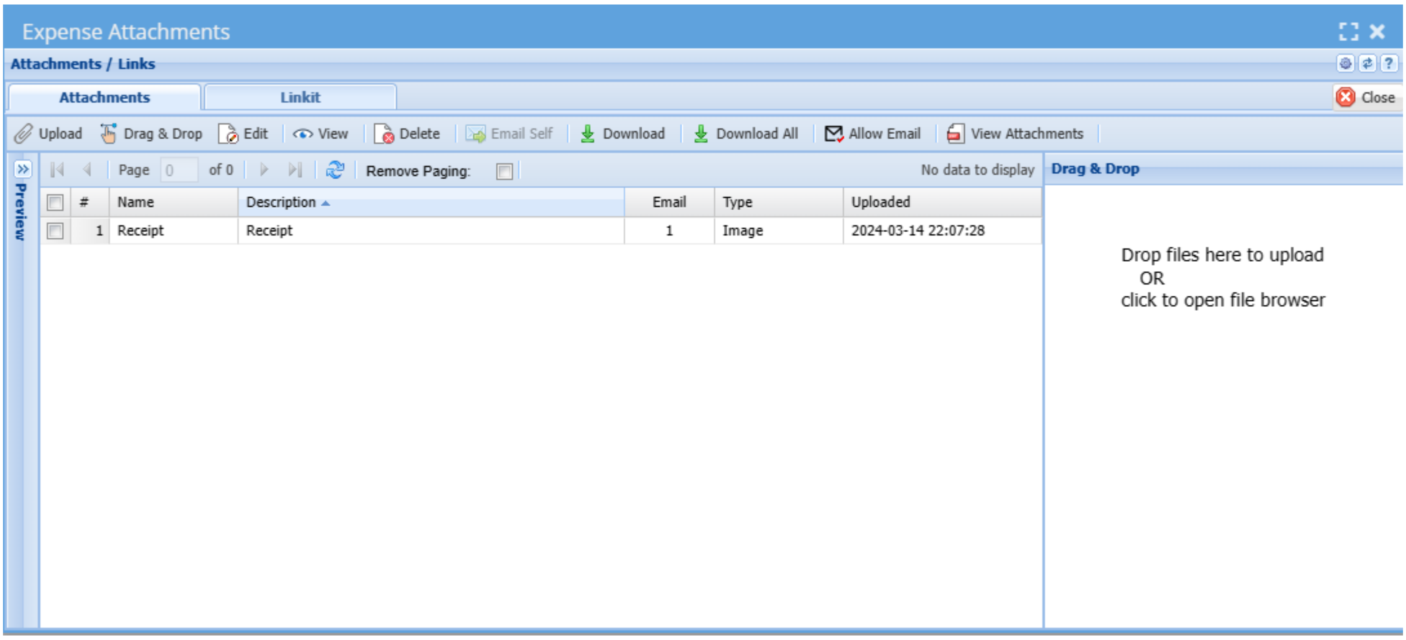
After clicking Add a screen below will appear, Add all necessary information as shown below



Employee	Select the employee who is claiming on the dropdown list
Manager	The assigned approver will populate this field
Description	Enter claim description
Reference	Enter Claim reference
Amount	Enter the expense amount
Category	Select Category from the drop-down selection
Sub Category	Select the correct sub-category if there is more than one
Division	Enter division
Region	Enter region
Notes	Add detailed additional notes if applicable
Expense Date	Enter the correct date for the claim

Invoice No	Enter the supporting document number if you have This is not compulsory

Once you are done capturing you can load the receipt as proof on the attachments

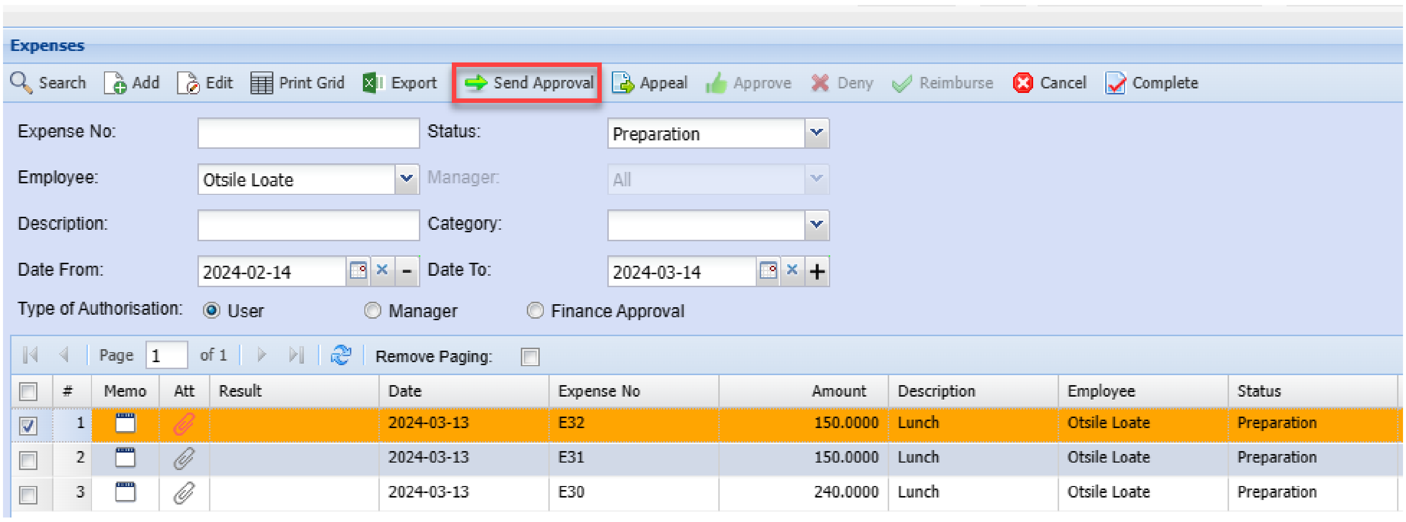


Once the information has been captured and all receipts are loaded then save and close your expense claim,

Go back to the grid

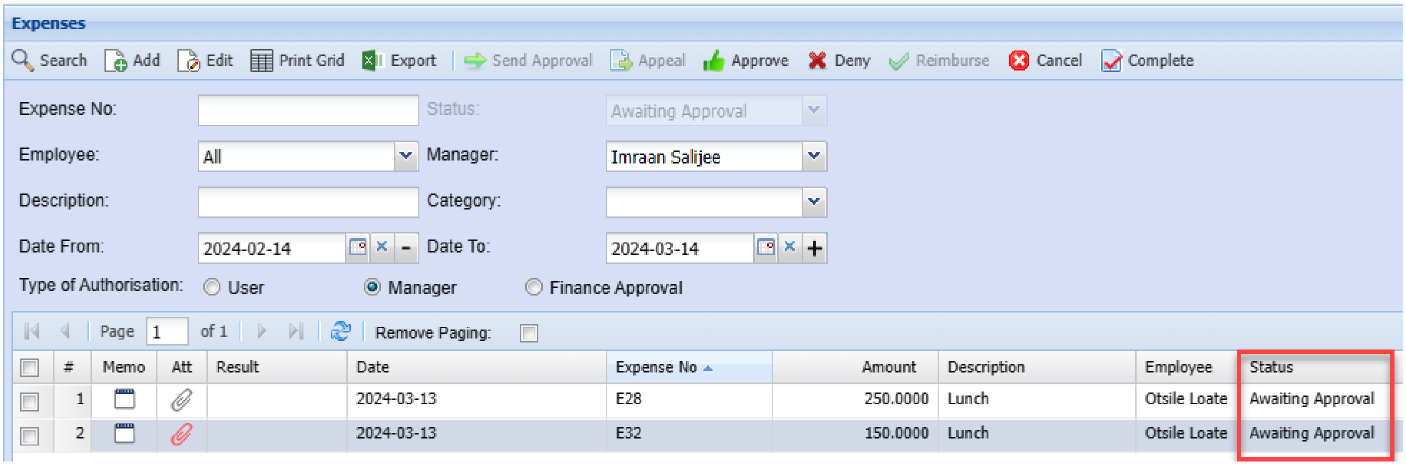
Select the expense claim from the grid and click Send Approval

This will email the approver (Manager) a request to review and approve the expense claim



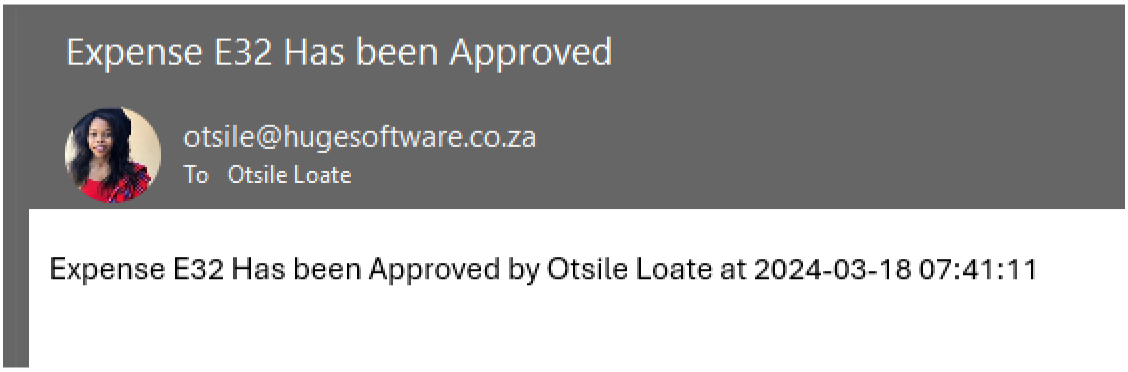
Manager

The status of the expense claim will now change to awaiting approval



The Manager can then approve or deny the claim,

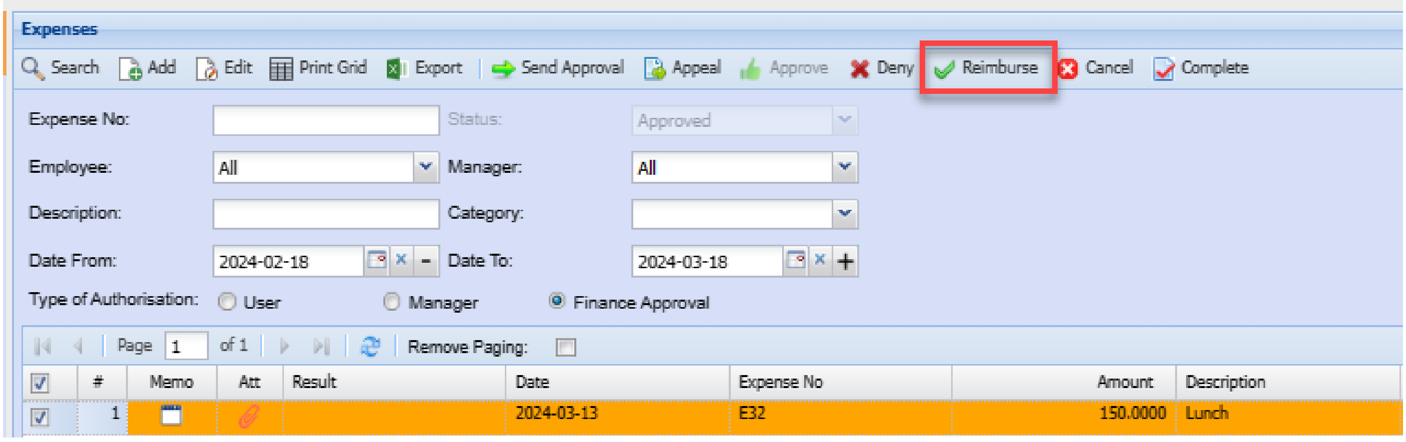
Once the manager approves the sales rep will receive an email confirming that the claim has been approved.



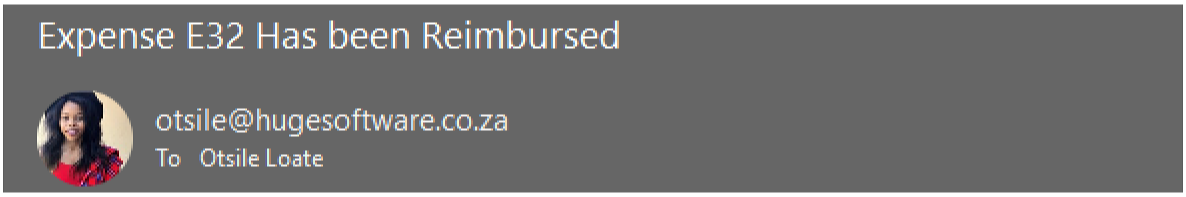
Finance Approval

The finance manager will then Appeal, Deny or Reimburse the expense claim.

Once the expense claim is reimbursed a journal will automatically be created



Once the fiance approval makes the decision the sales rep will receive an email informing them if they claim is going denied or going to be reimbursed.



Expense E32 Has been Reimbursed by Otsile Loate at 2024-03-18 07:46:14

Revision #5
Created 14 March 2024 07:27:29 by Otsile
Updated 18 March 2024 05:51:12 by Otsile