

Expense

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Expense Window Search

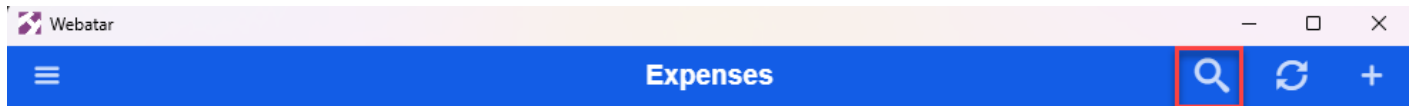
Search Button

To search for an existing expense

You can remove the date and description blank and search by status only. This will bring up all expenses for the status that you are searching by.

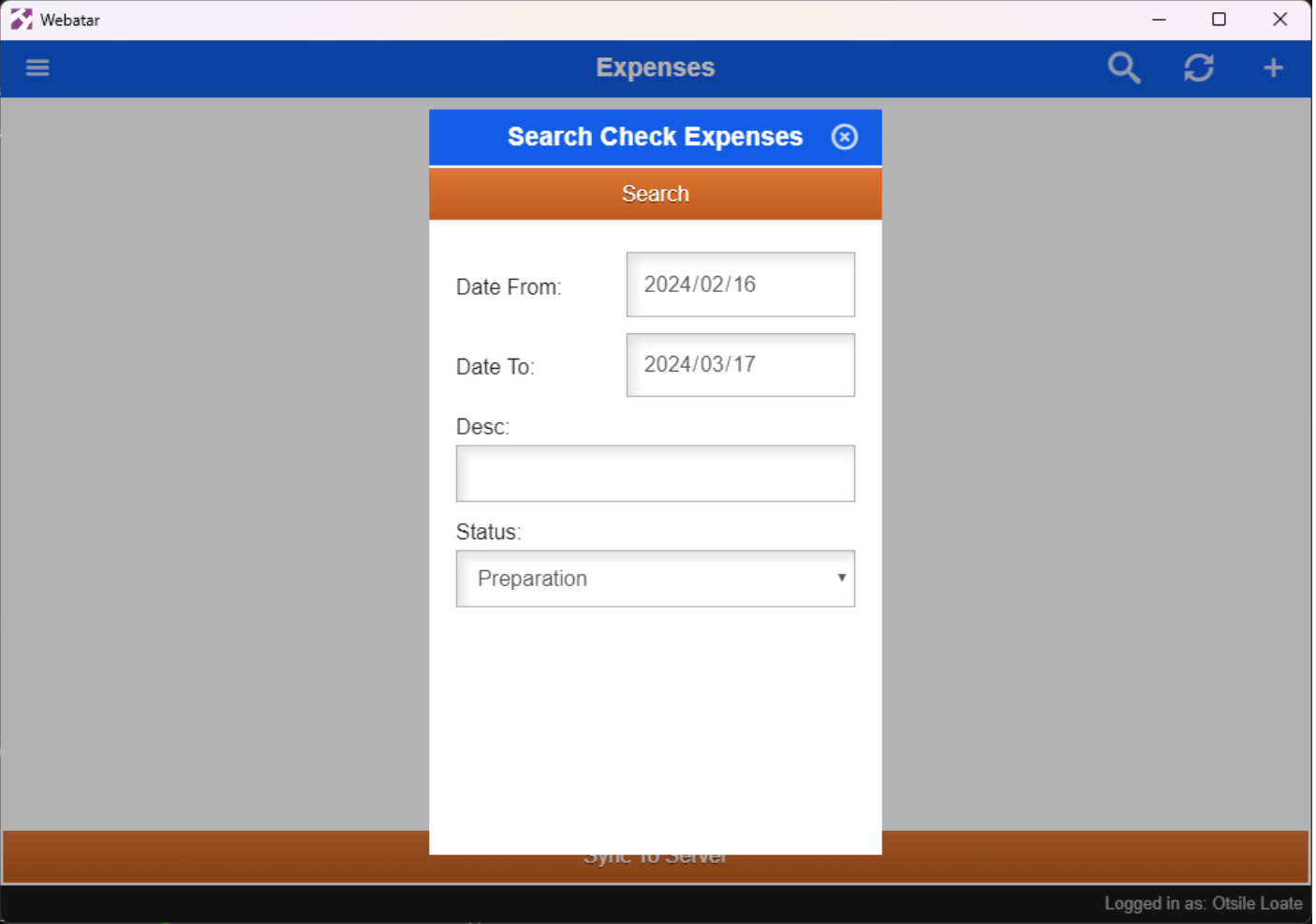
Go to Financial > Expenses then click on the search icon

As shown below:



After clicking on the search icon the screen below will appear

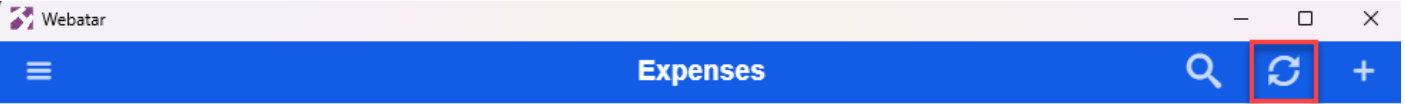
The search button allows you to search for specific expenses based on the search criteria and the status



Date From	From which date do you want to view your expenses
Date To	Enter until which date you want to view your expenses
Description	Search for Expense by capturing the description of the expense that you are looking for
Status	Select status on the drop down selection
Search Button	Click this button to search based on the criteria that you have selected

Refresh Button

Refresh button allows you to see a list of all expenses under preparation status



After clicking a refresh button the screen below will appear:

Webatar

Expenses

Last 7 Days

2024-03-13 – 150

Lunch

Entertainment – Resturant

Preparation – E31

Status: **Online**

Error Message:

2024-03-13 – 240

Lunch

Entertainment – Resturant

Preparation – E30

Status: **Online**

Error Message:

Sync To Server

Logged in as: Otsile Loate

You can open the one that you want to edit or that you want to send for approval.

To add or edit expenses successfully [click here](#)

New Expense

Adding new expenses

Please see the steps below to successfully add a new expense

1. Click + icon to add a new expense
2. Capture all information as explained in this manual
3. Click on the tick on the top right to save the expense
4. Scroll left to update division and region and all details
5. Scroll left again to attach a slip or invoice
6. Once you have completed all the stages you need to click on the back arrow to a screen that will inform you to sync your expense

Click on the Plus + button to add a new expense

Always click on the tick box to save the expense before moving on to the other menus

After attaching a document or image click on the back arrow so you only sync the expense once if you sync the attachment on its own and send the document for approval the system does not send the correct link to the approver and it will not allow the approver to open the document

Webatar

Expenses

←

✓

Appeal

Send Approval

Amount:

|150,00

Date:

2024/03/13

InvoiceNo:

Category:

Entertainment

Sub Category:

Resturant

Description:

Lunch

Reference:

Lunch

Logged in as: Otsile Loate

Amount	Enter the expense amount
Expense Date	Enter the correct date for the claim
Invoice No	Enter the supporting document number if you have This is not compulsory
Category	Select Category from the drop-down selection
Sub Category	Select the correct sub-category if there is more than one
Description	Enter claim description
Reference	Enter Claim reference
Notes	Add detailed additional notes if applicable

Once complete

Webatar

— □ ×

←

Details

Status:	Preparation
Expense No:	E31
Manager:	
Region:	Centurion ▼
Division:	ACCOUNTING ▼

Division	Enter division
Region	Enter region

After adding division and region scroll left again to add your till slip or invoice

Once done adding an image

Click on the back arrow

A screenshot of a web browser window. The address bar shows 'Webatar'. The page title is 'Images'. The main content area is a large gray rectangle with a small icon of a picture with a mountain and a sun, indicating a missing or placeholder image.

The back arrow which shows the screen below will allow you to sync.

After, syncing your expense go back into your expense then send it for approval

Webatar

Expenses

Last 7 Days

2024-03-13 – 150

Lunch

Entertainment – Resturant

Preparation – E31

Status: Needs Sync

Error Message:

Sync To Server

Logged in as: Otsile Loate

After, syncing click on it to send for approval as shown below:



Expenses



Appeal

Send Approval

Amount:

150,00

Date:

2024/03/13

InvoiceNo:

Category:

Entertainment ▼

Sub Category:

Resturant ▼

Description:

Lunch

Reference:

Lunch

