

Add an Expense

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General Details

Mileage

Meal

Hotel

Daily Allowance

Fixed Allowance






Permissions

You will require the following permissions:

- The relevant item role that allows you to claim these expense types.

Note: You may be able to complete extra fields which are not included as part of this guide. The fields have been configured specifically by your organisation and if you require guidance with them, contact your local administrator.

1. Navigate from the Home page to **My Claims | Current Claims**. Within the Current Claims page, you will see a list of your claims which have yet to be submitted.

Current Claims					
 	Claim Number ▲	Claim Name	Claim Description	Number of Items	Claim Total
  3		Claim1		2	£85.03
  5		Claim3		1	£150.00

2. Click on a current claim you would like to add an expense to and click **New Expense**. This will open the Add Expense page.

Page Options
New Expense
Claim List
Change View
Print
Submit Claim

3. The Add Expense page will allow you to record the specific details of the expense you have incurred. Begin by completing the **General Details** of the expense:

Field	Description
Date	Enter the date that the expense was incurred.

Field	Description
Claim	The Claim field will default to the claim that you have navigated through to get to the Add Expense page. You can click the Claim field to add this expense to another current claim, if applicable.
Organisation	Specify the organisation that the expense was incurred for. For example, if you are adding a parking ticket expense for visiting a customer, enter the name of the company that you visited. Click in the Organisation field and type the organisation that you want to add. If the organisation you have typed is not present within your system, a pop-up will appear asking you if you'd like to save. Alternatively, click the magnifying glass to search all existing saved organisations within your system.
Reason	Select the reason for incurring the expense by clicking on an option from the list of available reasons.
Country	Select the country that the expense was incurred in. This will default to the Primary Country set within your employee record.
Currency	Select the currency that was used to pay for the expense. This will default to the Primary Currency set within your employee record. If you select another currency, the exchange rate will display against your Primary Currency. Your system configuration will determine whether or not you can edit this exchange rate.
Department	If required, select a department to assign the expense to.
Cost Code	If required, search for a cost code to assign the expense to.
Project Code	If required, select a project code to assign the expense to.
Other Details	Provide any other details such as a brief explanation of the claim.

4. Each expense that you are permitted to claim for is available under the **My Expense Items** sidebar. Select the check box next to each expense that you wish to reclaim.

My Expense Items

Select an item below to add it to your expense sheet:

- Additional Mileage
- Breakfast (Demo)
- Bus Fare
- Business Miles
- CC
- Congestion Charge
- Courier
- Course Fees (Exter...
- Dinner
- Drinks
- Evening Meal (demo)
- Flight (demo)
- Food
- Gifts to Staff
- Hire Car / Pool Car ...
- Hotel
- Hotel Accommodati...
- Hotel Outside Lond...
- Internet Access
- Landline Phone Calls

Note: If you add several expenses at once, the General Details entered will be saved against each of those expenses.

5. Once you have selected an expense, the page will display the Specific Details related to that expense.

The tabs at the top of this article will provide you will more detail about how to input different types of expense such as Mileage, Meals and Hotels.