

# Remind Approvers of Pending Claims

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## Permissions

You will require an Access Role with the following permissions:

- General Options

In order to automatically remind approvers that they have outstanding claims which they need to action, certain options must be configured. When configured, the reminder emails will be sent to approvers who have outstanding claims every **X** days (depending on the frequency entered). Follow the steps below to configure these options:

1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.
2. Scroll down to the **Email Reminders** section.
3. Select the check box to **Remind approvers of pending claims**. Selecting this option will display the **Reminder Frequency** field.
4. Enter the frequency, in days, which you would like the email reminders to be sent (between 1 and 99). This will send a reminder email to the approver every X days. For example, if you configure this option on Monday and set the number as 7, the approver will receive a reminder email every Monday until the claims are actioned.

### Email Reminders

Remind approvers of pending claims



Reminder frequency (days)\*



5. Click **Save** at the bottom of the page to activate this feature and store the settings.
  - Upon clicking **Save** on this page, the approvers who have outstanding claims will receive their first email reminder. The following reminders will then be determined by the frequency which has been set. If this option is already active and the frequency is changed, Assure Expenses will check the new frequency and automatically work out whether it needs to send out a new email reminder.
  - The email which is sent to approvers can be customised within the Notification Templates menu located under **Administrative Settings | Tailoring | Notification Templates**.

Dear Dave

The following claim(s) are awaiting your approval:

<b>Check Expenses</b>	<b>Claimant</b>	<b>Claim Name</b>	<b>Claim Total</b>	<b>Claim Submitted On</b>
<a href="#">Check Expenses</a>	Smith, Mrs Jane	JSmith1	£17.18	12/10/2015
<a href="#">Check Expenses</a>	Harris, Mrs Angela	AHarris20	£12.29	30/07/2016
<a href="#">Check Expenses</a>	Harris, Mrs Angela	AHarris21	£12.30	30/07/2016
<a href="#">Check Expenses</a>	Harris, Mrs Angela	AHarris22	£39.99	03/08/2016

Please logon to Expenses and review the claim(s) as soon as possible.

Regards,

Expenses Administration

- Claims will not be included in the email reminder if they include a returned Expense Item. If this is the only claim which requires a reminder, the email will not be sent.
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