Expenses Mobile - Manage my Advances

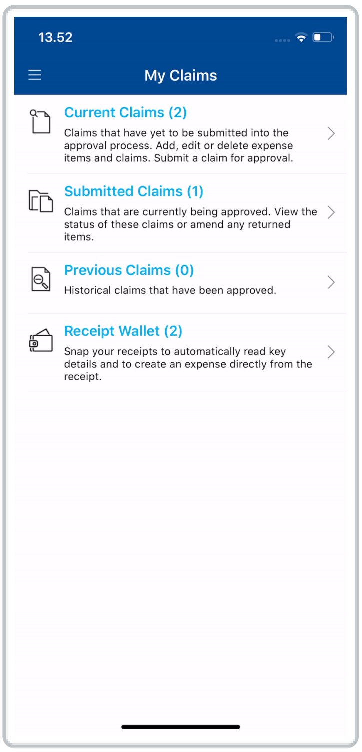
Last Modified on 03/12/2019 2:56 pm GMT

Permissions

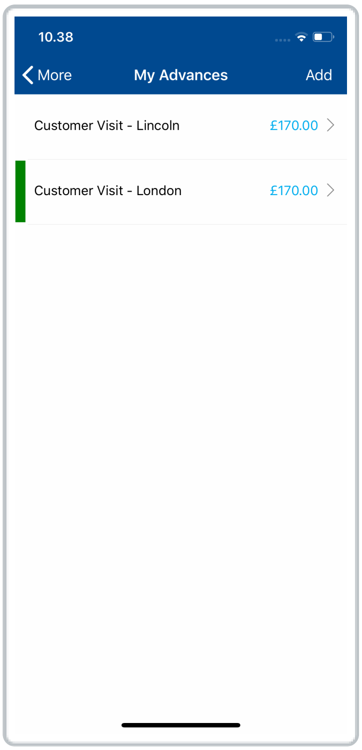
You will require the following permissions:

- In order to access the 'My Advances' menu you will require a Signoff Group to be set for 'Advances' within your employee record

1. Log into Expenses Mobile. Tap the **Hamburger Menu** ☰ and then tap **More**.



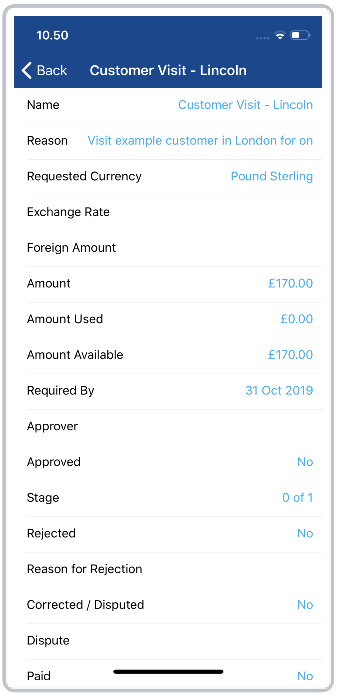
2. Tap **My Advances**. This will display a list of all your existing advances created within Expenses, however, settled advances will not be displayed.



- The status of an advance will be shown with a colour indicator:
  - Green Indicator - The advance has been paid.
  - Red Indicator - The advance has been rejected/returned.
  - No Indicator - The advance is pending/awaiting approval.
- You can view further details, edit or delete an advance:

Platform	Instruction
iOS	View advance details: Tap on the advance. Edit an advance: Swipe left on the advance and then tap **Edit**. Delete an advance: Swipe left on the advance and then tap **Delete**.

Platform	Instruction
Android	View advance details: Tap on the advance and then tap **View Details**. Edit an advance: Tap on the advance and then tap **Edit**. Delete an advance: Tap on the advance and then tap **Delete**.



Note: You will only be able to edit or delete an advance if it has been rejected or returned to you. The image above is the 'View advance details' option.

The details which may be displayed when viewing an advance are described below:

Field	Description

Field	Desceription
Name	Tap the claim that you want to add an expense item to. This will direct you to the **Claim Details** page for the claim.
Reason	Tap the claim that you want to add an expense item to and then tap the **Expense Items** button. This will direct you to the**Claim Details** page for the claim.
Requested Currency	Tap the claim that you want to add an expense item to. This will direct you to the **Claim Details** page for the claim.
Exchange Rate	Displays the exchange rate if the claimant requests a currency which is different to your organisation's base currency. **Note:** An exchange rate must be configured between the base currency and the requested currency in order to request the advance.
Foreign Amount	Displays the amount requested in the foreign currency if the requested currency is different to your organisation's base currency.
Amount	Displays the amount requested in the base currency. If the requested currency is different to your organisation's base currency, this will display the converted amount.
Amount Used	Displays the amount of the advance which has been used against expense items.
Amount Available	Displays the amount of the advance which has not been used yet and is still available to be used.

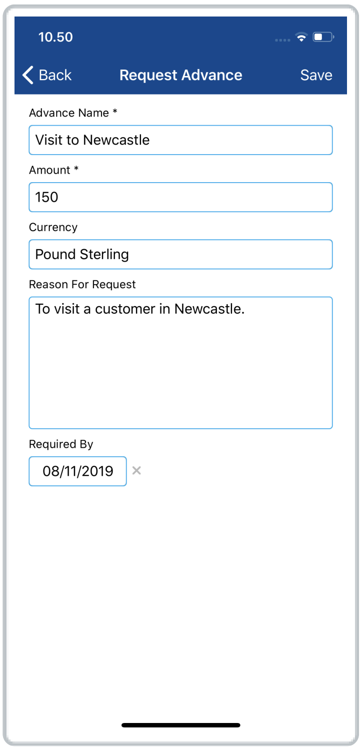
Field	Desceription
Required By	The date which the claimant has requested that advance is provided by.
Approver	Displays the name of the user is responsible for approving the advance.
Approved	Shows whether the advance has been approved or not.
Stage	Displays which signoff stage the approval is at.
Rejected	Shows whether the advance has been rejected or not.
Reason for Rejection	If the advance has been rejected, this displays the approver's reason for rejection.
Corrected / Disputed	Shows whether the advance has been corrected/disputed and sent for approval or not.
Dispute	If the advance has been previously rejected and disputed by the claimant, this displays the claimant's reason for dispute.
Paid	Shows whether the advance has been paid or not.
Issue Number	A unique number which is assigned when the advance has been moved from 'approved' to 'paid'.
Settled	Shows whether the advance has been settled or not.

Requesting an Advance

1. From the **My Advances** screen, tap **Add** (+).

2. Enter the following details:

Field	Description
Advance Name*	Enter the name for this advance.
Amount*	Enter the amount required for this advance.
Currency	Select a currency from the list of active countries. This will be pre-populated with the primary currency from within your employee record.
Reason For Request	Enter the reason why you require this advance.
Required By	Select the date which you require this advance by.



3. Tap Save. This will create the advance and send it to the approver set within your advances signoff group.