Advances - Feature Overview

Overview

The advances feature allows your organisation to provide payment to claimants prior to expenses being incurred. This can be hugely advantageous in helping employees manage their outgoings if that are anticipating a large outlay or have a high amount of business expenditure on a regular basis.

Claimants can request an advance, specify an amount along with a reason and submit for approval. Approvers can then approve/reject the advance or alter the amount provided and issue a response to the claimant's justification. Once approved, the advance can still be modified by topping up or returning any unspent funds.

Features

Feature	Description
Claimant Access	Determine which claimants can request advances.
Configure Signoff Group	Configure signoff groups with multiple stages to approve/reject advances.
Advance Management	Change amounts, top-up, settle or return remaining balances.
Mobile Advance Requests	Request advances on Assure Expenses Mobile.
Advance History	View a list of settled advances with usage information.

Implementation

Administrators

1. For an administrator to configure advances, they will require the following permissions on their Access Role:

   - Employees
   - Access Roles
   - Signoff Groups

2. In order to request an advance, claimants must have a signoff group selected for advances. For more information view Configure Advances Access.

Links

Administrator	Configure Advances Access
Approver	Approve an Advance

| Claimant | Request an Advance |
| | Mobile - Manage My Advances |