

Mobile - Manage My Advances

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Permissions

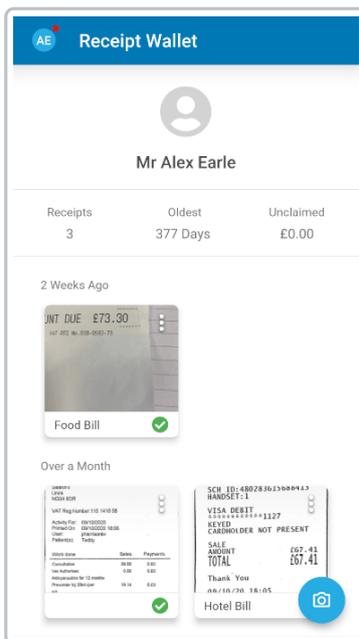
You will require the following permissions:

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

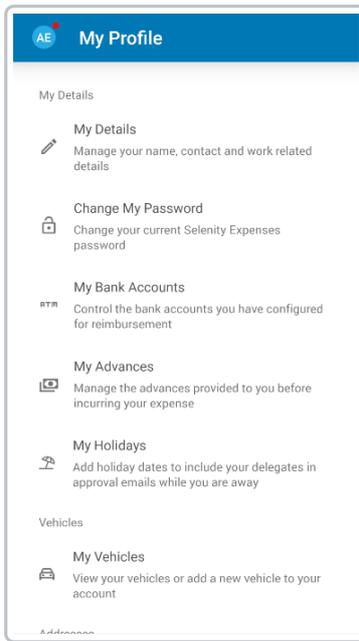
Here we will be showing you how to request an advance to help you out with high expense costs as well as viewing your existing advances.

View My Advances

1. Tap the Navigation Menu  and then tap My Profile.



2. Within the 'My Details' section, tap My Advances. This will display a list of all your existing advances, however, settled advances will not be displayed.



Your advances will be split into relevant sections based on their current status. The sections are:

- Pending Advances
- Approved Advances
- Rejected Advances
- Disputed Advances
- Paid Advances

Note: For advances that have been rejected/returned to you, tap the menu and then tap **Edit** or **Delete**.

3. Tap an advance to view further details. The fields which may be displayed include:

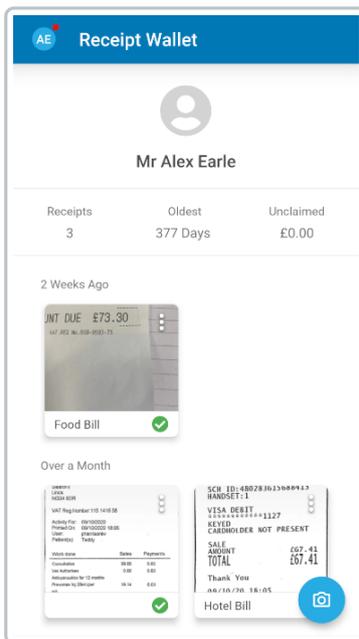
Field	Description
Name	The name entered for the advance.
Status	The current status of the advance (Pending, Approved, Rejected, Disputed, or Paid)
Amount	Displays the amount requested in the base currency. If the requested currency is different to your organisation's base currency, this will display the converted amount.
Used	Displays the amount of the advance which has been used on expense items.
Available	Displays the amount of the advance which has not been used yet and is still available.

Field	Description
Reason	The reason for requesting the advance.
Requested Currency	The currency that the advance has been requested in.
Exchange Rate	Displays the exchange rate if you request 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.
Required By	The date which the claimant has requested that advance is provided by.
Approver	Displays the name of the user that 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.
Dispute	If the advance has been previously rejected and disputed, this displays your 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 Advances' to 'Paid Advances'.
Settled	Shows whether the advance has been settled or not.

← Advances for Speakers		
Advances for Speakers		
Pending		
Amount	Used	Available
£50.00	-	£50.00
Other Details		
Reason Need speakers for my office.		
Currency Pound Sterling		
Required By 11/12/2020		
Approver Earle, Mr Alex		
Approved No		
Stage		

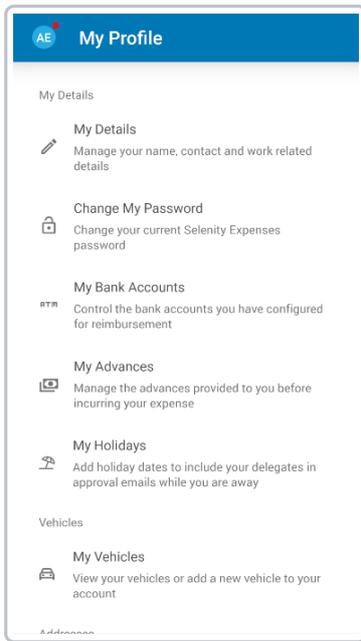
Request an Advance

1. Tap the Navigation Menu  and then tap My Profile.



The screenshot shows the 'Receipt Wallet' app interface for Mr Alex Earle. At the top, there is a navigation menu with the 'AE' icon. Below the header, the user's name 'Mr Alex Earle' is displayed next to a profile icon. A summary section shows 'Receipts: 3', 'Oldest: 377 Days', and 'Unclaimed: £0.00'. Under the heading '2 Weeks Ago', there is a receipt for a 'Food Bill' for £73.30. Under the heading 'Over a Month', there are two receipts: one for a 'Hotel Bill' for £67.41 and another for a 'Hotel Bill' for £67.41. A camera icon is visible in the bottom right corner of the receipt area.

2. Within the 'My Details' section, tap **My Advances**. This will display a list of all your existing advances.



3. Tap . This will open the 'Request Advance' page.

4. Enter the following details:

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

← Request Advance SAVE

Advance Name
Advance for Car Parking

Required

Amount
50.00

Required By
31/12/2020

Required

Currency
Pound Sterling

Reason for Request
When visiting customer, I will need to pay for parking.

5. Tap **SAVE**. This will create the advance and send it to the approver set within your 'Advances Signoff Group'.
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