May 2026 to April 2027 - New and Updated Features

Last Modified on 20/10/2026 4:13 pm BST

Assure Expenses | New User Interface Design

We are preparing to introduce an updated application experience designed to make the product feel more modern, easier to navigate and more consistent for users. The changes focus on improving the look and feel of the application, simplifying everyday journeys, and laying the groundwork for future accessibility and usability improvements.

What's changing?

- **A refreshed sign-in page:** A cleaner layout with standard sign-in and SSO options presented together, clearer forgotten password guidance and updated RLDatix branding.
- **A cleaner home page:** The home page will have a fresher, more modern design with clearer visual structure and fewer outdated components.
- **New navigable tiles:** Key items such as claims will be easier to access directly from the home page, helping users reach common actions in fewer clicks.
- **Improved navigation:** The side menu will start collapsed, adapt to each user's permissions and provide a more consistent way to move around the application.
- **Updated colour themes:** Users will be able to choose light, dark or high-contrast theme options, supporting personal preference and accessibility needs.
- **Consistent summary pages:** Grids and tables will have a refreshed design with improved spacing, clearer layout and a more consistent experience across the product.
- **Updated system messages:** Error pages, inactivity warnings and access messages will be refreshed to feel clearer and more aligned with the new design.
- **Receipt wallet:** To bring consistency across the expenses mobile app and the web based version, we'll be adding the Receipt Wallet to Expenses Web.

Why are we making these changes?

- **To keep our technology current:** Updating the underlying interface components helps ensure the application continues to use supported, up-to-date technology.
- **To modernise the user experience:** The refreshed design creates a cleaner, crisper and more intuitive application experience.
- **To improve navigation:** Common tasks will be easier to find and complete, reducing unnecessary clicks and helping users move through the product more efficiently.
- **To support accessibility:** Updated themes, contrast options and design standards help us move towards improved accessibility support.
- **To align web and mobile experiences:** The changes help bring the web application more closely in line with the more modern experience already available in the mobile app.

- **To respond to feedback:** These improvements are being shaped through internal review, customer feedback and iterative updates.

What does this mean for users?

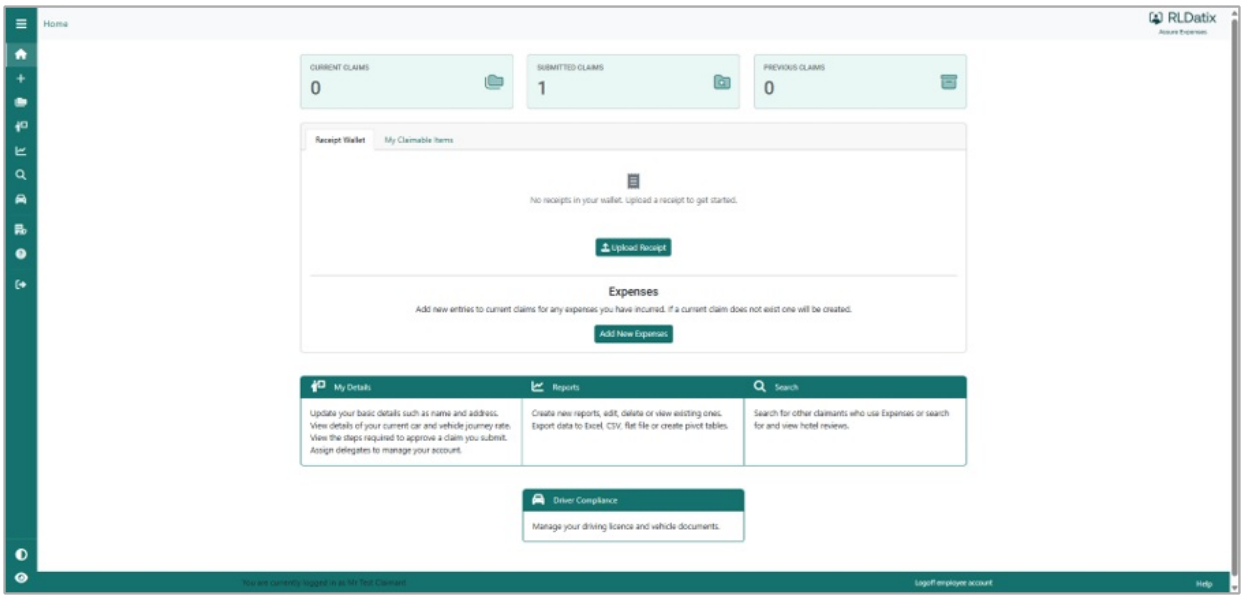
Users should expect the application to look and feel different in several areas, particularly when signing in, navigating from the home page, through the menu options, and when using summary screens. Core workflows are not being redesigned as part of this update; the focus is on improving the interface, navigation, consistency and overall usability of the existing experience.

What is not changing?

- Existing permissions and access levels will continue to determine what each user can see and do.
- Core business processes and workflows will remain unchanged.
- The update is focused on the user interface, navigation and presentation rather than changing how the product fundamentally works.

Preview

Here's how the new design is taking shape…



Your feedback matters

Feedback will help shape the final experience. If you are invited to review the updated design, please share what works well, what feels unclear and where further improvements could make the application easier to use.

Assure Expenses | New Design Overview

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages when using the desktop version.

These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

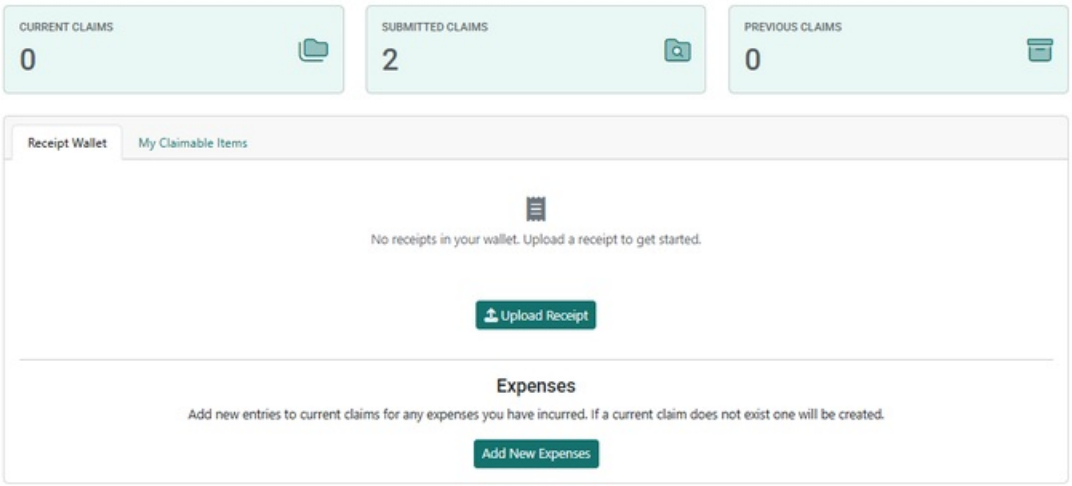
There are no changes in how you complete your usual tasks, such as creating, managing, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Home Page New Design

On the **Home Page** all your claim options have been brought together at the top of the page instead of them being dispersed across different menu options.

This makes all the options easier for you to find, reduces the amount of clicks you will need to make to navigate to claim areas, and gives you better visibility of your claims in the system.

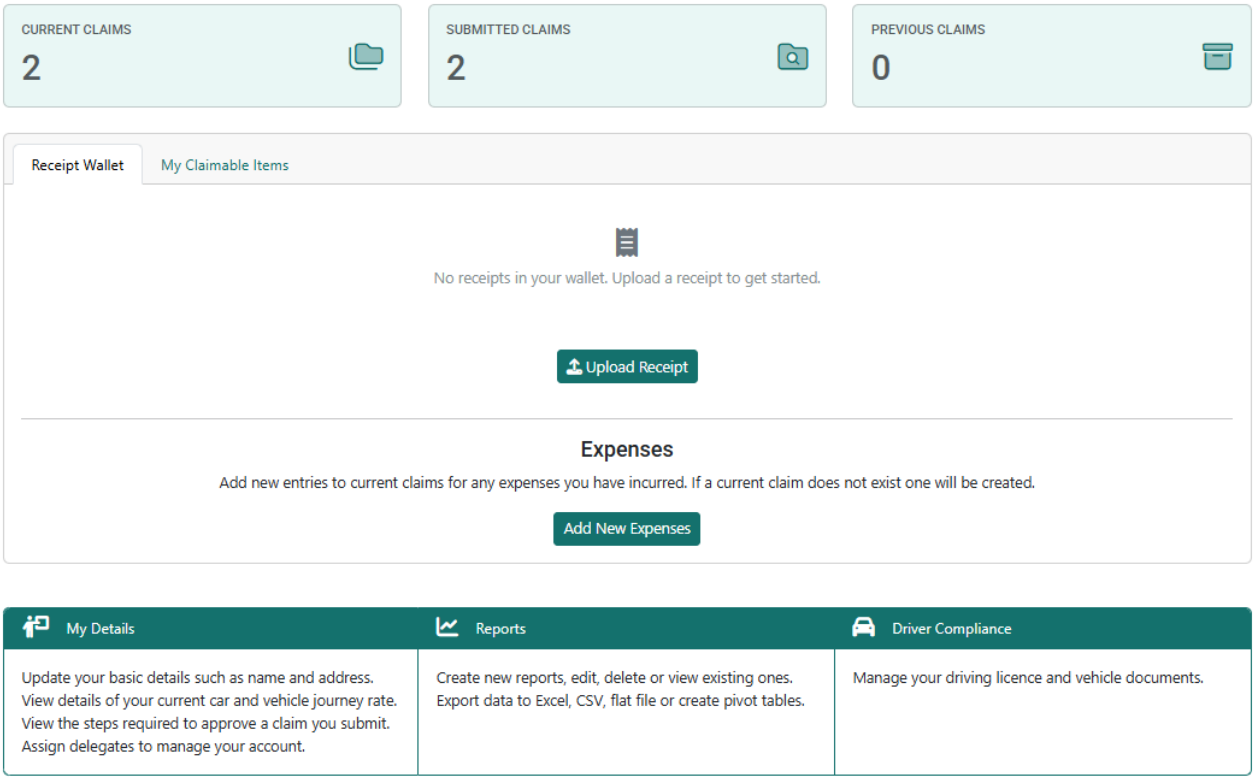


The Receipt Wallet has been added to the new version to provide you with consistency with the mobile app that you are already familiar with.

To further aid ease of use, the page is now de-cluttered to contain the options you are most likely to use, with remaining menu options that you may use less frequently now moved to the side menu.

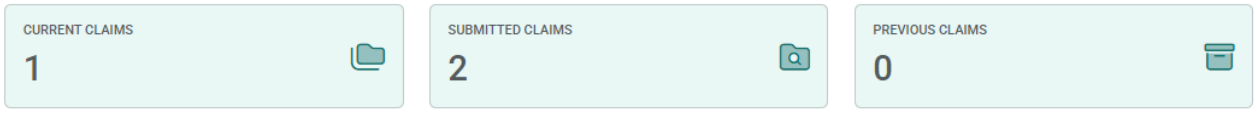
Where menu options remain on the**Home Page**, the design and icons have been updated and modernised, inline with other apps you may use, and there is a more prominent colour change as you hover over the menus.

Themes have been introduced to allow you with a personal choice on how Expenses displays for you. The image above is shown in light theme, but the other options are described further below.



Claim Details

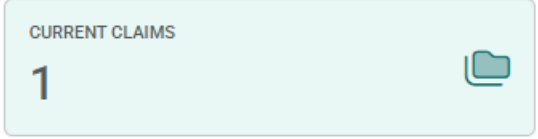
The original My Claims menu, and separate submenus, are now replaced by tiles giving you a visual display of your claims in the system.



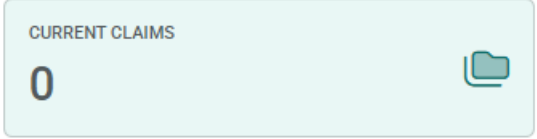
As well as the visual benefit, these tiles provide navigation to the area you want to go to and now reduce the number of menu options you need to choose to get there.

Current Claims

Clicking on the **Current Claims** tile will navigate you to the current claims section where you can add further expense items onto your claim before submitting it for approval.



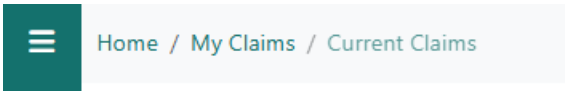
If you do not currently have a current claim the tile will show with 0 as shown below.



Clicking on the Current Claims tile when the number is shown as **0** will allow you to create a new claim in the system to which you can then add your expense items.

Clicking on the Current Claims tile when the number is shown as **1** (or more) will navigate you to your current claim to which you can then add your expense items.

From Current Claims, you will still be able to navigate back through the menus via the breadcrumbs at the top of the page:

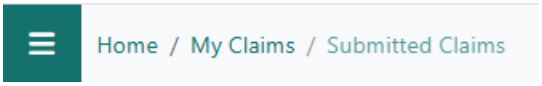


Submitted Claims

Clicking on the tile will navigate you to the submitted claims section where you can check on the progress of the claim(s) you have submitted for approval.



From Submitted Claims, you will still be able to navigate back through the menus via the breadcrumbs at the top of the page:

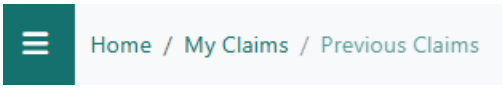


Previous Claims

Clicking on the tile will navigate you to the previous claims section where you can check on the claims you have previously made that have been fully approved for reimbursement back to you.

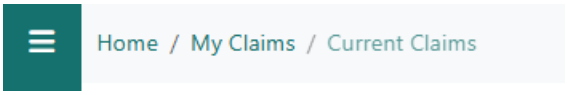


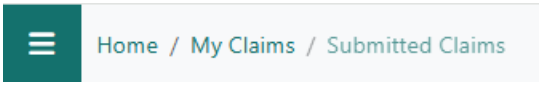
From Previous Claims, you will still be able to navigate back through the menus via the breadcrumbs at the top of the page:

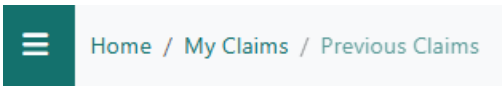


Breadcrumbs and Navigation

The breadcrumbs at the top of the page indicate where you have navigated to (where you currently are) in the system.

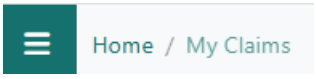


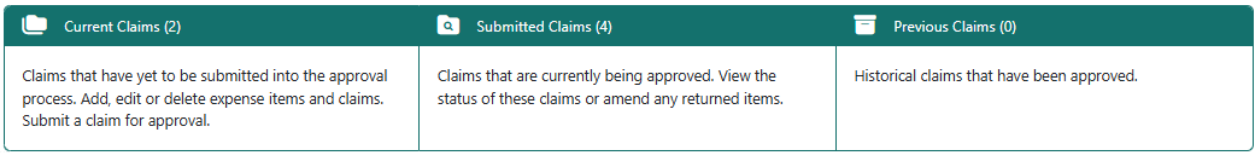




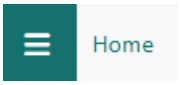
Clicking on any menu option within the breadcrumbs will navigate you back through the system.

Navigating back to **My Claims** using the breadcrumbs directs you to the menu options for claims:





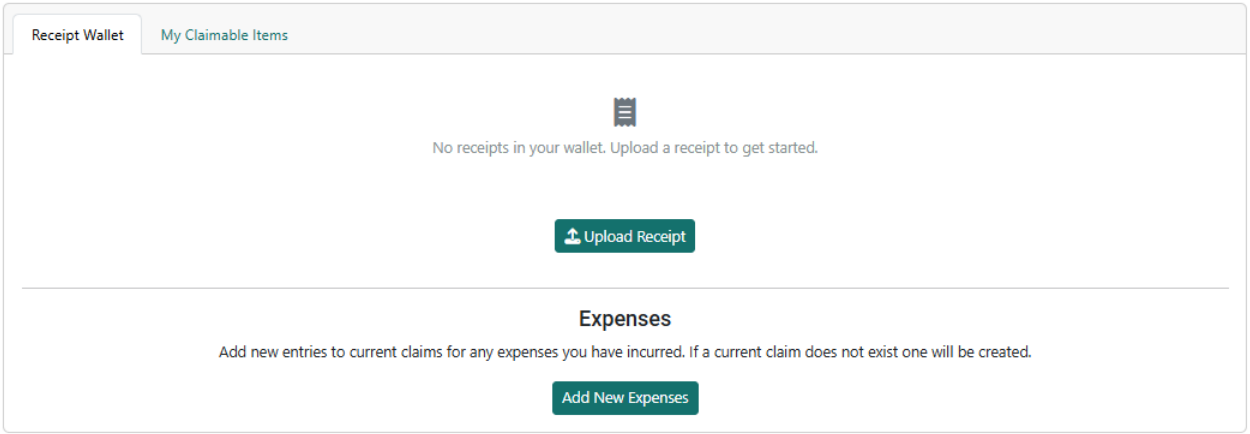
Navigating back to **Home** using the breadcrumbs directs you back to the home page:



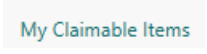


Viewing Your Claimable Items

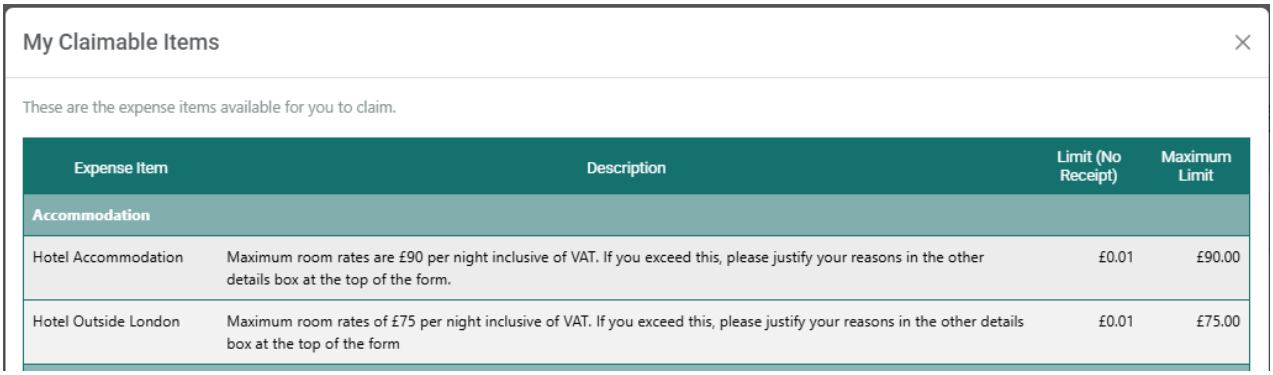
The option is moved nearer the top of the page to make it easier to find.



Click on the **My Claimable Items** tab:

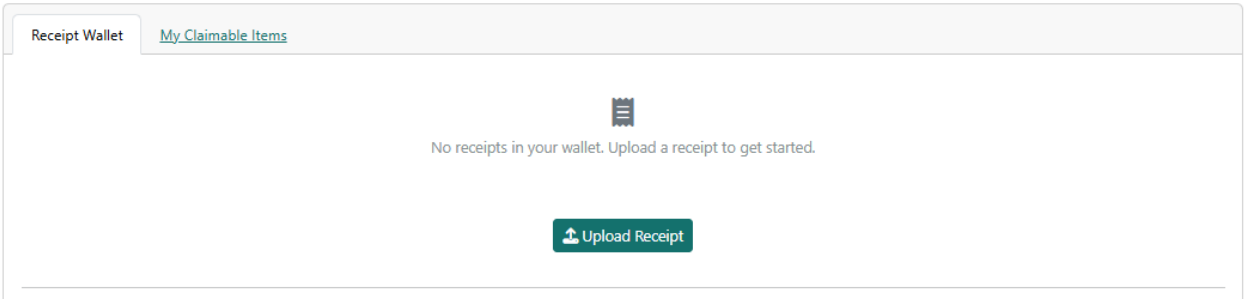


A summary of the items you are entitled to claim will display with any limits that apply.



Receipt Wallet

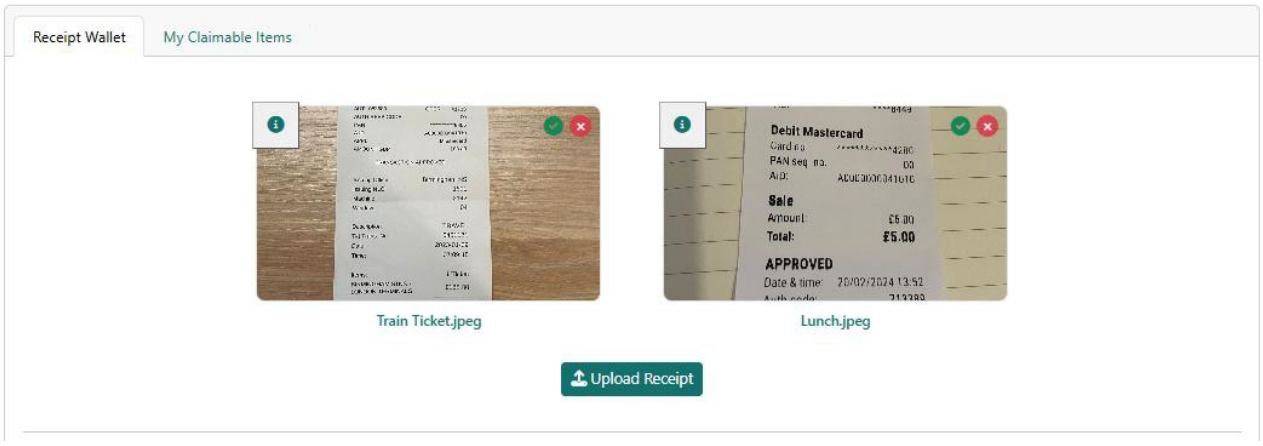
The Receipt Wallet has been added to the new version to provide you with consistency with the mobile app that you are already familiar with.



You are already able to add receipts using the mobile app by capturing images with the device, or uploading an image from the gallery, but you now also have the option to upload a receipt image to the wallet using the desktop version of Expenses.



If you add an image using the mobile app it will appear in the desktop version of your Receipt Wallet, and similarly, vice-versa, if you upload a receipt into the wallet via the desktop version it will appear in the mobile app.



Optical Character Recognition (OCR) Processing

OCR provides automatic recognition of details contained within your receipt.

OCR processing has always been part of the mobile app receipt wallet, but now that the receipt wallet has been added to the new desktop version of Expenses, OCR is also used here too. This brings you a consistency across both systems so that you are now able to use either the mobile app or the desktop in the same way.

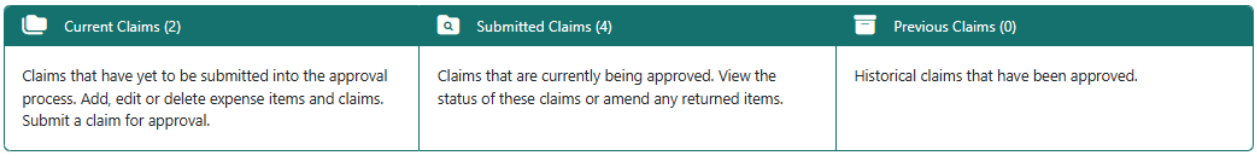
When you upload your receipt into the wallet, the system will determine the date you incurred the expense, the currency, the total, and the amount of VAT, and this now occurs automatically for desktop as well as the mobile app.

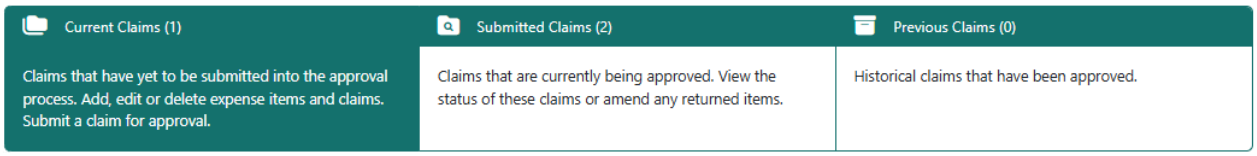
You can also add an expense to your current claim directly from a receipt in the wallet and any detail determined from OCR processing will carry through so that you don't have to enter these details for the expense item.

Menu Options

To further aid ease of use, the**Home Page** is now de-cluttered to contain the options you are most likely to use, with remaining menu options that you may use less frequently now moved to the side menu.

Where menus show on the page, the design is updated and the icons modernised, and there is a more prominent colour change as you hover over the menus.





Side Menu

The side menu includes options that you may use less frequently.

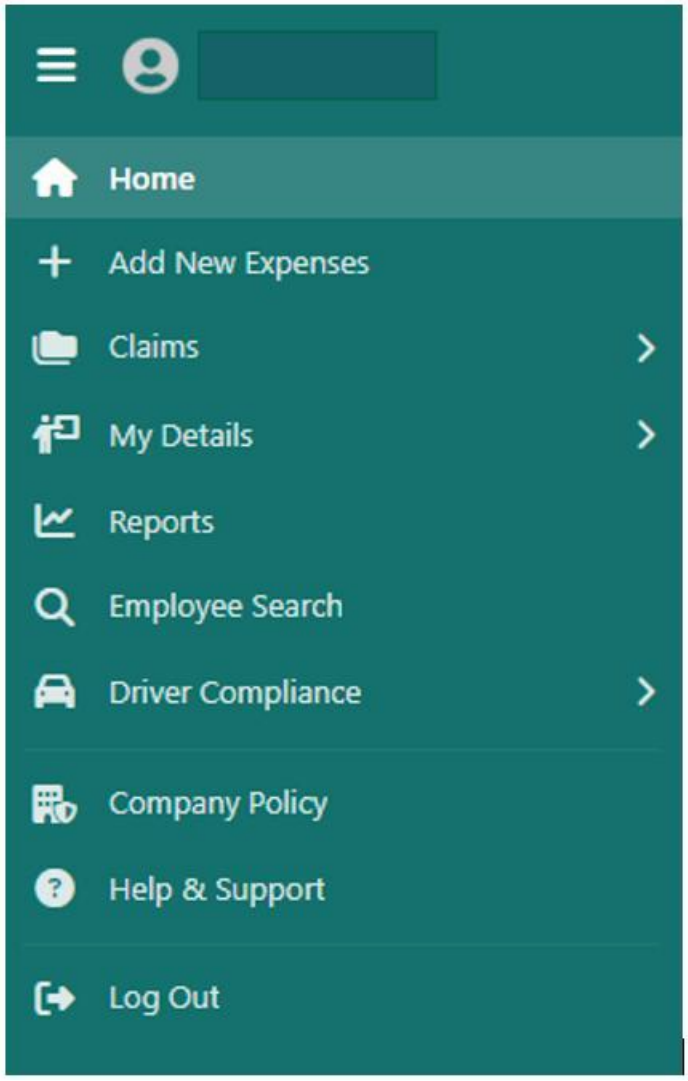


The side menu will appear closed, and you can navigate to the areas of the system directly using the icons.

Or you may choose to open the menu for a more detailed view by clicking on the icon.



Opened side menu example:



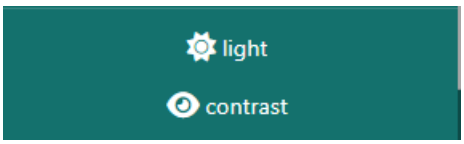
Themes

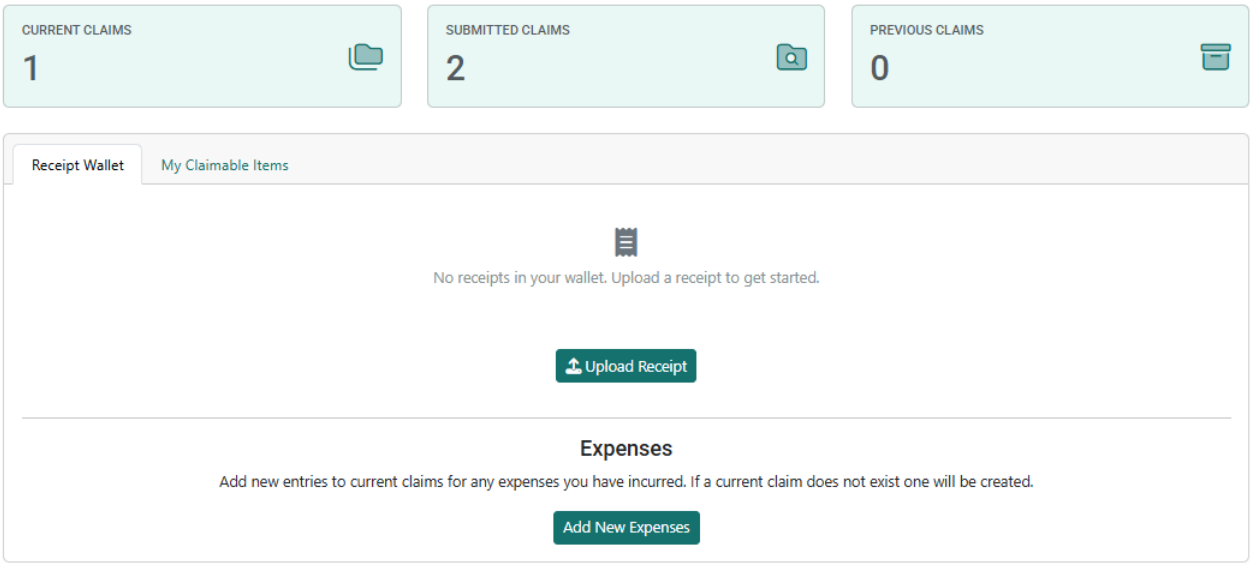
Themes have been introduced to allow you with a personal choice on how you want the Expenses pages to display for you.

This also aligns with the mobile app that has always used themes and will allow us to continue work towards higher accessibility standard compliance.

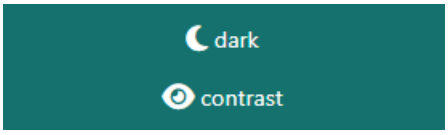
Changing theme can be done at any time, and from any page in the system, by using the icons at the bottom of the side menu to toggle to your required choices.

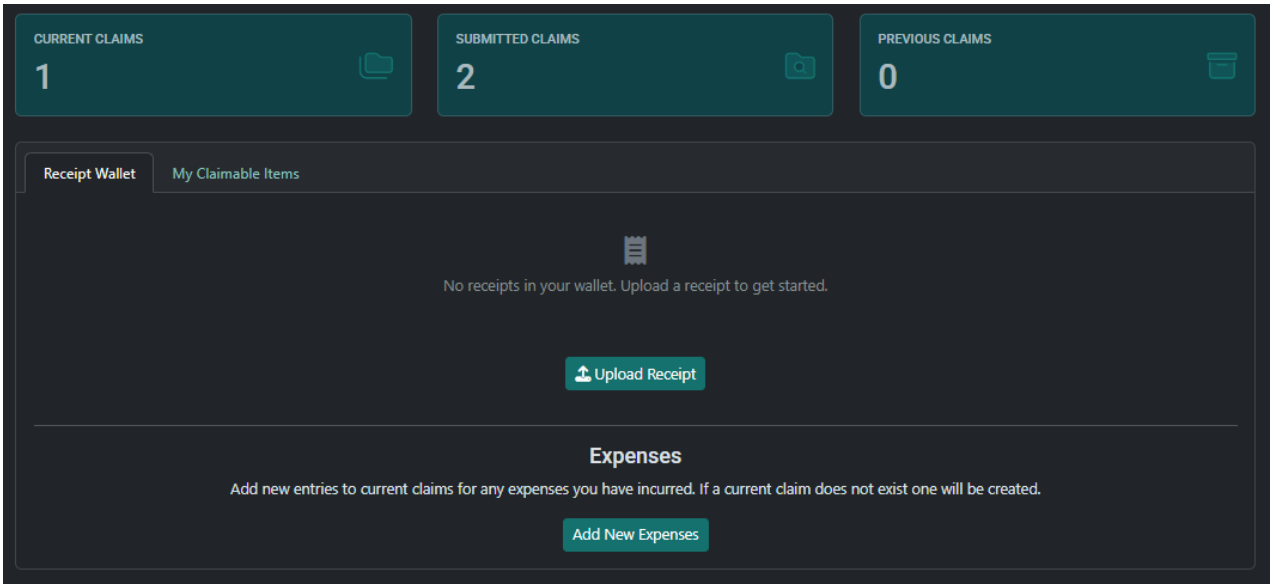
Light Theme





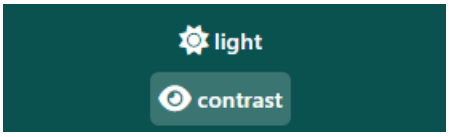
Dark Theme

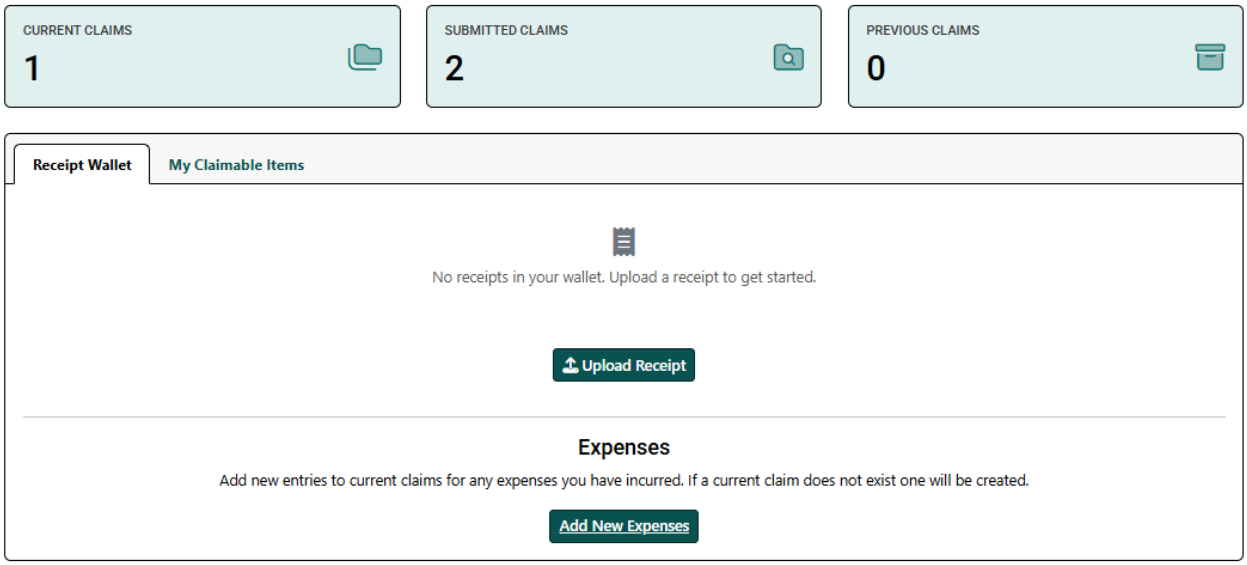




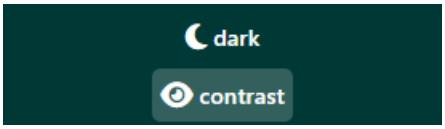
Light Theme – High Contrast

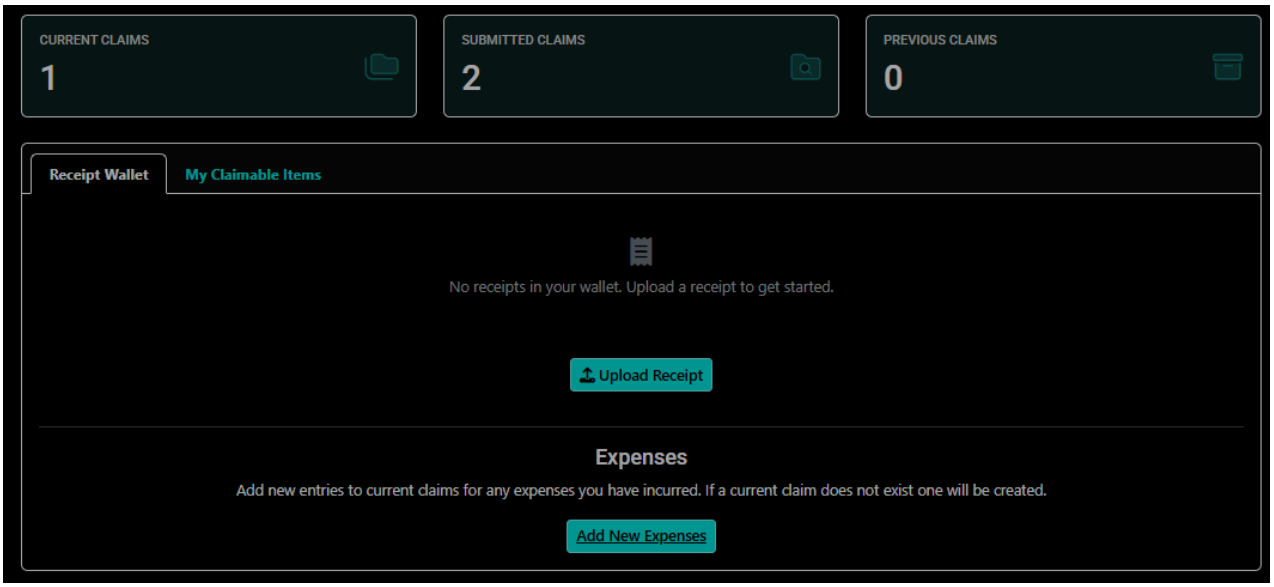
If you need, or prefer high contrast this is now available to you too:





Dark Theme – High Contrast

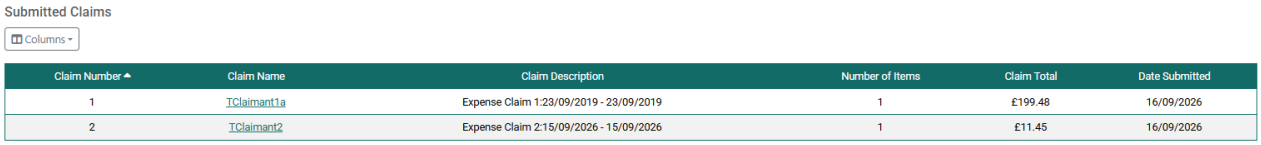




Summary Pages

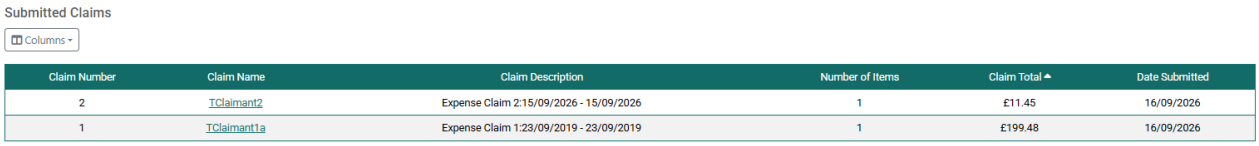
With the new design you now have options for personal choices that were not there before, from choosing your theme and contrast, to how your summary pages appear.

All summary pages have been updated and modernised.



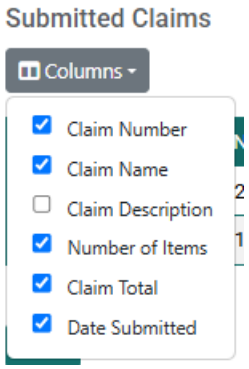
Sorting a Summary Page

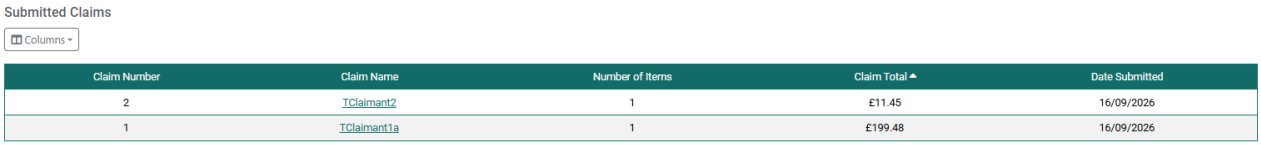
As before, every column in a summary page can be sorted by clicking on the column header, and where the page shows a filter option the filter works with your sorted column.



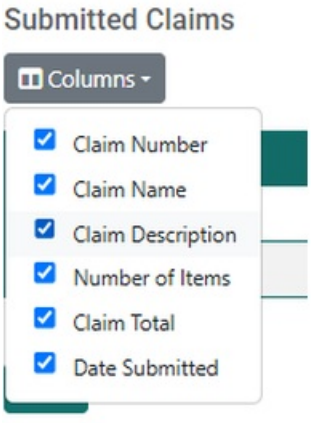
Summary Page Columns

You also have a new option to be able to remove columns from the summary page that you do not want to see. Simply tick or untick the options to show or hide the columns so that the page appears to your preference.





You can add a column back in at any time by ticking the option you previously chose to hide.





This guide has been provided with generic details to give you general information on the changes coming to you in October 2026.

Assure Expenses | Logon Page New Design

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages when using the desktop version.

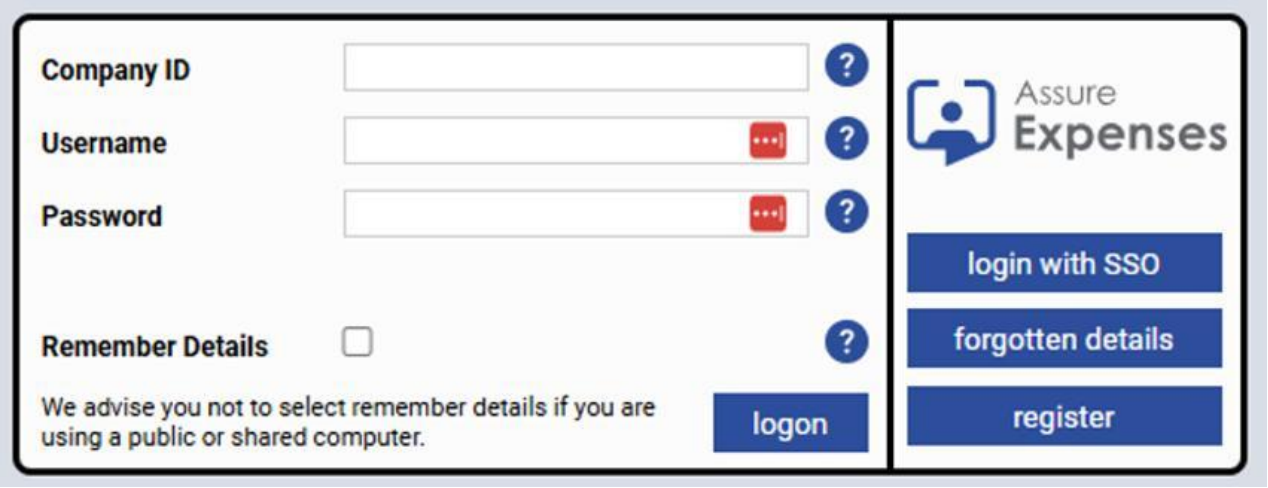
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes in how you complete your usual tasks, such as logging in.

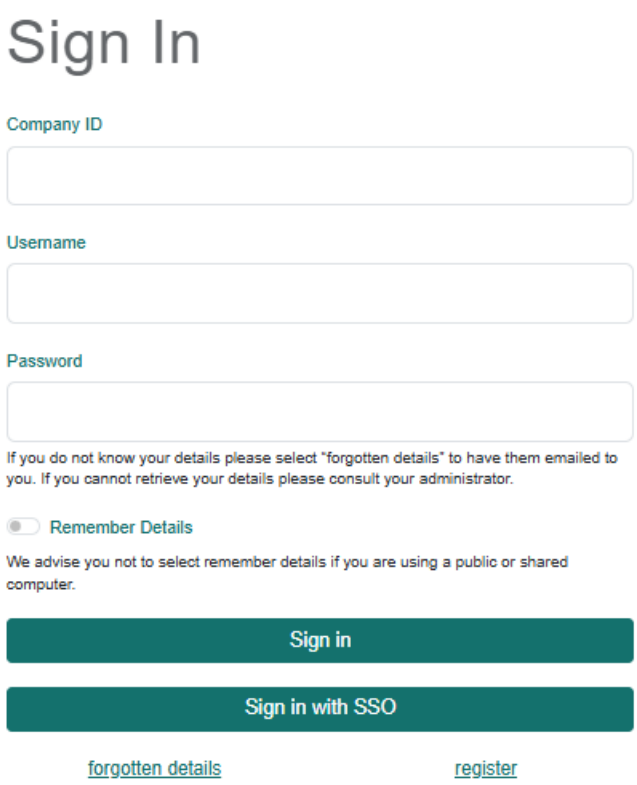
The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Logon Page New Design

As of October 2026, the Logon Page is being modernised from this design:



To this:



The design is more modern, better spaced for easier reading/completing, brings the options together in a more logical sequence, and provides additional guidance about password reset.

Signing In

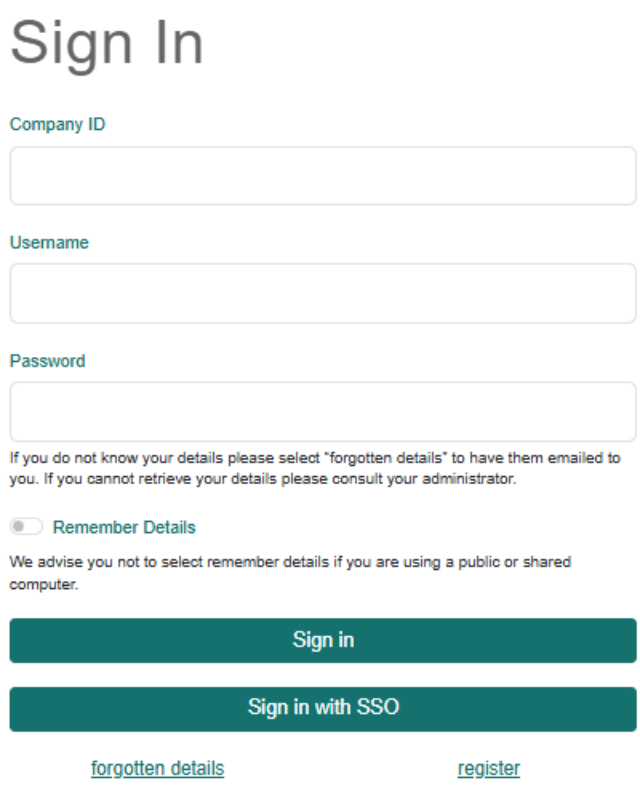
Although the design has been updated there are no changes to your credentials or how you access the system.

The URL to navigate to the logon page will stay the same:www.sel-expenses.com

If your system has been configured for Single Sign-on (SSO), access remains the same and you should select the **Sign in with SSO** option and enter your company email address.

If your system is still being used with username and password, these will not be changed and you should enter your **Company Id**, **Username**, and **Password**, as normal then click on the**Sign in** option.

Once you provide your user information you will be authenticated and logged into the Expenses system.



To Login:

- Your existing **Company Id**
- Your existing **Username**
- Your existing **Password**
- Click **Sign in**
- Or click **Sign in with SSO** if this is your normal login option, and enter your email

Summary

The website URL will stay the same.

Your credentials will not be changed.

Company Id, Usernames, Password, SSO login credentials will not be changed.

The page looks different, but you should sign in as you normally do.

Assure Expenses | Creating a New Claim

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

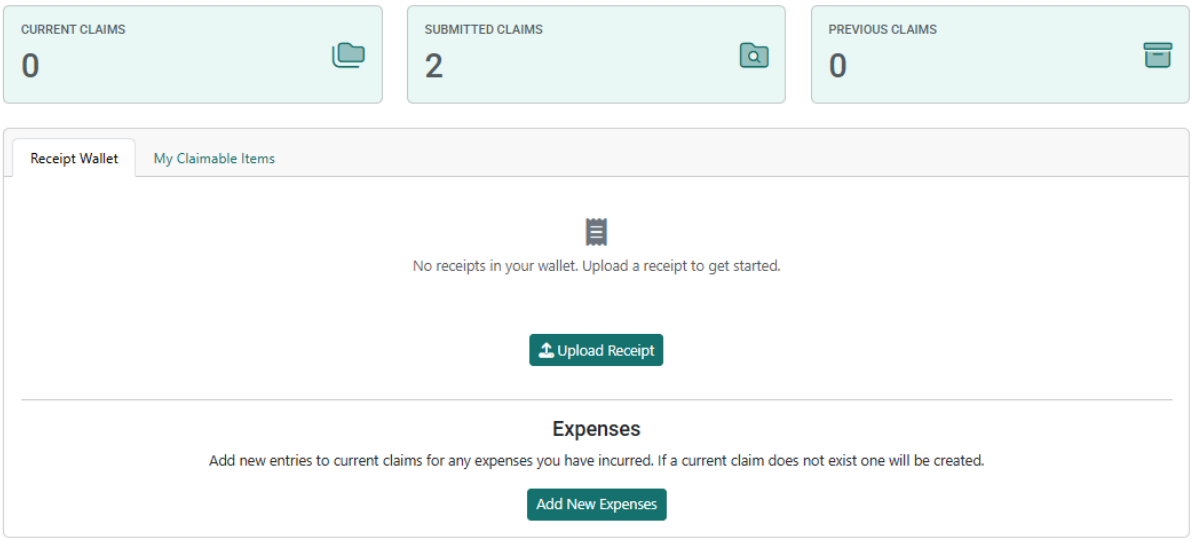
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes in how you complete your usual tasks, such as creating, managing, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Creating a New Claim

1. From the Homepage:



2.

   Notice the new **Current Claims** tile at the top of the page.



   The number of current claims you have is displayed in the tile.
   You can click on any of the tiles for navigation.
   When you do not have a current claim in the system, the tile will display with number 0 as shown above.
   If you already have a current claim this will appear as 1 (or more) and you can navigate to that current claim by clicking on the tile. There is a separate document - “Navigating to an Existing Claim”.

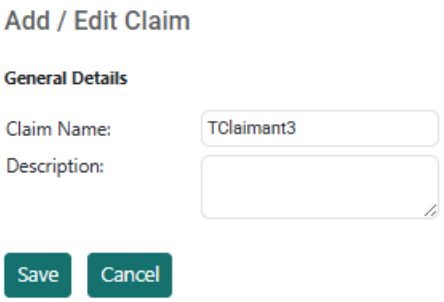
3. Click on the **Current Claims** tile.

4. Select **New Claim** from the **Page Options** menu.



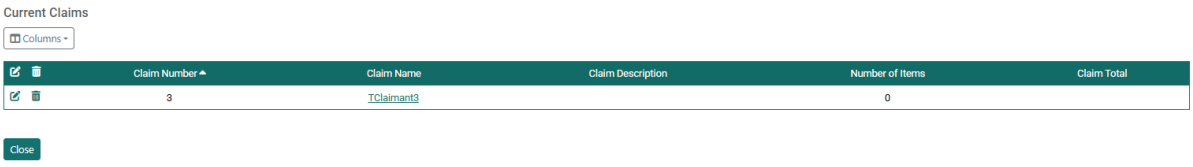
> *Depending upon your system configuration you may only be allowed one current claim at a time.*
>
> *If this is the case, the New Claim option will not be displayed within the Page Options menu, and you will be directed to the page to add your expenses to your current claim. This is controlled within the system configuration by your system administrator.*

5. Complete the details for your new claim in the **Add/Edit Claim** Page:



   - A default claim name is provided so you do not need to enter anything here.
   - The claim description can also be left blank, and this will then be filled in for you when you submit your claim for approval.

6. Click **Save** and your claim will be created, and you will then be directed to the **Current Claims** screen.



7. To add expenses to the current claim, click on the **Claim Name** link.



> *Refer to the separate guidance document for adding an expense item to your claim.*

The steps you follow to create a new claim are not being changed.

The only change is how you navigate to the claims section as noted in the steps above.

The remainder of the steps are included here only for reference, and to provide you with visibility of the updated screen designs.

Assure Expenses | Navigating to an Existing Claim

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

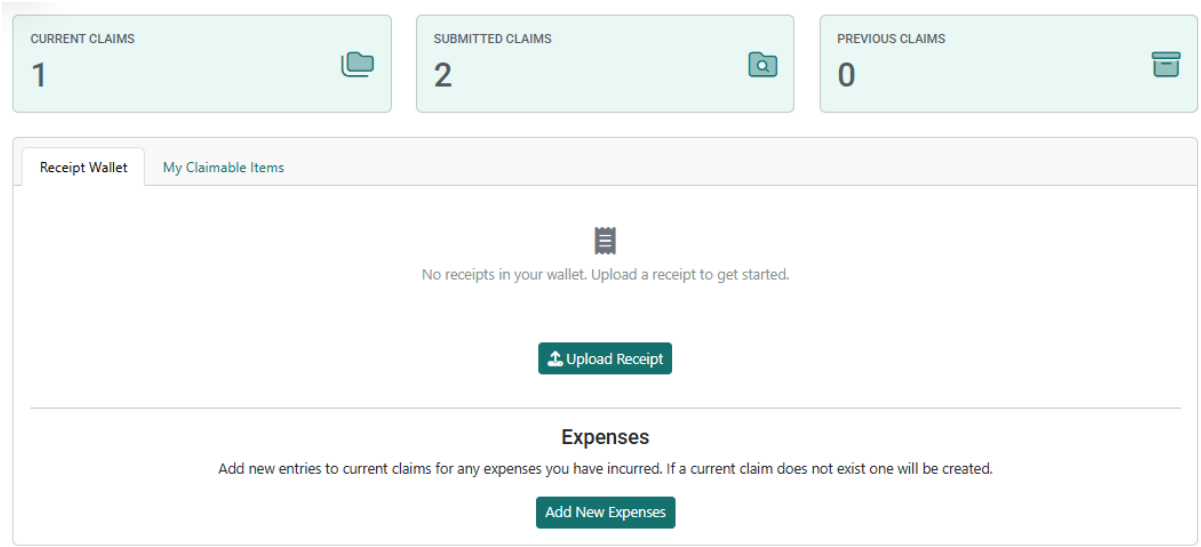
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as creating, managing, or submitting an expense claim, except for how you navigate the menu options.

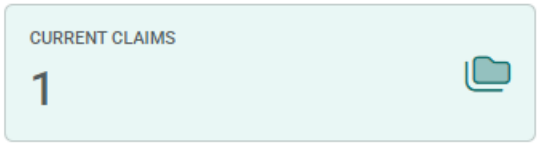
The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Navigating to an Existing Claim

1. From the Homepage:



2. Notice the new **Current Claims** tile at the top of the page.



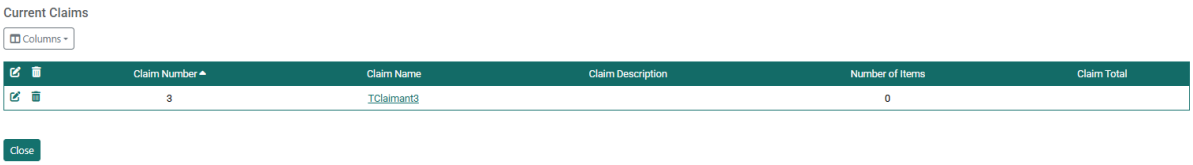
The number of current claims you have is displayed in the tile.

You can click on any of the tiles for navigation.

When you already have a current claim in the system, the tile will display with the number 1 (or more) as shown above.

If you do not have a current claim this will appear as 0, and when you click on the tile you will be able to create a new current claim. For this, you can also refer to the document “Creating a New Claim”.

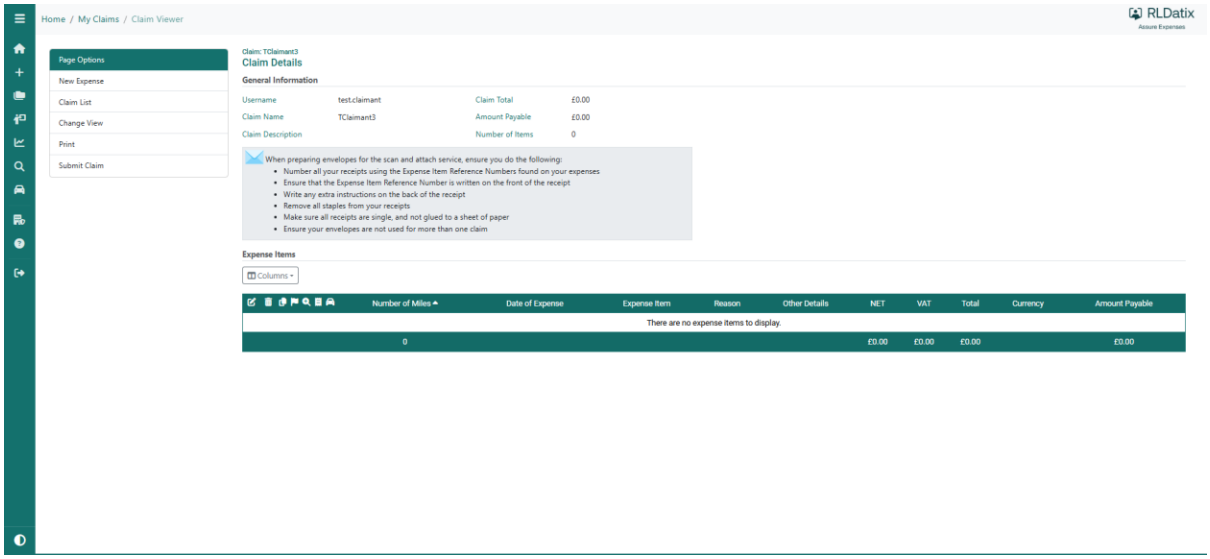
3. Click on the **Current Claims** tile.
4. You will be directed to the **Current Claims** screen.



5. To add expenses to the current claim, click on the **Claim Name** link.



6. You will be directed to the **Claim View** page where you can start, or continue, to add your expenses in the usual way.



Refer to the separate guidance documents for adding and approving expenses.

Assure Expenses | Adding an Expense Item with a Receipt

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

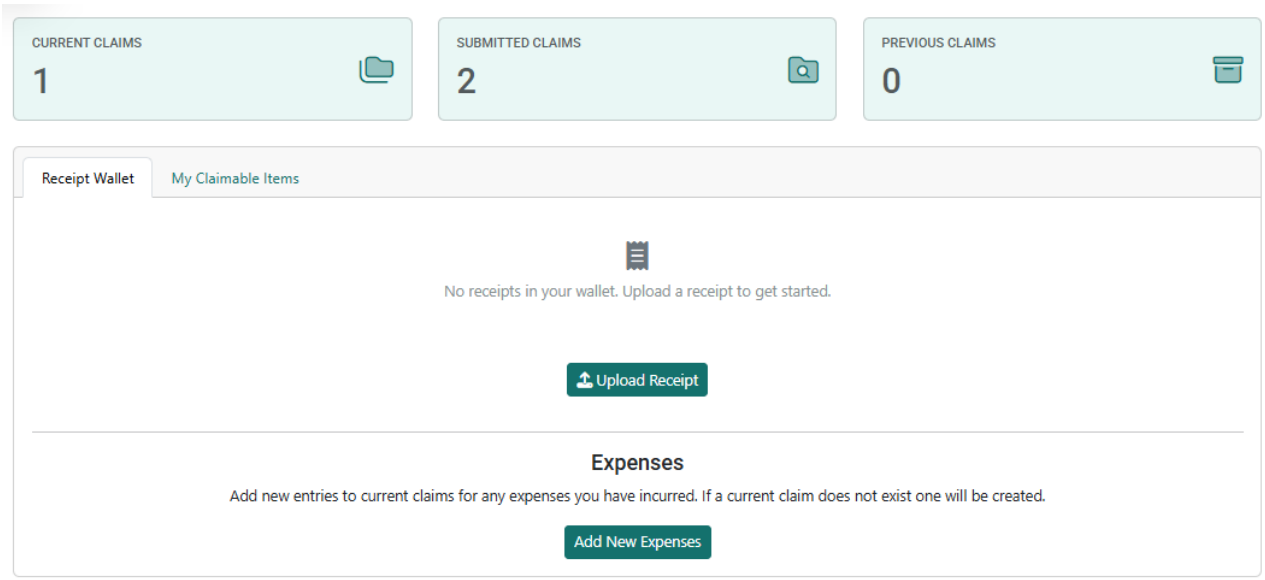
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as adding your expenses, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Options for Adding a New Expense

Options from the **Home Page**:



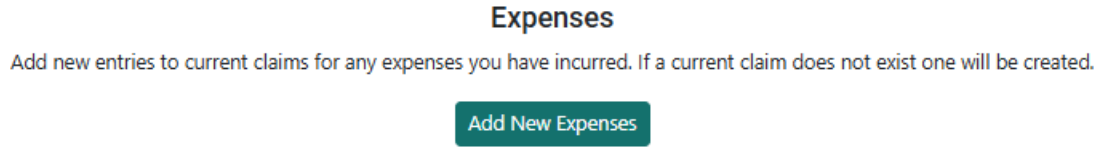
To make a claim for an expense item for which you have a receipt you now have 3 options.

- Click on the **Add New Expense** button
- Navigate to your existing **Current Claims**
- Use a receipt in the **Receipt Wallet**

Each of these options is described in more detail below.

Option 1 - **Add New Expense**

1. Select **Add New Expenses** from the **Home Page**.

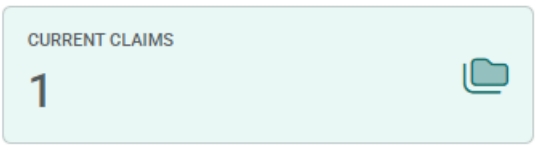


2. You will be directed to **Add Expense** page for your current claim to allow you to record the specific details of the expense you have incurred.

3. Skip down to the Expense Item General Details section below.

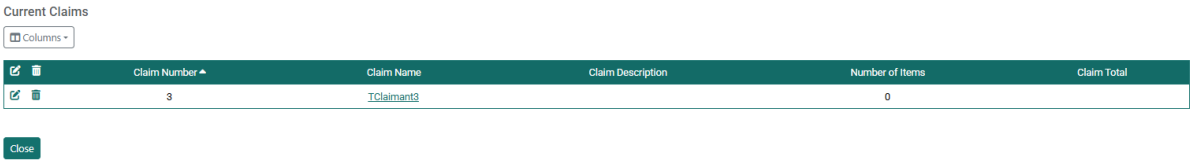
Option 2 - **Navigate to Existing Current Claim**

4. Notice the new **Current Claims** tile at the top of the page.



5. Click on the **Current Claims** tile.

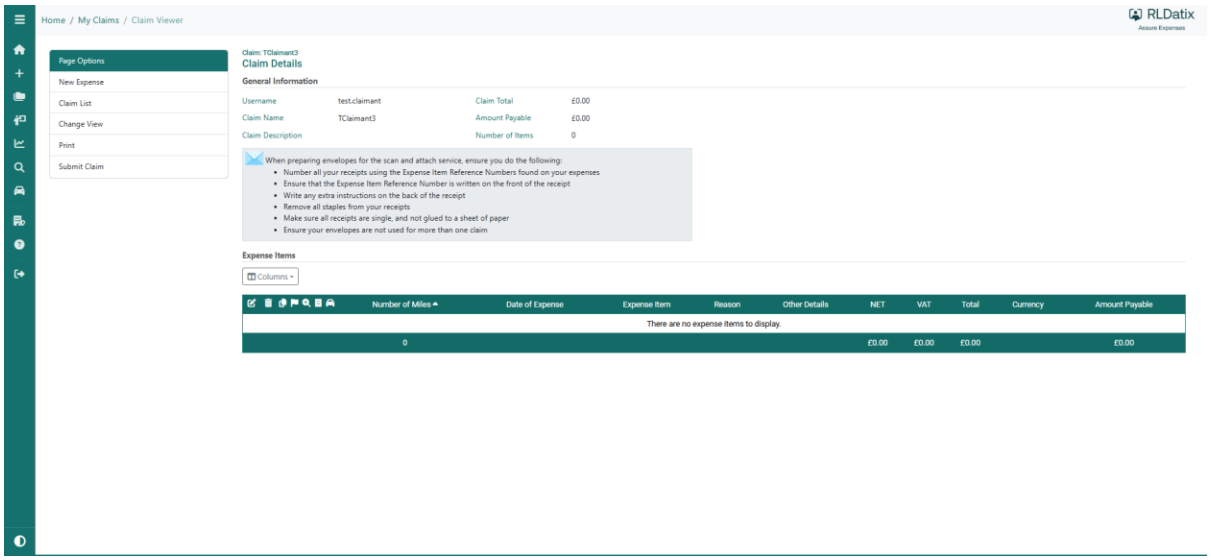
6. You will be directed to the **Current Claims** screen.



7. Select the current claim you would like to add your expenses to by clicking on the **Claim Name** link.



8. You will be directed to the **Claim View** page where you can add your expense item details.



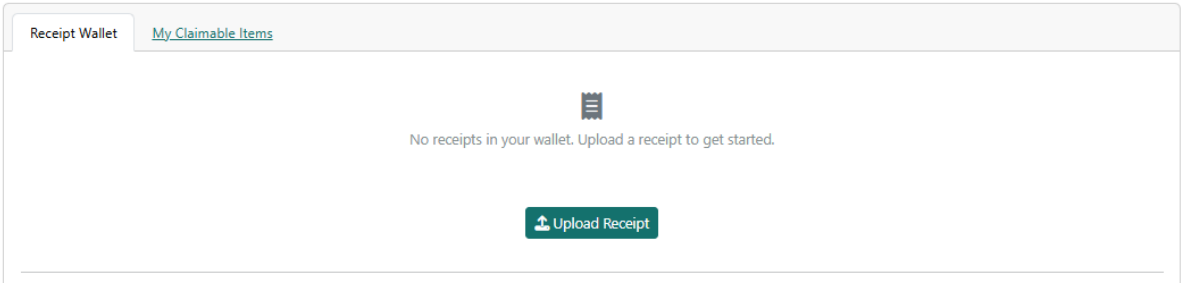
9. Select **New Expense** from the **Page Options** menu.



10. You will be directed to **Add Expense** page for your current claim to allow you to record the specific details of the expense you have incurred.
11. Skip down to the Expense Item General Details section below.

Option 3 - **Add the Expense From a Wallet Receipt**

12. The **Receipt Wallet** has been added to the new version to provide you with consistency with the mobile app that you are already familiar with.

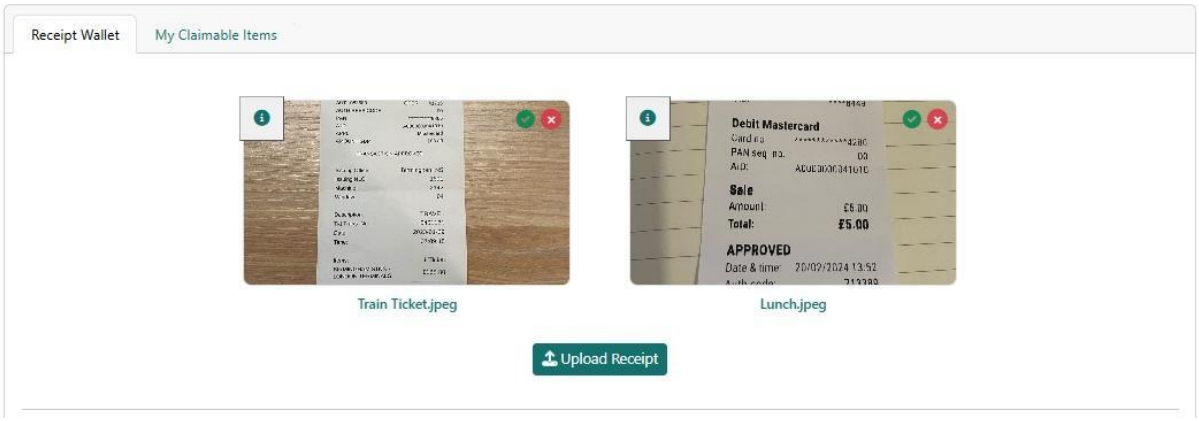


13. Click on the **Upload Receipt** button to upload a copy of your receipt to the wallet.



14. Provide a name for your receipt for your own reference.

15. If you have more receipts, continue adding your receipts to the wallet.



16. When you upload your receipt into the wallet, the system will automatically send the receipt for OCR processing. A green icon shows when processing has completed.



17. OCR processing will try to determine the date you incurred the expense, the currency, the total, and the amount of VAT. This may depend on the quality of your receipt.

18. The information determined by OCR can be accessed through the information icon.



19. Click on the receipt for the item you want to add to your claim.

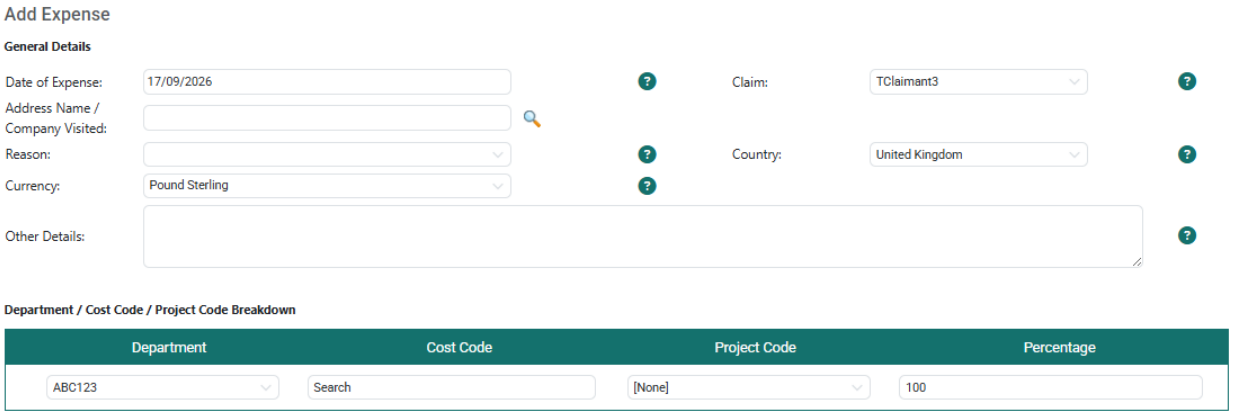


Train Ticket.jpeg

20. You will be directed to Add Expense page for your current claim where the details determined by OCR processing will already be filled in for you.

21. Skip down to the Expense Item General Details section below to complete the remaining details for your expense item.

Expense Item General Details



Your system configuration will determine whether or not you need to provide information in each of the following fields.

If you do not see one or more of the fields described below don't worry, your organisation has determined that they do not need you to enter the information and, in this case, the fields do not display.

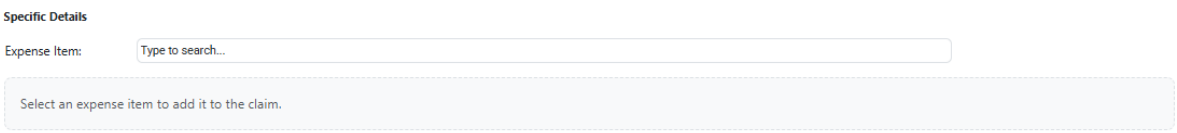
Field	Description
Date of Expense	Enter the date that the expense was incurred. This is a mandatory field.

Field	Description
Organisation / Address Name / Company Visited	Specify the organisation that the expense was incurred for. For example, if you are adding a parking receipt expense for visiting another company or organisation, enter the details of where you visited. Click in the 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 selecting an option from the list of available reasons.
Country	Select the country that the expense was incurred in. This will default to your Primary Country or residence 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.

22. Complete the details for your claim in the **General Details** section at the top of the **Add Expenses** page.

Expense Item Specific Details

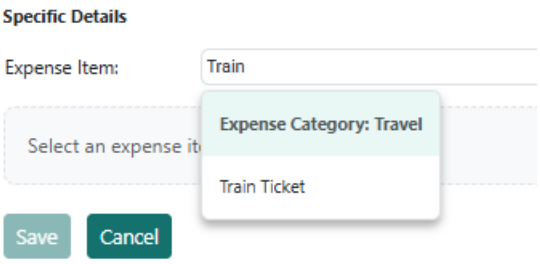
23. Select the type of expense you want to claim and for which you have a receipt by typing in the **Expense Item** box.



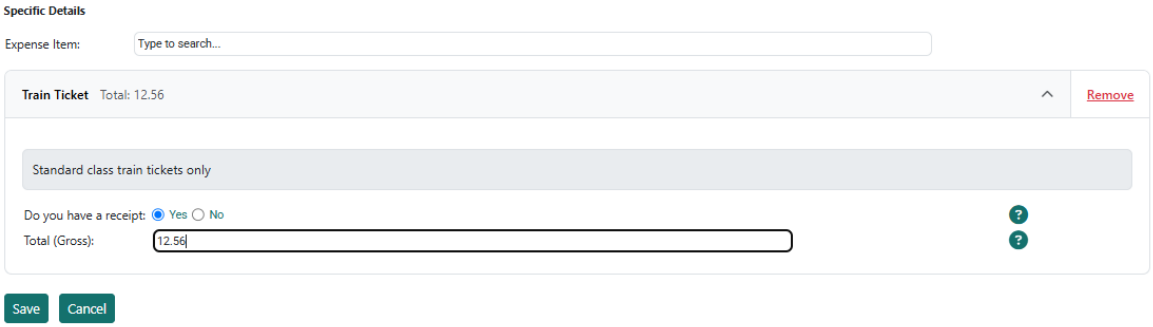
This way of specifying your expense item is to enable the expense to be added from the receipt wallet image whilst also allowing the two original methods of adding an expense to the claim.

This is now aligned with how you select your expense item via the mobile app giving you a consistent approach no matter whether you use the app or the desktop version.

You can make a selection by searching by item or category, for example, "Train Ticket" or "Travel".

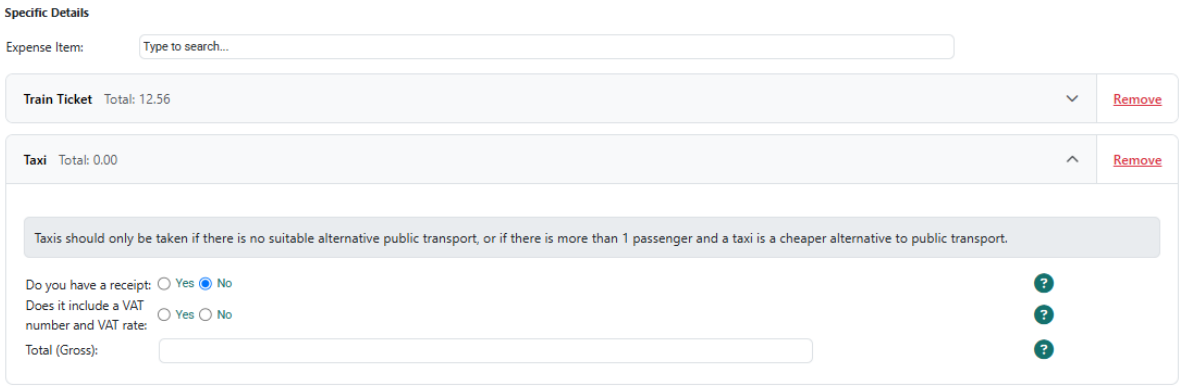


24. Provide the relevant details for the expense matching to your receipt:



25. If you want to add another expense item for the same day select this in the **Expense Item** box in the same way.

26. The first item container will close, and the new one will be open ready for you to enter your details.

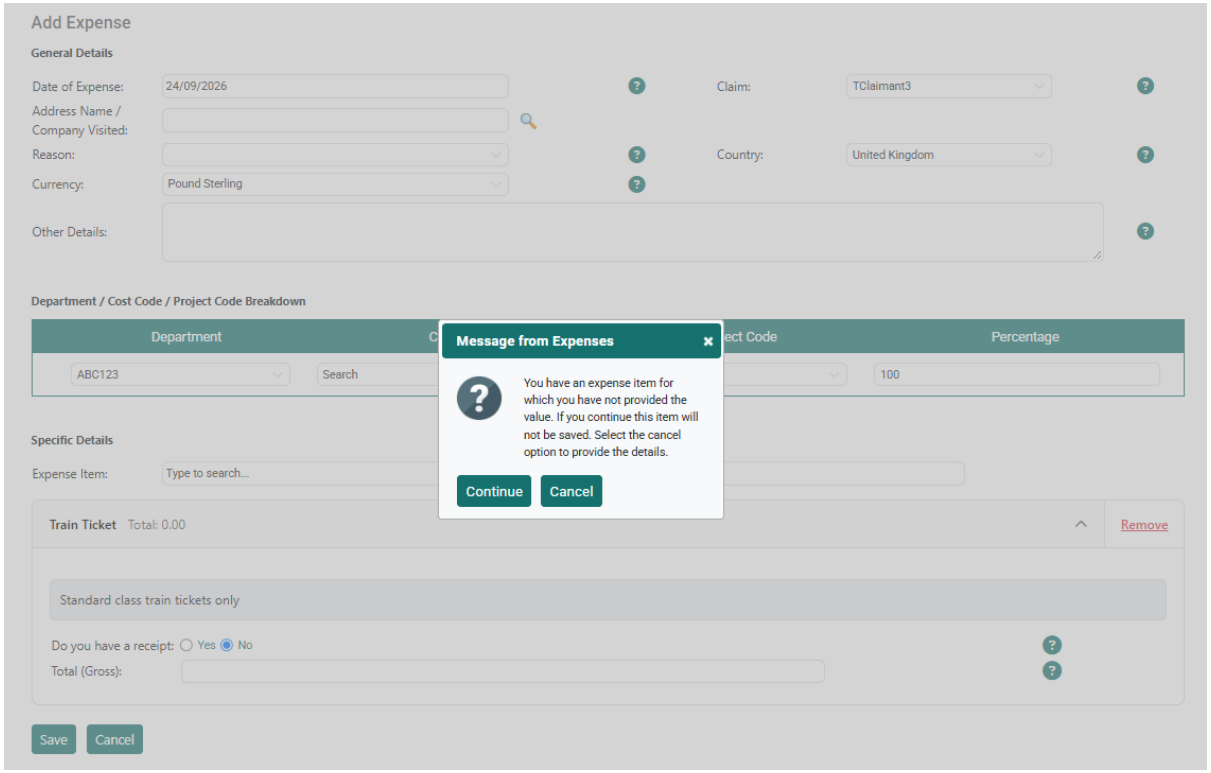


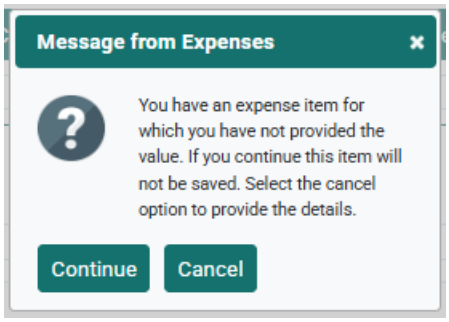
27. Continue to add the expenses that you incurred on the same day.



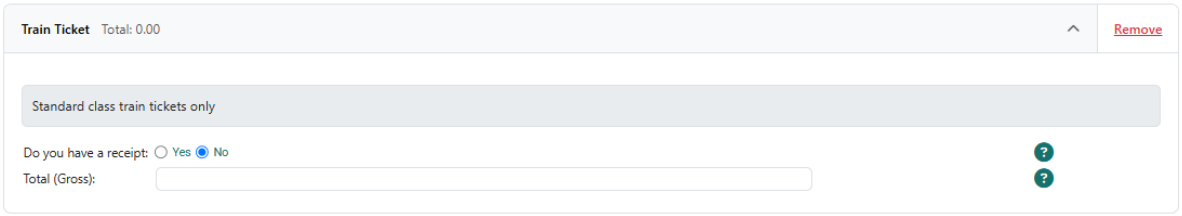
28. When you have entered all your items for the claim date showing at the top of the page, click on **Save** to add the item(s) to your current claim.

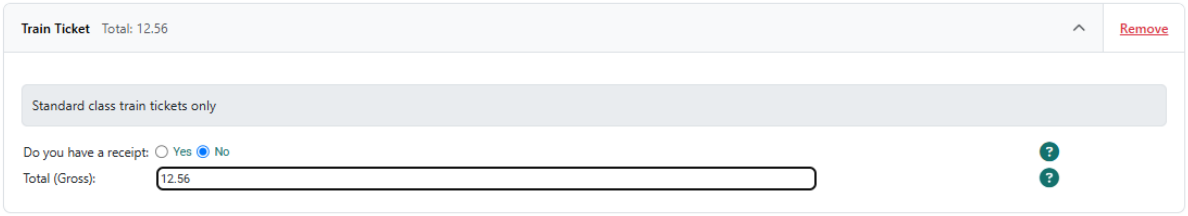
29. If you have not completed a mandatory field, or if you have not entered a value for an item you selected, a message will be displayed to allow you to correct this as in the following example.





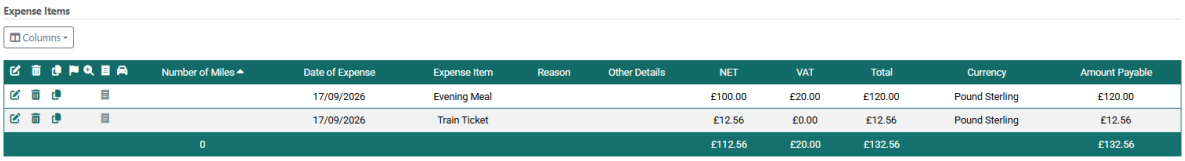
30. If you didn't enter the expense item value, select **Cancel** from the message and then provide the **Total** for your expense.



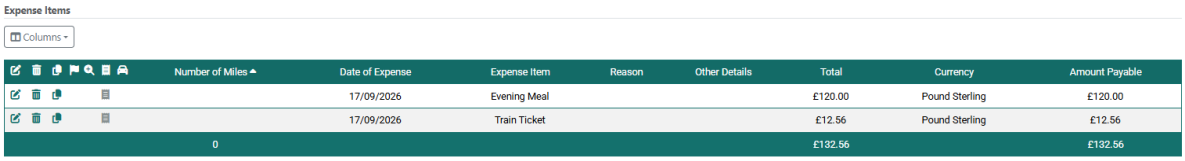


31. Once all the details are provided, the **Save** option will add the item(s) to your current claim.

32. The **Claim Details** page displays providing you with a summary of all the items you have added to your Current Claim for which you want to be reimbursed.



33. Note that if your organisation does not require you to provide VAT details your display may not include Net or VAT columns, for example:



Managing the Expense Item Receipt

Receipt First

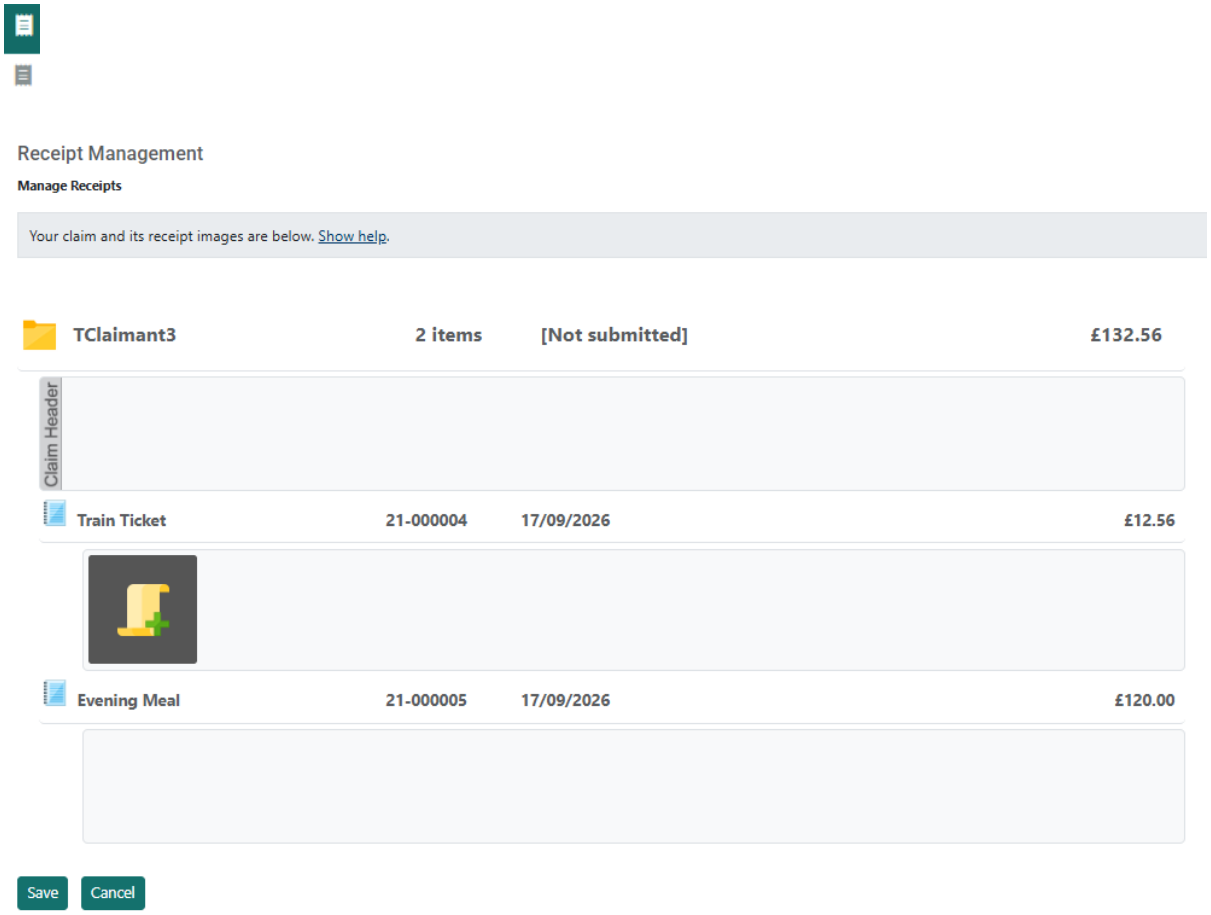
If you selected to add the expense item to your current claim by using a receipt from the wallet, the receipt will already be attached to your expense item, and you don't need to take any further action. Go to the Viewing the Expense Item Receipts section below.

Expense Item First

If you have added an expense item to your current claim using the Add Expense option or after navigating to your current claim you will need to upload a copy of the receipt. Go to the Uploading a Receipt to the Saved Expense Item section below.

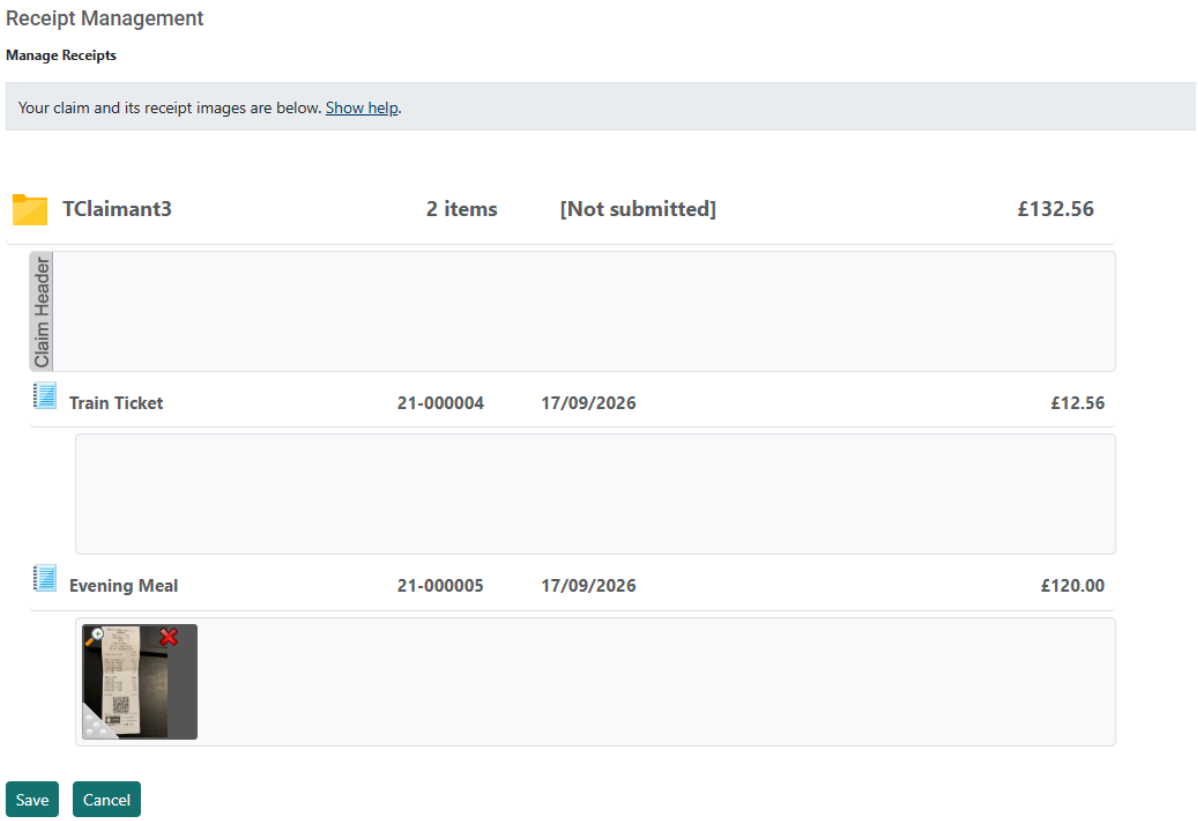
Uploading a Receipt to the Saved Expense Item

34. From the **Current Details** summary page, click on the icon to**Manage Receipts**.

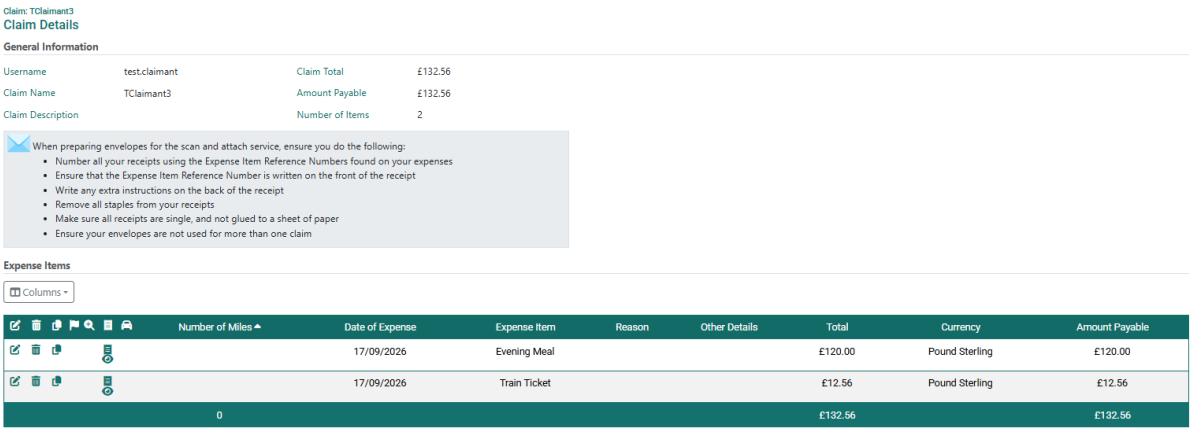


35. Add a copy of your receipt in the normal way by clicking on the icon.





36. Click **Save** to save the receipt images.



Viewing the Expense Item Receipts

37. From the **Current Details** summary page, click on the icon to **Quick View Receipts**.



38. The image will display on the screen.



Summary of Options for Adding an Expense with a Receipt

There are 3 options to add your expense item to your current claim, and you can choose the option you prefer.

Options include:

- Option 1 - Click on the **Add New Expense** button
- Option 2 - Navigate to your existing **Current Claims**
- Option 3 - Use a receipt in the **Receipt Wallet**

Option 1 navigates you directly to your current claim and allows the expense item details to be entered following which you can upload the receipt against the item.

Option 2 involves more clicks to navigate to the current claim but then follows the same path as option 1.

Option 3 is new but probably the easiest to use since there are fewer navigational clicks and fewer details to enter. Selecting the image from the wallet directs you straight to the current claim where some of the details are already populated, and, when you complete and save the remaining expense item details, the receipt is already attached to the item for you.

Assure Expenses | Adding an Expense Item for Mileage

> *Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.*

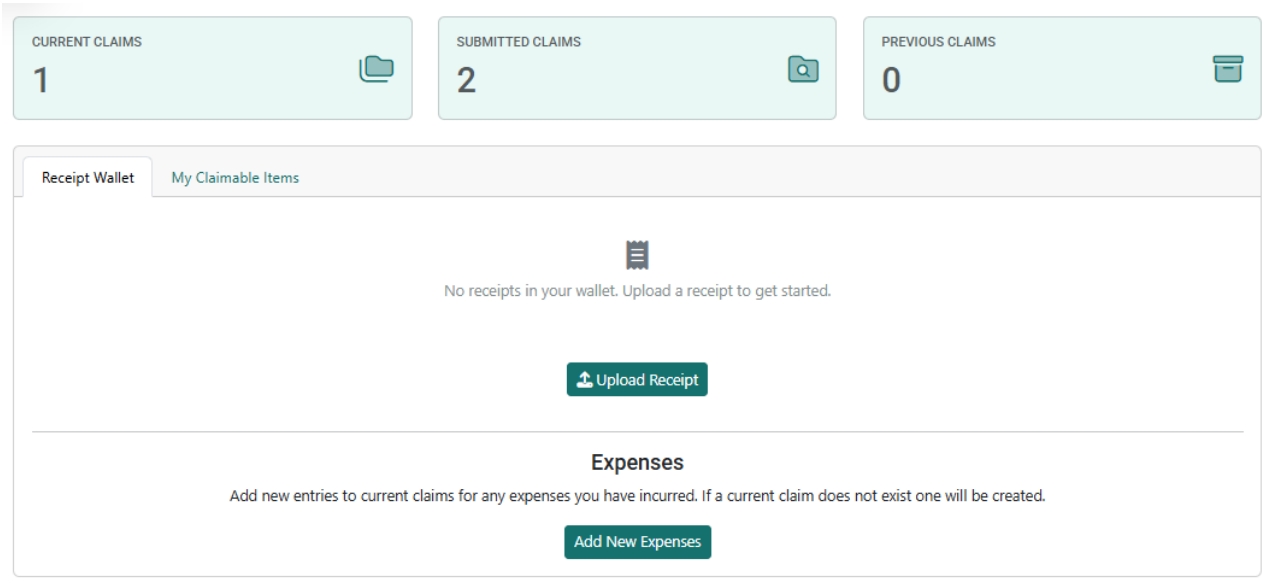
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as adding mileage to your claim, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

Options for Adding a New Expense

Options from the **Home Page**:



To make a claim for a mileage expense item you have 2 options as before.

- Click on the **Add New Expense** button
- Navigate to your existing **Current Claims**

Each of these options is described in more detail below.

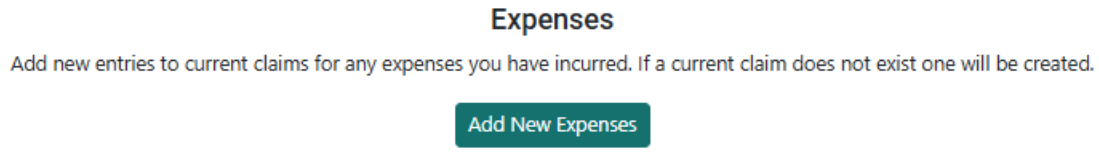
Note that if you are asked to provide receipts in support of mileage items you could also use the option:

- Use a receipt in the **Receipt Wallet**

This option is described in the separate document “Adding an Expense Item with a Receipt”.

Option 1 - **Add New Expense**

1. Select **Add New Expenses** from the **Home Page**.



2. You will be directed to **Add Expense** page for your current claim to allow you to record the specific details of the expense you have incurred.

3. Skip down to the Expense Item General Details section below.

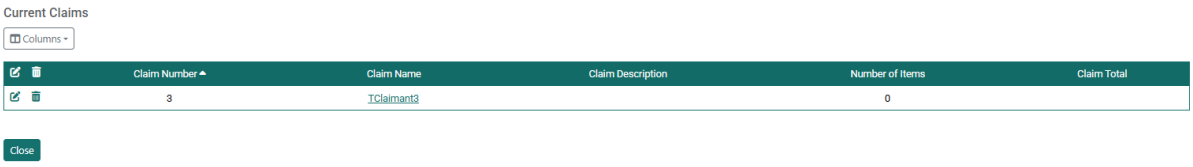
Option 2 - **Navigate to Existing Current Claim**

4. Notice the new **Current Claims** tile at the top of the page.



5. Click on the **Current Claims** tile.

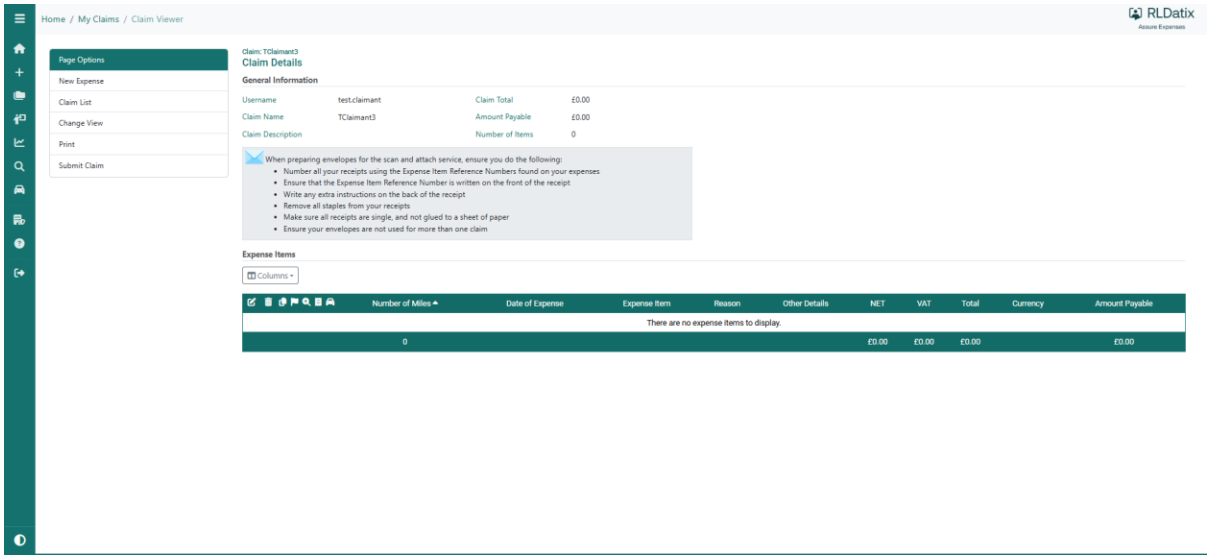
6. You will be directed to the **Current Claims** screen.



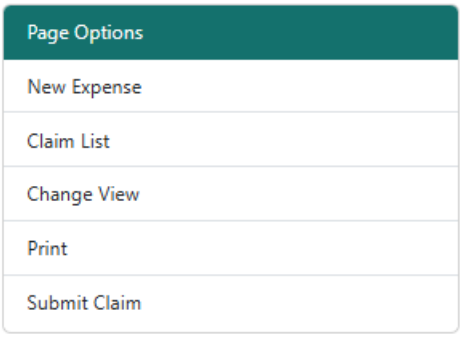
7. Select the current claim you would like to add your expenses to by clicking on the **Claim Name** link.



8. You will be directed to the **Claim View** page where you can add your expense item details.



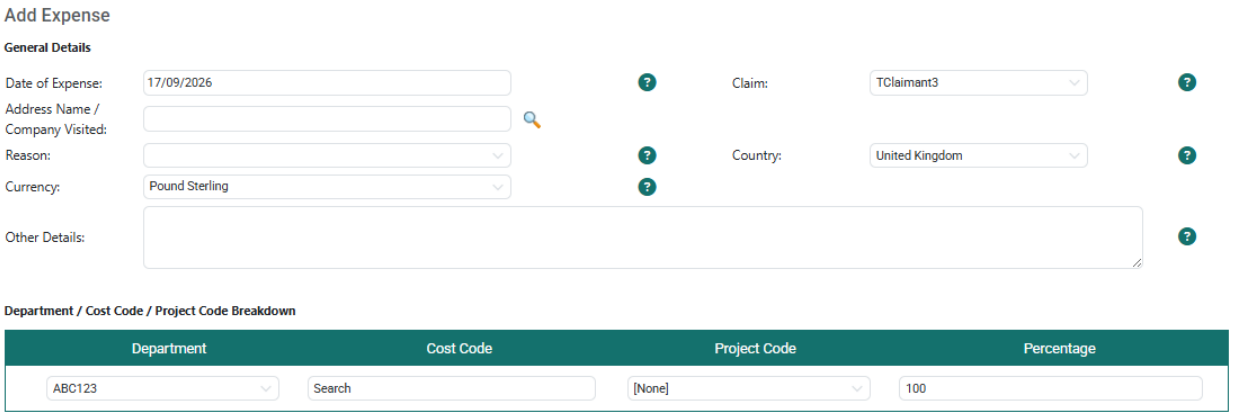
9. Select **New Expense** from the **Page Options** menu.



10. You will be directed to Add Expense page for your current claim to allow you to record the specific details of the expense you have incurred.

11. Skip down to the Expense Item General Details section below.

Expense Item General Details



Your system configuration will determine whether or not you need to provide information in each of the following fields.

If you do not see one or more of the fields described below don't worry, your organisation has determined that they do not need you to enter the information and, in this case, the fields do not display.

Field	Description
Date of Expense	Enter the date that the expense was incurred. This is a mandatory field.
Organisation / Address Name / Company Visited	Specify the organisation that the expense was incurred for. For example, if you are adding a parking receipt expense for visiting another company or organisation, enter the details of where you visited. Click in the 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 selecting an option from the list of available reasons.
Country	Select the country that the expense was incurred in. This will default to your Primary Country or residence 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.

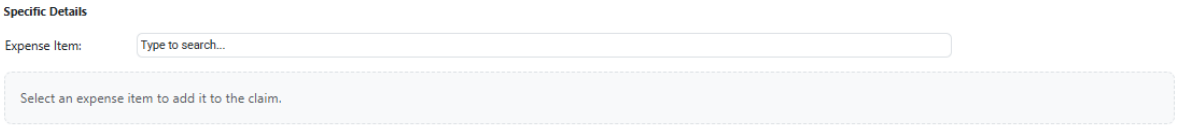
12. Complete the details for your claim in the **General Details** section at the top of the **Add Expenses** page.

Mileage Expense Item Specific Details

If you already claim mileage expenses the process will already be familiar to you, but we have

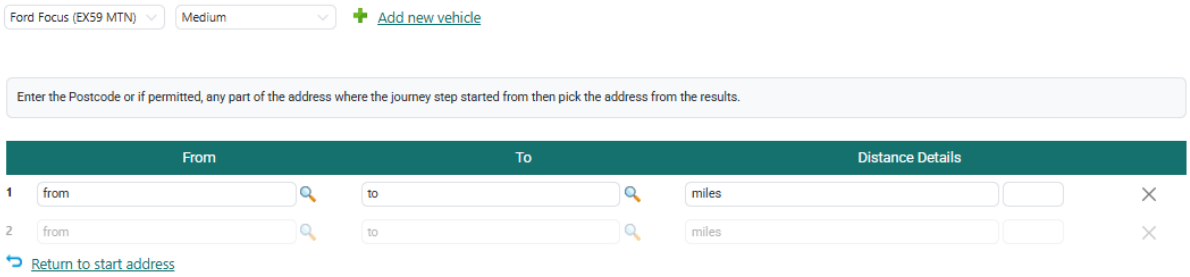
included a brief summary with updated screen displays for you below.

13. Select the type of expense you want to claim by typing in the**Expense Item** box, for example, “Mileage”.



> *This way of specifying your expense item has been implemented to enable the expense to be added from the receipt wallet image whilst also allowing the two original methods of adding an expense to the claim.*
>
> *This is now aligned with how you select your expense item via the mobile app giving you a consistent approach no matter whether you use the app or the desktop version.*
>
> *You can make a selection by searching by item or category, for example, “Mileage” or “Travel”.*

14. If you selected a mileage type item that requires you to provide details of your journey, a journey step grid may appear allowing you to record your journey details.



15. The journey details work as normal, first select the vehicle used for the journey from the drop-down list.

16. Click in the **From** field, within the journey grid, to enter the location where the journey began.



17. Enter your start location by clicking on the home or workplace icon or start to type the address

from where you started.

> *If your Expenses system has been configured for use in different countries, you can click on the country flag to change to the country in which you made the journey.*

18. After entering the start location, click in the **To** field, within the journey grid, to complete the details of your journey step destination. This will automatically populate the **Distance Details** with the recommended distance between both locations.

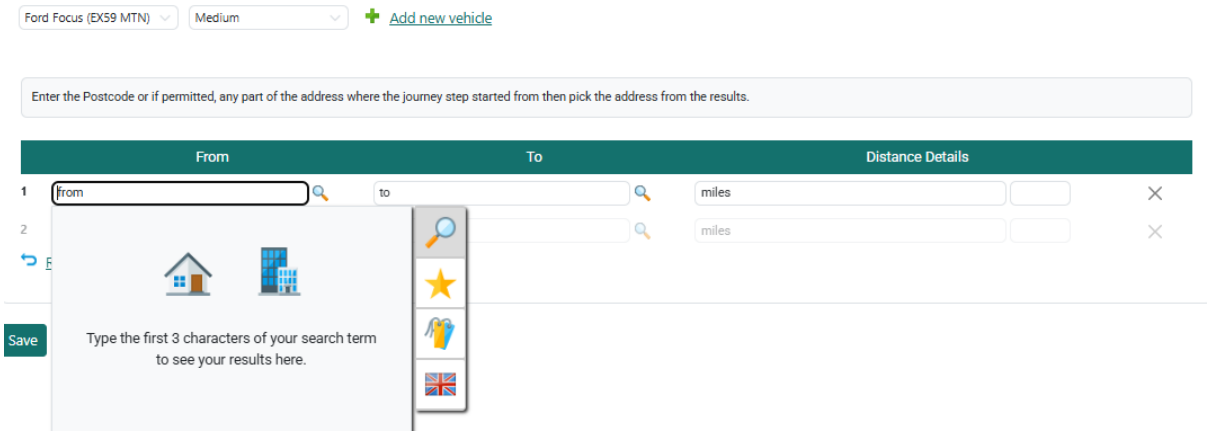
19. Below is a list of additional fields that may be available for you to complete for each journey step, depending upon your system set:

Features	Descriptions
Passenger	You may be able to enter passengers who were travelling with you on that specific journey step; this is required if you receive a higher rate of reimbursement for vehicle sharing. Depending on your system setup, you can add passengers using the following methods: ◦ **Name of Passengers** - Click the Add Passenger link and then search for the Assure Expenses user who was a passenger on this step of the journey. Click the user to add them as a passenger. You can then repeat this process for each passenger present on this step of the journey. ◦ **Number of Passengers** - Enter the number of passengers who were present on this step of the journey (not including the driver).
Return to Start Address	Click this option to create a journey step that returns to your original location from your last entered location.
Heavy/Bulky Equipment	You may be able to tick the Heavy/Bulky Equipment checkbox. Click this option if you transported heavy or bulky equipment during the journey step. This will calculate the amount reimbursed based upon the journey steps it has been selected against.

20. When you click in the **To** field in the row below the **From** field is automatically populated.

21. Continue to click in the next **To** field in subsequent rows within the journey grid, to add additional steps to your journey until your journey details are complete.

22. Upon completing your Journey details.



23. If you want to add another expense item for the same day select this in the**Expense Item** box in the same way as described above.

24. The first item container for your mileage journey will close, and the new one will be open ready for you to enter your details.

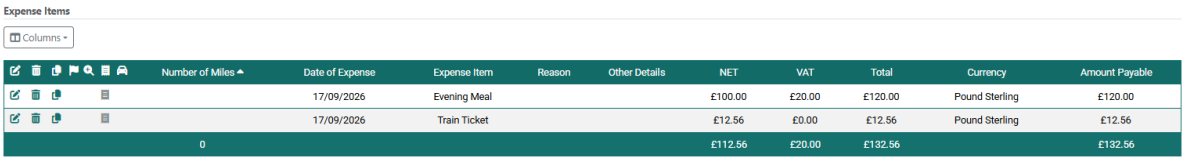
25. When you have entered all your items for the claim date showing at the top of the page, click on **Save** to add the mileage and any other item(s) to your current claim.

26. Alternatively, click **Cancel** to discard the unsaved changes.

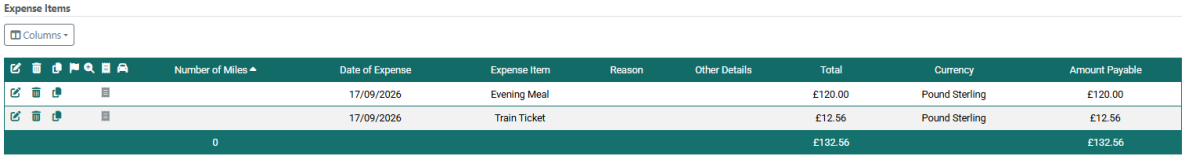
27. If you have not completed a mandatory field, or if you have not entered a value for the item you selected, a message will be displayed to allow you to correct this.

28. Once all the details are provided, the**Save** option will add your mileage and any other item(s) to your current claim and return to the **Claim Details** page.

29. The **Claim Details** page provides you with a summary of all the items you have added to your Current Claim for which you want to be reimbursed.



30. Note that if your organisation does not require you to provide VAT details your display may not include Net or VAT columns, for example:



This guide describes adding a mileage item for which you need to record the journey steps.

There may be other mileage type items configured in your Expenses system that only require

you to provide a total number of miles, for example on an emergency call out, or for an out of hours return to duty.

There may be other mileage type items that allow you to claim a mileage allowance, for example a fixed allowance, or a workplace relocation mileage (excess mileage) for reimbursement of the additional home to new base mileage distance.

You will already be familiar with these types of mileage if they are configured in your Expenses system and you are entitled to be reimbursed.

In all cases, the same steps can be followed as described above but where you are required to claim a fixed number of miles, or an allowance, the journey steps grid will not then appear.

Please also refer to the separate guide describing adding an expense item with a receipt for non-mileage expense items.

Assure Expenses | Copying an Expense Item

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as creating, managing, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

If you have a recurring expense that you claim more than once over the course of the claim period (week or month), you can copy the expense item instead of re-entering all the details for each day you wish to claim the item.

This is described below in this article.

The process is the same as before and not changed as part of the design changes, but we've provided this guidance to show you the updated screen pages.

Navigate to an Existing Current Claim

1. Notice the new **Current Claims** tile at the top of the page.

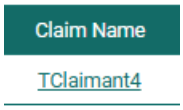


2. Click on the **Current Claims** tile.

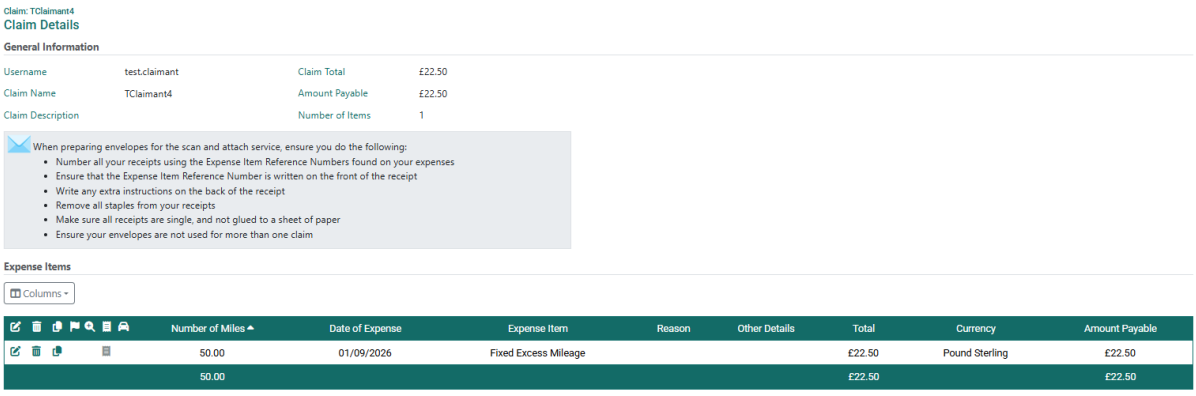
3. You will be directed to the **Current Claims** screen.



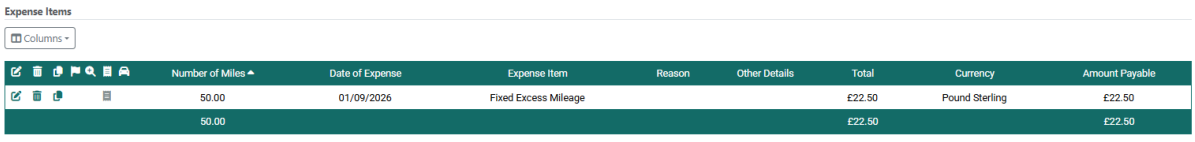
4. Select the current claim you would like to add your expenses to by clicking on the **Claim Name** link.



5. You will be directed to the **Claim Details** page.



6. Check the items already entered in the **Expense Items** summary section.

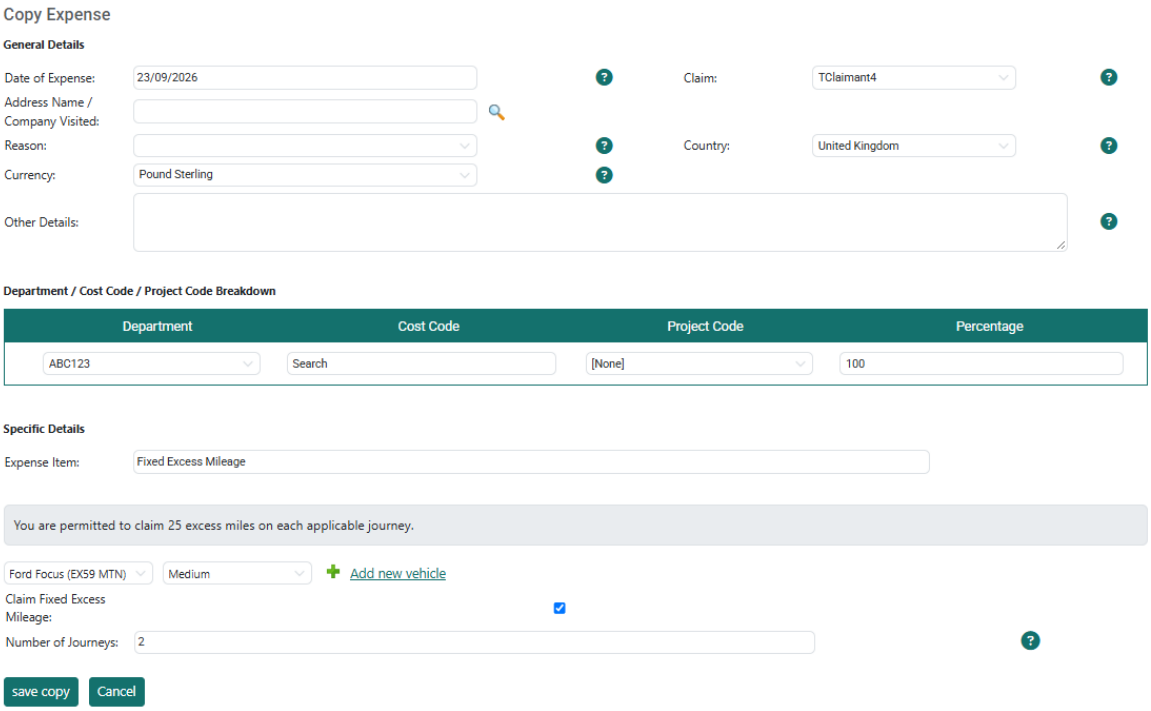


7. Select the **Copy Expense** icon.



8. You will be directed to **Copy Expense** where a copy of the expense item you chose can be added to your current claim.

9. When you are directed to **Copy Expense** page, the date will default to a new date, but all the other details (General Details and Specific Details) will be pre-populated from the expense item you copied.

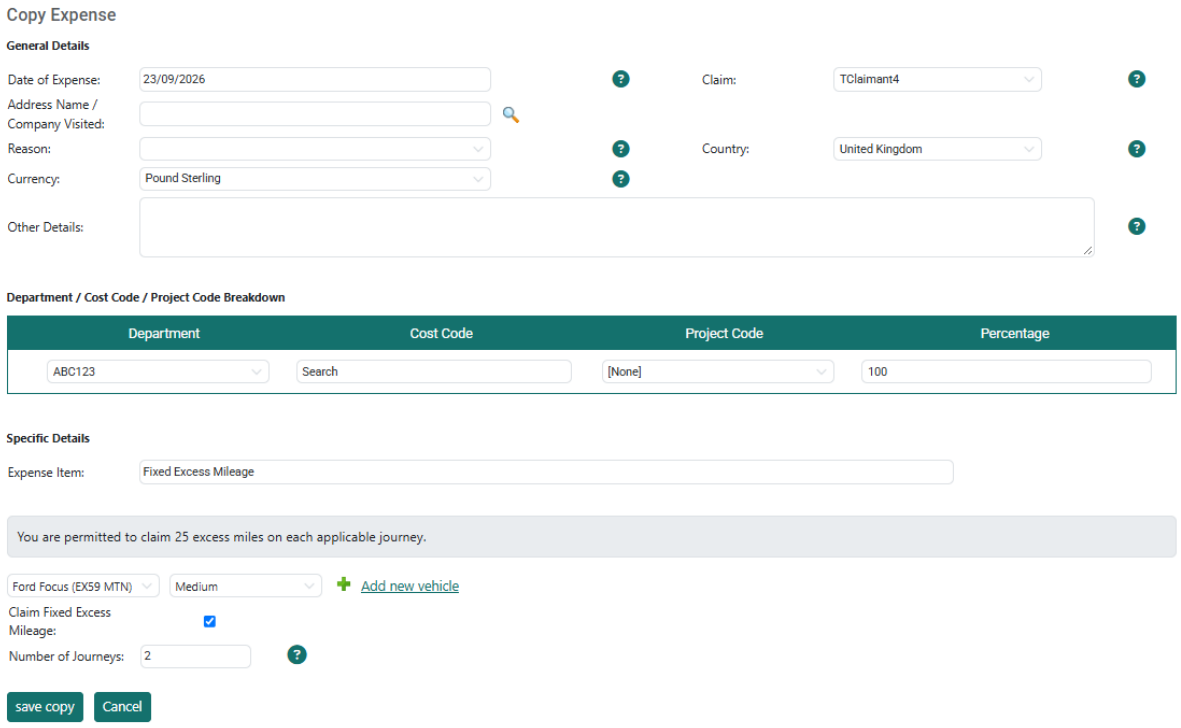


10. If required, update the date for your copied expense item in the **General Details** section at the top of the **Copy Expenses** page so that it reflects the date that you incurred the expense.

> Note that you can only ever claim for items you have already incurred and therefore cannot future date the expense.
>
> When making the copy of an item you must have already incurred the expense, and so the date you enter can only be Today or any date in the past.

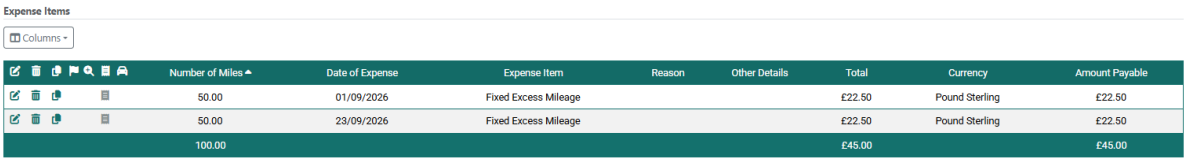
11. Update any of the pre-populated details that you wish to change in the **General Details** section at the top of the **Copy Expenses** page.

12. The expense item Specific Details will be same as the item you copied with all the fields copied and pre-populated, but you can also update the information in the **Specific Details** section.



13. Click on **Save Copy** to add the copied item on your current claim.

14. The **Claim Details** page provides you with a summary of all the items you now have added to your Current Claim, including the copied item.



15. Repeat these steps until you have a copy for each occurrence of the item for the claim period.

The steps you follow to copy an expense are not being changed.

The only change is how you navigate to your claim expenses noted in the steps above.

The remainder of the steps are included here only for reference, and to provide you with visibility of the updated screen designs.

Assure Expenses | Submitting a Claim for Approval

Submitting a Claim for Approval

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses

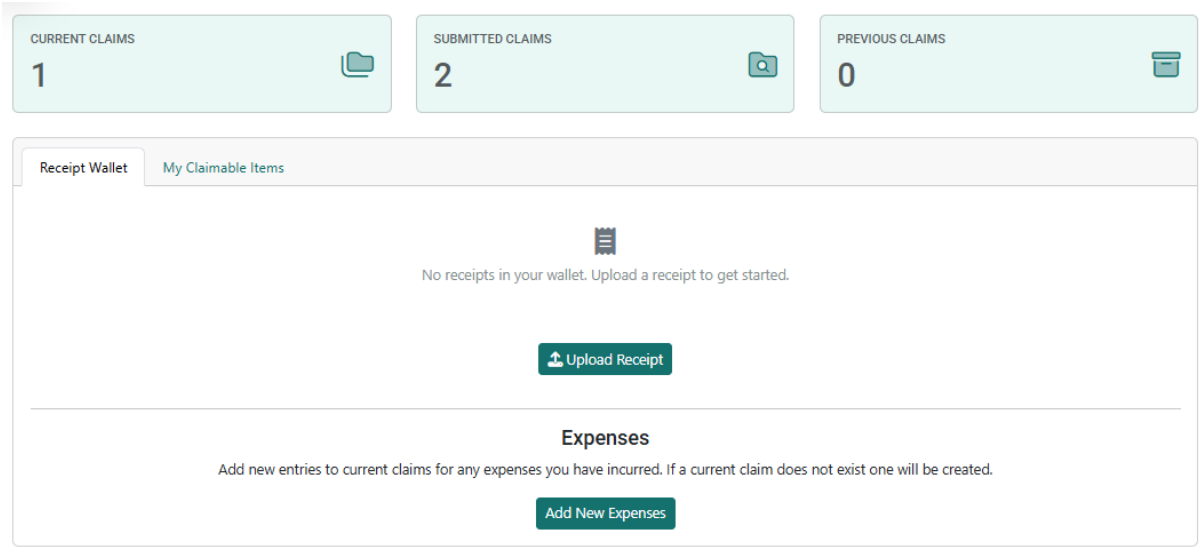
pages.

These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as creating, managing, or submitting an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

1. From the **Homepage**:



2. Notice the new **Current Claims** tile at the top of the page.



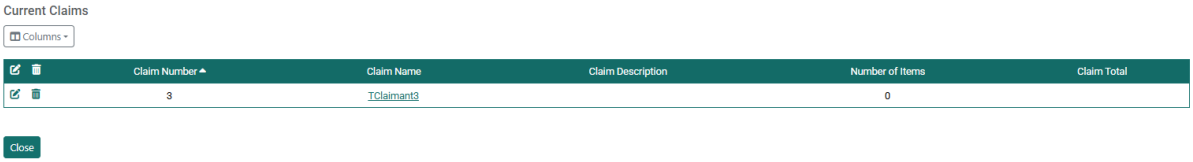
The number of current claims you have is displayed in the tile.

You can click on any of the tiles for navigation.

When you already have a current claim in the system, the tile will display with the number 1 (or more) as shown above.

3. Click on the **Current Claims** tile.

4. You will be directed to the **Current Claims** screen.



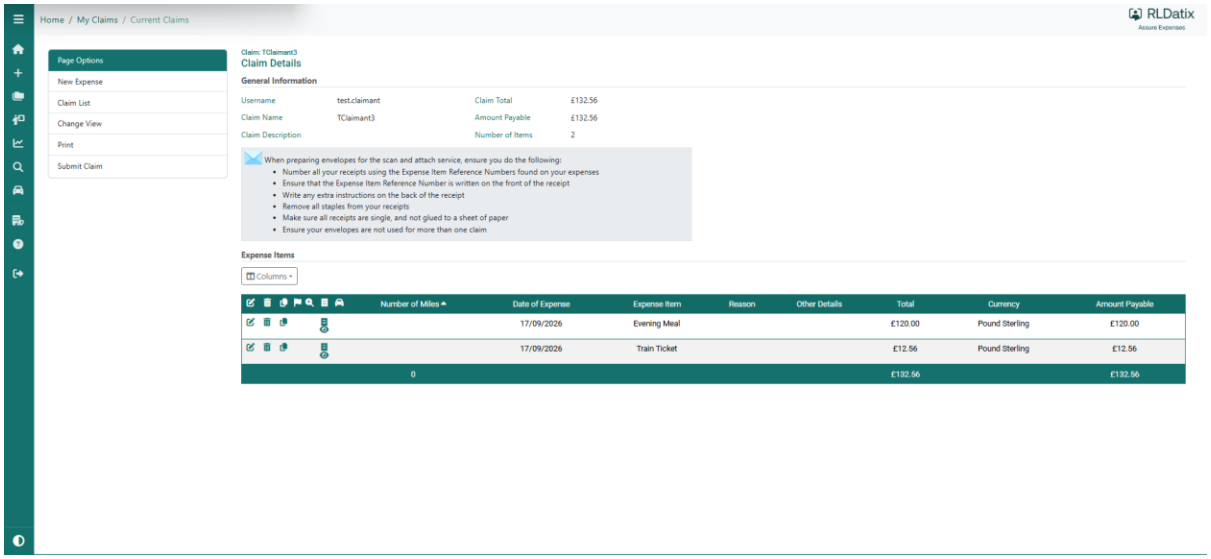
Only the navigation to the Current Claims page has changed.

From here the tasks for submitting your claim will be done exactly the same as usual.

5. Select the current claim by clicking on the **Claim Name** link.



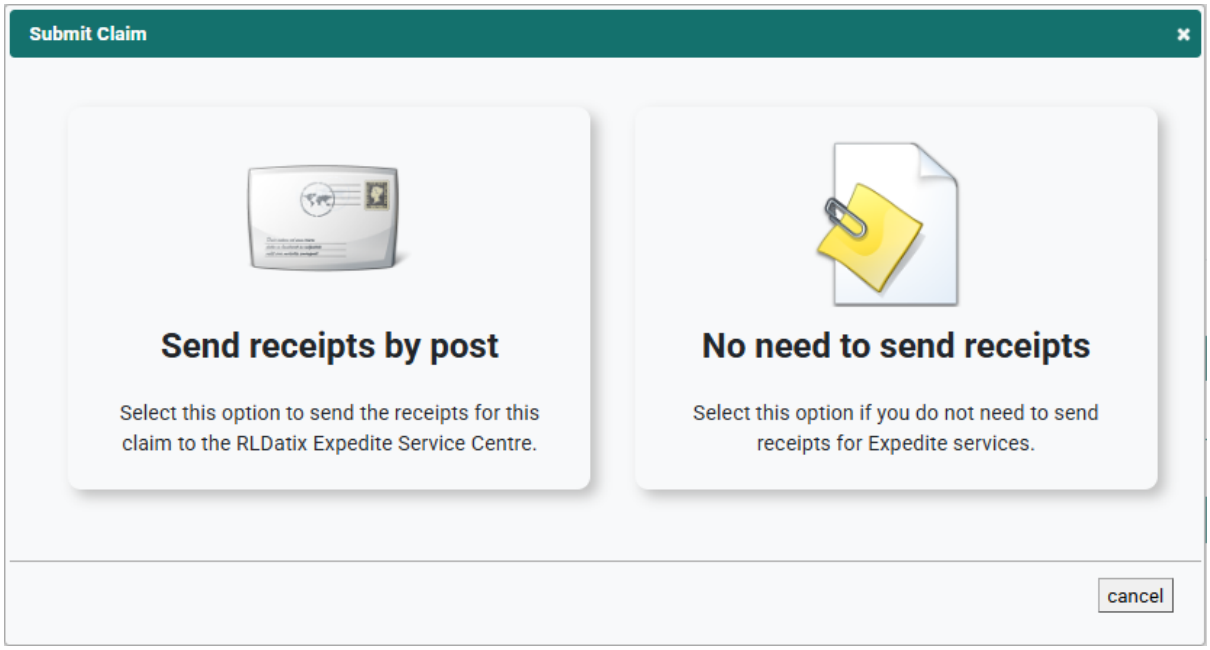
6. You will be directed to the **Claim View** page where you will see the items you have added to the claim.



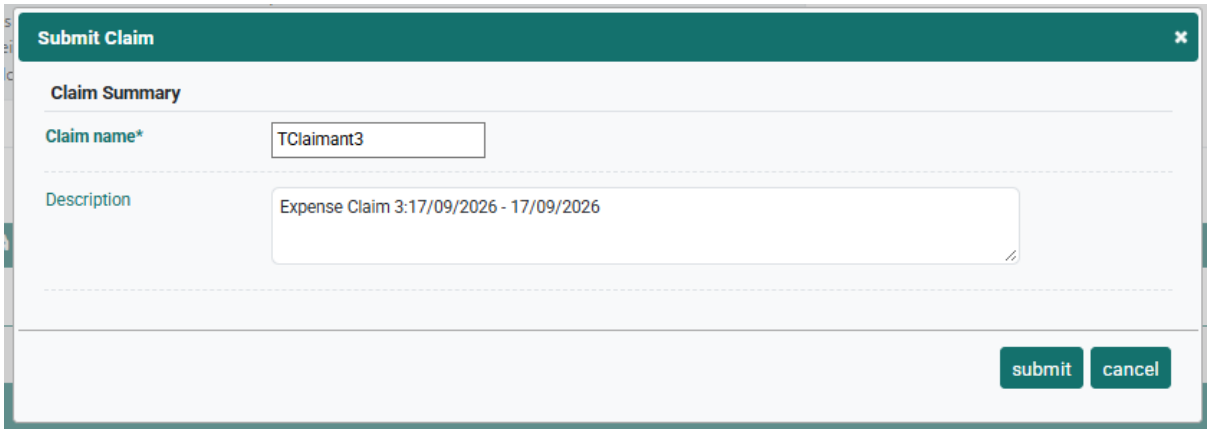
7. Select **Submit Claim** from the **Page Options**.



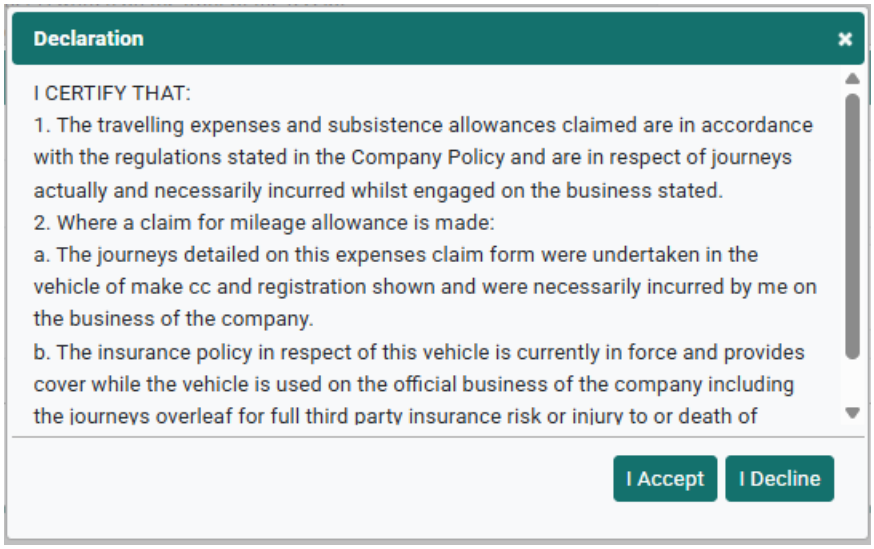
8. Select the relevant receipts option, for example, **No need to send receipts**.



9. If you have items that have been flagged fill in the justification for each item.
10. Select **submit** to send your claim for approval.

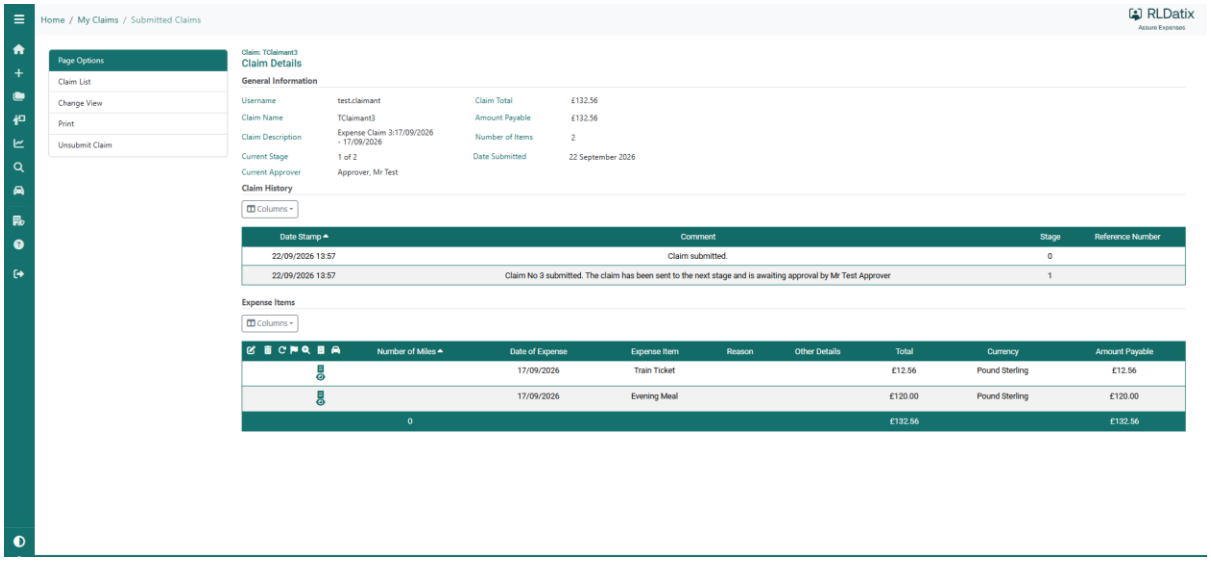


11. If you are required to sign a declaration, as in the following example, select the option **I Accept** and the claim will move to the approver. If instead, you select the option, **I Decline**, the claim will stay with you as a current claim, and you can submit it later.

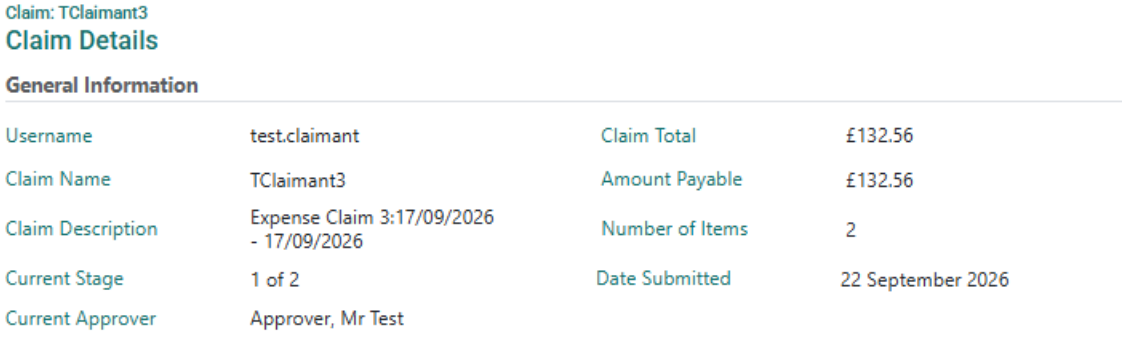


The declaration wording is configured in your system in line with your organisation's Expenses policy and may therefore be different to the example shown here.

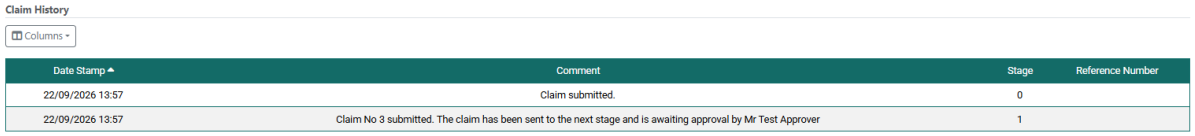
12. You will be directed to the **Submitted Claims** page where you will see the claim you have submitted. There will also be a claim history audit trail.



Claim Details



Claim History Approval Audit Trail

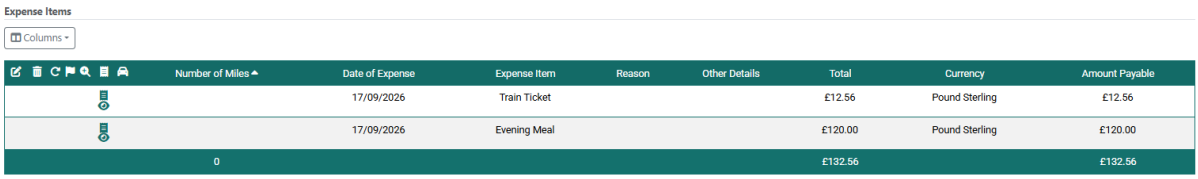


Claim History

Columns

Date Stamp	Comment	Stage	Reference Number
22/09/2026 13:57	Claim submitted.	0	
22/09/2026 13:57	Claim No 3 submitted. The claim has been sent to the next stage and is awaiting approval by Mr Test Approver	1	

Claim Expense Item Details

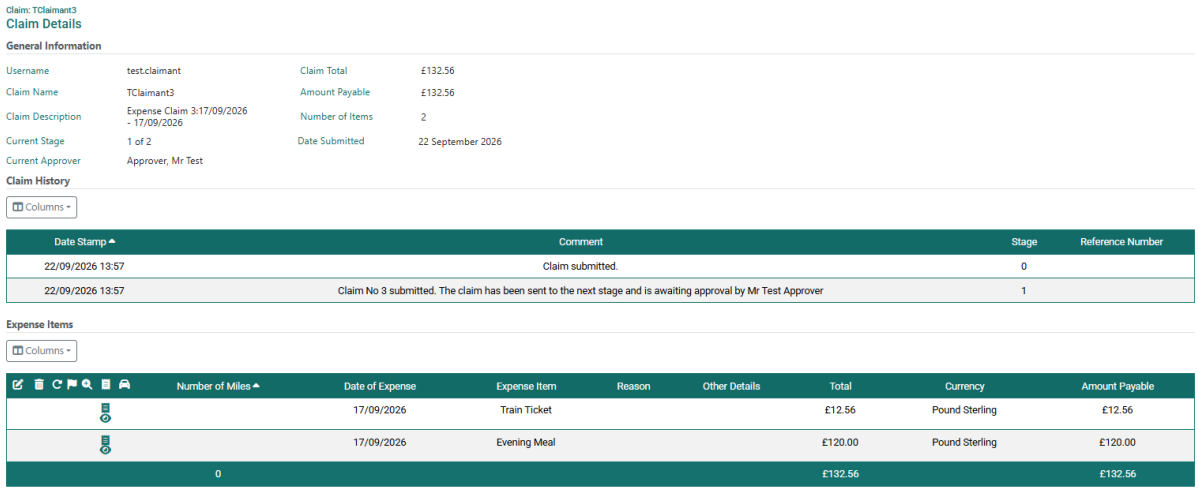


Expense Items

Columns

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Currency	Amount Payable
	17/09/2026	Train Ticket			£12.56	Pound Sterling	£12.56
	17/09/2026	Evening Meal			£120.00	Pound Sterling	£120.00
0					£132.56		£132.56

Claim Details Page



Claim: TClaimant3

Claim Details

General Information

Username	test.claimant	Claim Total	£132.56
Claim Name	TClaimant3	Amount Payable	£132.56
Claim Description	Expense Claim 3:17/09/2026 - 17/09/2026	Number of Items	2
Current Stage	1 of 2	Date Submitted	22 September 2026
Current Approver	Approver, Mr Test		

Claim History

Columns

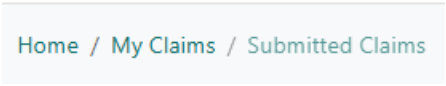
Date Stamp	Comment	Stage	Reference Number
22/09/2026 13:57	Claim submitted.	0	
22/09/2026 13:57	Claim No 3 submitted. The claim has been sent to the next stage and is awaiting approval by Mr Test Approver	1	

Expense Items

Columns

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Currency	Amount Payable
	17/09/2026	Train Ticket			£12.56	Pound Sterling	£12.56
	17/09/2026	Evening Meal			£120.00	Pound Sterling	£120.00
0					£132.56		£132.56

13. You can use the breadcrumbs to navigate back to a previous menu or the **Home Page**.



The steps you follow to submit your claim for approval are not being changed.

The only change is how you navigate to your claim as noted in the steps above.

The remainder of the steps are included here only for reference, and to provide you with visibility of the updated screen designs.

Assure Expenses | Approving a Claim

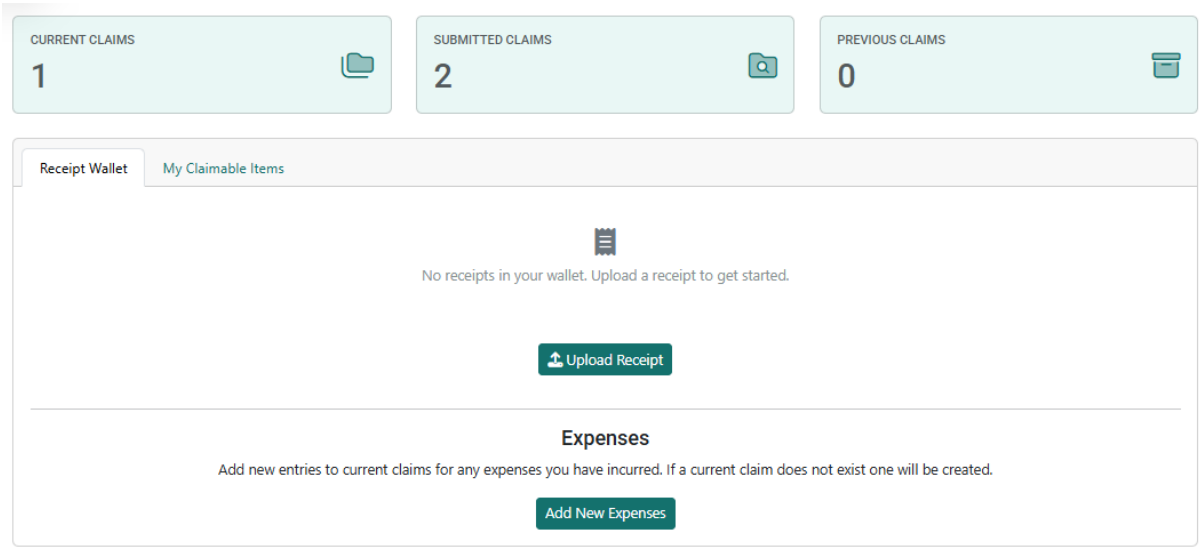
Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

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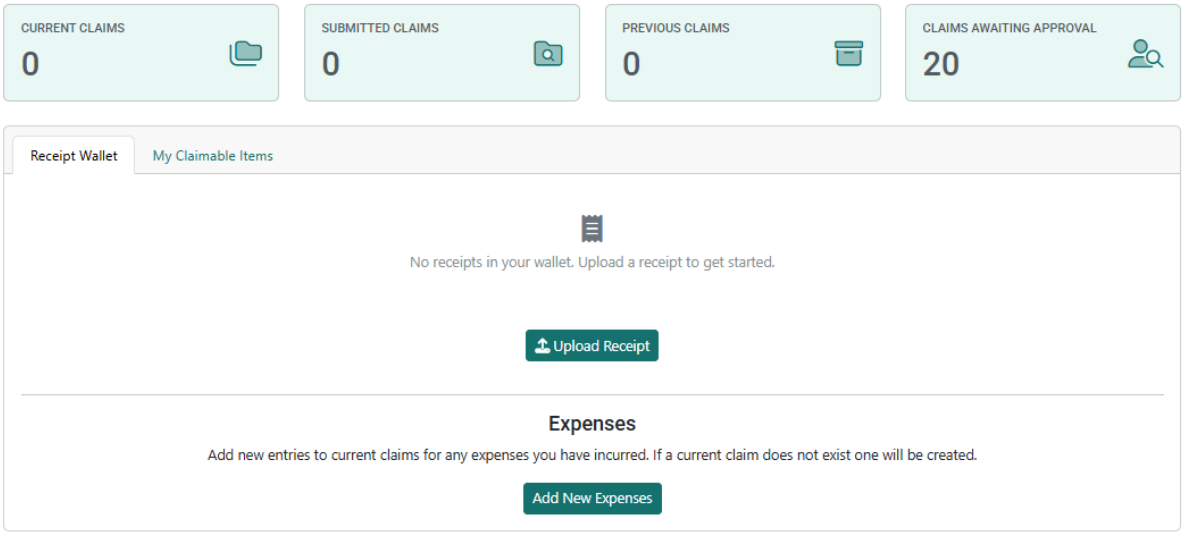
There are no changes to how you complete your usual tasks, such as approving an expense claim, except for how you navigate the menu options.

The design changes apply only to the desktop version of Expenses. The mobile app is not being updated.

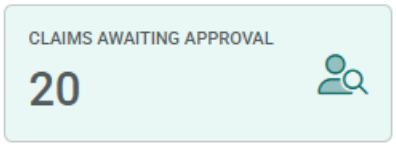
1. If you are a claimant and not required to approve the claims of others, your **Home Page** will look like this:



2. If you are an approver and you are required to approve the claims of others, your **Home Page** will instead look like this:



3. Notice the new **Claims Awaiting Approval** tile at the top of the page.

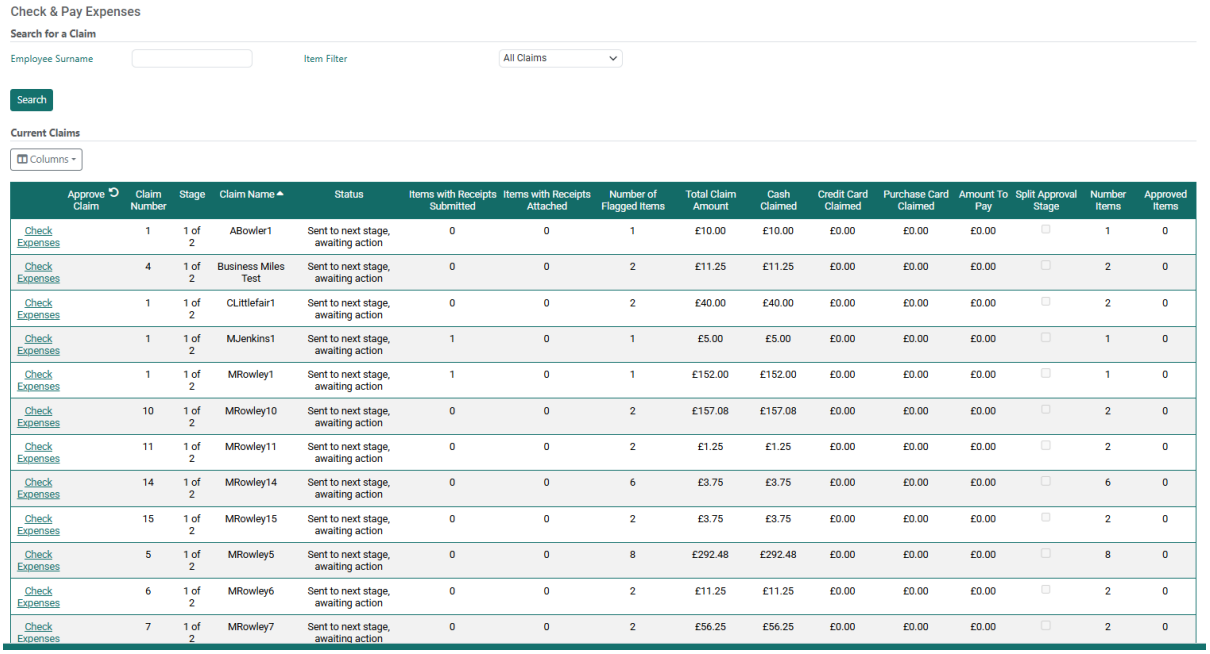


The number of claims that have been submitted for you to approve is displayed in the tile.

You can click on any of the tiles for navigation.

This tile replaces the Check and Pay expenses Home Page menu.

4. Click on the **Claims Awaiting Approval** tile.
5. You will be directed to the **Check and Pay Expenses** screen.

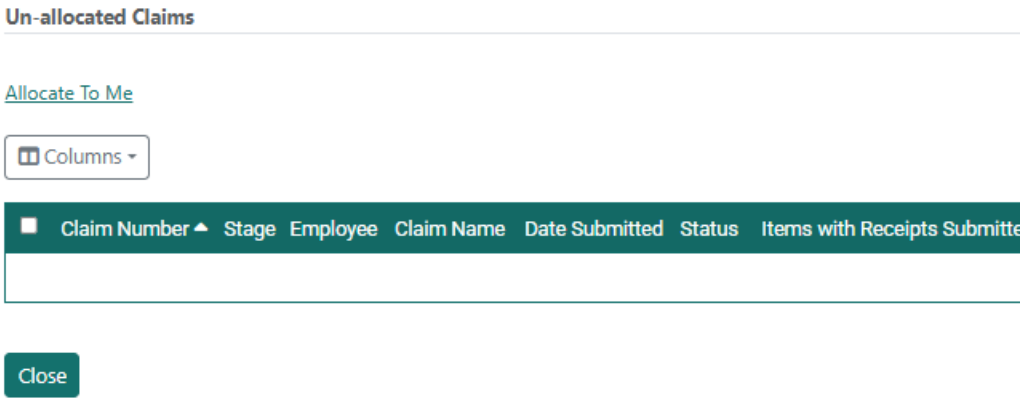


Approve Claim	Claim Number	Stage	Claim Name	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed	Amount To Pay	Split Approval Stage	Number Items	Approved Items
Check Expenses	1	1 of 2	ABowler1	Sent to next stage, awaiting action	0	0	1	£10.00	£10.00	£0.00	£0.00	£0.00		1	0
Check Expenses	4	1 of 2	Business Miles Test	Sent to next stage, awaiting action	0	0	2	£11.25	£11.25	£0.00	£0.00	£0.00		2	0
Check Expenses	1	1 of 2	CLittlefair1	Sent to next stage, awaiting action	0	0	2	£40.00	£40.00	£0.00	£0.00	£0.00		2	0
Check Expenses	1	1 of 2	MJenkins1	Sent to next stage, awaiting action	1	0	1	£5.00	£5.00	£0.00	£0.00	£0.00		1	0
Check Expenses	1	1 of 2	MRowley1	Sent to next stage, awaiting action	1	0	1	£152.00	£152.00	£0.00	£0.00	£0.00		1	0
Check Expenses	10	1 of 2	MRowley10	Sent to next stage, awaiting action	0	0	2	£157.08	£157.08	£0.00	£0.00	£0.00		2	0
Check Expenses	11	1 of 2	MRowley11	Sent to next stage, awaiting action	0	0	2	£1.25	£1.25	£0.00	£0.00	£0.00		2	0
Check Expenses	14	1 of 2	MRowley14	Sent to next stage, awaiting action	0	0	6	£3.75	£3.75	£0.00	£0.00	£0.00		6	0
Check Expenses	15	1 of 2	MRowley15	Sent to next stage, awaiting action	0	0	2	£3.75	£3.75	£0.00	£0.00	£0.00		2	0
Check Expenses	5	1 of 2	MRowley5	Sent to next stage, awaiting action	0	0	8	£292.48	£292.48	£0.00	£0.00	£0.00		8	0
Check Expenses	6	1 of 2	MRowley6	Sent to next stage, awaiting action	0	0	2	£11.25	£11.25	£0.00	£0.00	£0.00		2	0
Check Expenses	7	1 of 2	MRowley7	Sent to next stage, awaiting action	0	0	2	£56.25	£56.25	£0.00	£0.00	£0.00		2	0

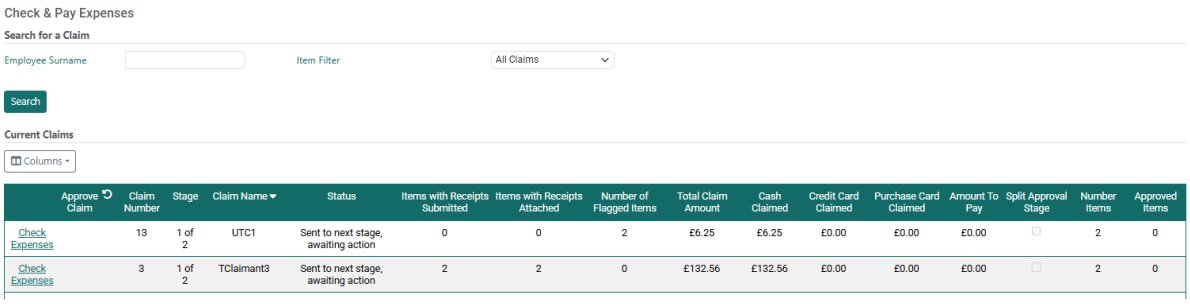
Only the navigation to the Check and Pay Expenses page has changed.

From here your actions for approving the claim items will be done exactly the same as usual.

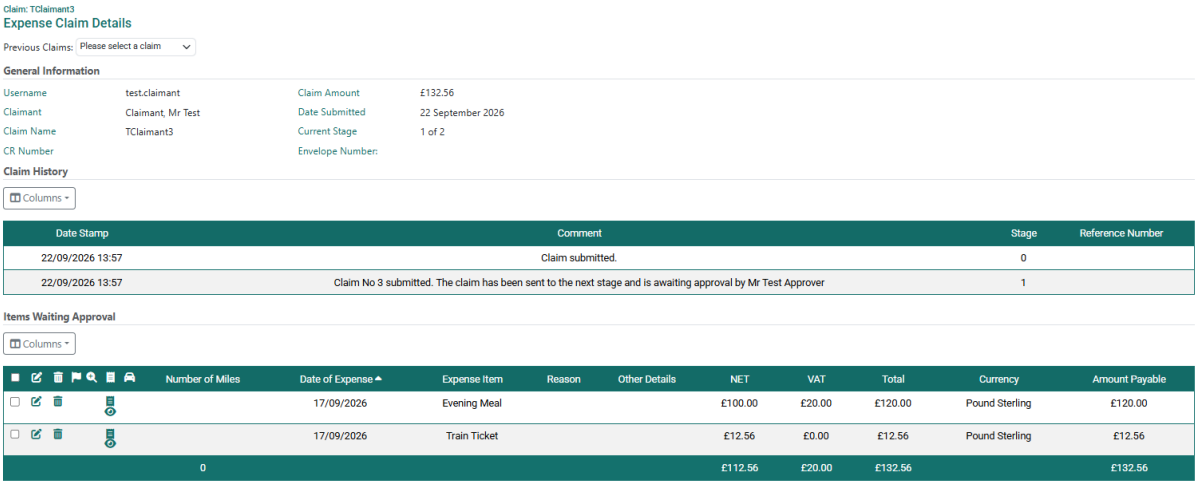
6. Claims which appear in the **Un-allocated Claims** section are allocated to a team for approval, rather than a specific approver, but if you are a member of that team and you see claims in this section, you can approve the claim by selecting the check box next to it and then clicking the **Allocate to Me** option. This will move the claim into your **Current Claims** section.



7. From the **Current Claims** section, select the claim you want to check by clicking on the **Check Expenses** link to the left of the claim.



8. You will be directed to the **Expense Claim Details** page where you will see the expense items the claimant has added to the claim.



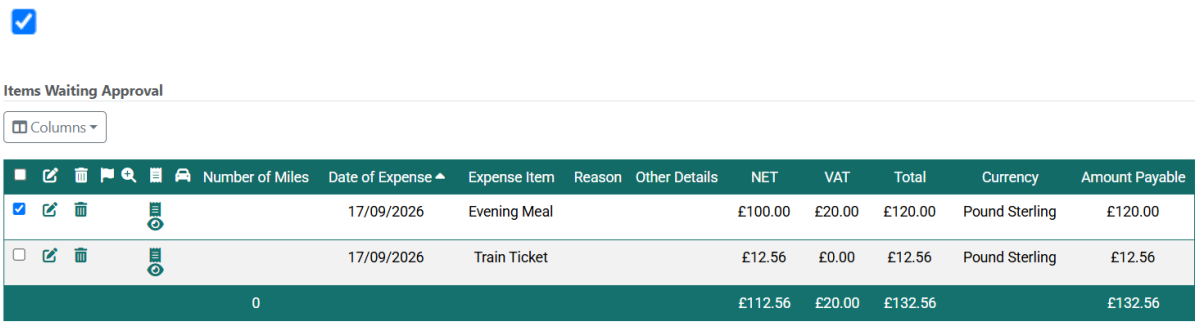
9. The **Expense Claim Details** page displays a high-level overview of the claim. The grid will display concise information about each expense being claimed, and by using the icons described below, you can further investigate.

Option	Description
	Click to open the expense for further information that is not currently displayed on screen. You can also amend any details you think are incorrect. You will need to provide a justification for changing the details the claimant provided.
	Remove the expense from the claim. This will send an email to the claimant explaining that the expense has been deleted. You will need to provide a justification for removing an item from the claim.
	Click to reveal a detailed explanation of why the expense has been flagged as being outside policy, and where provided, the claimant's justification. This information will help you identify whether or not to approve the expense.
	Indicates that an expense has been split. This might be: a meal expense where a portion will be allocated to subsistence, and a portion will be allocated to entertainment; or a hotel expense where a portion will be allocated for the room, and a portion will be for items like meals that are charged separately but on the same bill.
	View the attached receipt.
	Show full details of all the journey steps for the mileage being claimed.

10. As an approver, it is your responsibility to check each expense thoroughly before deciding to approve or reject each of the individual items.

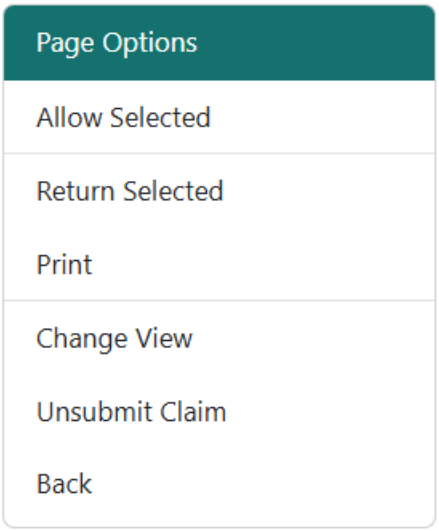
Approving an Expense Item

11. If you are satisfied that an item from the claim should be approved, select the check box in the left most column next to the item.

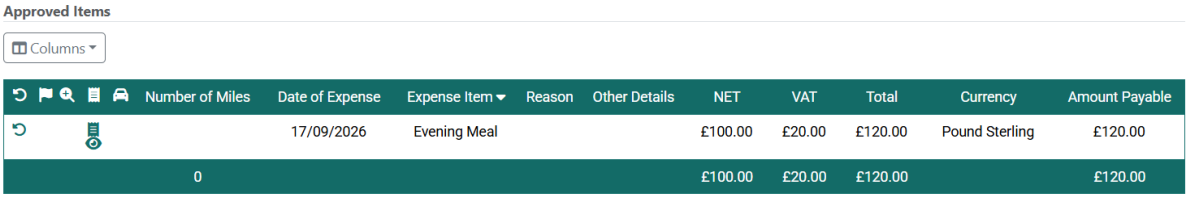


Note that you can select more than one item to approve at a time.

12. Select **Allow Selected** from the **Page Options**.

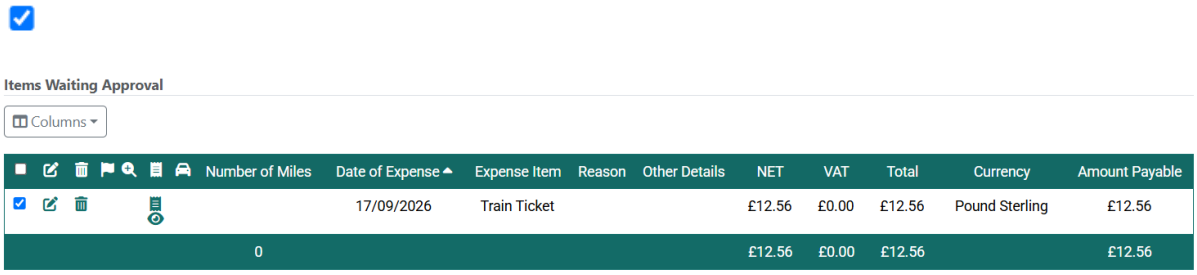


13. The expense item(s) will then move and appear in the**Approved Items** section.

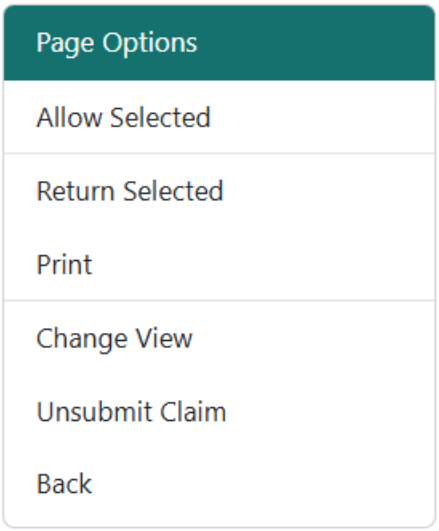


Disputing an Expense Item

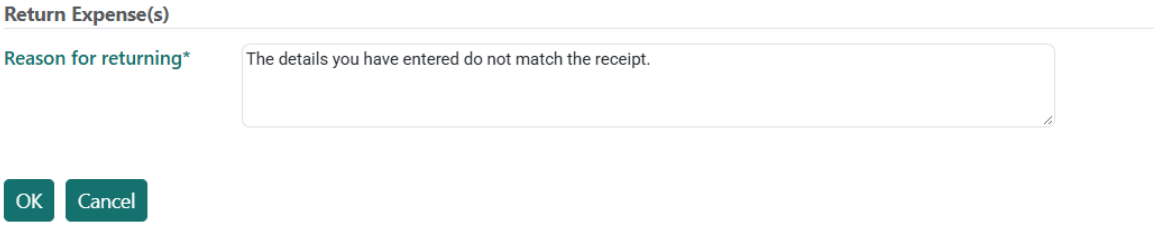
14. If you want to dispute a claimed item, you should return it to the claimant for further detail or justification. To do this, select the check box in the left most column next to the item.



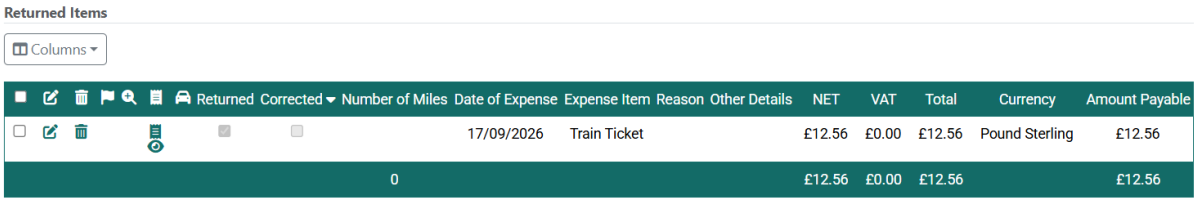
15. Select **Return Selected** from the **Page Options**.



16. Provide details for the claimant so that they know why the item is being returned.

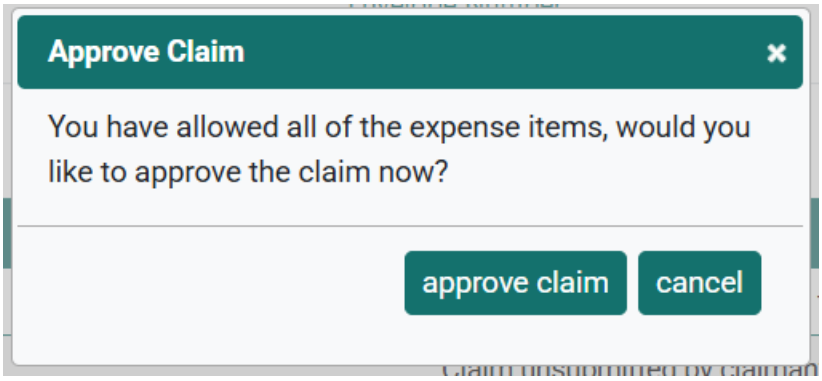


17. The expense items will then move and appear in the**Returned Items** section until the claimant responds.



Approving the Claim

18. Once all the expenses have been allowed, you will be asked if you want to approve the claim.



19. Once you select **approve claim**, you may be required to accept a declaration which displays on screen.

20. After accepting the declaration, this action will send an email to the next approver in the approval process, and the claim will disappear from your list of claims to approve.

21. You will be returned to the **Check and Pay Expenses** page where you can then select another claim awaiting approval and repeat the approval process.

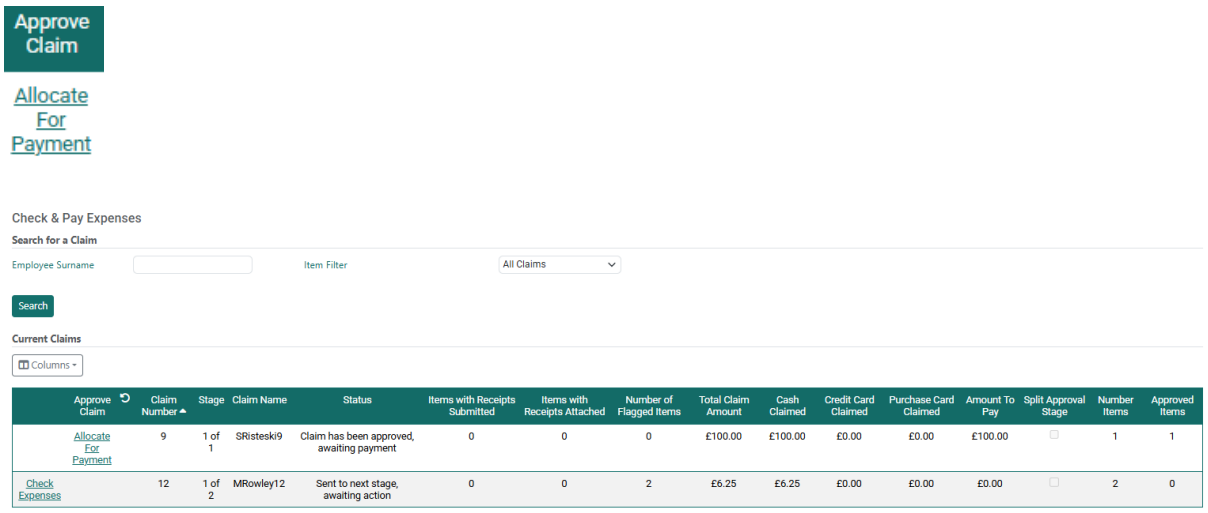
Final Stage of Approval

This step will depend on how your Expenses system has been configured for the approval process.

22. Once the claim has been approved in the final approval stage, you as the approver for that stage will be returned to the **Check and Pay Expenses** page.

    - If One Step Authorisation has been enabled, clicking Approve Claim will approve the claim and automatically allocate the claim for payment. No further action will need to be taken.
    - If One Step Authorisation has not been enabled, you will have one more step to complete before the claim is fully approved as described below.

23. From the **Check and Pay Expenses** page, select the **Allocate For Payment** option.



24. The fully approved claim will disappear from the **Check and Pay Expenses** page but from here you can then select another claim awaiting approval and repeat the approval process.

The steps you follow to approve a claim are not being changed.

The only change is how you navigate to Check and Pay expenses noted in the steps above.

The remainder of the steps have been included here only for reference, and to provide you with

visibility of the updated screen designs.

Assure Expenses | Navigating to Driver Compliance

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as adding or managing driving licences or vehicle documents.

Overview

If you are required to drive on behalf of your organisation suitable checks must be put in place to ensure you are legal and competent to drive, such as having a valid driving licence.

Where you use your own vehicle, additional checks should be made to ascertain the roadworthiness of the vehicle such as having valid Tax, MOT and insurance that includes business usage for you as a driver.

Enabling Driver Check within Expenses allows your organisation to manage these processes, ensuring that their Duty of Care responsibilities towards you as a driver, are being adhered to.

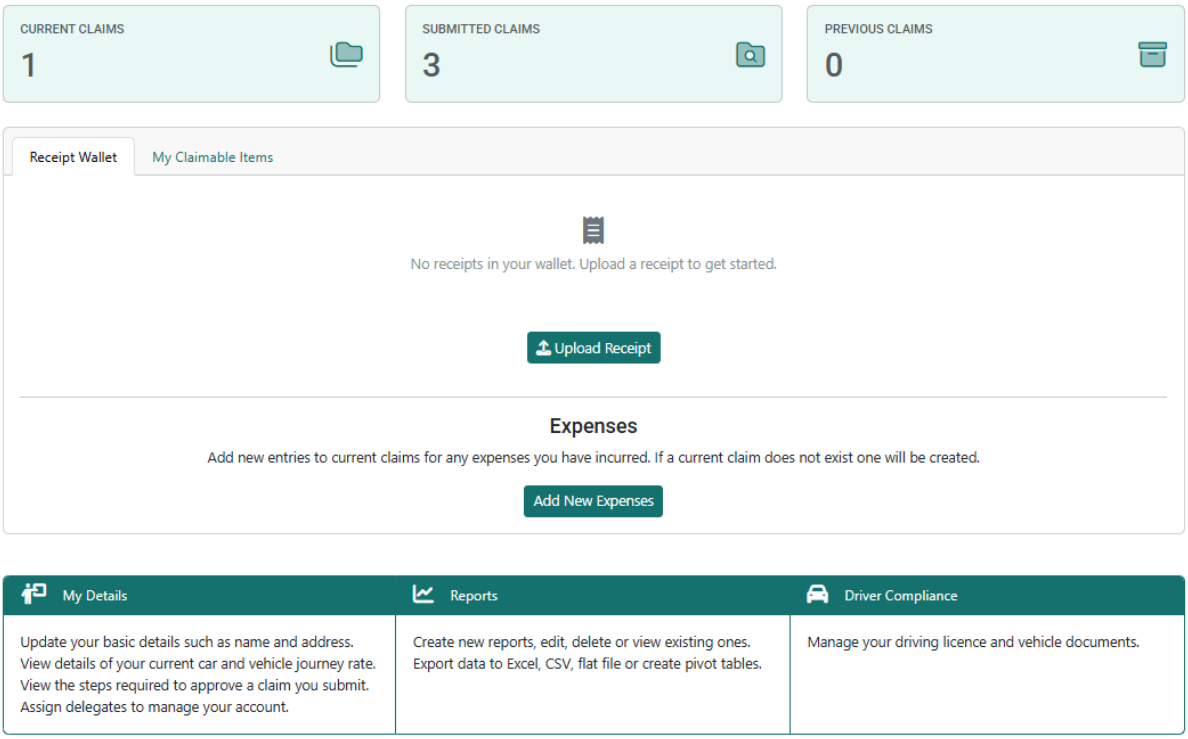
The Driver Compliance service allows fast and accurate real-time information to be obtained for your driving licences sourced from DVLA data, for vehicle Tax and MOT documents, significantly reducing the amount of time it takes you to provide this evidence, and reducing the administrative burden for your organisation.

If your organisation is using Driver Compliance you will already be familiar with these processes.

The processes are not being changed and will remain exactly the same when you use the new version.

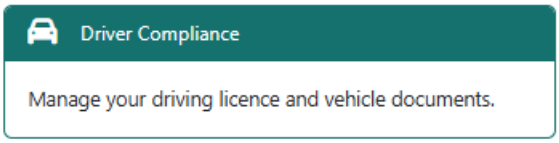
This guidance document is being provided only for the purpose of giving you visibility of the new page designs.

1. From the **Homepage**:



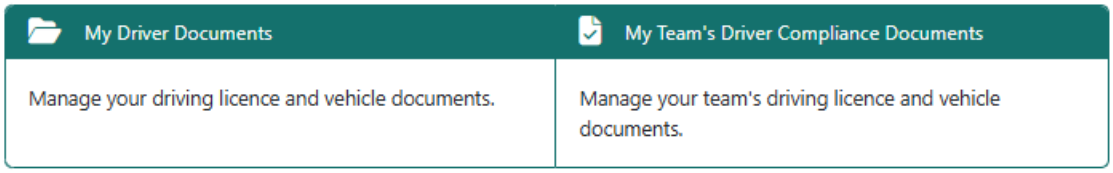
Driver Compliance Menu

2. Notice the new **Driver Compliance** menu at the bottom of the page.



> *This menu will not be present if your organisation is not using the Driver Compliance module.*

3. Click on the **Driver Compliance** menu.
4. You will be directed to the **Driver Compliance** page.

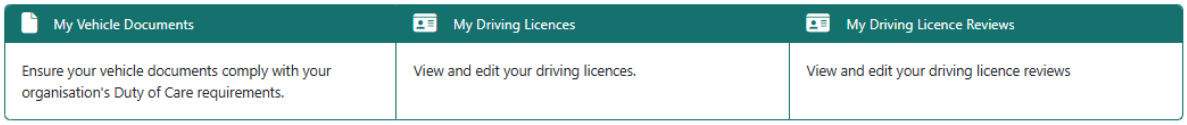


> *You will only see the **My Team's Driver Compliance Documents** if you are required to review the documents of others.*
>
> *If you simply need to provide evidence of your driving licence and vehicle documents, you will*

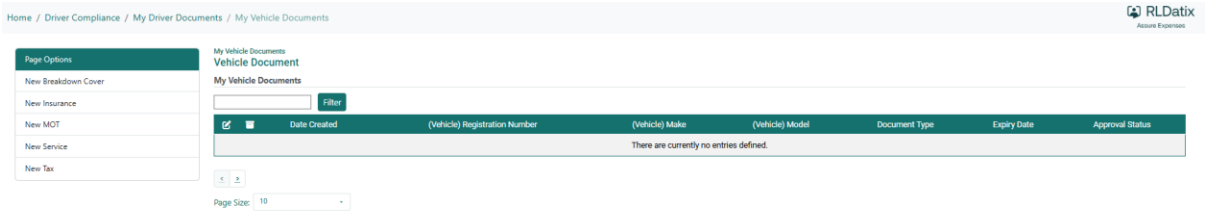
*only have the **My Driver Documents** menu.*

My Driver Documents

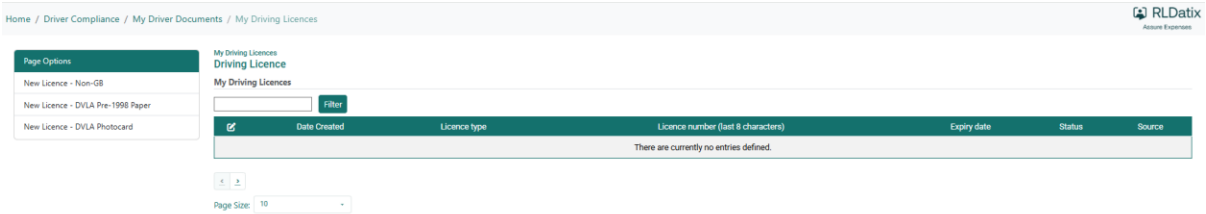
5. When you select **My Driver Documents** the following menu displays:



6. If you select **My Vehicle Documents**, you can view your existing records or add a new record where a previous document has expired.



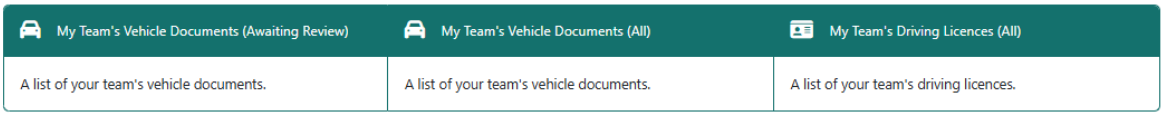
7. If you select **My Driving Licences** you can view your existing licence records.

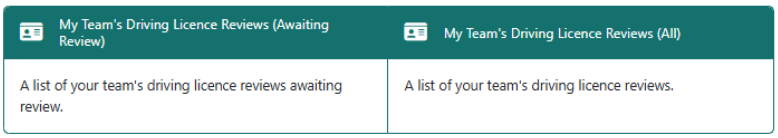


8. If you select **My Driving Licence Reviews** you can view your existing records.

My Team's Driver Compliance Documents

9. When you select **My Team's Driver Compliance Documents** the following menu displays:





10. You can choose any of these menus to carry out your normal driver compliance checks.

The steps you follow for Driver Compliance as a driver or an approver are not being changed.

The only change is how your pages display.

The steps are included here only for reference, and to provide you with visibility of the updated screen designs.

Please refer to the separate guidance documents for claims, adding and approving expenses.

Assure Expenses | Reconciling Corporate Card Transactions

Towards the end of October 2026, you will notice a refreshed look and feel across the Expenses pages.

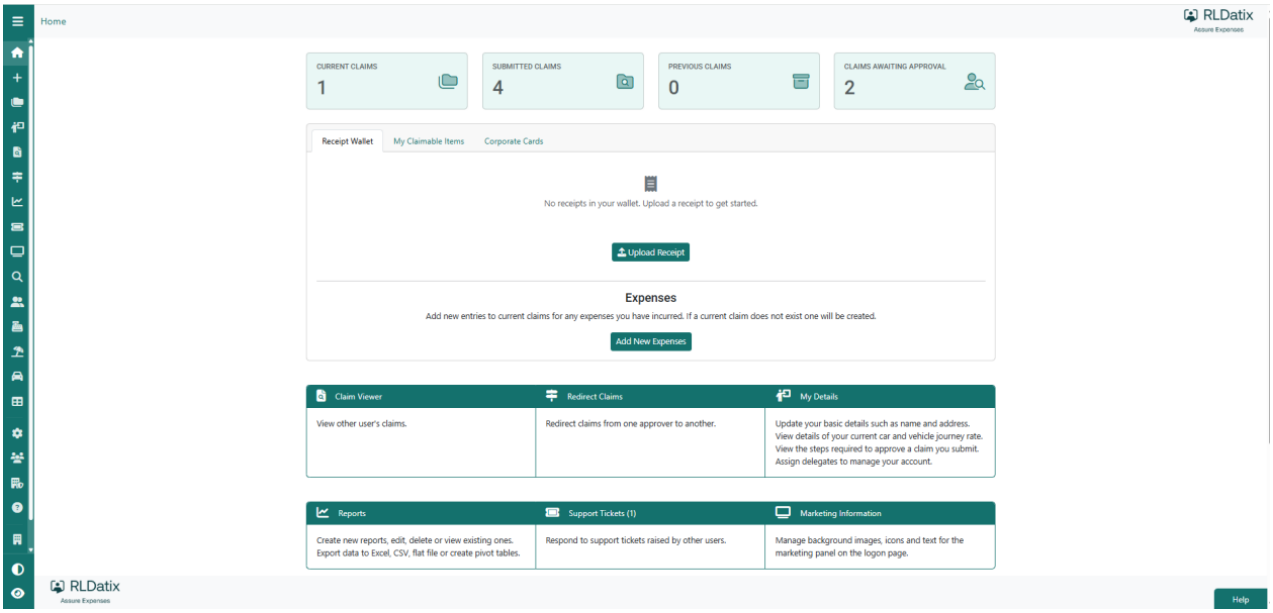
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

There are no changes to how you complete your usual tasks, such as creating, managing or submitting an expense claim, or how you reconcile your corporate card transactions, except for how you navigate the menu options.

These design changes apply only to the desktop version of Expenses. The mobile app is not being changed.

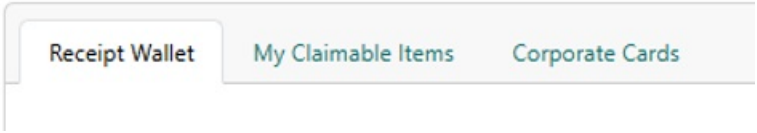
Navigating to Corporate Card Transactions

1. From the **Home Page**:



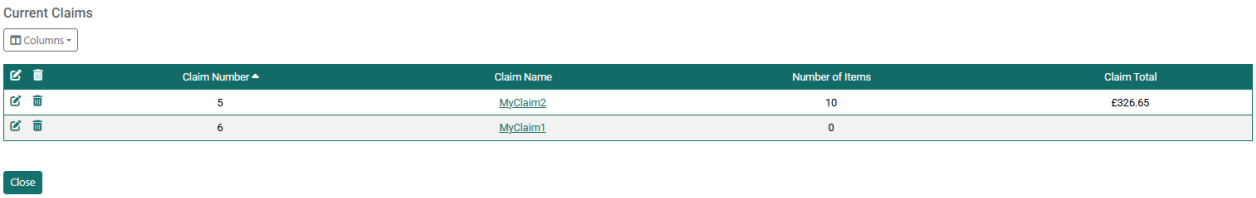
All the options relating to claims are now located together at the top of the page.

2. Notice the new **Corporate Cards** tab option.

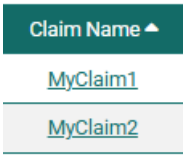


*This option replaces the **Reconcile Transactions** Expenses Home Page menu.*

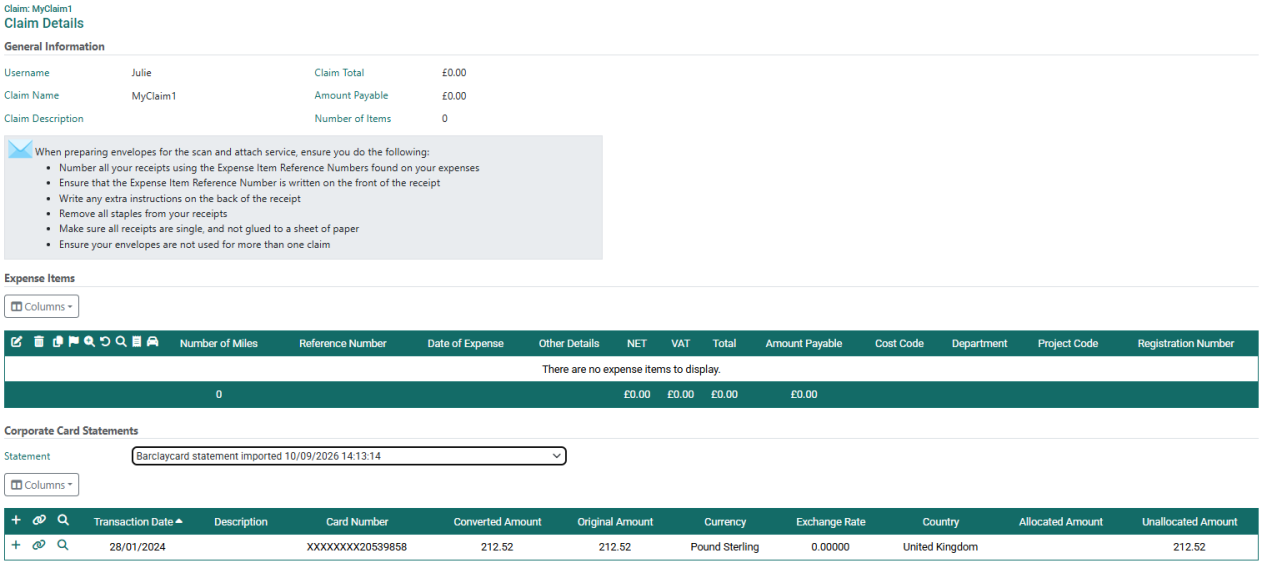
3. Click on the **Corporate Cards** tab option.
4. You will be directed to the **Current Claims** screen.



5. Select the current claim you would like to add your expenses to by clicking on the **Claim Name** link.



6. You will be directed to the **Claim Details** page where you will see the latest **Corporate Card Statements**.



7. If you have multiple Corporate Card Statements, you can switch between them using the **Statement** drop-down field.

*Only the navigation to the **Reconcile Transactions** page has changed.*

From here, your actions for reconciling the transactions to your claim will be done in exactly the same way as usual.

We have included the following screen examples so that you can see the new design.

Reconciling a Corporate Card Transaction

8. Select the **Statement** you require.
9. From the **Claim Details** screen, click the **plus** icon next to the Corporate Card Transaction that you want to reconcile to your claim.

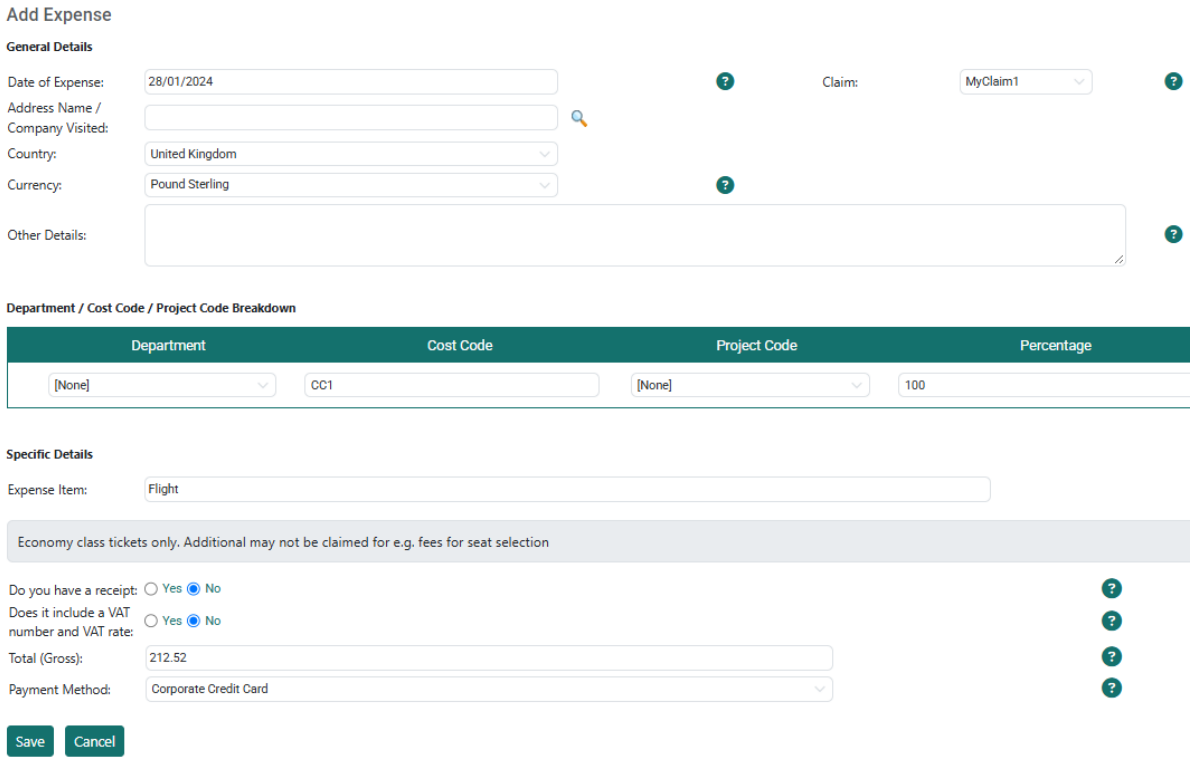


10. This will open the **Add Expense** page where you will be able to enter the details.

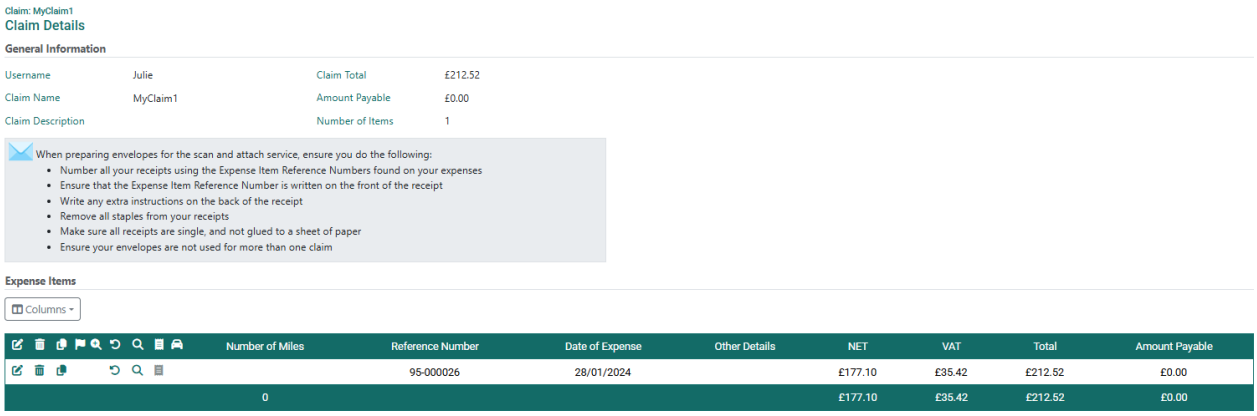
***Note:** The **General Details** fields, including the date, will be automatically populated with information brought through from the Corporate Card Transaction that you selected.*

11. If your corporate card is a Fuel Card, the **Expense Item** field may be pre-populated to reflect your purchase of fuel for the vehicle. Otherwise, select the appropriate **Expense Item** from the available list.

***Note:** The **Payment Method** field will default to **Corporate Credit Card**, and the **Total** field will be automatically populated with the information from the Corporate Card Transaction that you selected.*



12. Complete any further fields as required, and then click**Save**.
13. This will return you to the**Claim Details** page where you can see that the Corporate Card Transaction is now listed as an expense on the claim.



> ***Note:** The **Amount Payable** amount will generally default to £0.00, as you will not be reimbursed for an item when your organisation pays for this directly via the corporate card statement. You will only see the amount payable value if your organisation requires you to settle the corporate card statement yourself.*

14. There are further options within the**Corporate Cards** column of the grid that are described below.

Action	Icon	Description
Transaction Details		Click this icon to display details of the original Corporate Card Transaction.
Un-match Transaction		Click this icon to un-match the Corporate Card Transaction from the expense. This will return the Corporate Card Transaction back to the list of un-matched transactions.

15. Repeat the process to reconcile further Corporate Card Transactions.

The steps you follow to reconcile card transactions are not being changed.

The only change is how you navigate to your current claim as noted in the steps above.

The remainder of the steps are included here only for reference, and to provide you with visibility of the updated screen designs.

Assure Expenses | New Design Screenshot Pack

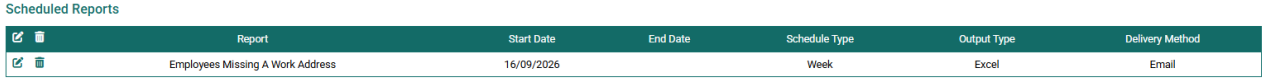
This document includes a series of screenshots from the new Expenses design as examples of individual pages and options.

You may use these to update any of your own documentation, or you may use the individual user guides (numbered 01 to 11) to communicate to your Expenses claimants and approvers.

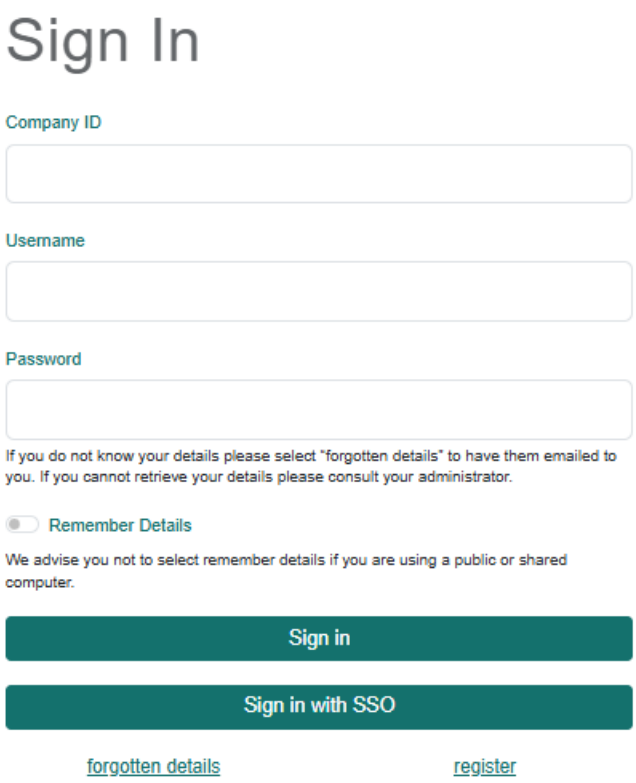
These screenshots are provided as individual examples of the new design only.

They have been kept generic for a wider audience, but there may be examples that do not entirely match your Expenses configuration settings.

The designs could be updated between this document creation and the release of the new version of Expenses, but any changes are expected to be minimal.

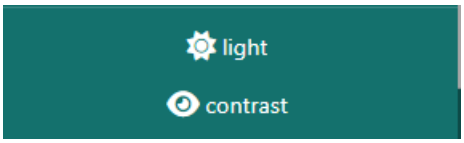


Logon Page

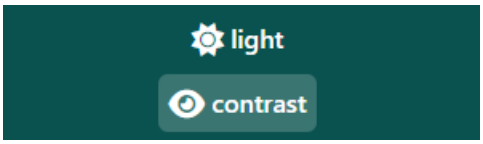


Themes

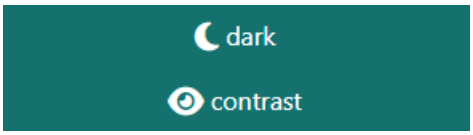
Light Theme



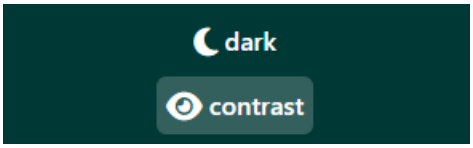
Light Theme - High Contrast



Dark Theme

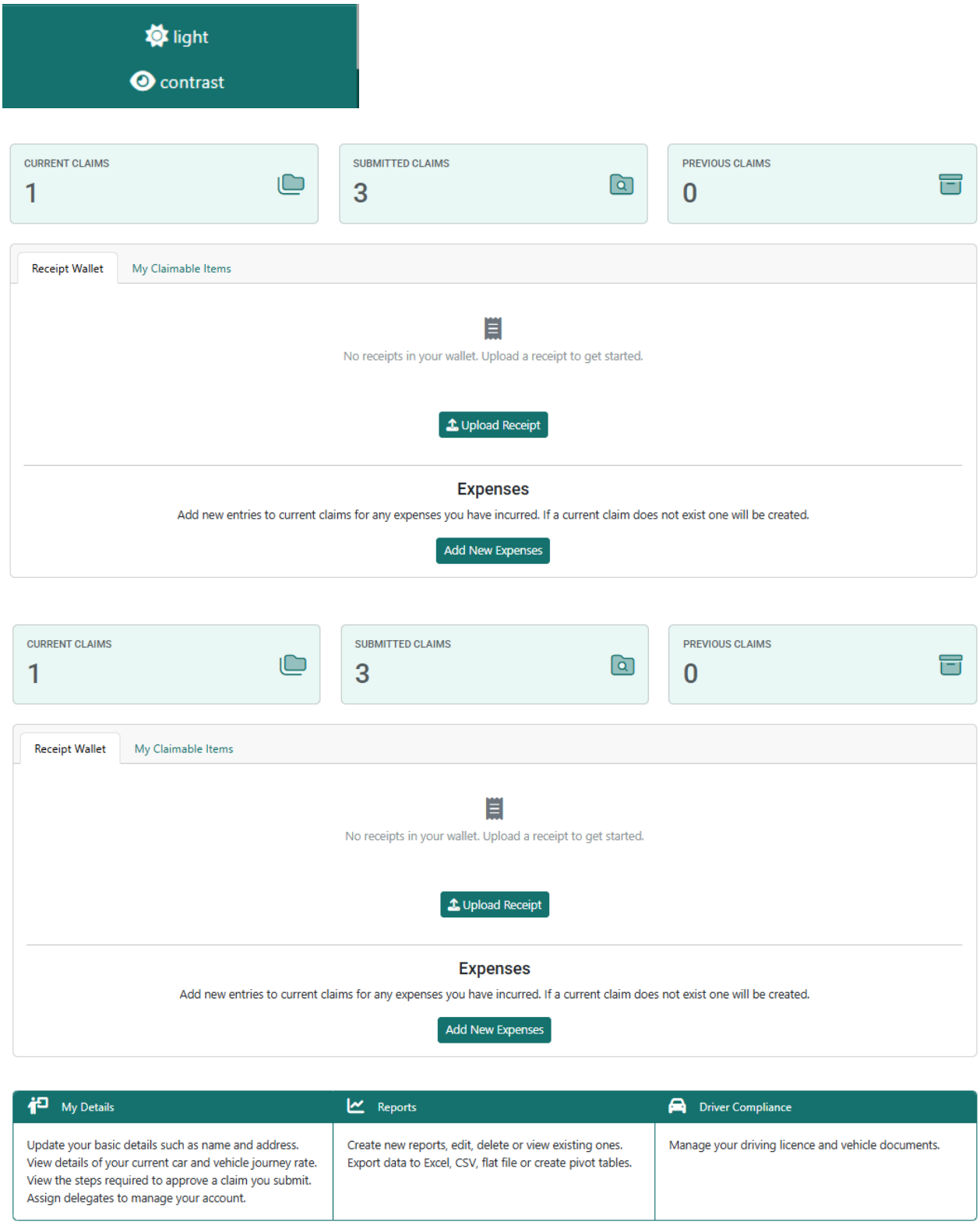


Dark Theme - High Contrast

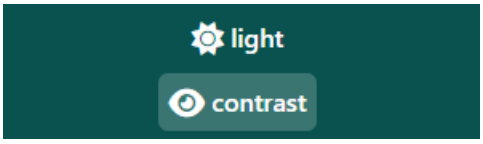


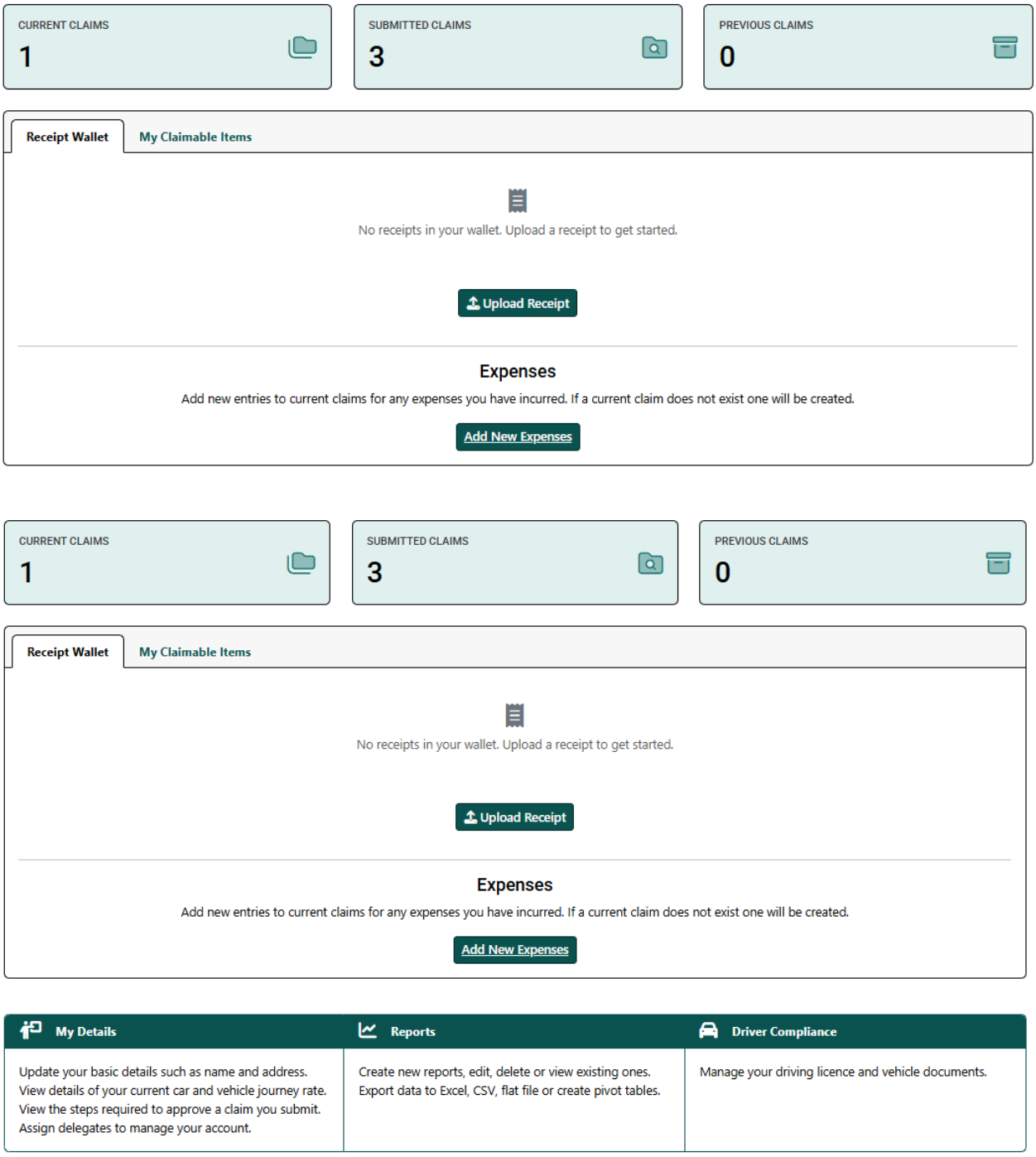
Home Page - Claimant

Light Theme - Claimant

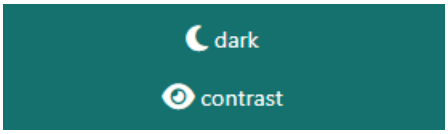


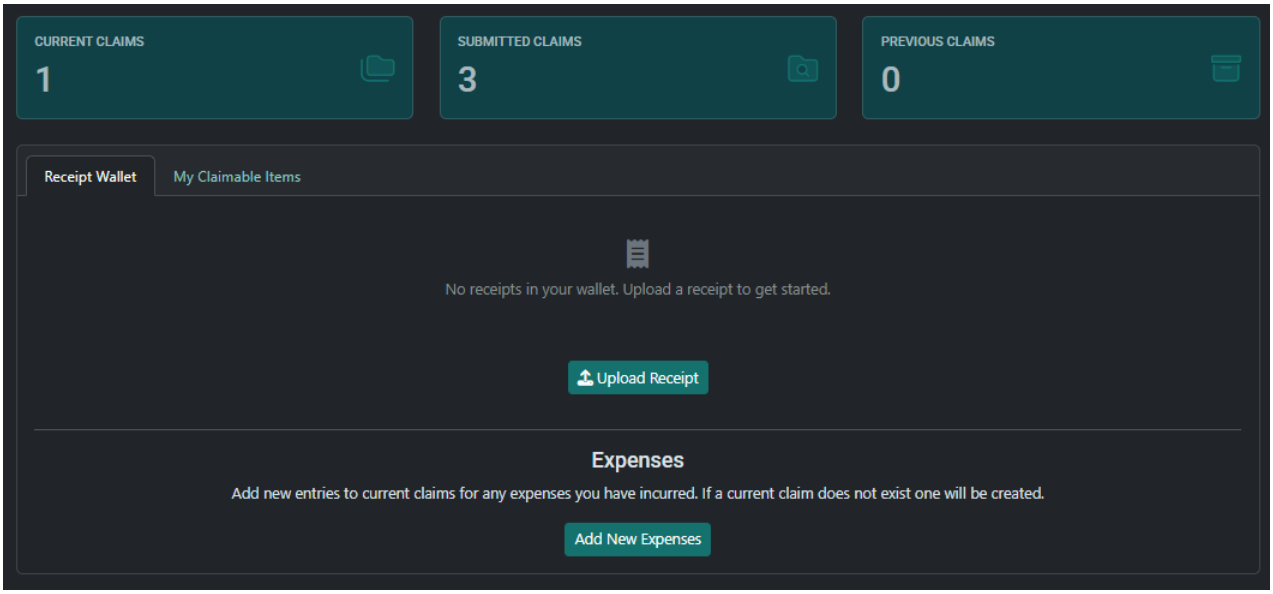
Light Theme - High Contrast - Claimant

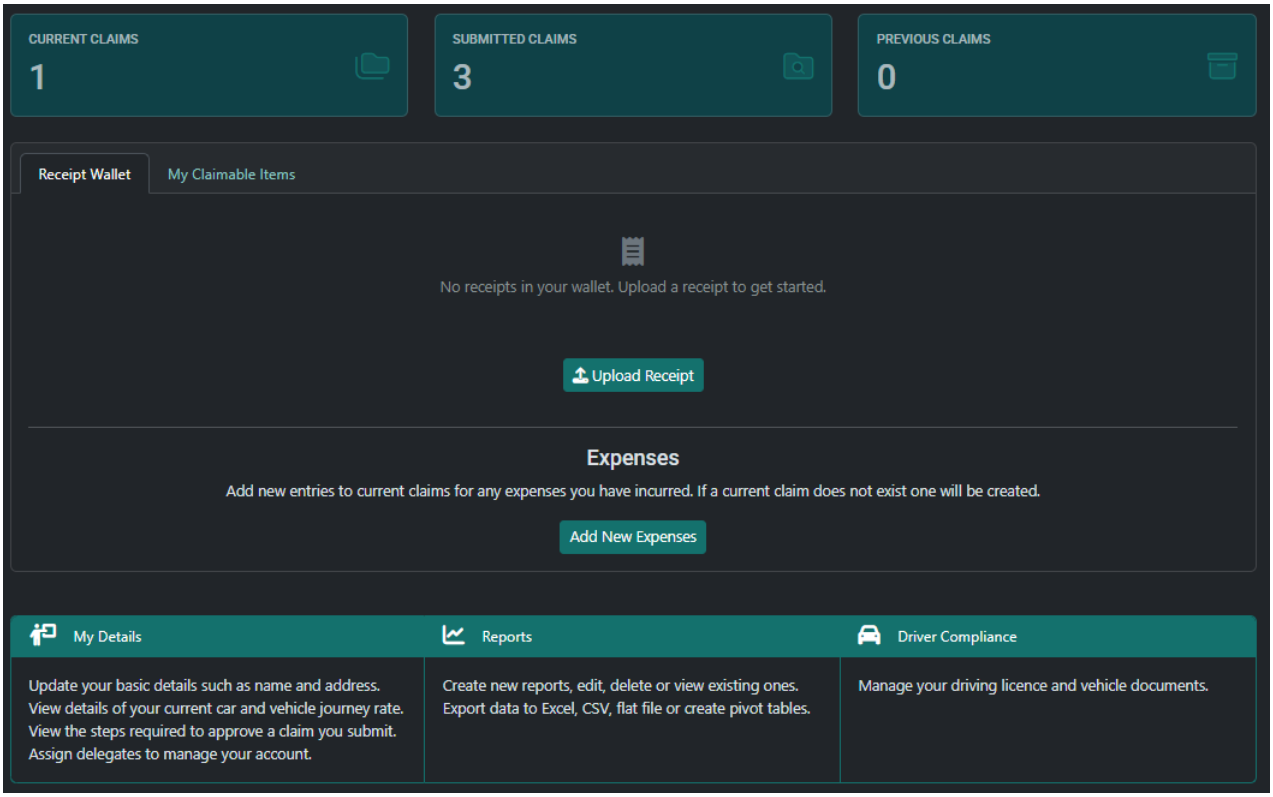




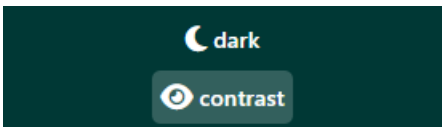
Dark Theme - Claimant

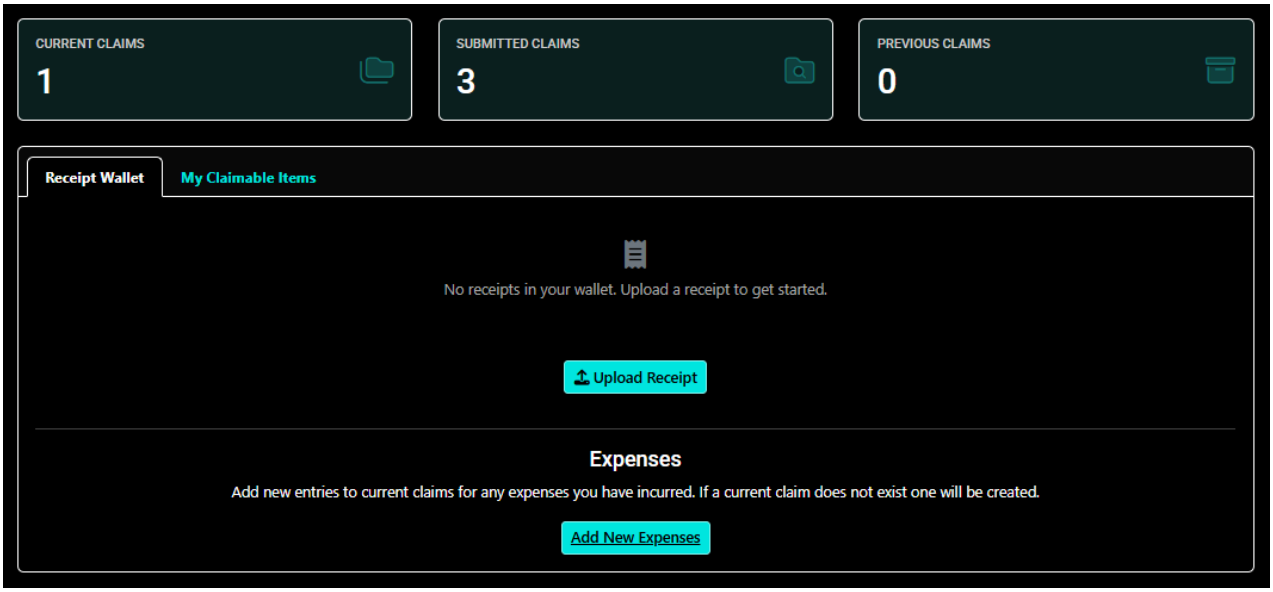


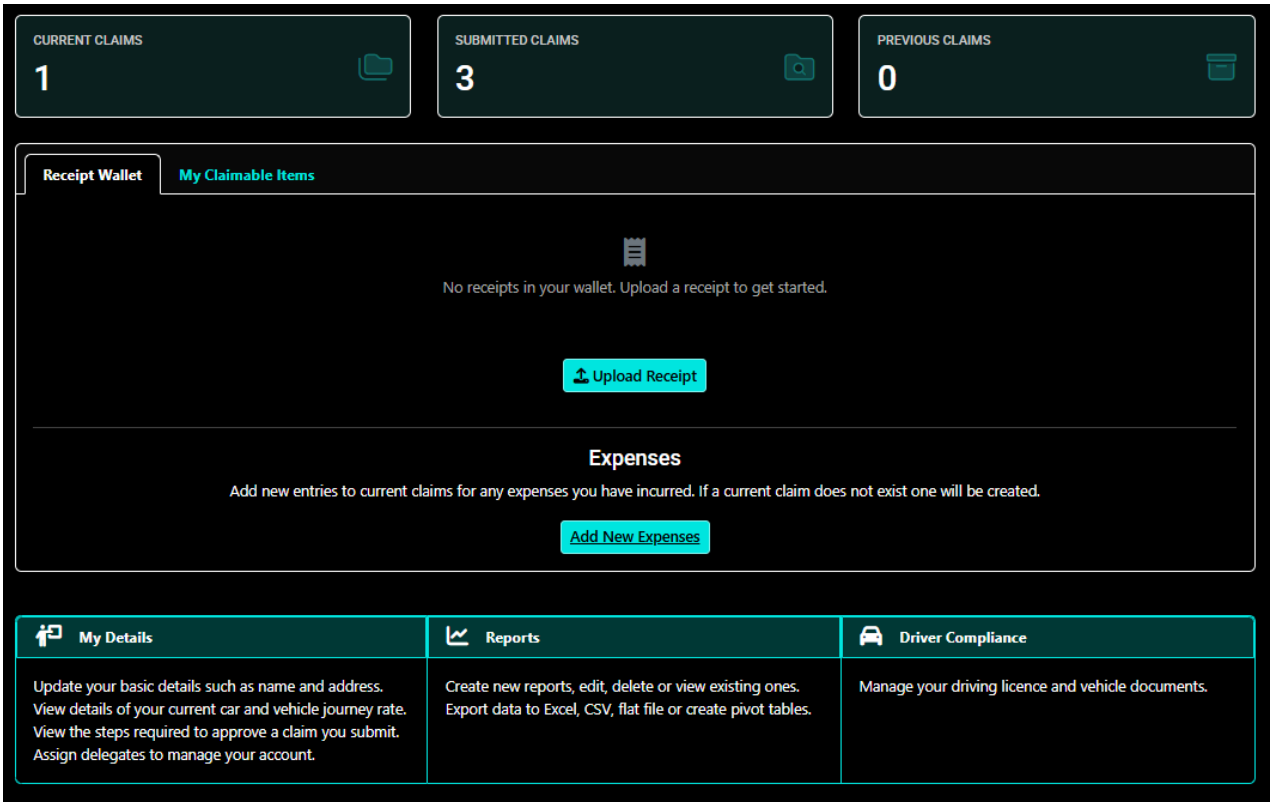




Dark Theme - High Contrast - Claimant

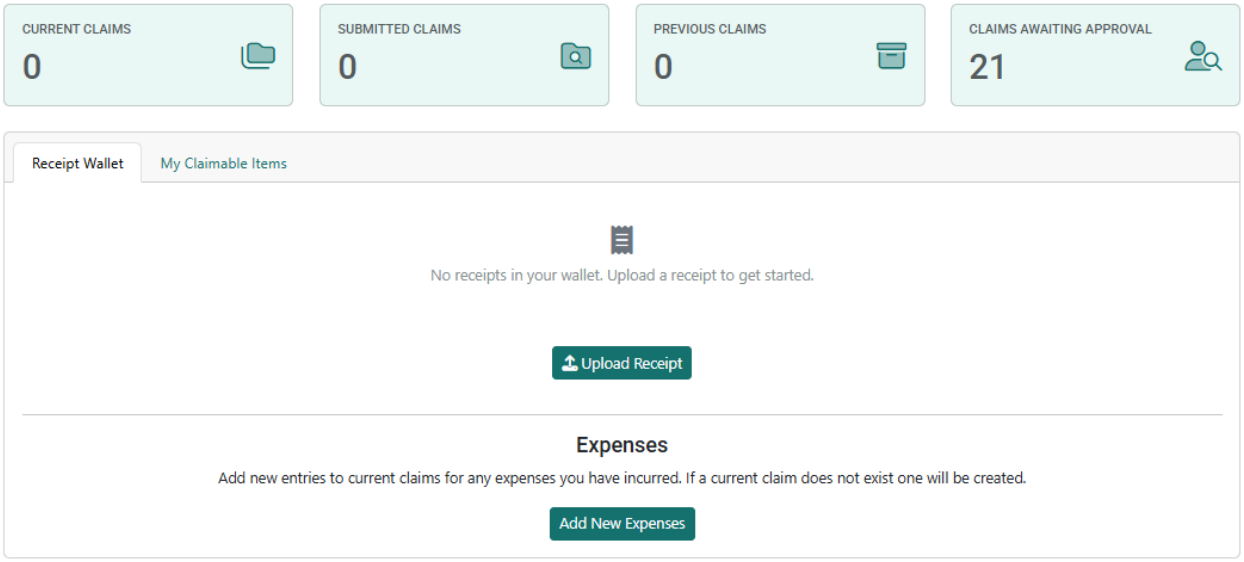


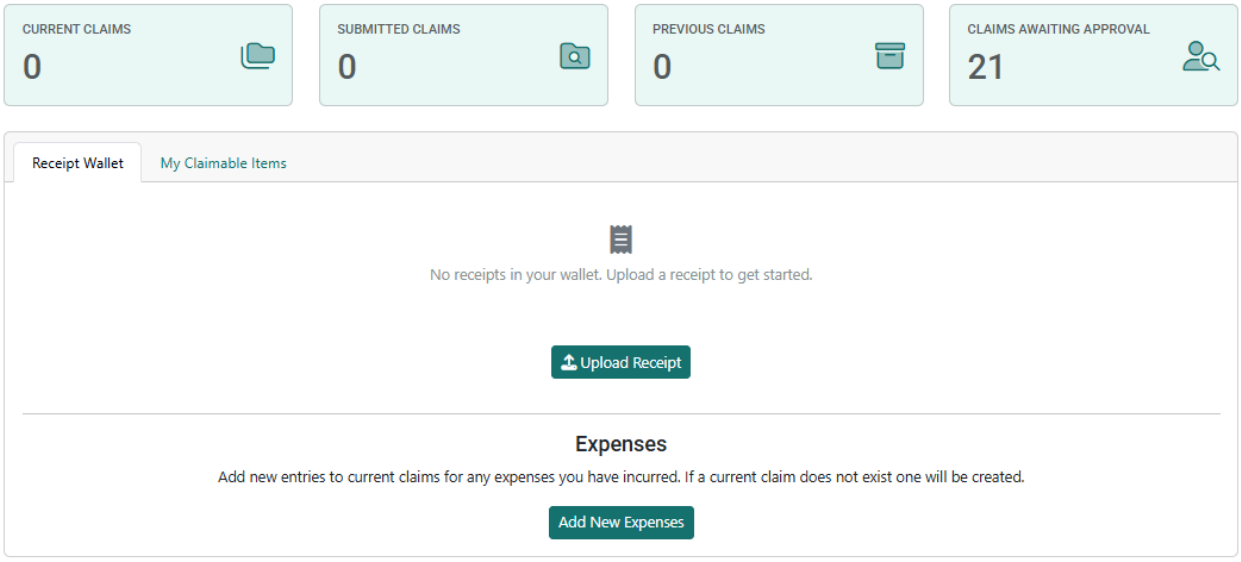


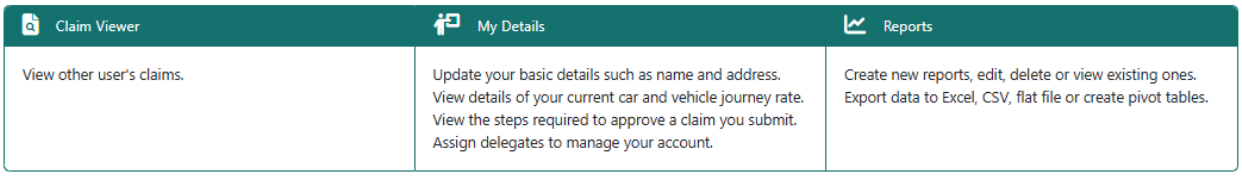


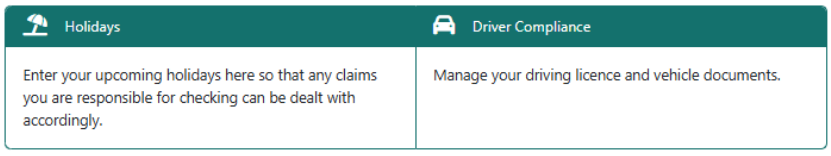
Home Page - Approver

Light Theme - Approver

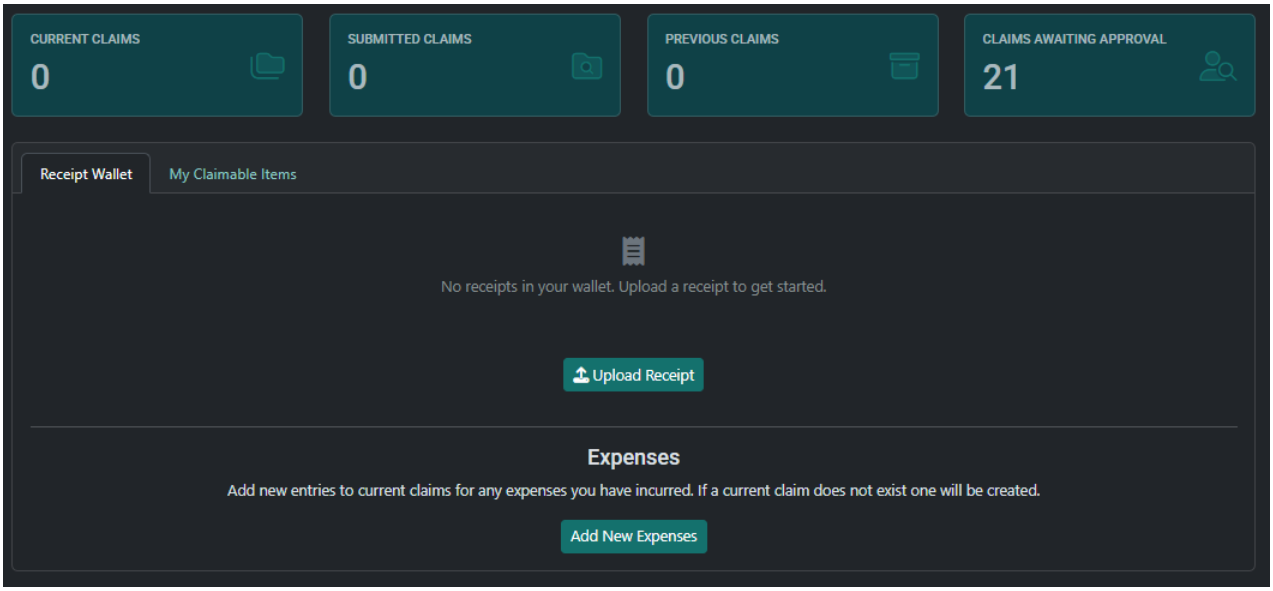


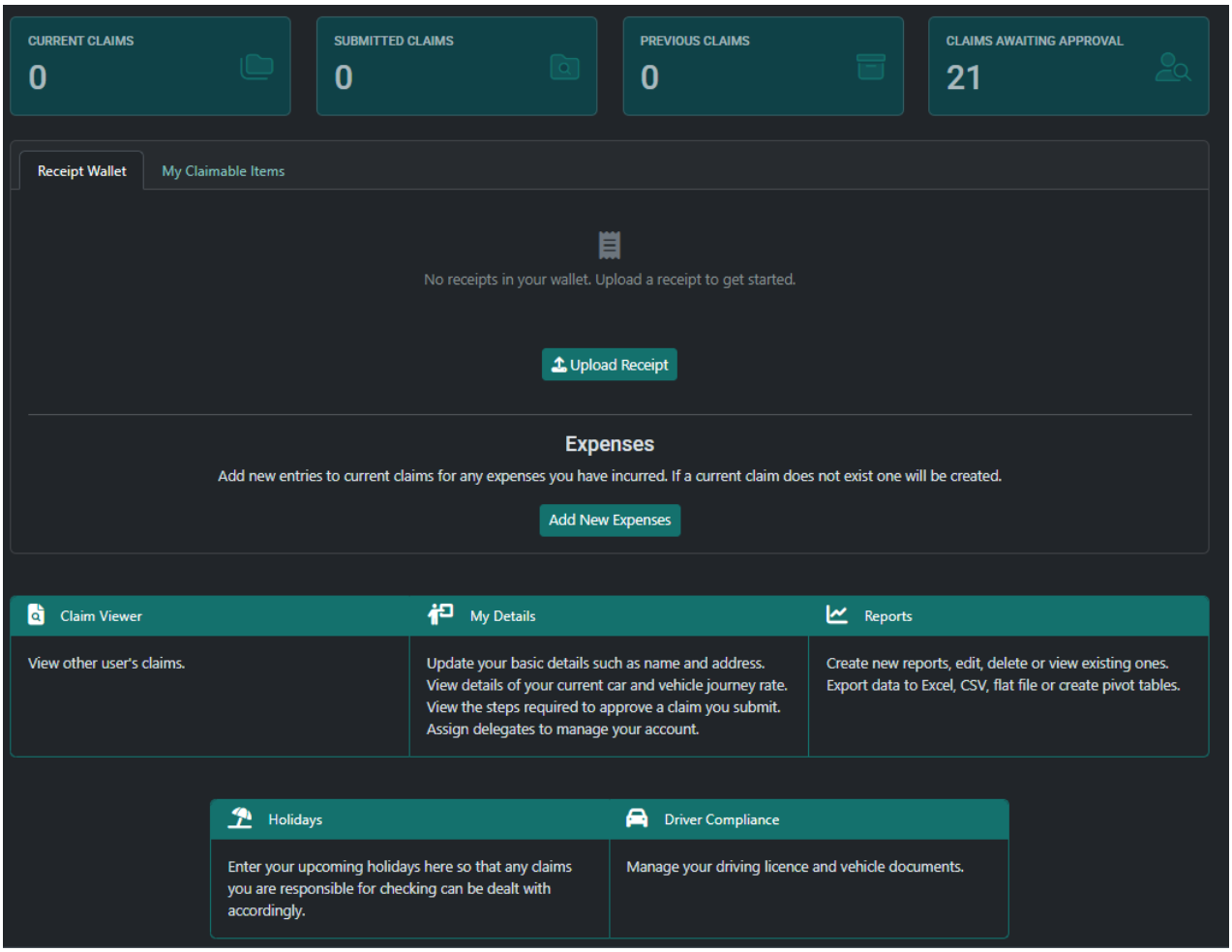






Dark Theme - Approver

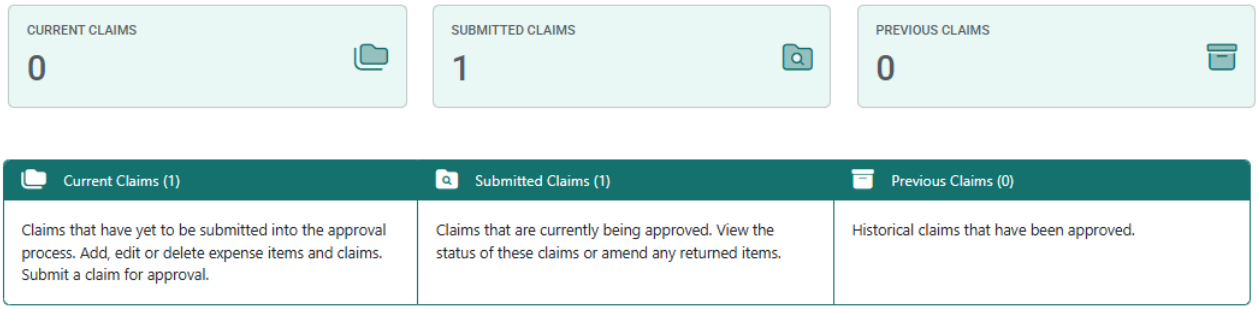




My Claims

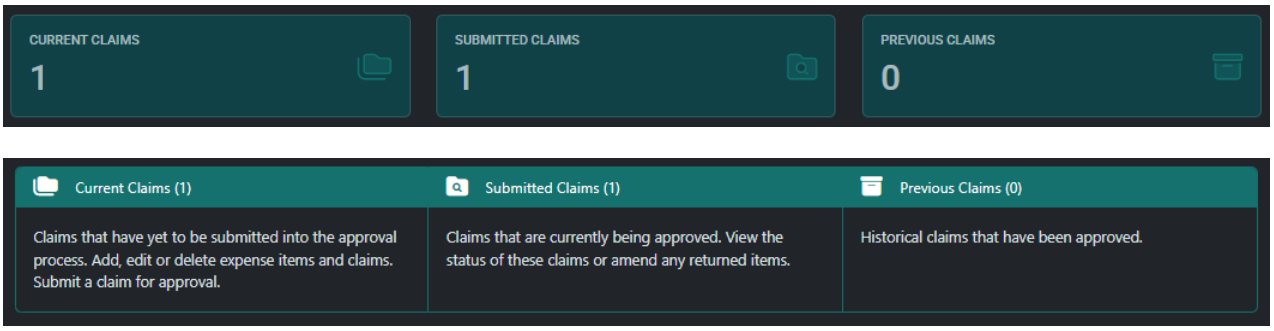
Claimant - Visual Tiles - Light Theme

My Claims

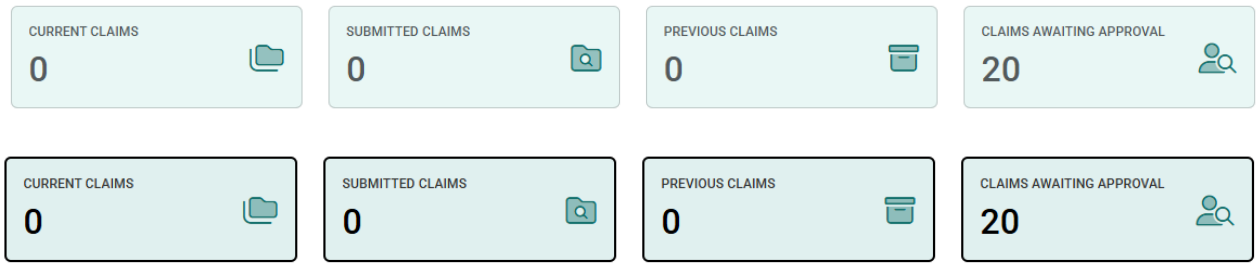


Claimant - Visual Tiles - Dark Theme

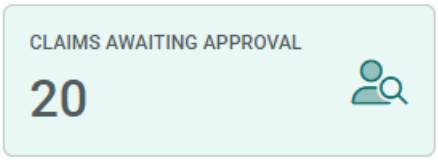
My Claims



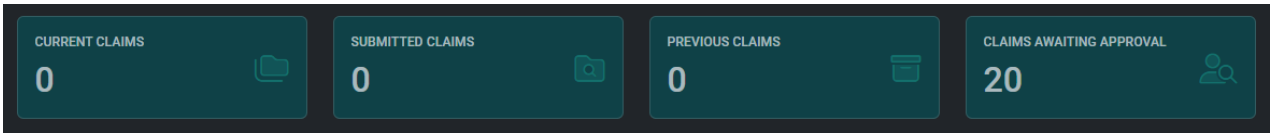
Approver - Visual Tiles - Light Theme



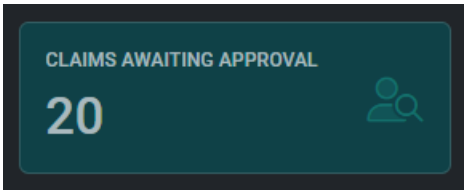
Claim Approval / Check and Pay Expenses

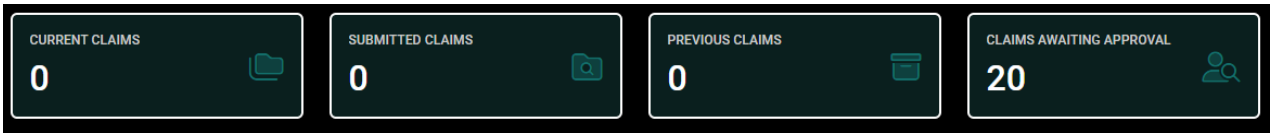


Approver - Visual Tiles - Dark Theme



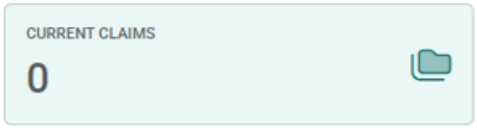
Claim Approval / Check and Pay Expenses



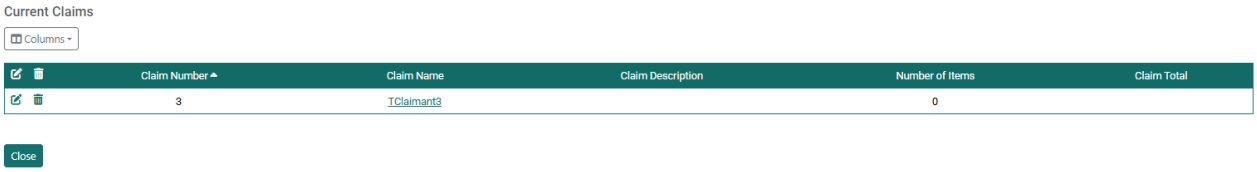


Current Claims - Claim Details - Light Theme

Menu Tile



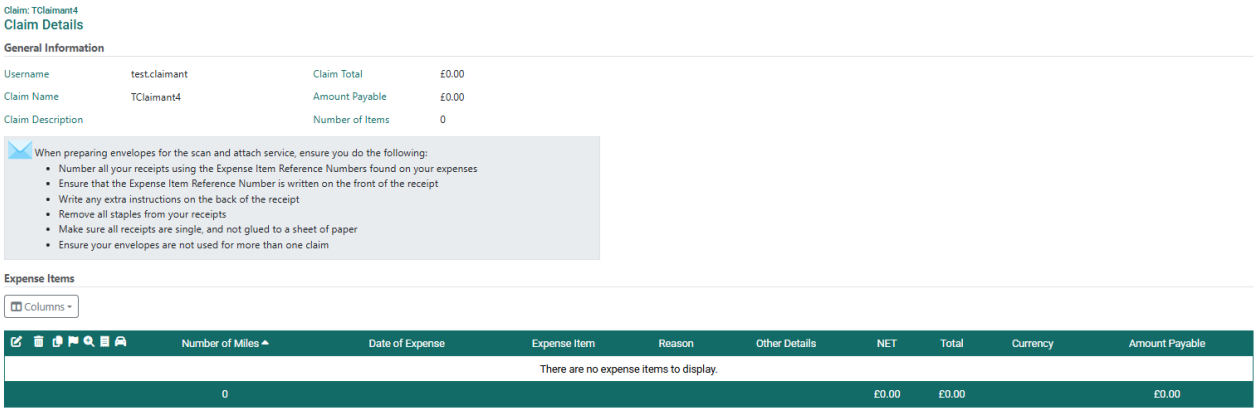
List of Current Claims

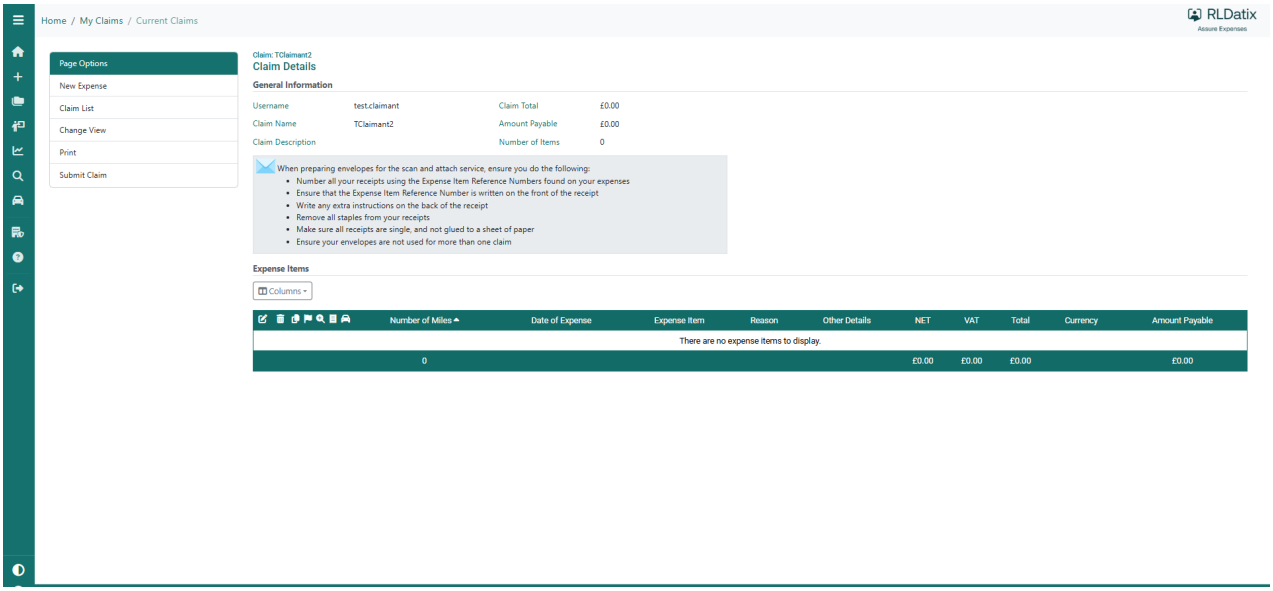


Claim Selection



Claim Details Page



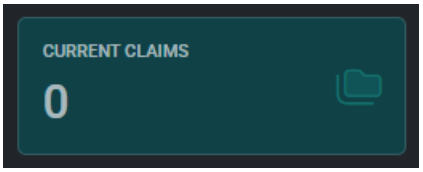


Current Claim - Page Options

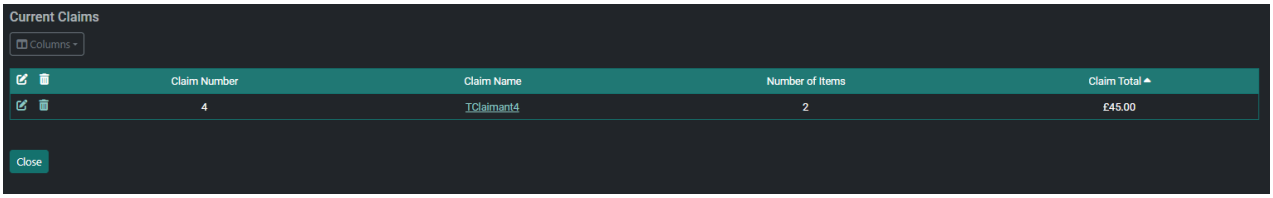


Current Claims - Claim Details - Dark Theme

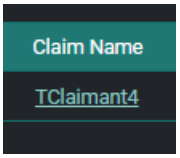
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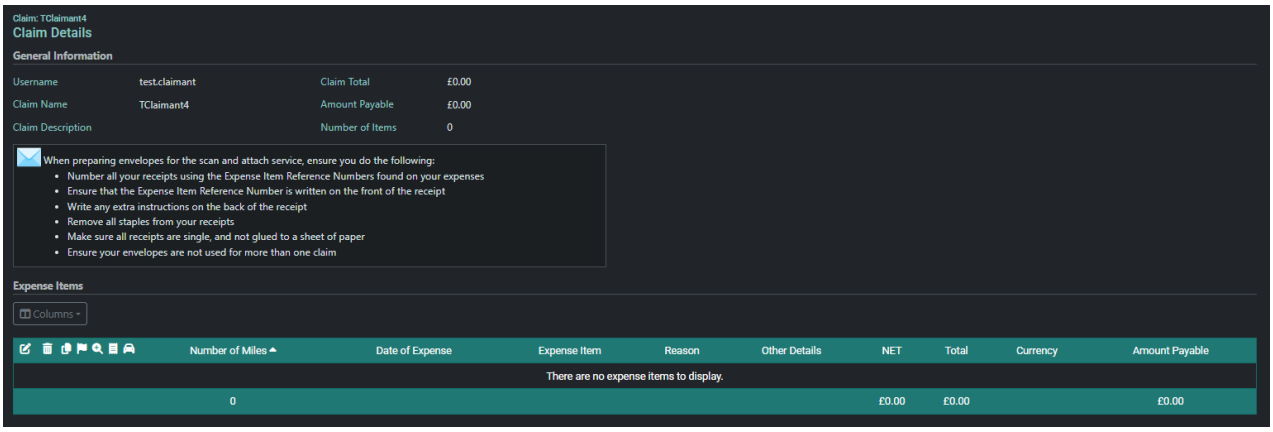
List of Current Claims

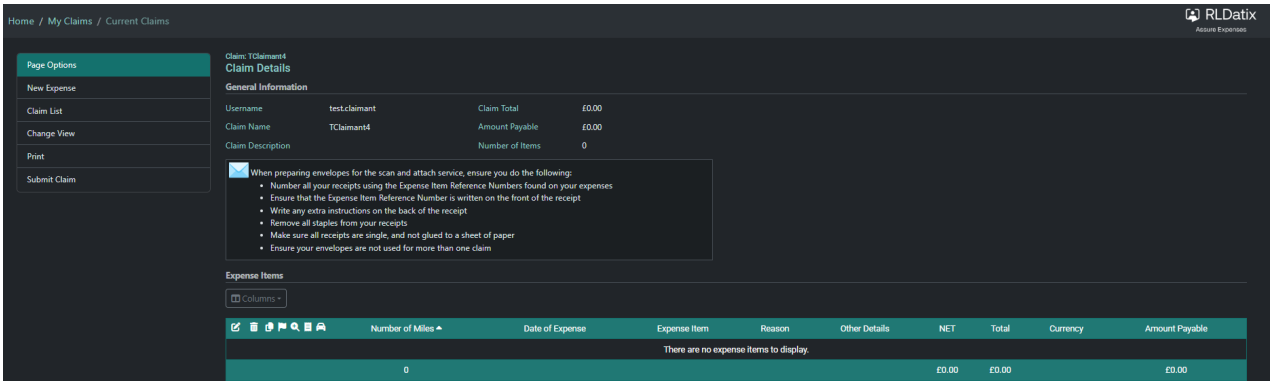


Claim Selection

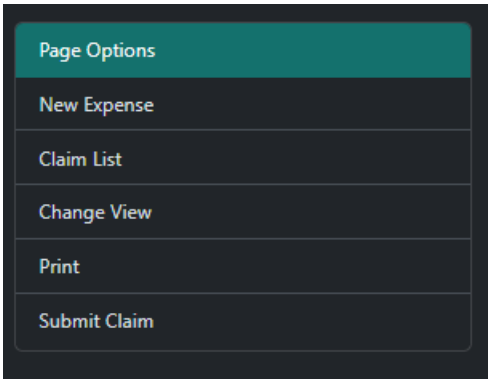


Claim Details Page





Current Claims - Page Options



My Claims - Add Claim Pages - Light Theme

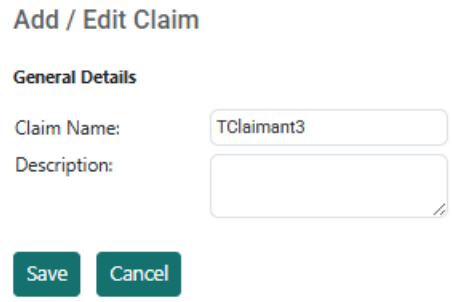
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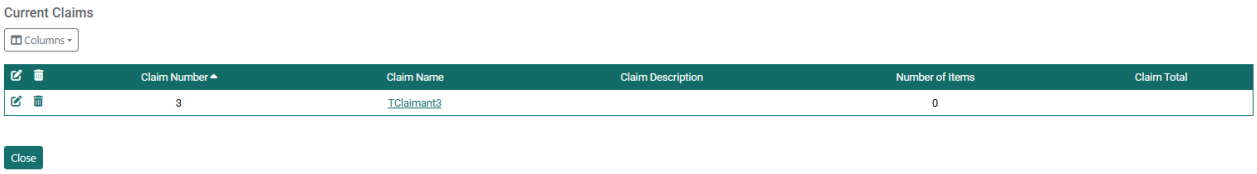
New Claim Option



Claim Name and Description

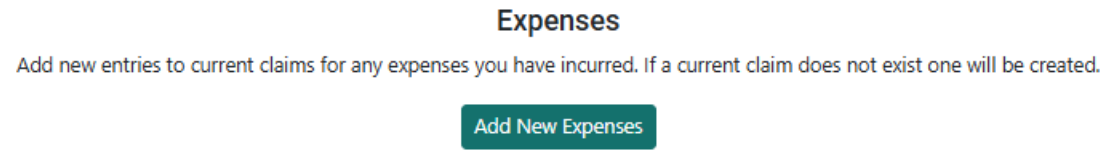


Current Claims List



My Claims - Adding an Expense - Light Theme

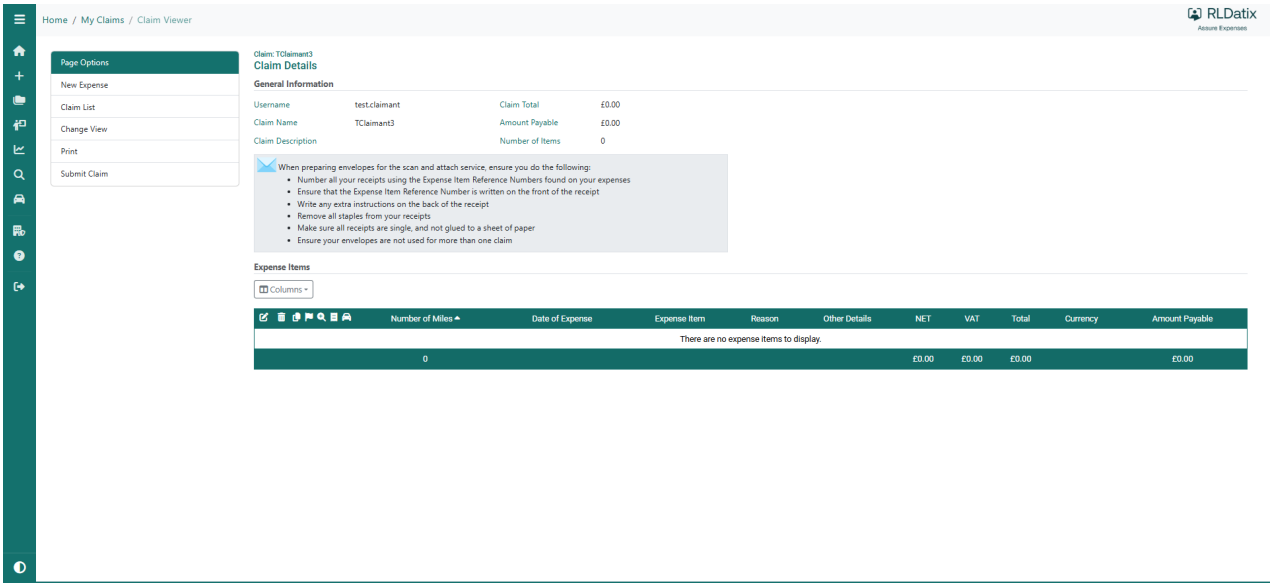
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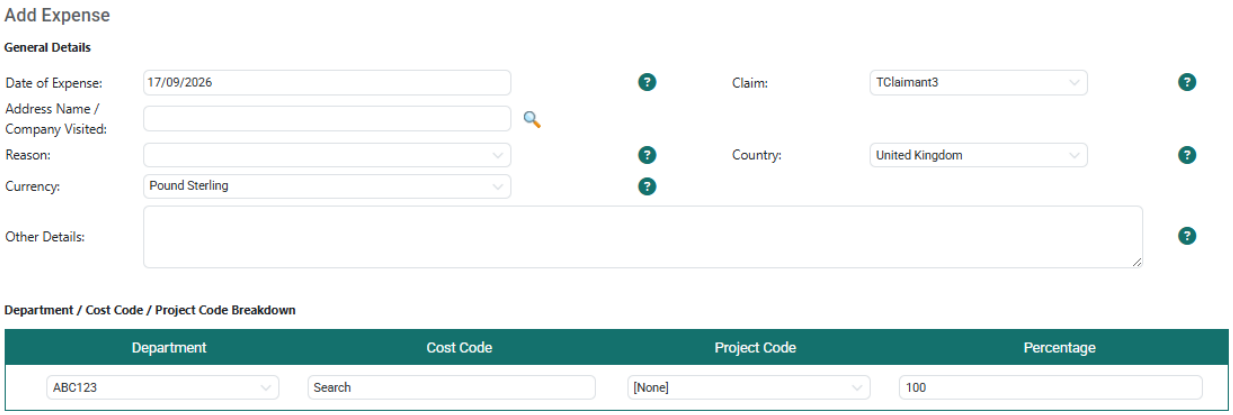
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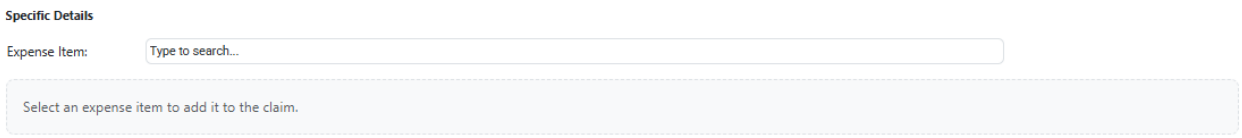
Claim Details Page



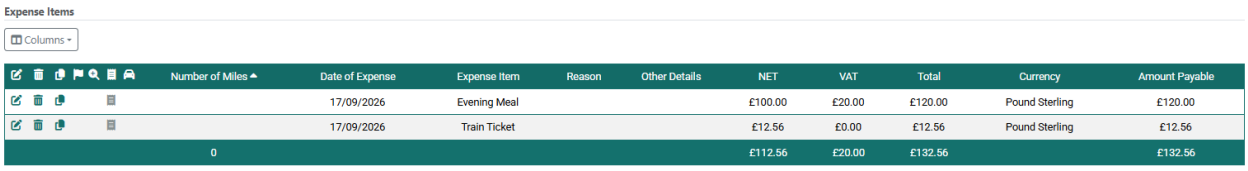
Add Expense - General Details



Add Expense - Expense Item Details

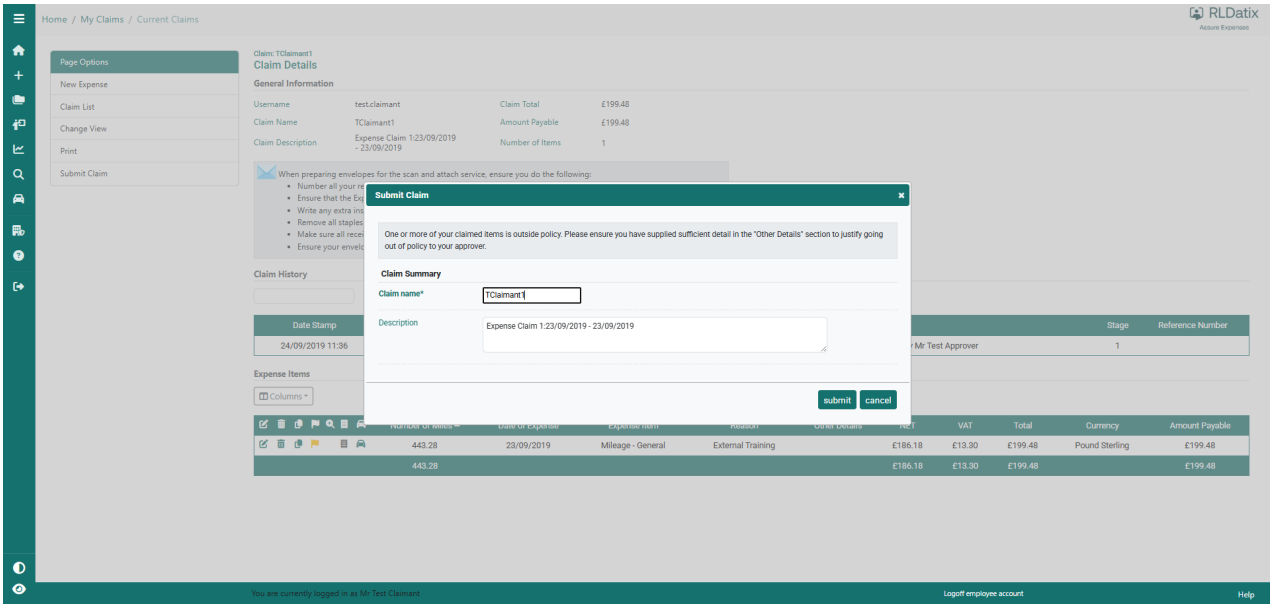


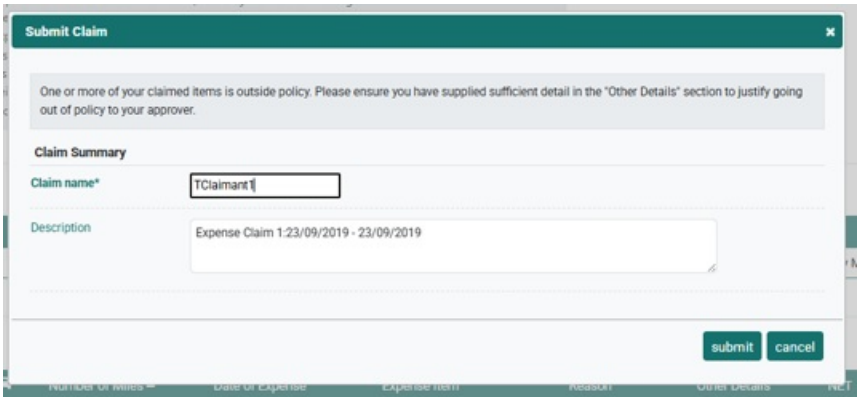
Claimed Expenses Items Summary Page



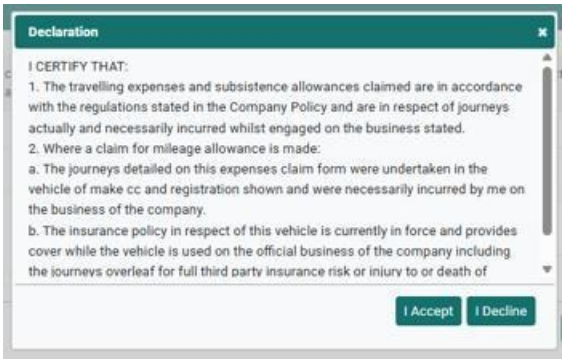
Submit Claim - Light Theme

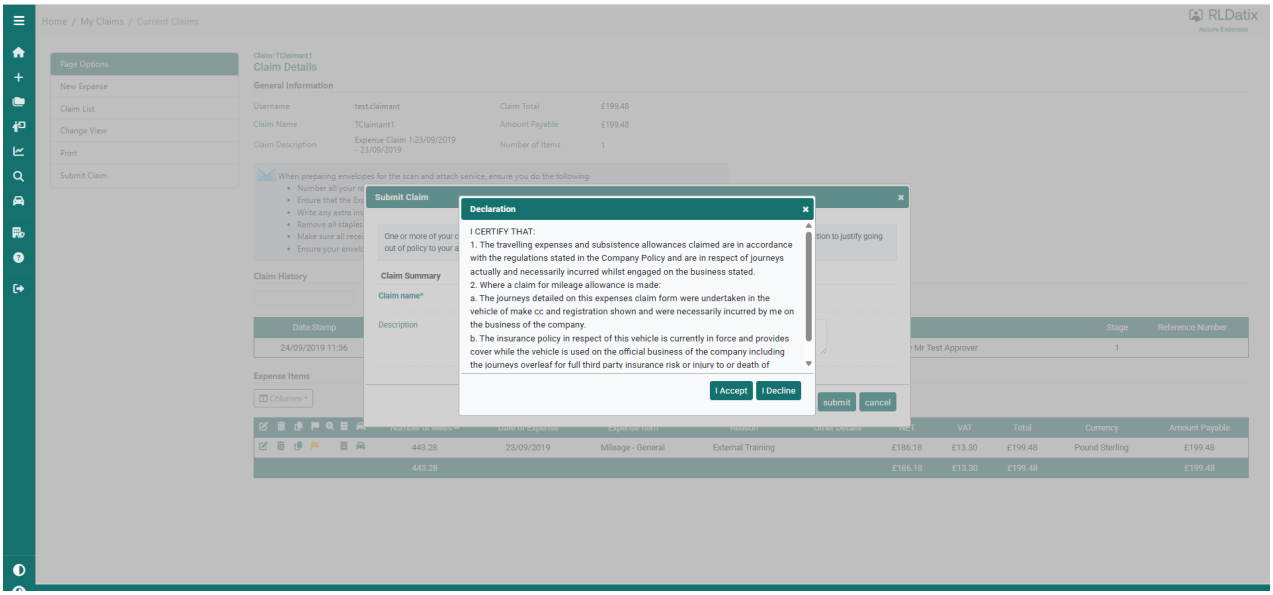
Submit Claim





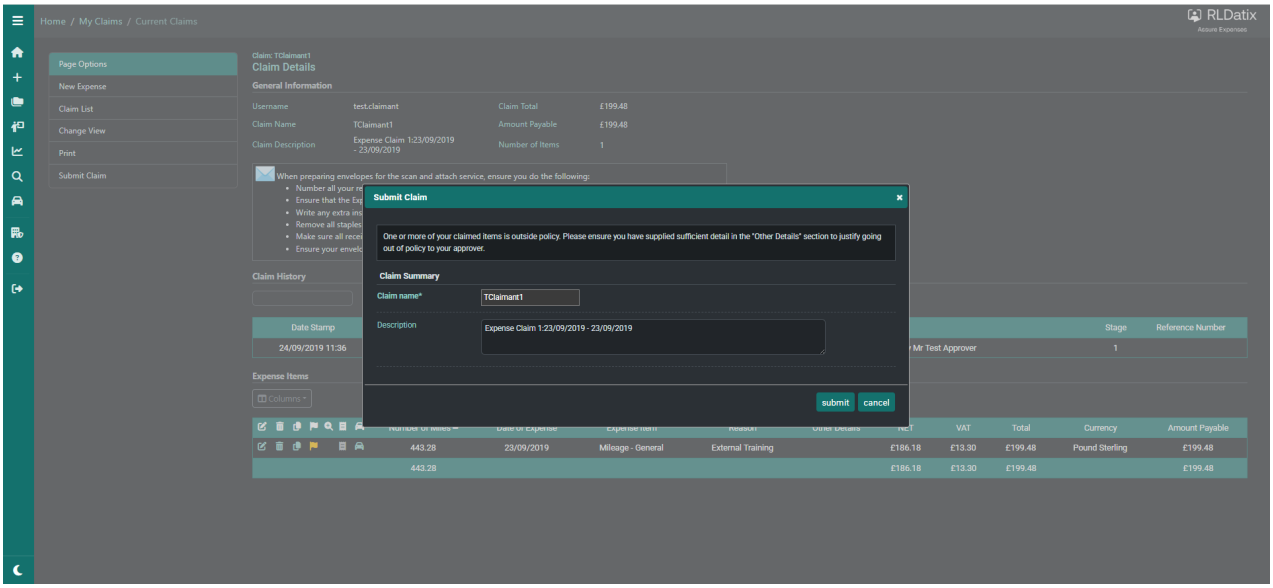
Example Declaration

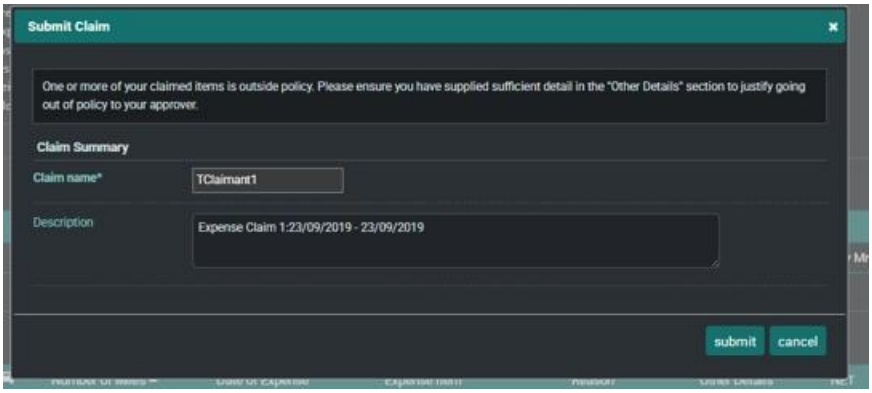




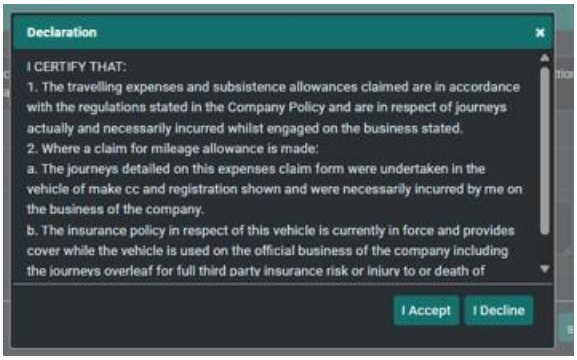
Submit Claim - Dark Theme

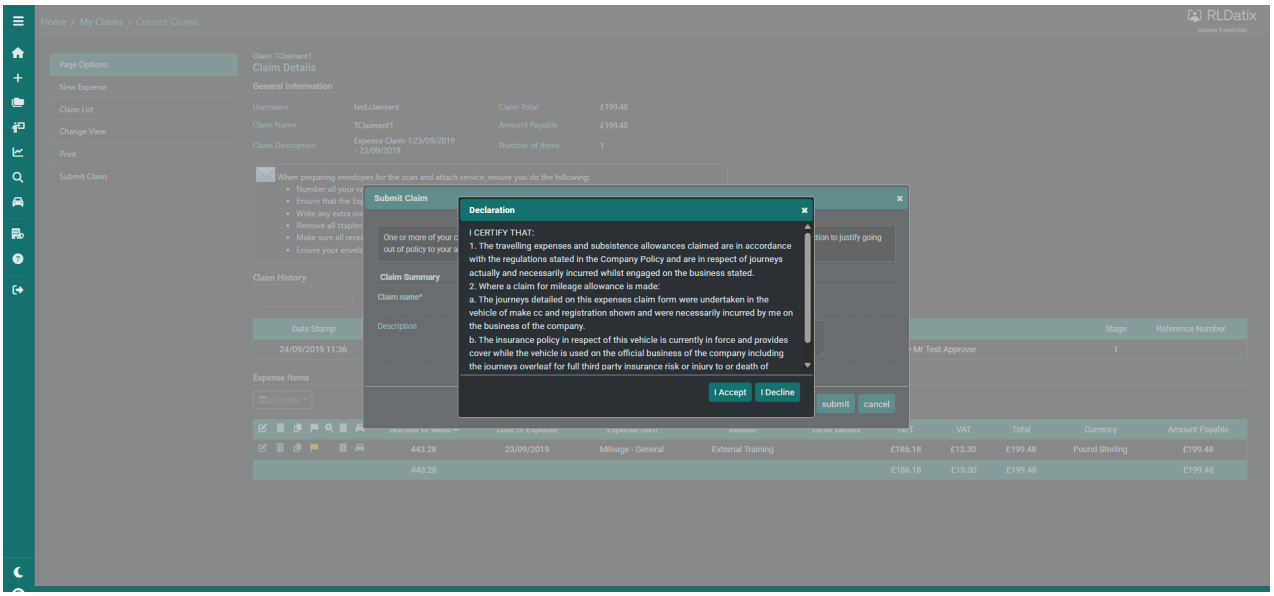
Submit Claim





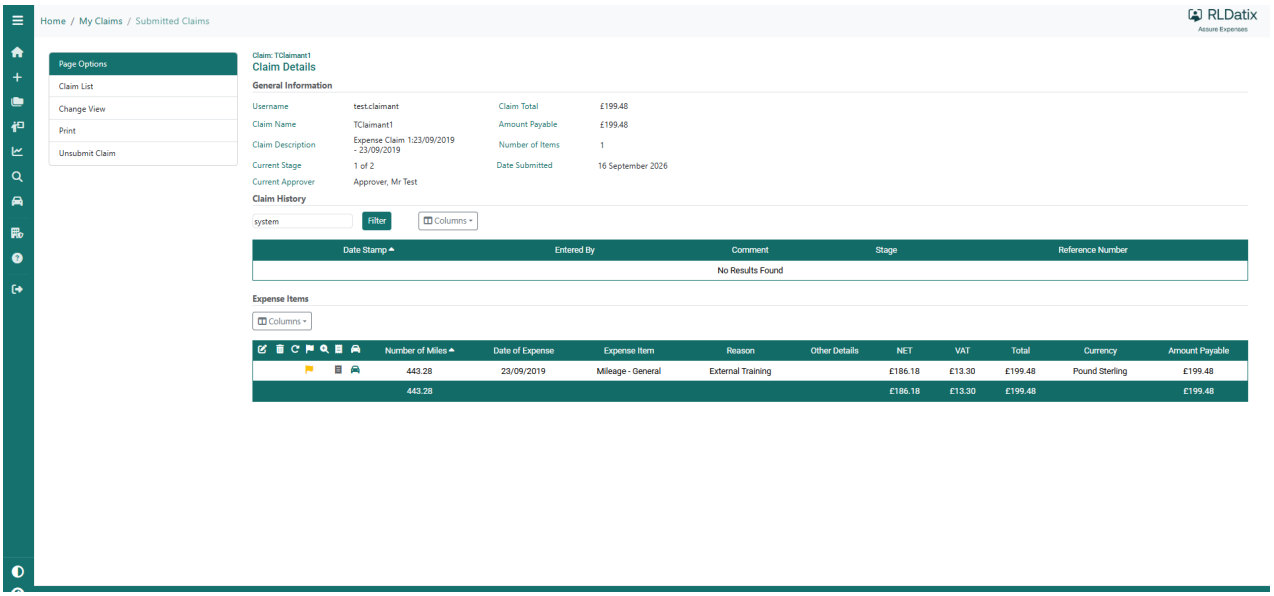
Example Declaration





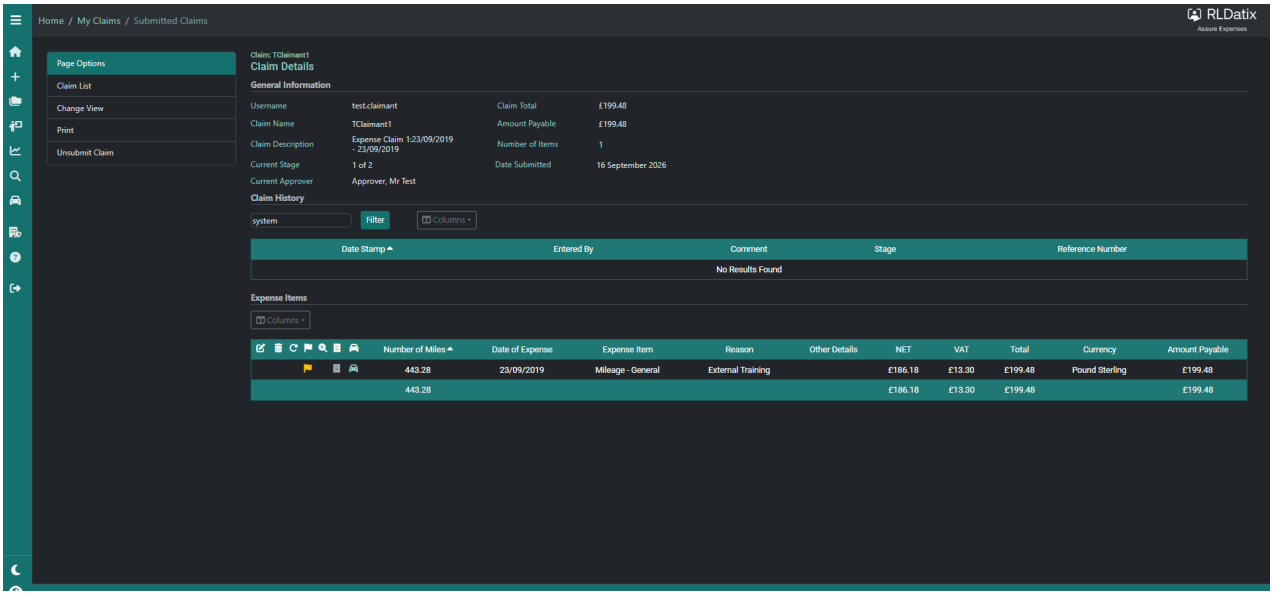
Submitted Claim

Submitted Claims - Light Theme



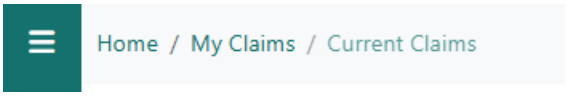
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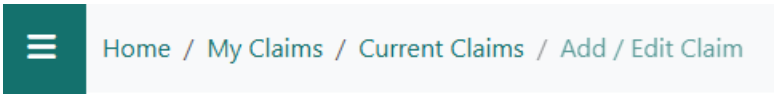
Submitted Claims - Dark Theme



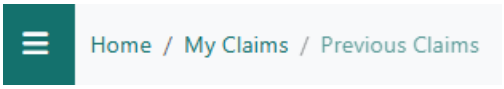
Breadcrumbs

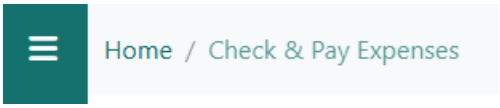
Breadcrumbs Example - Light Theme



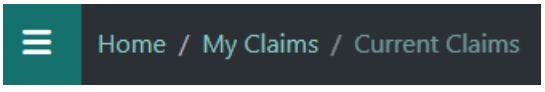


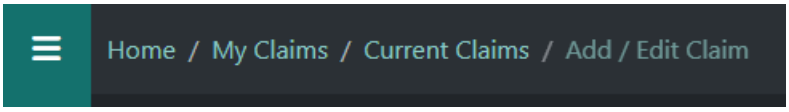


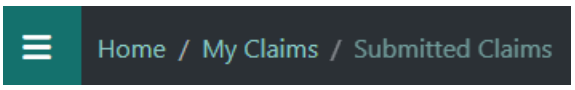


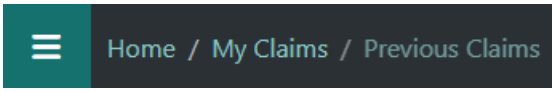


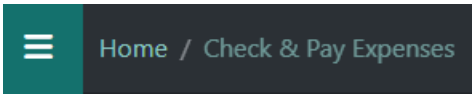
Breadcrumbs Example - Dark Theme





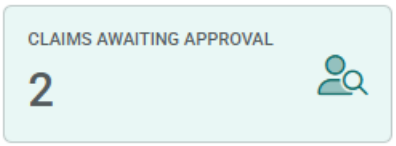




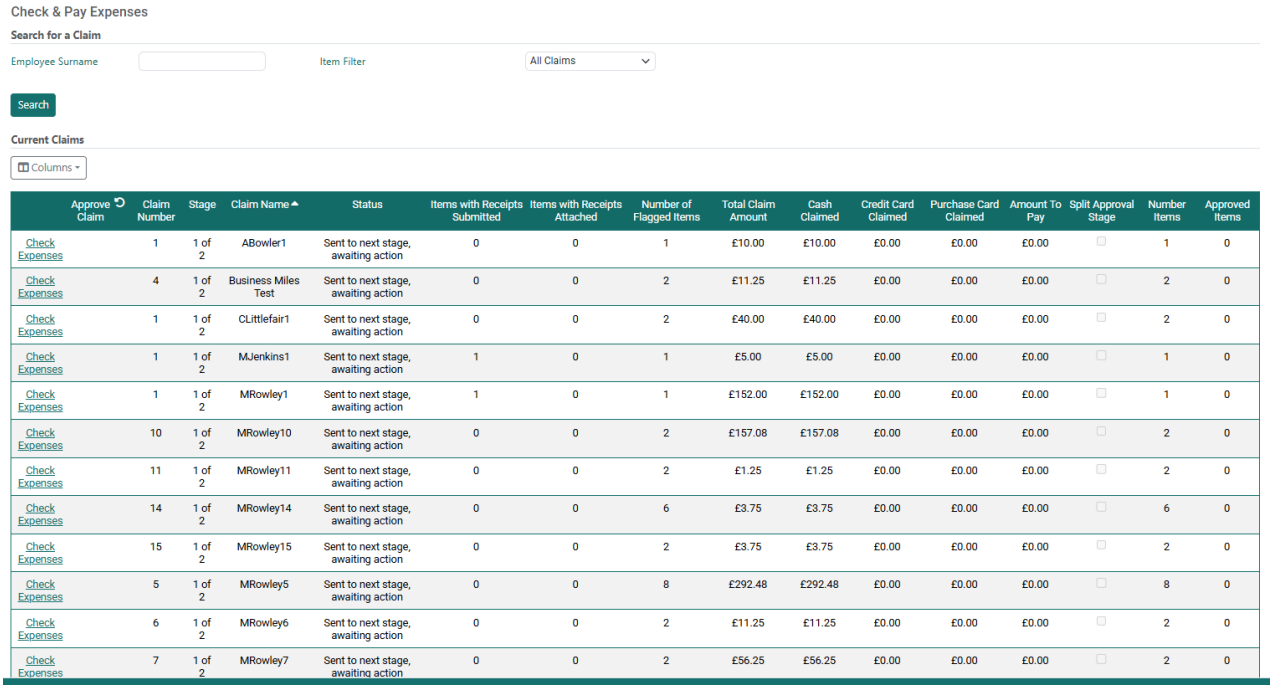


Approvers - Check and Approve Expenses - Light Theme

Claims Awaiting Approval Tile



Claims and Pay Expenses Claim Summary Page



Check & Pay Expenses

Search for a Claim

Employee Surname | Item Filter: All Claims

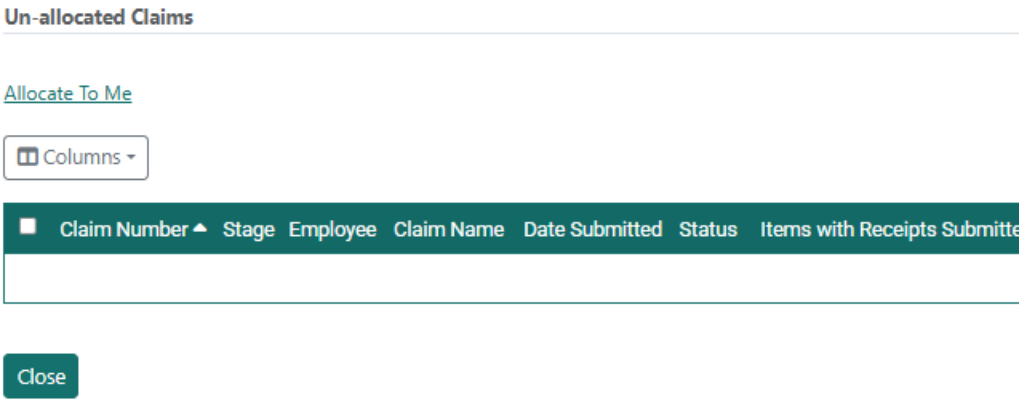
Search

Current Claims

Columns

Approve Claim	Claim Number	Stage	Claim Name	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed	Amount To Pay	Split Approval Stage	Number Items	Approved Items
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Check Expenses	4	1 of 2	Business Miles Test	Sent to next stage, awaiting action	0	0	2	£11.25	£11.25	£0.00	£0.00	£0.00		2	0
Check Expenses	1	1 of 2	CLittlefair1	Sent to next stage, awaiting action	0	0	2	£40.00	£40.00	£0.00	£0.00	£0.00		2	0
Check Expenses	1	1 of 2	MJenkins1	Sent to next stage, awaiting action	1	0	1	£5.00	£5.00	£0.00	£0.00	£0.00		1	0
Check Expenses	1	1 of 2	MRowley1	Sent to next stage, awaiting action	1	0	1	£152.00	£152.00	£0.00	£0.00	£0.00		1	0
Check Expenses	10	1 of 2	MRowley10	Sent to next stage, awaiting action	0	0	2	£157.08	£157.08	£0.00	£0.00	£0.00		2	0
Check Expenses	11	1 of 2	MRowley11	Sent to next stage, awaiting action	0	0	2	£1.25	£1.25	£0.00	£0.00	£0.00		2	0
Check Expenses	14	1 of 2	MRowley14	Sent to next stage, awaiting action	0	0	6	£3.75	£3.75	£0.00	£0.00	£0.00		6	0
Check Expenses	15	1 of 2	MRowley15	Sent to next stage, awaiting action	0	0	2	£3.75	£3.75	£0.00	£0.00	£0.00		2	0
Check Expenses	5	1 of 2	MRowley5	Sent to next stage, awaiting action	0	0	8	£292.48	£292.48	£0.00	£0.00	£0.00		8	0
Check Expenses	6	1 of 2	MRowley6	Sent to next stage, awaiting action	0	0	2	£11.25	£11.25	£0.00	£0.00	£0.00		2	0
Check Expenses	7	1 of 2	MRowley7	Sent to next stage, awaiting action	0	0	2	£56.25	£56.25	£0.00	£0.00	£0.00		2	0

Un-allocate Claims - Sent for Team Approval



Un-allocated Claims

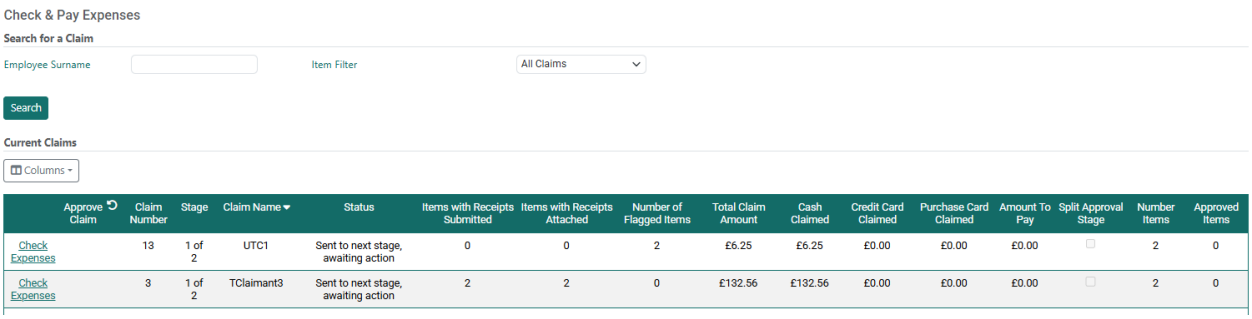
Allocate To Me

Columns

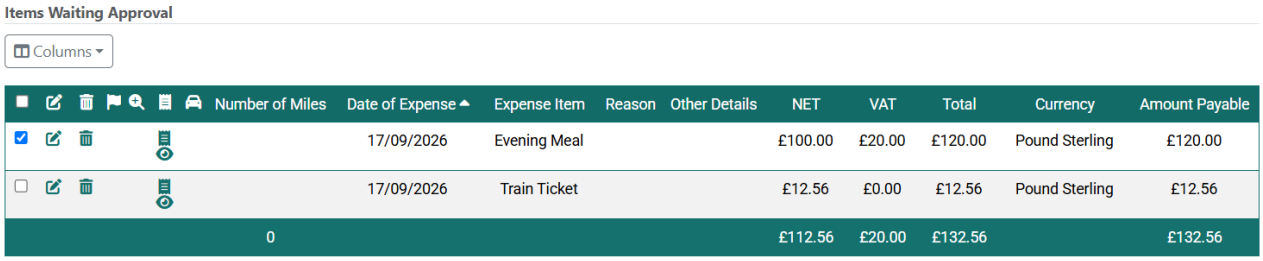
Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitte

Close

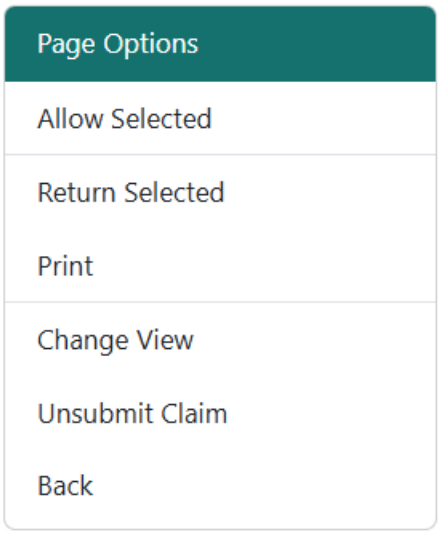
Allocate Team Approval Claim to Me



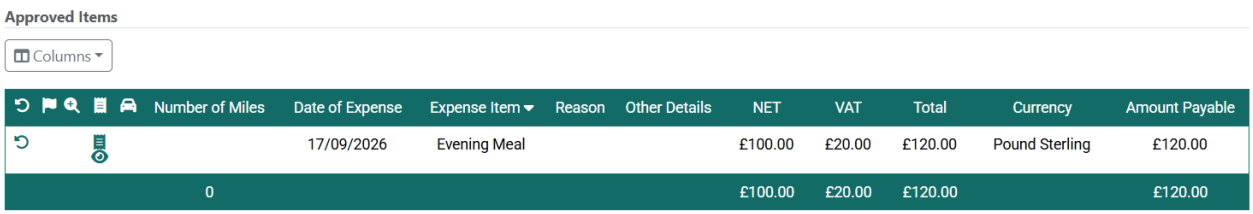
Claim Expense Items Awaiting Approval



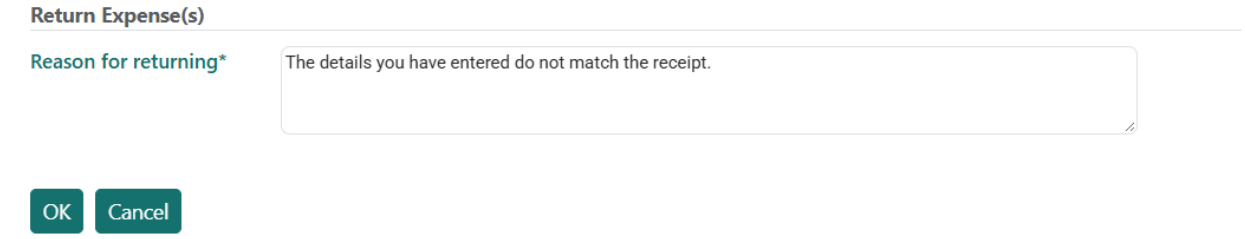
Approver Options



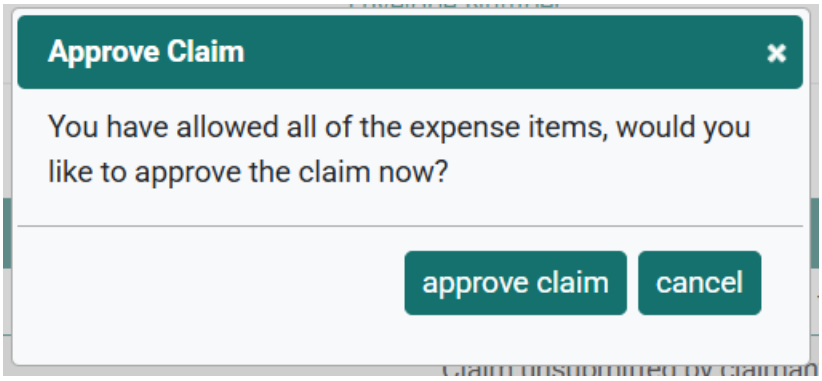
Claim Expense Items - Approved Items



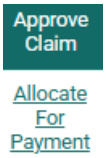
Returning an Item



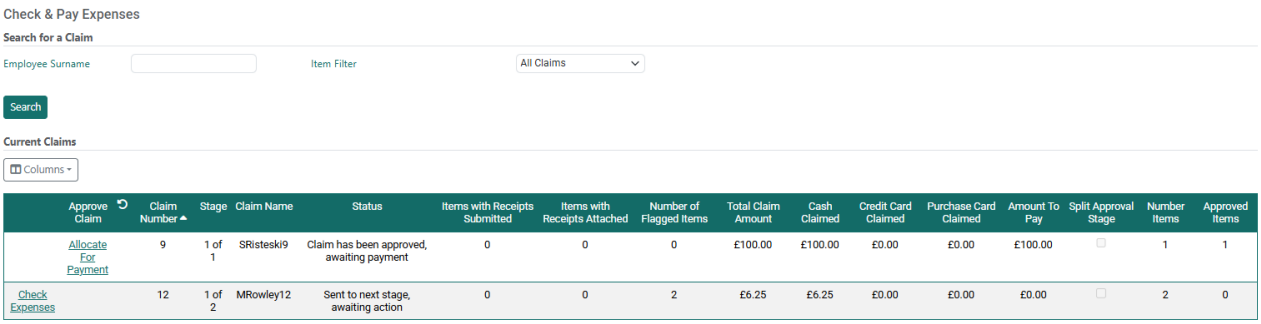
Approve Claim

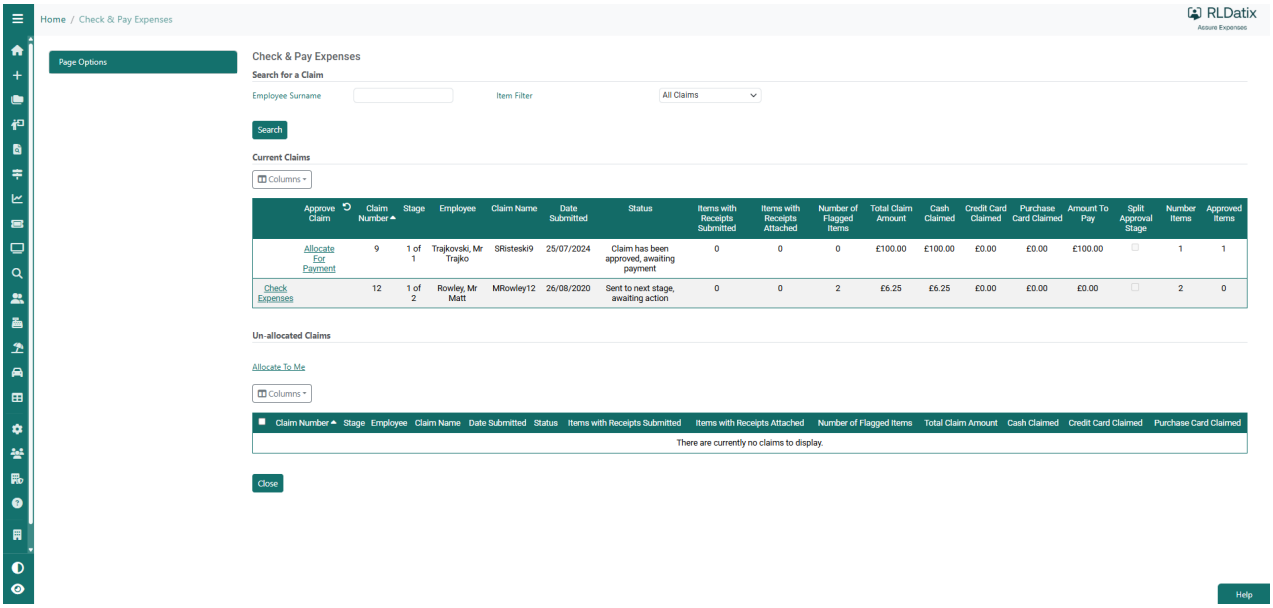


Allocate for Payment

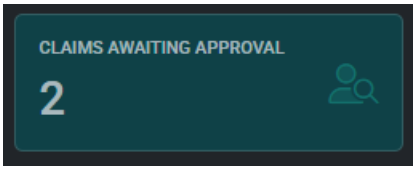


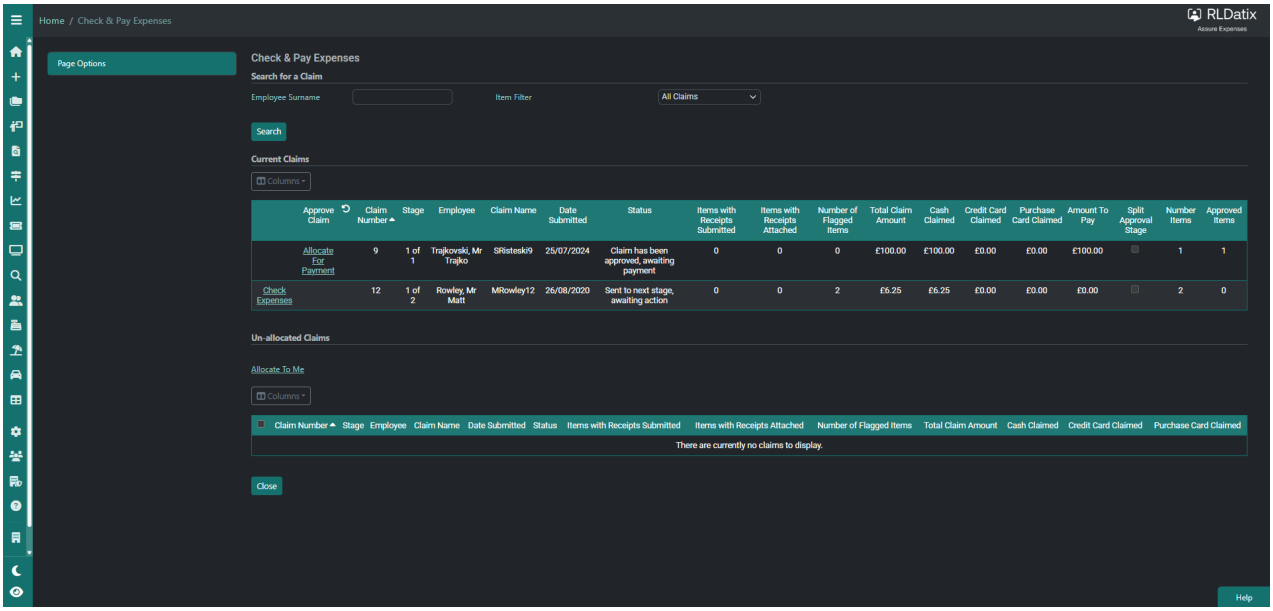
Check and Pay Expenses





Approvers - Check and Approve Expenses - Dark Theme





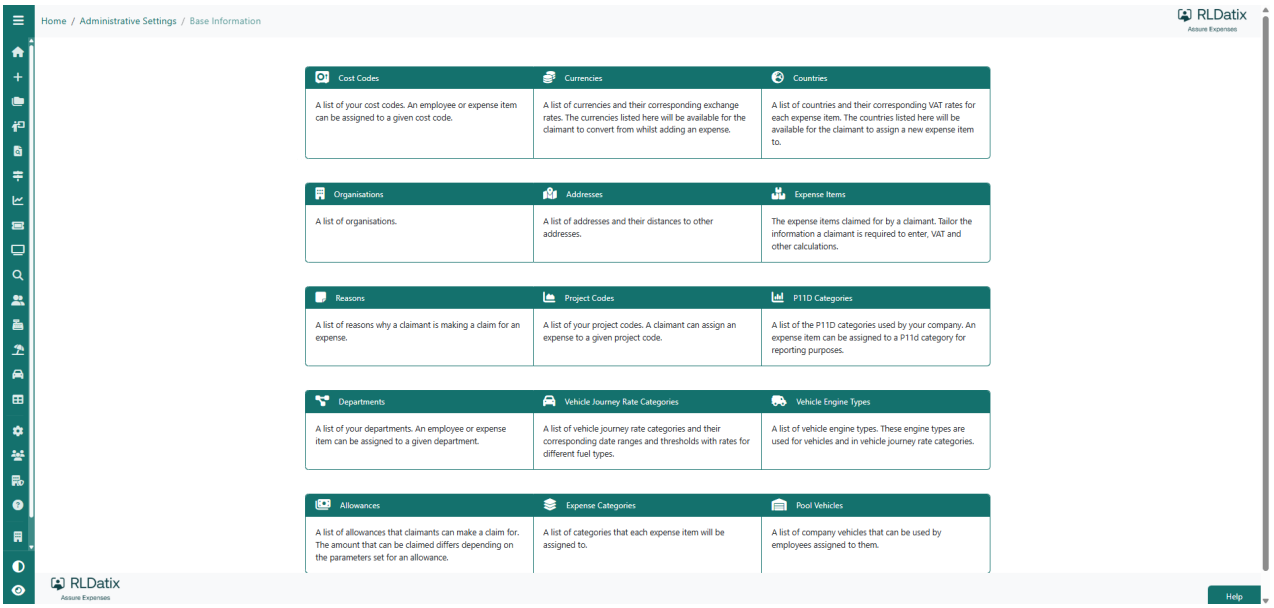
Menus and Icons - Administrative Settings

New Menu Design and Updated Icons

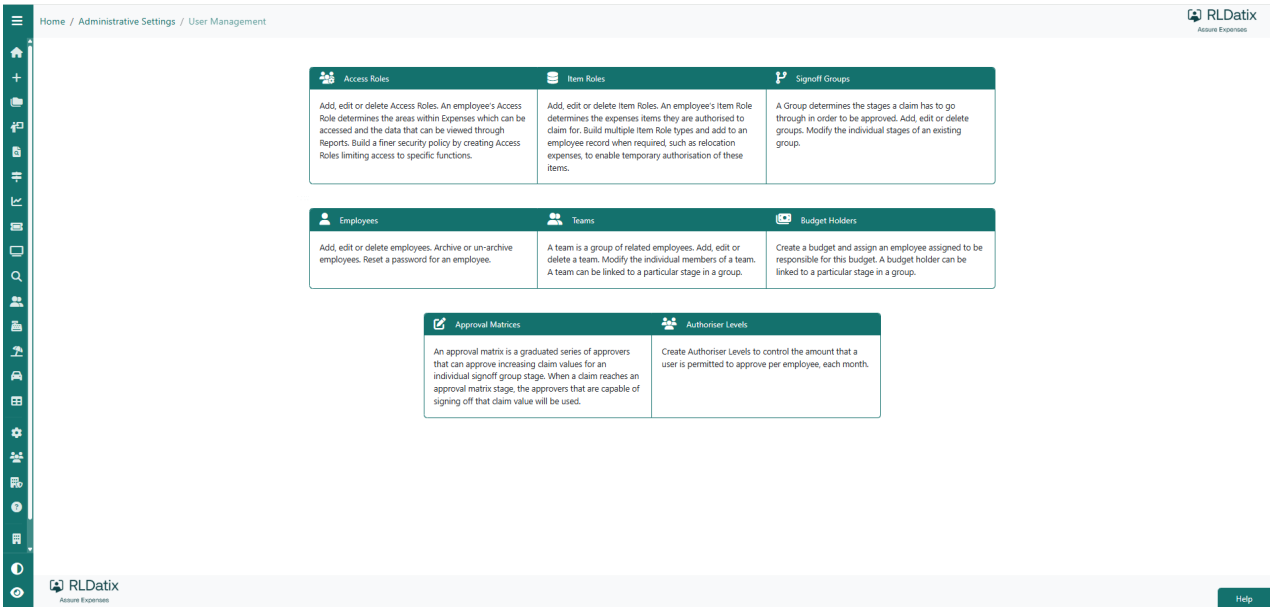
Base Information	Tailoring	Policy Information
Set-up and alter basic category information such as Reasons, Expense Items, Vehicle Journey Rate Categories and Departments.	Customise the look and feel of Expenses and alter basic settings.	Upload and display information about your Travel and Expense Company policy. Enforce policy by highlighting any exceptions that occur.

User Management	Imports / Exports	System Options
Alter employees, roles, groups, teams and budget holders.	Import and export data from Expenses	Application configuration area, including audit log, attachment types and IP address filtering.

Menus and Icons - Administrative Settings - Base Information

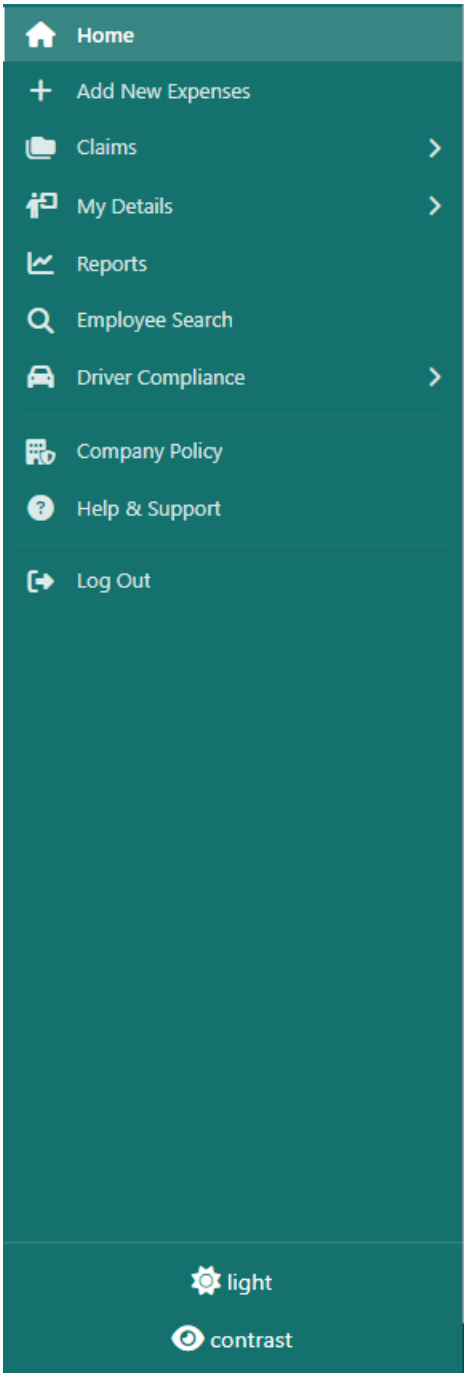


Menus and Icons - Administrative Settings - User Management

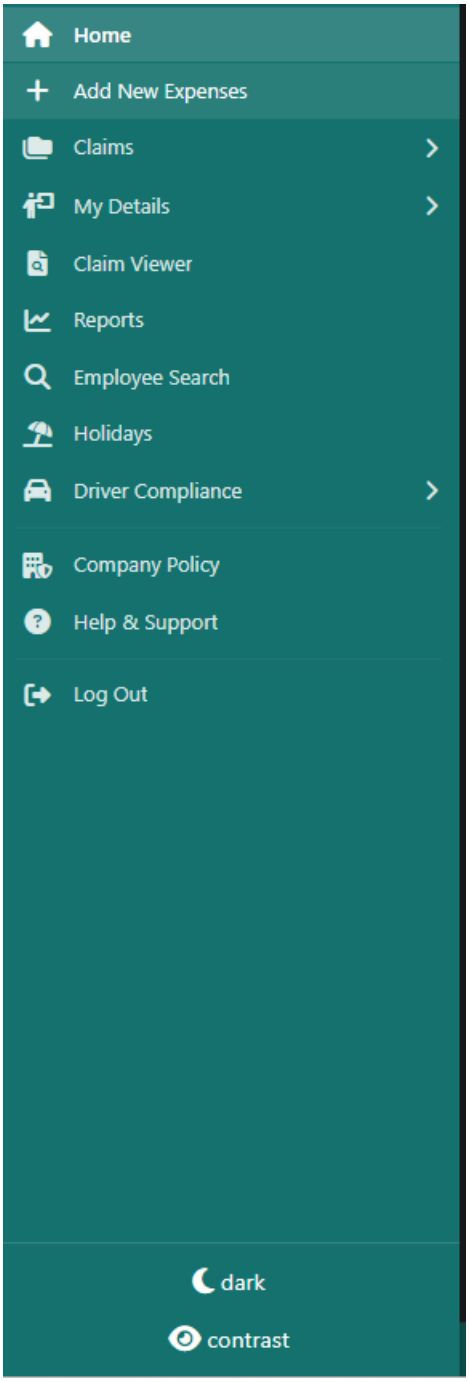


Side Menu

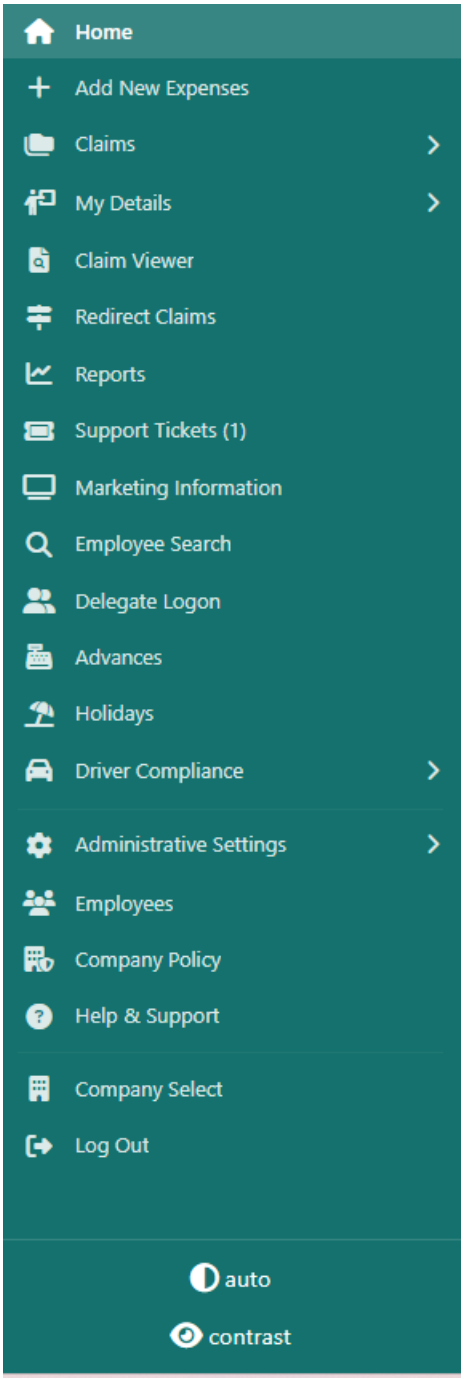
Side Menu - Claimant



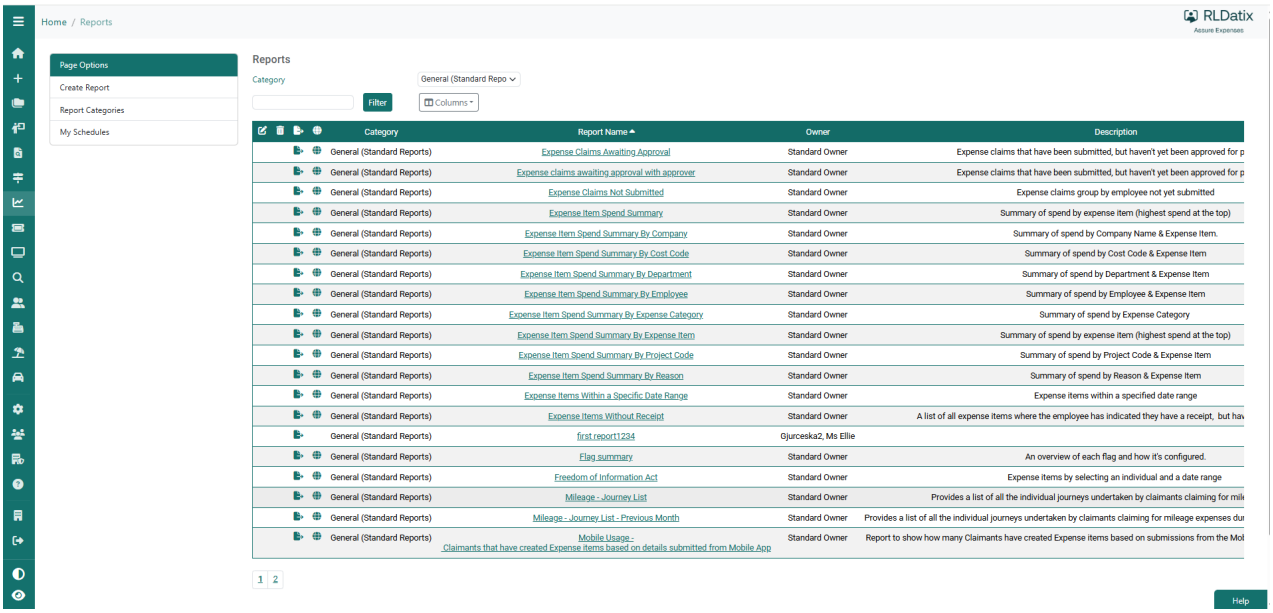
Side Menu - Approver



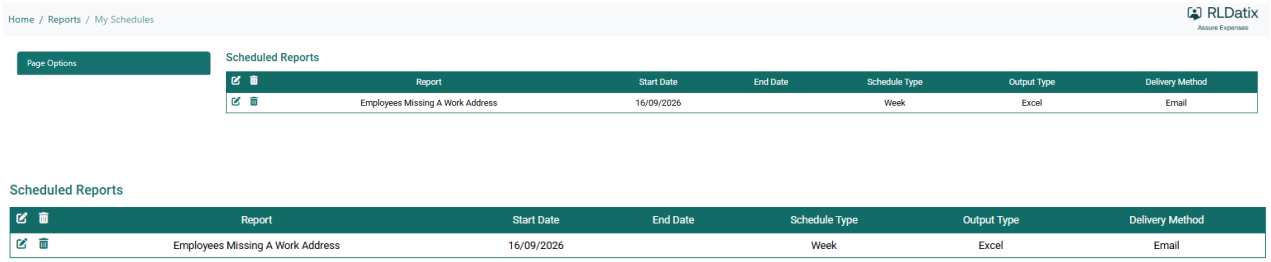
Side Menu - Administrator


Home
Add New Expenses
Claims
My Details
Claim Viewer
Redirect Claims
Reports
Support Tickets (1)
Marketing Information
Employee Search
Delegate Logon
Advances
Holidays
Driver Compliance
Administrative Settings
Employees
Company Policy
Help & Support
Company Select
Log Out
auto
contrast

Reports



My Schedules



These screenshots are provided as examples of the new design only.

We reserve the right to update the designs between this document creation and the release of the new version.

Assure Expenses | New UI FAQs

Customer FAQs | Webinar follow-up

Key message

The new Expenses user interface is primarily a visual and navigational modernisation. Existing functionality, permissions, processes, reports, integrations and configuration remain unchanged. The goal is to provide a cleaner, more modern and easier-to-use experience while minimising disruption.

About this document

These FAQs bring together the key information shared during the RLDatix Expenses New UI webinar on 16 September 2026. Dates and details described as planned, expected or under exploration remain subject to confirmation.

Release and what is changing

1. Why is the Expenses user interface changing?

The new interface modernises the look and feel of Expenses, improves navigation, supports accessibility standards and creates a more consistent experience across the web and mobile applications. Core Expenses functionality remains the same.

2. When will the new UI be released?

The planned launch window is the week commencing 19 October 2026. The exact release day has not yet been confirmed but will be shared week commencing 12 October 2026.

3. What are the biggest changes users will notice?

- A redesigned sign-in page
- A new dashboard-style homepage
- Improved side navigation with drop-down menus
- Easier access to common actions
- New colour themes and accessibility options
- Receipt Wallet available within Expenses Web

4. Are there any new features?

The main new feature is Receipt Wallet within the web application. Most other changes focus on design, usability, navigation and accessibility.

5. Will there be any downtime?

The update is expected to be deployed as a standard release with only minimal interruption, similar to routine maintenance activities.

Processes, configuration and access

6. Will the way I submit or approve claims change?

No. The update focuses on the interface, navigation and presentation. Existing expenses submission, approval, and administration processes remain unchanged.

7. Will our configuration, expense items, cost codes or settings be affected?

No. Existing configuration, permissions, expense items, cost codes, reporting structures and

settings will remain in place.

8. Will user permissions and access roles change?

No. Users will continue to see functions based on their existing roles and permissions, presented through the new navigation structure.

9. Will Single Sign-On still work?

Yes. Current information indicates that existing Single Sign-On configurations will continue to work as they do today. Customers should not need to reconfigure certificates, identity providers, or authentication settings.

10. Will reports and exports still work?

Yes. Existing reports, custom reports, financial exports and integrations are unchanged and will continue working as they do today.

11. Are import and export file formats changing?

No. There are no changes to current import or export formats.

12. Do claims need to be submitted before the change?

No. Current, part-completed and submitted claims will remain exactly as they are and can be continued after the release.

13. Is the mobile app changing too?

No mobile app changes are planned as part of this release. The web application is being updated to align more closely with the existing mobile experience.

Using the new experience

14. What is Receipt Wallet?

Receipt Wallet allows receipt images to be stored before making the expenses claim. Images captured in the mobile app will now be available within Expenses Web, and vice versa. This makes it easier to capture receipts while travelling and complete claims later on a desktop or through the mobile app.

15. Is OCR available in the web version?

Yes. OCR is included in the web receipt wallet and can pre-populate information such as date, total, VAT and currency.

16. Will the receipt wallet be available when reconciling corporate card transactions?

Corporate card options will remain available within the claimant items area, and the reconciliation process will work as it does today.

17. Which evidence file types can be uploaded?

Permitted attachment types are controlled by each organisation's system configuration. Examples discussed included PNG, JPEG, TIFF, DOCX, PDF and GIF. Additional types may be enabled in Administrative Settings, and help guidance is available for the email-in function.

18. Will users need retraining?

Most users should require only minimal familiarisation. The functionality remains the same, but some menu locations and navigation routes will be different. Administrators are encouraged to share guidance with end users.

19. Is the consent process for automated DVLA checks changing?

No. The process remains the same.

20. Can users personalise the new screens?

Yes. Users will be able to customise column views in various areas of the application and switch between the available display themes.

21. What accessibility improvements are included?

The new UI introduces light, dark and high-contrast themes, improved navigation structures and more accessible design standards.

22. Will broadcast messages still appear?

Yes. Broadcast and notification messages will continue to appear in the new experience.

23. Will our organisation's custom branding remain?

No. Existing custom colour branding will be replaced by standardised theme options designed to improve accessibility, align with the mobile app, and provide each user with the option to make their own choice of display based on their individual needs and preferences.

Preparing for go-live

24. What support and training materials will be available?

- A live administrator webinar and recording
- Administrator guidance
- End-user videos
- Knowledge Base articles
- Updated documentation and comparison guides

25. What should administrators do before go-live?

- Review the available guidance materials
- Brief end users and stakeholders
- Update internal screenshots or user guides where applicable

- Familiarise themselves with the new navigation at launch

Release approach and technical considerations

26. When will the new Expenses UI launch?

The planned launch is the week commencing 19 October. This timing avoids typical payroll processing peaks and the higher claim volumes seen closer to the holiday period, while ensuring our teams are available to support customers. We will provide supporting materials before launch, including FAQs, screenshots, knowledge articles and videos.

27. Can some customers become early adopters of the new UI?

No. All customers use the same live version of Expenses and receive system-wide updates at the same time. Although some individual features can be introduced using feature flags, the new UI relies on updated technology and code libraries that apply across the whole system, so an early-adopter release is not possible.

28. Can the release be rolled back if there is an issue?

Yes. We can roll back the code to the previous version without affecting customer data. However, we normally resolve and deploy a fix as quickly as possible through our continuous delivery process. The old and new versions cannot run in the live environment at the same time.

29. Can users switch between the current and new designs?

No. The new interface uses updated components and icons, while elements used by the current design are no longer supported in the new code library. Because only one version of that library can run at a time, a design toggle cannot be provided.

Need help?

New interface and launch queries: expensesteam@rldatix.com

Live product or service issues: support@selenity.com