

Assure Expenses | Adding an Expense Item with a Receipt

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

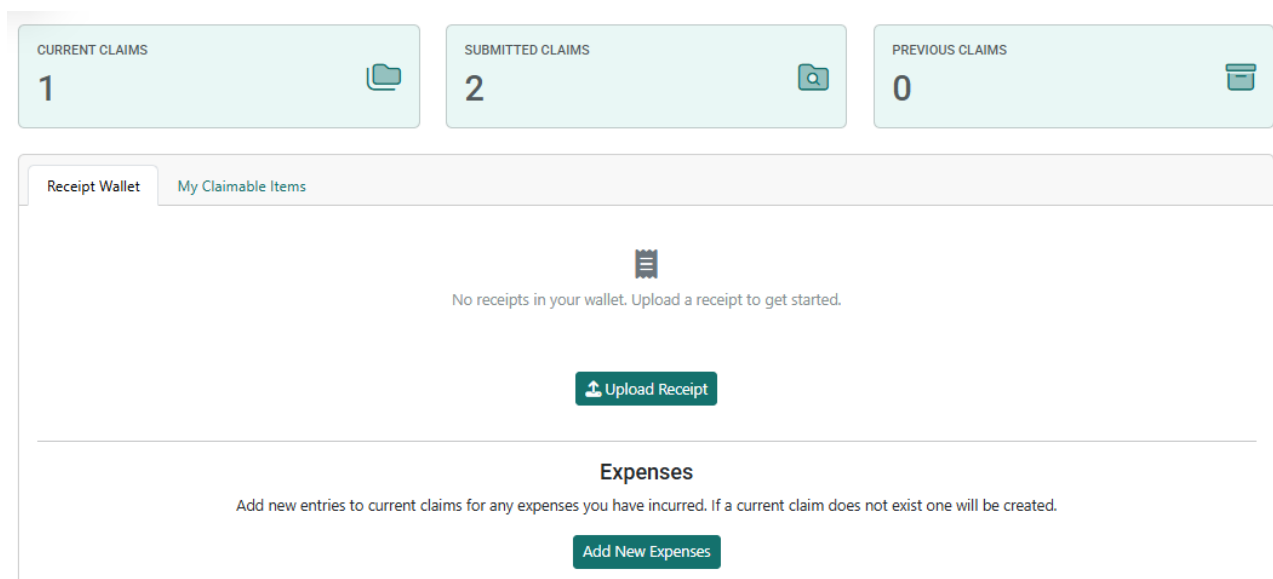
These updates are designed to make the system easier to navigate, with a cleaner, more visual, and more modern design that helps you find what you need more quickly.

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**.

Expenses

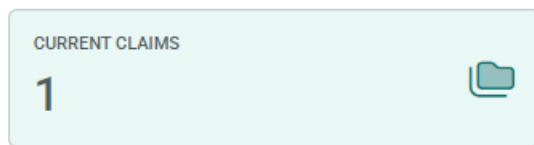
Add new entries to current claims for any expenses you have incurred. If a current claim does not exist one will be created.

Add New Expenses

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

Option 2 - Navigate to Existing Current Claim

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



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

Current Claims

Columns -

	Claim Number	Claim Name	Claim Description	Number of Items	Claim Total
	3	IClaimant3		0	

Close

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



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

Home / My Claims / Claim Viewer

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim: Tclaimant3

Claim Details

General Information

Username	test.claimant	Claim Total	£0.00
Claim Name	Tclaimant3	Amount Payable	£0.00
Claim Description		Number of Items	0

When preparing envelopes for the scan and attach service, ensure you do the following:

- Number all your receipts using the Expense Item Reference Numbers found on your expenses
- Ensure that the Expense Item Reference Number is written on the front of the receipt
- Write any extra instructions on the back of the receipt
- Remove all staples from your receipts
- Make sure all receipts are single and not glued to a sheet of paper
- Ensure your envelopes are not used for more than one claim

Expense Items

Columns

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Currency	Amount Payable
There are no expense items to display.									
0					£0.00	£0.00	£0.00		£0.00

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

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

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.

Receipt Wallet

[My Claimable Items](#)

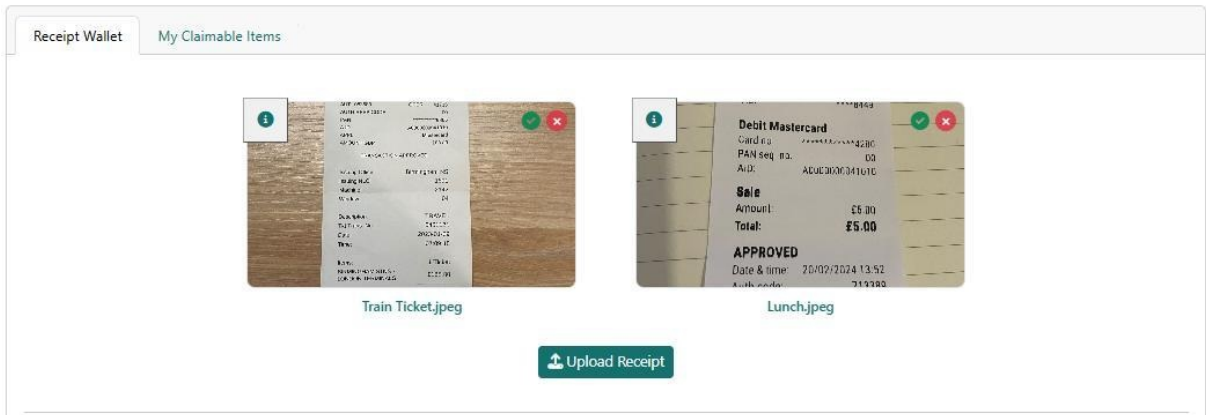
No receipts in your wallet. Upload a receipt to get started.

Upload Receipt

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

Upload Receipt

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.



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

Add Expense

General Details

Date of Expense:	17/09/2026		Claim:	TClaimant3	
Address Name / Company Visited:					
Reason:			Country:	United Kingdom	
Currency:	Pound Sterling				
Other Details:					

Department / Cost Code / Project Code Breakdown

Department	Cost Code	Project Code	Percentage
ABC123	Search	[None]	100

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.

Field	Description
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.

Specific Details

Expense Item:

Select an expense item to add it to the claim.

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".

Specific Details

Expense Item:

Select an expense item to add it to the claim.

Expense Category: Travel

Train Ticket

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

Specific Details

Expense Item:

Train Ticket
Total: 12.56

Remove

Standard class train tickets only

Do you have a receipt: ☒ Yes ☐ No

Total (Gross):

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.

Specific Details

Expense Item:

Train Ticket
Total: 12.56

Remove

Taxi
Total: 0.00

Remove

Taxis should only be taken if there is no suitable alternative public transport, or if there is more than 1 passenger and a taxi is a cheaper alternative to public transport.

Do you have a receipt: ☐ Yes ☒ No

Does it include a VAT number and VAT rate: ☐ Yes ☐ No

Total (Gross):

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

Specific Details

Expense Item:

Train Ticket
Total: 12.56

Remove

Taxi
Total: 11.45

Remove

Taxis should only be taken if there is no suitable alternative public transport, or if there is more than 1 passenger and a taxi is a cheaper alternative to public transport.

Do you have a receipt: ☐ Yes ☒ No

Does it include a VAT number and VAT rate: ☐ Yes ☒ No

Total (Gross):

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.

Add Expense

General Details

Date of Expense: 24/09/2026 ? Claim: TClaimant3 ?

Address Name / Company Visited: ?

Reason: ?

Currency: Pound Sterling ?

Country: United Kingdom ?

Other Details: ?

Department / Cost Code / Project Code Breakdown

Department	Cost Code	Project Code	Percentage
ABC123			100

Specific Details

Expense Item: Type to search...

Train Ticket Total: 0.00 Remove

Standard class train tickets only

Do you have a receipt: ☐ Yes ☒ No ?

Total (Gross): ?

Save **Cancel**

Message from Expenses x

? You have an expense item for which you have not provided the value. If you continue this item will not be saved. Select the cancel option to provide the details.

Continue **Cancel**

Message from Expenses x

? You have an expense item for which you have not provided the value. If you continue this item will not be saved. Select the cancel option to provide the details.

Continue **Cancel**

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

Train Ticket Total: 0.00 Remove

Standard class train tickets only

Do you have a receipt: ☐ Yes ☒ No ?

Total (Gross): ?

Train Ticket Total: 12.56 Remove

Standard class train tickets only

Do you have a receipt: ☐ Yes ☒ No ?

Total (Gross): 12.56 ?

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.

Expense Items

Columns

	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Currency	Amount Payable
		17/09/2026	Evening Meal			£100.00	£20.00	£120.00	Pound Sterling	£120.00
		17/09/2026	Train Ticket			£12.56	£0.00	£12.56	Pound Sterling	£12.56
0						£112.56	£20.00	£132.56		£132.56

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:

Expense Items

Columns

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

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**.



Receipt Management

Manage Receipts

Your claim and its receipt images are below. [Show help](#).

	TClaimant3	2 items	[Not submitted]	£132.56
Claim Header				
	Train Ticket	21-000004	17/09/2026	£12.56
				
	Evening Meal	21-000005	17/09/2026	£120.00

Save

Cancel

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



Receipt Management

Manage Receipts

Your claim and its receipt images are below. [Show help.](#)

 TClaimant3

2 items

[Not submitted]

£132.56

Claim Header

 Train Ticket

21-000004

17/09/2026

£12.56

 Evening Meal

21-000005

17/09/2026

£120.00



Save

Cancel

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

Claim: TClaimant3

Claim Details

General Information

Username	test.claimant	Claim Total	£132.56
Claim Name	TClaimant3	Amount Payable	£132.56
Claim Description		Number of Items	2

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Expense Items

Columns ▾

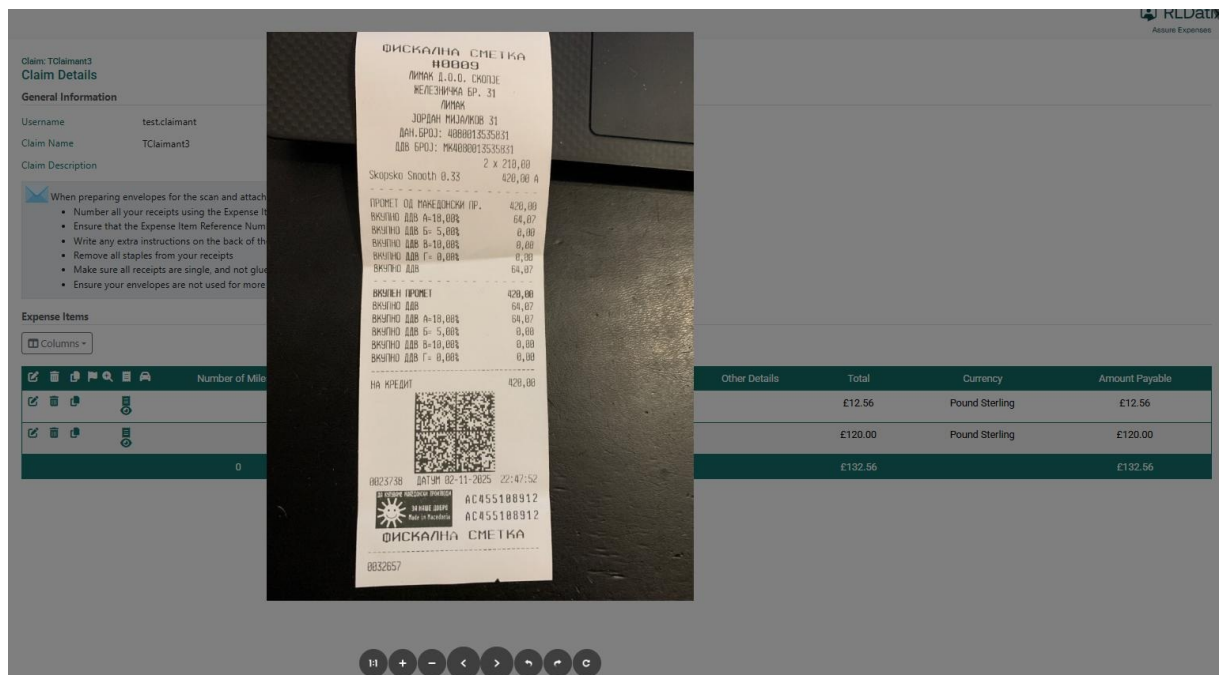
    	Number of Miles ↕	Date of Expense	Expense Item	Reason	Other Details	Total	Currency	Amount Payable
    		17/09/2026	Evening Meal			£120.00	Pound Sterling	£120.00
    		17/09/2026	Train Ticket			£12.56	Pound Sterling	£12.56
	0					£132.56		£132.56

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.