

Assure Expenses | New Design Screenshot Pack

Last Modified on 19/10/2026 3:00 pm BST

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.

Scheduled Reports

 	Report	Start Date	End Date	Schedule Type	Output Type	Delivery Method
 	Employees Missing A Work Address	16/09/2026		Week	Excel	Email

Logon Page

Sign In

Company ID

Username

Password

If you do not know your details please select "forgotten details" to have them emailed to you. If you cannot retrieve your details please consult your administrator.

☐ Remember Details

We advise you not to select remember details if you are using a public or shared computer.

Sign in

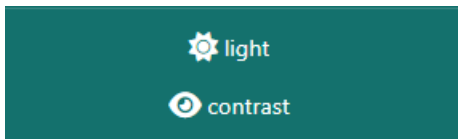
Sign in with SSO

[forgotten details](#)

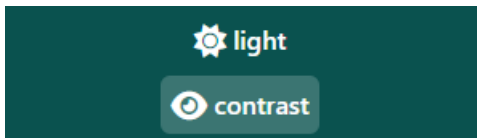
[register](#)

Themes

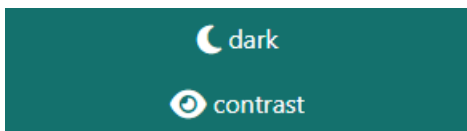
Light Theme



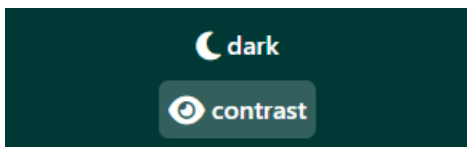
Light Theme - High Contrast



Dark Theme

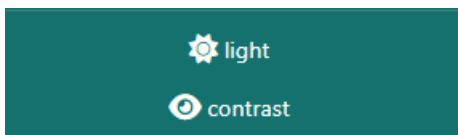


Dark Theme - High Contrast



Home Page - Claimant

Light Theme - Claimant



CURRENT CLAIMS 1	SUBMITTED CLAIMS 3	PREVIOUS CLAIMS 0
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Receipt Wallet

My Claimable Items

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

Upload Receipt

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

CURRENT CLAIMS

1

SUBMITTED CLAIMS

3

PREVIOUS CLAIMS

0

Receipt Wallet

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Upload Receipt

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Add New Expenses

My Details

Reports

Driver Compliance

Update your basic details such as name and address.
View details of your current car and vehicle journey rate.
View the steps required to approve a claim you submit.
Assign delegates to manage your account.

Create new reports, edit, delete or view existing ones.
Export data to Excel, CSV, flat file or create pivot tables.

Manage your driving licence and vehicle documents.

Light Theme - High Contrast - Claimant

light

contrast

CURRENT CLAIMS

1

SUBMITTED CLAIMS

3

PREVIOUS CLAIMS

0

Receipt Wallet

My Claimable Items

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Expenses

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Add New Expenses

CURRENT CLAIMS
1

SUBMITTED CLAIMS
3

PREVIOUS CLAIMS
0

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Manage your driving licence and vehicle documents.

Dark Theme - Claimant

dark

contrast

CURRENT CLAIMS
1

SUBMITTED CLAIMS
3

PREVIOUS CLAIMS
0

Receipt Wallet

My Claimable Items

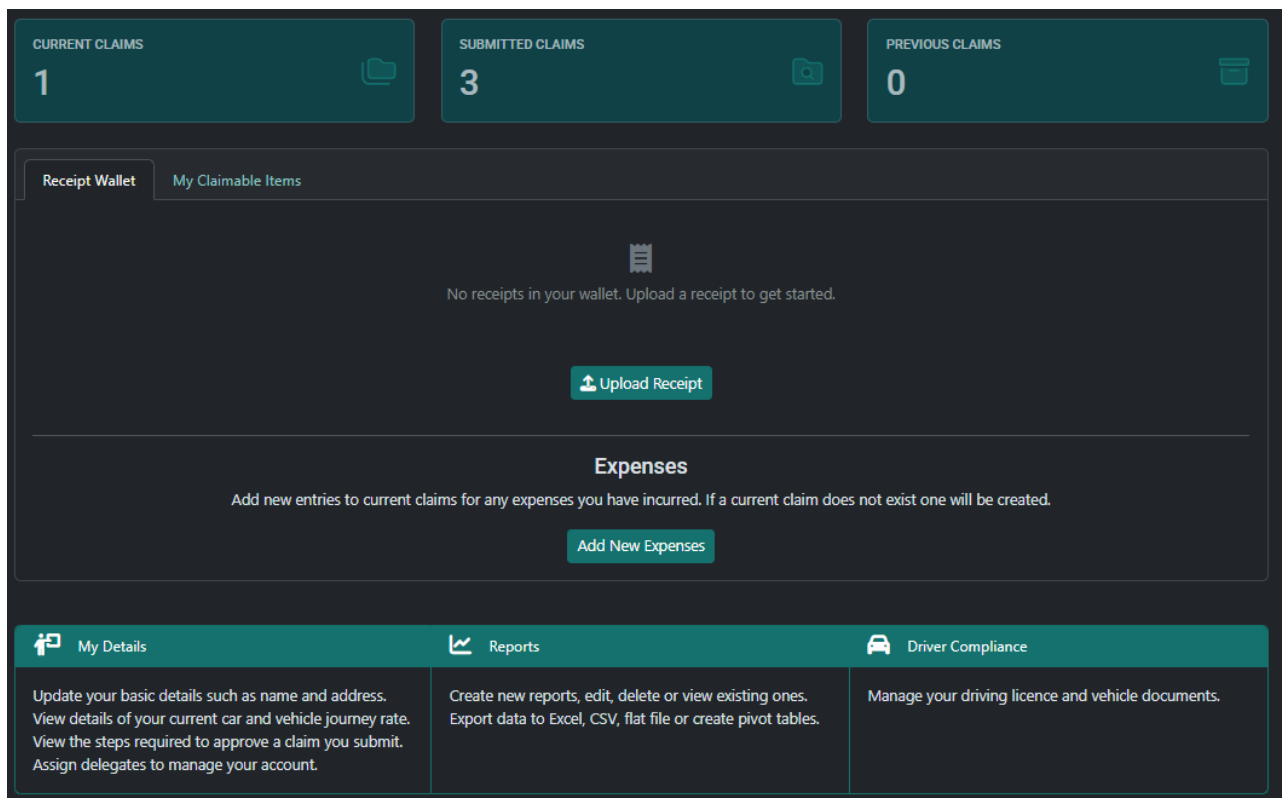
No receipts in your wallet. Upload a receipt to get started.

Upload Receipt

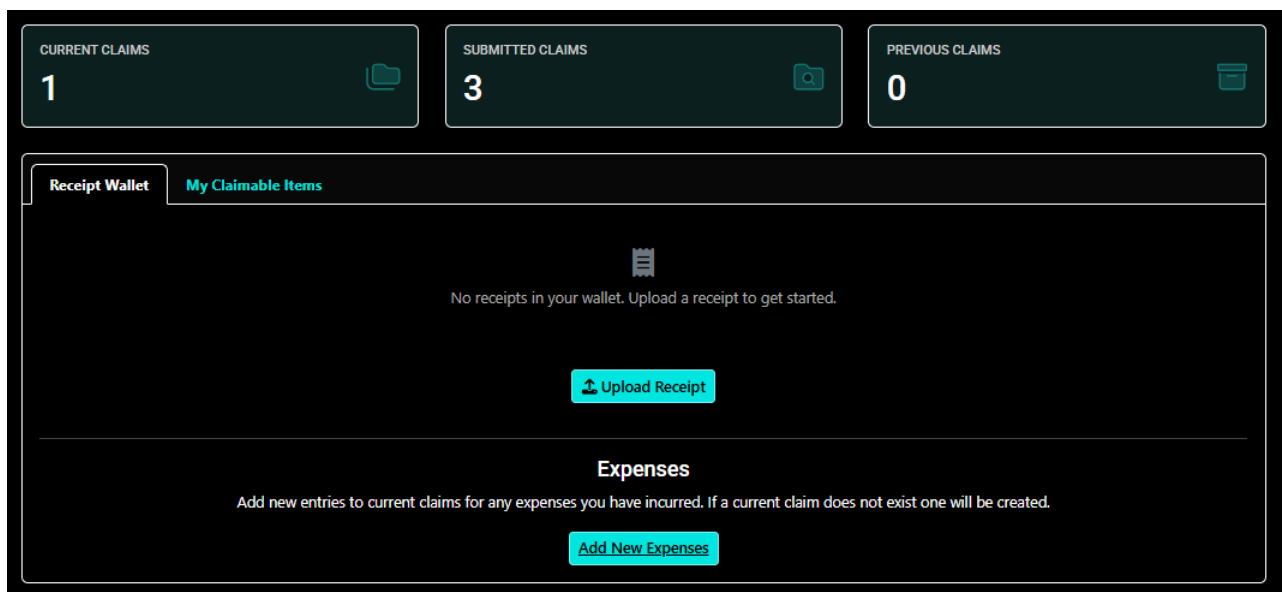
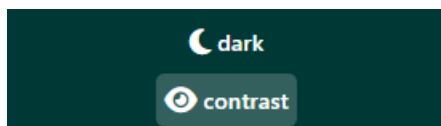
Expenses

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



Dark Theme - High Contrast - Claimant



CURRENT CLAIMS

1

SUBMITTED CLAIMS

3

PREVIOUS CLAIMS

0

Receipt Wallet

My Claimable Items

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Upload Receipt

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

My Details

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View details of your current car and vehicle journey rate.
View the steps required to approve a claim you submit.
Assign delegates to manage your account.

Reports

Create new reports, edit, delete or view existing ones.
Export data to Excel, CSV, flat file or create pivot tables.

Driver Compliance

Manage your driving licence and vehicle documents.

Home Page - Approver

Light Theme - Approver

CURRENT CLAIMS

0

SUBMITTED CLAIMS

0

PREVIOUS CLAIMS

0

CLAIMS AWAITING APPROVAL

21

Receipt Wallet

My Claimable Items

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

Upload Receipt

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

CURRENT CLAIMS 0	SUBMITTED CLAIMS 0	PREVIOUS CLAIMS 0	CLAIMS AWAITING APPROVAL 21
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Receipt Wallet

My Claimable Items



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

Upload Receipt

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

Claim Viewer	My Details	Reports
View other user's claims.	Update your basic details such as name and address. View details of your current car and vehicle journey rate. View the steps required to approve a claim you submit. Assign delegates to manage your account.	Create new reports, edit, delete or view existing ones. Export data to Excel, CSV, flat file or create pivot tables.

Holidays	Driver Compliance
Enter your upcoming holidays here so that any claims you are responsible for checking can be dealt with accordingly.	Manage your driving licence and vehicle documents.

Dark Theme - Approver

CURRENT CLAIMS

0

SUBMITTED CLAIMS

0

PREVIOUS CLAIMS

0

CLAIMS AWAITING APPROVAL

21

Receipt Wallet

My Claimable Items



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

Upload Receipt

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

CURRENT CLAIMS0

SUBMITTED CLAIMS0

PREVIOUS CLAIMS0

CLAIMS AWAITING APPROVAL21

Receipt Wallet

My Claimable Items

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

Upload Receipt

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

Claim Viewer

My Details

Reports

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Export data to Excel, CSV, flat file or create pivot tables.

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Driver Compliance

Enter your upcoming holidays here so that any claims you are responsible for checking can be dealt with accordingly.

Manage your driving licence and vehicle documents.

My Claims

Claimant - Visual Tiles - Light Theme

My Claims

CURRENT CLAIMS0

SUBMITTED CLAIMS1

PREVIOUS CLAIMS0

Current Claims (1)	Submitted Claims (1)	Previous Claims (0)
Claims that have yet to be submitted into the approval process. Add, edit or delete expense items and claims. Submit a claim for approval.	Claims that are currently being approved. View the status of these claims or amend any returned items.	Historical claims that have been approved.

Claimant - Visual Tiles - Dark Theme

My Claims

CURRENT CLAIMS1

SUBMITTED CLAIMS1

PREVIOUS CLAIMS0

Current Claims (1)	Submitted Claims (1)	Previous Claims (0)
Claims that have yet to be submitted into the approval process. Add, edit or delete expense items and claims. Submit a claim for approval.	Claims that are currently being approved. View the status of these claims or amend any returned items.	Historical claims that have been approved.

Approver - Visual Tiles - Light Theme

CURRENT CLAIMS 0	SUBMITTED CLAIMS 0	PREVIOUS CLAIMS 0	CLAIMS AWAITING APPROVAL 20
CURRENT CLAIMS 0	SUBMITTED CLAIMS 0	PREVIOUS CLAIMS 0	CLAIMS AWAITING APPROVAL 20

Claim Approval / Check and Pay Expenses

CLAIMS AWAITING APPROVAL 20

Approver - Visual Tiles - Dark Theme

CURRENT CLAIMS 0	SUBMITTED CLAIMS 0	PREVIOUS CLAIMS 0	CLAIMS AWAITING APPROVAL 20
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Claim Approval / Check and Pay Expenses

CLAIMS AWAITING APPROVAL 20

CURRENT CLAIMS 0	SUBMITTED CLAIMS 0	PREVIOUS CLAIMS 0	CLAIMS AWAITING APPROVAL 20
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Current Claims - Claim Details - Light Theme

Menu Tile

CURRENT CLAIMS 0

List of Current Claims

Current Claims

Columns

	Claim Number	Claim Name	Claim Description	Number of Items	Claim Total
	3	TClaimant3		0	

Close

Claim Selection

Claim Name

TClaimant3

Claim Details Page

Claim: TClaimant4

Claim Details

General Information

Username	test.claimant	Claim Total	£0.00
Claim Name	TClaimant4	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	Total	Currency	Amount Payable
There are no expense items to display.									
	0					£0.00	£0.00		£0.00

Home / My Claims / Current Claims

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim: TClaimant2

Claim Details

General Information

Username	test.claimant	Claim Total	£0.00
Claim Name	TClaimant2	Amount Payable	£0.00
Claim Description		Number of Items	0

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

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- 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

RLDatix

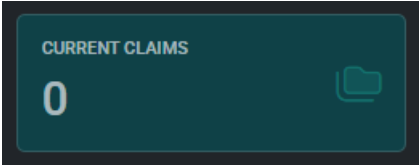
Assure Expenses

Current Claim - Page Options

Page Options
New Expense
Claim List
Change View
Print
Submit Claim

Current Claims - Claim Details - Dark Theme

Menu Tile



List of Current Claims

Current Claims				
Columns -				
 	Claim Number	Claim Name	Number of Items	Claim Total ▲
 	4	TClaimant4	2	£45.00
Close				

Claim Selection

Claim Name
TClaimant4

Claim Details Page

Claim: TClaimant4

Claim Details

General Information

Username	test.claimant	Claim Total	£0.00
Claim Name	TClaimant4	Amount Payable	£0.00
Claim Description	Number of Items0		



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

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• 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

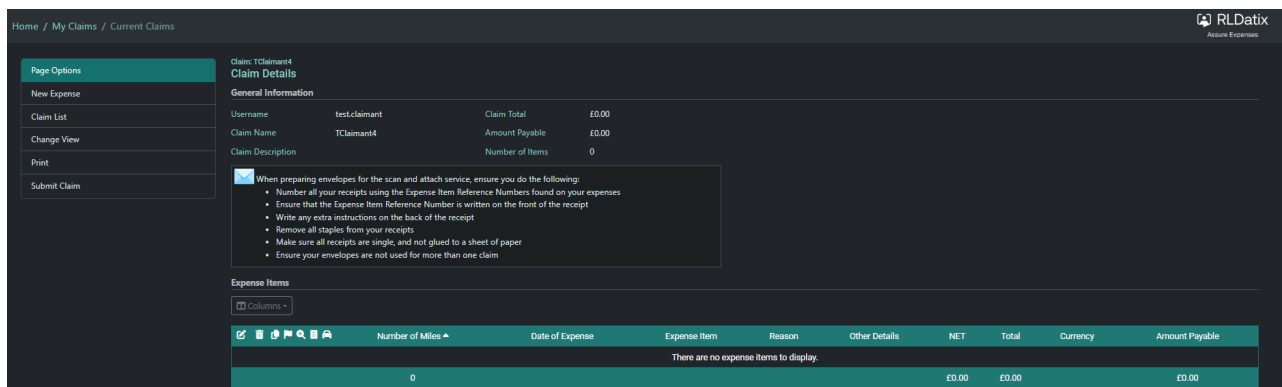
• Make sure all receipts are single, and not glued to a sheet of paper

• Ensure your envelopes are not used for more than one claim

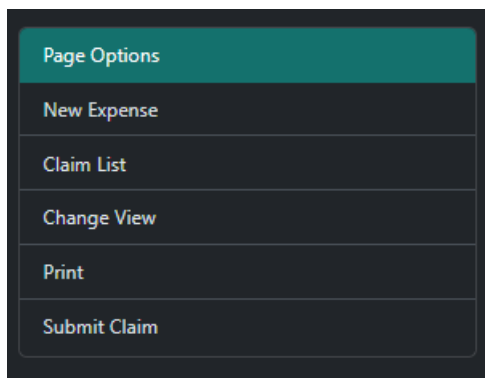
Expense Items

Columns

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

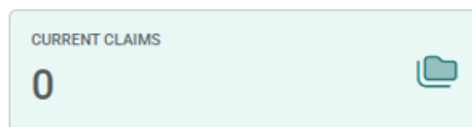


Current Claims - Page Options



My Claims - Add Claim Pages - Light Theme

Menu Tile



New Claim Option



Claim Name and Description

Add / Edit Claim

General Details

Claim Name:

Description:

Current Claims List

Columns

	Claim Number	Claim Name	Claim Description	Number of Items	Claim Total
	3	TCclaimant3		0	

Close

My Claims - Adding an Expense - Light Theme

Add New Expense

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

New Expense Options

Page Options
New Expense
Claim List
Change View
Print
Submit Claim

Claim Details Page

Home / My Claims / Claim Viewer

RLDatix
Return Expenses

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim: TCclaimant3

Claim Details

General Information

Username

test.claimant

Claim Total

£0.00

Claim Name

TCclaimant3

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

Add Expense - General Details

Add Expense

General Details

Date of Expense:17/09/2026?

Address Name / Company Visited:

Reason:

Currency:Pound Sterling?

Other Details:

Claim:TClaimant3?

Country:United Kingdom?

Department / Cost Code / Project Code Breakdown

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

Add Expense - Expense Item Details

Specific Details

Expense Item:Type to search...

Select an expense item to add it to the claim.

Claimed Expenses Items Summary Page

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

Submit Claim - Light Theme

Submit Claim

Home / My Claims / Current Claims

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim: TClaimant1

Claim Details

General Information

Username: test.claimant

Claim Name: TClaimant1

Claim Description: Expense Claim 1/23/09/2019 - 23/09/2019

Claim Total: £199.48

Amount Payable: £199.48

Number of Items: 1

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

Number all your re

Ensure that the En

Write any extra ins

Remove all staples

Make sure all need

Ensure your envel

Claim History

Date Stamp

24/09/2019 11:36

Expense Items

Columns -

Number of Miles

Date of Expense

Expense Item

Reason

Other Details

NET

VAT

Total

Currency

Amount Payable

443.28

23/09/2019

Mileage - General

External Training

£186.18

£13.30

£199.48

Pound Sterling

£199.48

443.28

£186.18

£13.30

£199.48

£199.48

Submit Claim

One or more of your claimed items is outside policy. Please ensure you have supplied sufficient detail in the "Other Details" section to justify going out of policy to your approver.

Claim Summary

Claim name*: TClaimant1

Description: Expense Claim 1/23/09/2019 - 23/09/2019

submitcancel

Mr Test Approver

Stage

Reference Number

1

443.28

23/09/2019

Mileage - General

External Training

£186.18

£13.30

£199.48

Pound Sterling

£199.48

443.28

£186.18

£13.30

£199.48

£199.48

You are currently logged in as Mr Test Claimant

Logout employee account

Help

Submit Claim

One or more of your claimed items is outside policy. Please ensure you have supplied sufficient detail in the "Other Details" section to justify going out of policy to your approver.

Claim Summary

Claim name*

TClaimant1

Description

Expense Claim 1:23/09/2019 - 23/09/2019

submit

cancel

Full Name of Member

Date of Expense

Expense Item

Receipt

Other Details

ref

Example Declaration

Declaration

I CERTIFY THAT:

1. The travelling expenses and subsistence allowances claimed are in accordance with the regulations stated in the Company Policy and are in respect of journeys actually and necessarily incurred whilst engaged on the business stated.

2. Where a claim for mileage allowance is made:

a. The journeys detailed on this expenses claim form were undertaken in the vehicle of make cc and registration shown and were necessarily incurred by me on the business of the company.

b. The insurance policy in respect of this vehicle is currently in force and provides cover while the vehicle is used on the official business of the company including the journeys overleaf for full third party insurance risk or injury to or death of

I Accept

I Decline

Home / My Claims / Current Claims

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim: TClaimant1

Claim Details

General Information

Username

test.claimant

Claim Total

£199.48

Claim Name

TClaimant1

Amount Payable

£199.48

Claim Description

Expense Claim 1:23/09/2019 - 23/09/2019

Number of Items

1

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

- Number all your receipts
- Ensure that the Envelope is sealed
- Write any extra info on the back
- Remove all staples
- Make sure all notes are included
- Ensure your envelope is clearly labelled

Claim History

Date Stamp

24/09/2019 11:36

Expense Items

Columns

Amount	Date of Expense	Expense Item	Receipt	Date of Receipt	VAT	Total	Currency	Amount Payable	
443.28	23/09/2019	Mileage - General	External Training		£186.18	£13.30	£199.48	Pound Sterling	£199.48
443.28					£186.18	£13.30	£199.48		£199.48

Submit Claim

One or more of your claimed items is outside policy. Please ensure you have supplied sufficient detail in the "Other Details" section to justify going out of policy to your approver.

Claim Summary

Claim name*

TClaimant1

Description

Expense Claim 1:23/09/2019 - 23/09/2019

submit

cancel

Declaration

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I Accept

I Decline

Mr Test Approver

Stage

Reference Number

1

Submit Claim - Dark Theme

Submit Claim

Home / My Claims / Current Claims

Page Options

New Expense

Claim List

Change View

Print

Submit Claim

Claim TClaimant1

Claim Details

General Information

Username

test.Claimant

Claim Total

£199.48

Claim Name

TClaimant1

Amount Payable

£199.48

Claim Description

Expense Claim 1:23/09/2019 - 23/09/2019

Number of Items

1

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

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- Write any extra info on the back of the envelope
- Remove all staples
- Make sure all notes are attached
- Ensure your envelope is clearly marked

Claim History

Date Stamp

24/09/2019 11:36

Expense Items

Columns

One or more of your claimed items is outside policy. Please ensure you have supplied sufficient detail in the "Other Details" section to justify going out of policy to your approver.

Claim Summary

Claim name*

TClaimant1

Description

Expense Claim 1:23/09/2019 - 23/09/2019

submit

cancel

Mr Test Approver

1

Particulars of Items

Date of Expense

Expense Item

Reimburse

Other Details

Net

VAT

Total

Currency

Amount Payable

443.28

23/09/2019

Mileage - General

External Training

£186.18

£13.30

£199.48

Pound Sterling

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443.28

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£199.48

£199.48

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Claim Summary

Claim name*

TClaimant1

Description

Expense Claim 1:23/09/2019 - 23/09/2019

submit

cancel

Example Declaration

Declaration

I CERTIFY THAT:

1. The travelling expenses and subsistence allowances claimed are in accordance with the regulations stated in the Company Policy and are in respect of journeys actually and necessarily incurred whilst engaged on the business stated.

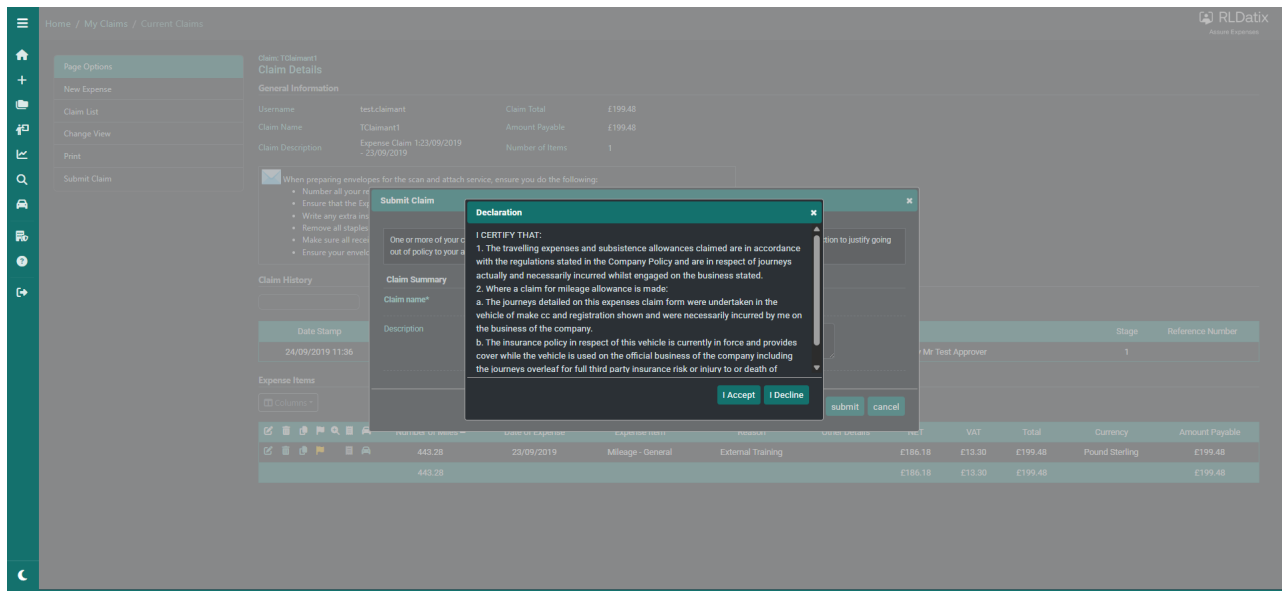
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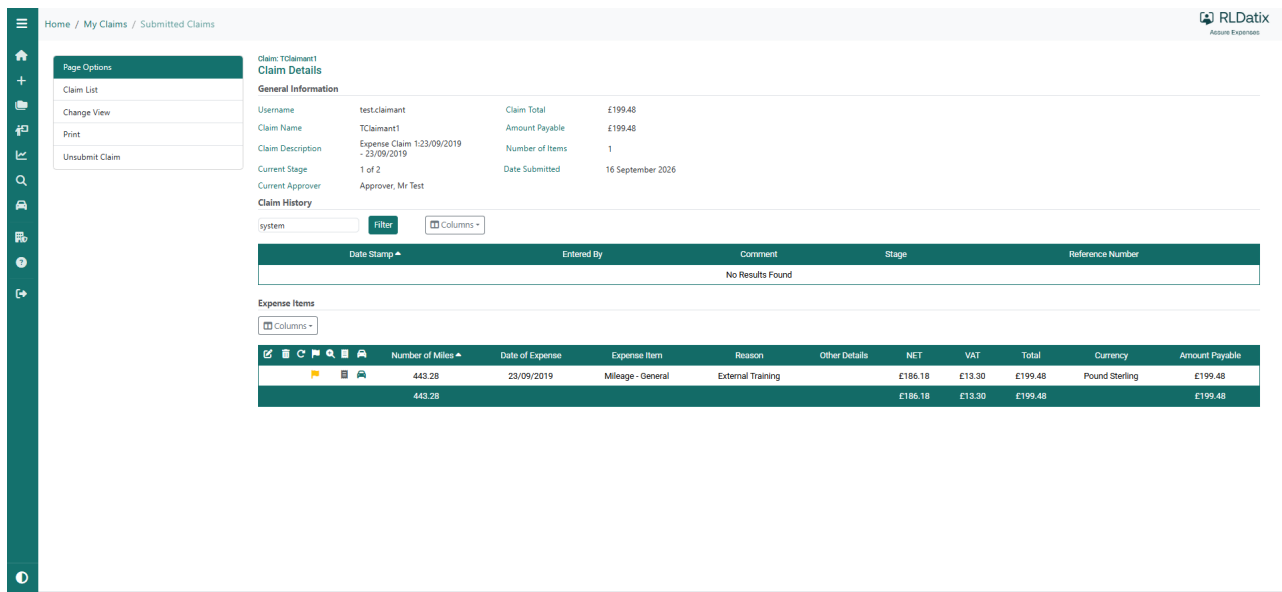
I Accept

I Decline



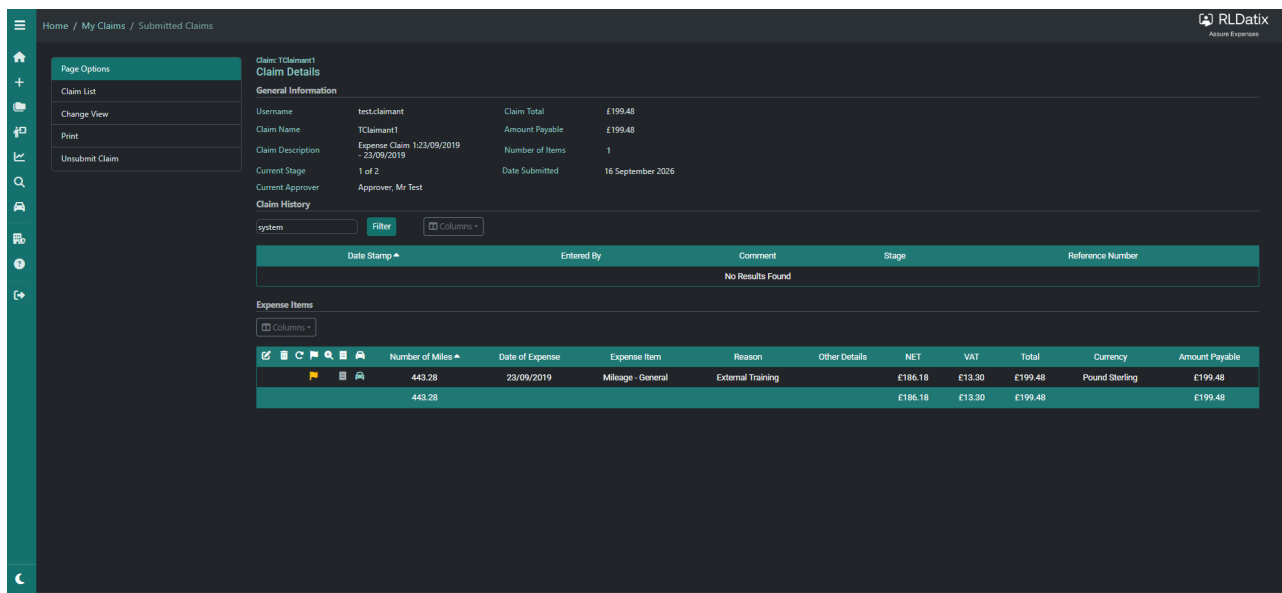
Submitted Claim

Submitted Claims - Light Theme



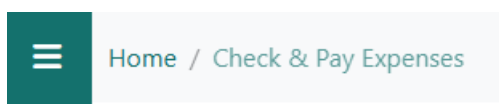
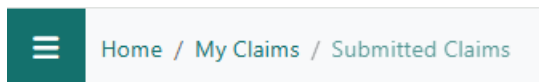
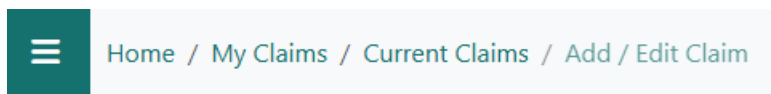
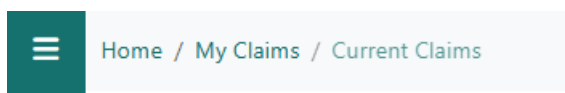
Submitted Claim

Submitted Claims - Dark Theme

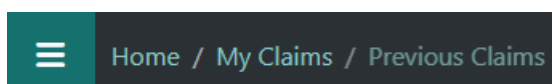
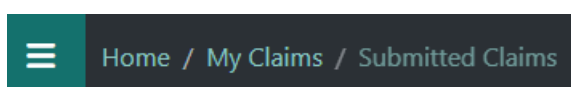
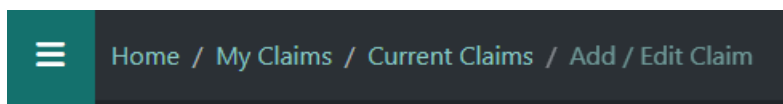
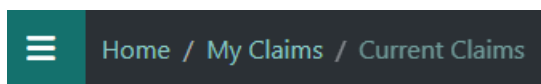


Breadcrumbs

Breadcrumbs Example - Light Theme



Breadcrumbs Example - Dark Theme



Approvers - Check and Approve Expenses - Light Theme

Claims Awaiting Approval Tile

CLAIMS AWAITING APPROVAL

2



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
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

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 Submitted

Close

Allocate Team Approval Claim to Me

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
Check Expenses		13	1 of 2	UTC1	Sent to next stage, awaiting action	0	0	2	£6.25	£6.25	£0.00	£0.00	£0.00	☐	2	0
Check Expenses		3	1 of 2	TClaimant3	Sent to next stage, awaiting action	2	2	0	£132.56	£132.56	£0.00	£0.00	£0.00	☐	2	0

Claim Expense Items Awaiting Approval

Items Waiting Approval

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

Approver Options

Page Options

Allow Selected

Return Selected

Print

Change View

Unsubmit Claim

Back

Claim Expense Items - Approved Items

Approved 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
				0					£100.00	£20.00	£120.00		£120.00

Returning an Item

Return Expense(s)

Reason for returning*

The details you have entered do not match the receipt.

OK

Cancel

Approve Claim

Approve Claim

You have allowed all of the expense items, would you like to approve the claim now?

approve claim

cancel

Allocate for Payment

Approve Claim

[Allocate For Payment](#)

Check and Pay Expenses

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
Allocate For Payment	9	1 of 1	SRisteski9	Claim has been approved, awaiting payment	0	0	0	£100.00	£100.00	£0.00	£0.00	£100.00	☐	1	1
Check Expenses	12	1 of 2	MRowley12	Sent to next stage, awaiting action	0	0	2	£6.25	£6.25	£0.00	£0.00	£0.00	☐	2	0

Home / Check & Pay Expenses

RLDatix
Assure Expenses

Page Options

Check & Pay Expenses

Search for a Claim

Employee SurnameItem Filter

All Claims

Search

Current Claims

Columns -

Approve Claim	Claim Number	Stage	Employee	Claim Name	Date Submitted	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
Allocate For Payment	9	1 of 1	Trajkovski, Mr Trajko	SRisteski9	25/07/2024	Claim has been approved, awaiting payment	0	0	0	£100.00	£100.00	£0.00	£0.00	£100.00	☐	1	1
Check Expenses	12	1 of 2	Rowley, Mr Matt	MRowley12	26/08/2020	Sent to next stage, awaiting action	0	0	2	£6.25	£6.25	£0.00	£0.00	£0.00	☐	2	0

Un-allocated Claims

Allocate To Me

Columns -

Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed
There are currently no claims to display.												

Close

Help

Approvers - Check and Approve Expenses - Dark Theme

CLAIMS AWAITING APPROVAL

2

Home / Check & Pay Expenses

RLDatix
Assure Expenses

Page Options

Check & Pay Expenses

Search for a Claim

Employee SurnameItem Filter

All Claims

Search

Current Claims

Columns -

Approve Claim	Claim Number	Stage	Employee	Claim Name	Date Submitted	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
Allocate For Payment	9	1 of 1	Trajkovski, Mr Trajko	SRisteski9	25/07/2024	Claim has been approved, awaiting payment	0	0	0	£100.00	£100.00	£0.00	£0.00	£100.00	☐	1	1
Check Expenses	12	1 of 2	Rowley, Mr Matt	MRowley12	26/08/2020	Sent to next stage, awaiting action	0	0	2	£6.25	£6.25	£0.00	£0.00	£0.00	☐	2	0

Un-allocated Claims

Allocate To Me

Columns -

Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed
There are currently no claims to display.												

Close

Help

Menus and Icons - Administrative Settings

New Menu Design and Updated Icons

 Base Information Set-up and alter basic category information such as Reasons, Expense Items, Vehicle Journey Rate Categories and Departments.	 Tailoring Customise the look and feel of Expenses and alter basic settings.	 Policy Information Upload and display information about your Travel and Expense Company policy. Enforce policy by highlighting any exceptions that occur.
 User Management Alter employees, roles, groups, teams and budget holders.	 Imports / Exports Import and export data from Expenses	 System Options Application configuration area, including audit log, attachment types and IP address filtering.

Menus and Icons - Administrative Settings - Base Information

Home / Administrative Settings / Base Information
RLDatix
Assure Expenses

 **Cost Codes**
A list of your cost codes. An employee or expense item can be assigned to a given cost code.

 **Currencies**
A list of currencies and their corresponding exchange rates. The currencies listed here will be available for the claimant to convert from whilst adding an expense.

 **Countries**
A list of countries and their corresponding VAT rates for each expense item. The countries listed here will be available for the claimant to assign a new expense item to.

 **Organisations**
A list of organisations.

 **Addresses**
A list of addresses and their distances to other addresses.

 **Expense Items**
The expense items claimed for by a claimant. Tailor the information a claimant is required to enter, VAT and other calculations.

 **Reasons**
A list of reasons why a claimant is making a claim for an expense.

 **Project Codes**
A list of your project codes. A claimant can assign an expense to a given project code.

 **P11D Categories**
A list of the P11D categories used by your company. An expense item can be assigned to a P11D category for reporting purposes.

 **Departments**
A list of your departments. An employee or expense item can be assigned to a given department.

 **Vehicle Journey Rate Categories**
A list of vehicle journey rate categories and their corresponding date ranges and thresholds with rates for different fuel types.

 **Vehicle Engine Types**
A list of vehicle engine types. These engine types are used for vehicles and in vehicle journey rate categories.

 **Allowances**
A list of allowances that claimants can make a claim for. The amount that can be claimed differs depending on the parameters set for an allowance.

 **Expense Categories**
A list of categories that each expense item will be assigned to.

 **Pool Vehicles**
A list of company vehicles that can be used by employees assigned to them.

RLDatix
Assure Expenses
Help

Menus and Icons - Administrative Settings - User Management

Home / Administrative Settings / User Management
RLDatix
Assure Expenses

 **Access Roles**
Add, edit or delete Access Roles. An employee's Access Role determines the areas within Expenses which can be accessed and the data that can be viewed through Reports. Build a finer security policy by creating Access Roles limiting access to specific functions.

 **Item Roles**
Add, edit or delete Item Roles. An employee's Item Role determines the expenses items they are authorised to claim for. Build multiple Item Role types and add to an employee record when required, such as relocation expenses, to enable temporary authorisation of these items.

 **Signoff Groups**
A Group determines the stages a claim has to go through in order to be approved. Add, edit or delete groups. Modify the individual stages of an existing group.

 **Employees**
Add, edit or delete employees. Archive or un-archive employees. Reset a password for an employee.

 **Teams**
A team is a group of related employees. Add, edit or delete a team. Modify the individual members of a team. A team can be linked to a particular stage in a group.

 **Budget Holders**
Create a budget and assign an employee assigned to be responsible for this budget. A budget holder can be linked to a particular stage in a group.

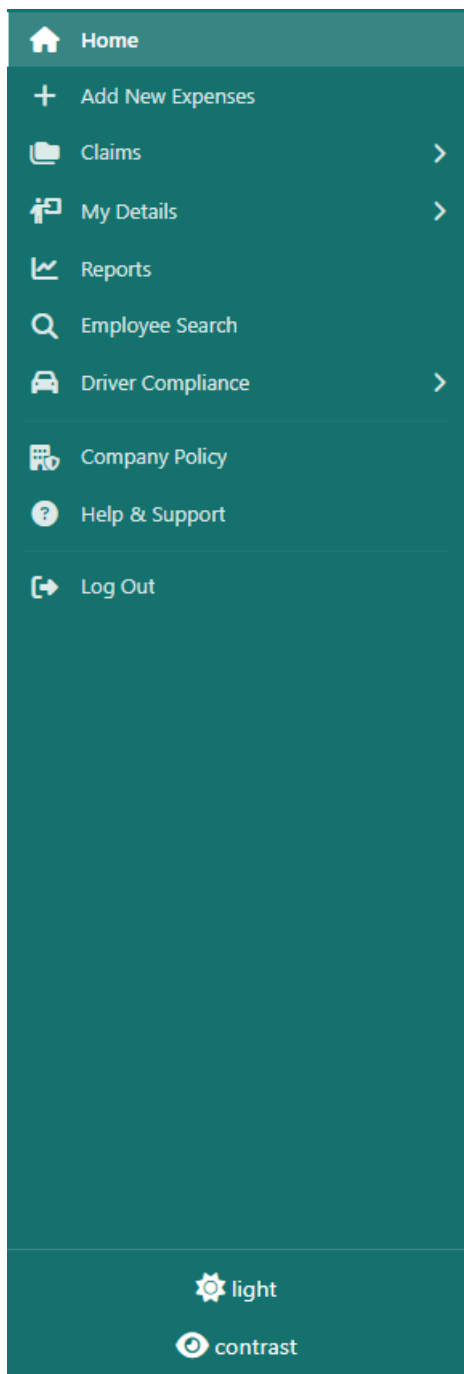
 **Approval Matrices**
An approval matrix is a graduated series of approvers that can approve increasing claim values for an individual signoff group stage. When a claim reaches an approval matrix stage, the approvers that are capable of signing off that claim value will be used.

 **Authoriser Levels**
Create Authoriser Levels to control the amount that a user is permitted to approve per employee, each month.

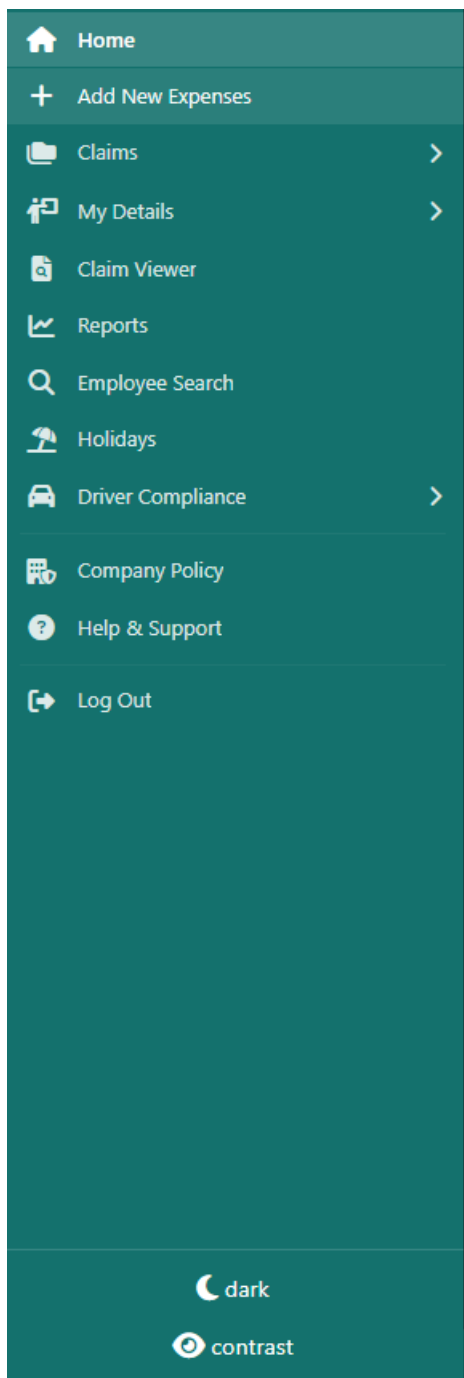
RLDatix
Assure Expenses
Help

Side Menu

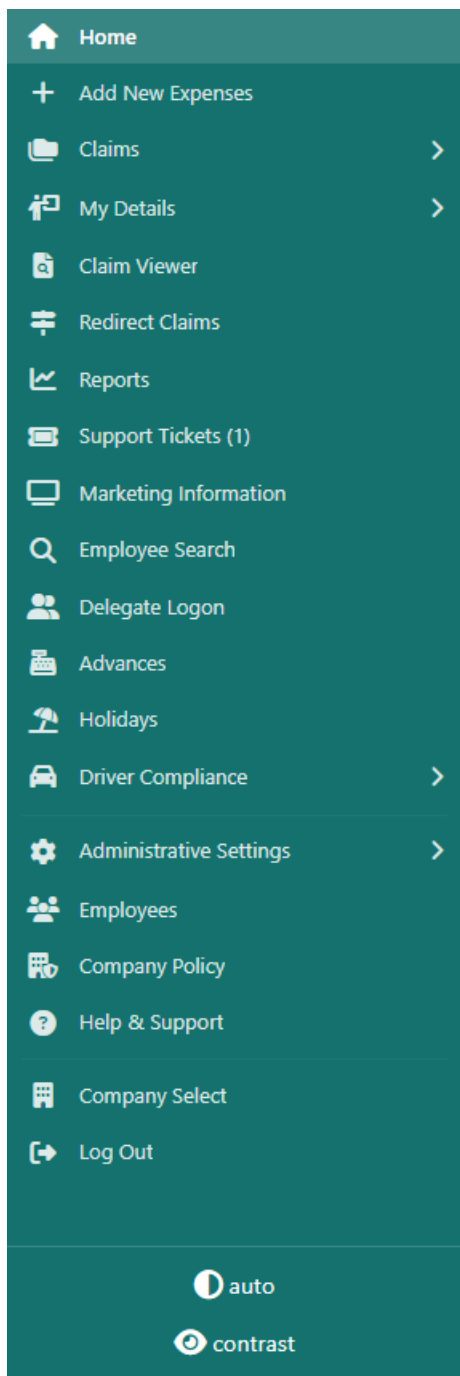
Side Menu - Claimant



Side Menu - Approver



Side Menu - Administrator



Reports

Home / Reports

Page Options

Create Report

Report Categories

My Schedules

Reports

Category

General (Standard Repo)

Filter

Columns

Category	Report Name	Owner	Description
General (Standard Reports)	Expense Claims Awaiting Approval	Standard Owner	Expense claims that have been submitted, but haven't yet been approved for p
General (Standard Reports)	Expense claims awaiting approval with approver	Standard Owner	Expense claims that have been submitted, but haven't yet been approved for p
General (Standard Reports)	Expense Claims Not Submitted	Standard Owner	Expense claims group by employee not yet submitted
General (Standard Reports)	Expense Item Spend Summary	Standard Owner	Summary of spend by expense item (highest spend at the top)
General (Standard Reports)	Expense Item Spend Summary By Company	Standard Owner	Summary of spend by Company Name & Expense Item.
General (Standard Reports)	Expense Item Spend Summary By Cost Code	Standard Owner	Summary of spend by Cost Code & Expense Item
General (Standard Reports)	Expense Item Spend Summary By Department	Standard Owner	Summary of spend by Department & Expense Item
General (Standard Reports)	Expense Item Spend Summary By Employee	Standard Owner	Summary of spend by Employee & Expense Item
General (Standard Reports)	Expense Item Spend Summary By Expense Category	Standard Owner	Summary of spend by Expense Category
General (Standard Reports)	Expense Item Spend Summary By Expense Item	Standard Owner	Summary of spend by expense item (highest spend at the top)
General (Standard Reports)	Expense Item Spend Summary By Project Code	Standard Owner	Summary of spend by Project Code & Expense Item
General (Standard Reports)	Expense Item Spend Summary By Reason	Standard Owner	Summary of spend by Reason & Expense Item
General (Standard Reports)	Expense Items Within a Specific Date Range	Standard Owner	Expense items within a specified date range
General (Standard Reports)	Expense Items Without Receipt	Standard Owner	A list of all expense items where the employee has indicated they have a receipt, but hav
General (Standard Reports)	first report1234	Gjurceska2, Ms Ellie	
General (Standard Reports)	Flag summary	Standard Owner	An overview of each flag and how it's configured.
General (Standard Reports)	Freedom of Information Act	Standard Owner	Expense items by selecting an individual and a date range
General (Standard Reports)	Mileage - Journey List	Standard Owner	Provides a list of all the individual journeys undertaken by claimants claiming for mil
General (Standard Reports)	Mileage - Journey List - Previous Month	Standard Owner	Provides a list of all the individual journeys undertaken by claimants claiming for mileage expenses du
General (Standard Reports)	Mobile Usage - Claimants that have created Expense Items based on details submitted from Mobile App	Standard Owner	Report to show how many Claimants have created Expense Items based on submissions from the Mbl

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Help

My Schedules

Home / Reports / My Schedules

Page Options

Scheduled Reports

Report	Start Date	End Date	Schedule Type	Output Type	Delivery Method
Employees Missing A Work Address	16/09/2026		Week	Excel	Email

Scheduled Reports

Report	Start Date	End Date	Schedule Type	Output Type	Delivery Method
Employees Missing A Work Address	16/09/2026		Week	Excel	Email

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.