Claimexpenses.com Start Up Guide

Contents
1. Quick Start ........................................................................................................................................... 2
2. Some hints for entering your expenses ................................................................................................. 6
   2.1 Location Inputting .............................................................................................................................. 6
   2.2 Distance Inputting .............................................................................................................................. 6
   2.3 Entering combined mileages from invoices ...................................................................................... 7
   2.5 Flat fares and travel passes ............................................................................................................... 8
1. Quick Start

A quick start guide to help you on your next steps after registering with Claim Expenses

Once in the Claim Expenses home page, select the login. And enter your account details. To begin entering an expenses claim click on ‘Claims’ in the header bar of the website and select ‘My claims’.

This page will appear. If you have already entered any claims they will all be listed here. To enter a new claim, click ‘New claim’ at the top left of the page.

Selecting the ‘Export my claims’ button at the bottom left of this screen will allow you to export all of the information you have entered in your claims to Excel in a .csv format.
This will create a claim. A claim type can be selected as expenses, credit card or other. To add a new item, click ‘+ Add more’ at the bottom of the claim table. Fill in the description for easy recognition.

A claim form will appear below the table. This is where the details of your expense will be entered. Ensure you have entered a date and filled in the required fields. Passengers may be selected from other account holders or as one or more generic passengers. Emissions will be calculated automatically.

See section 2 for some helpful hints on how to select your start and end points or to deal with large data sets. Once you've filled the form in, save it and it will be stored in the expense claim you just created.
Once you have filled in all the items for your expenses claim you must submit them. Click ‘Submit Claim’ which is to the bottom right of your list.

This screen will appear. This gives you the opportunity to double check your expenses claim and go back to correct any mistakes.

After this you will not be able to change any part of the claim. To continue click ‘Yes, Submit Claim’.

Your expenses claim form will now have been submitted for processing. You must then print the expenses claim form by clicking on the ‘Print Page’ icon at the bottom right of your screen.
This will convert the claim into a printer friendly format as shown to the left. You should then attach your receipts and submit to your finance department.
2. Some hints for entering your expenses

Claim Expenses has been created to be a user friendly website that helps organisations record their expenses and calculates the CO2 emissions from their travel expenses. The following section include some helpful advice on how to use Claim Expenses to suit your organisation.

2.1 Location Inputting

Locations which have previously been selected are stored in a database and can be quickly retrieved. Postcodes and new locations can occasionally be slow or tricky to pinpoint with Claim Expenses so here are a couple of tips for speeding up the inputting process.

Tip 1: Use a nearby major location or more peculiarly named street which may be in the database already:

Example: George Street will return multiple answers from around the UK but Charlotte Square which marks the west end of George Street will only return Edinburgh answers.

Tip 2: If a location is not recognised it may be pinpointed from the mapquest view and saved using a name of your choice which can be any text string. For frequently used locations such as your home address or workplace it is useful to name the location using the postcode. While not a postcode search, this will be saved in the database for future use.

Tip 3: It is very common for modes of transport to converge. People often get a train to an airport or get in a taxi from a train station. As Claim Expenses filters the locations it returns depending on what type of journey you are recording (mileage, train, flight etc) this can be used to speed up inputting.

Example: If you were recording a taxi journey from Glasgow Queen Street rail station you could click ‘Train’ to begin with; enter the start location as Glasgow Queen Street Station or GLQ for its station code. Claim Expenses will recognise this with no trouble and you will not need to do a search. Once that location is recognised, click on ‘Taxi’ instead and finish the rest of the claim.

2.2 Distance Inputting

Occasionally you can find records of journeys that have the distance but not the start or finish points you can still record it on Claim Expenses. Enter a journey between any two locations and let Claim Expenses work out the distance. You can then simply erase the distance that Claim Expenses has worked out and enter the
actual distance that you had in your records. The CO2 is then calculated on the
distance entered and will be accurately recorded even if the start and finish points
are made up. A handy tip is to always use the same start and finish point when
you’re entering a journey in this manner. This acts as a kind of short hand so that
we know not to be surprised that the distance between these two stationary
points varies so wildly! Explaining in the details box can also help prevent any
confusion. NOTE: this works on all kinds of travel except for flights where the
distance is not currently editable.

Example: If there is a taxi journey recorded for 10 miles without any start and
finish point, enter it as a Taxi between ‘Waverley Court’ and ‘North Bridge’ and
then manually type 10 into the distance box.

2.3 Entering combined mileages from invoices
The same method as above can be used to ‘batch’ input journeys. If you have an
invoice from a travel provider such as City Cabs or Arnold Clark with total
distances, these can be entered in batches by overriding the distance. This can be
helpful as it means that hundreds of small journeys that would be time consuming
to enter can be entered in one claim. However, this is best only done on a month-
by-month or invoice-by-invoice so that travel patterns in different months can be
compared. It may also be necessary to split out the invoice into different
budgets/projects/users depending on your recording methods.

Example: I have received an invoice from City Cabs for June for 40 journeys that
in total equal 250 miles and these journeys were taken by different users. Enter as
a Taxi between ‘Waverley Court’ and ‘North Bridge’ and then manually type 250
into the distance box. Enter e.g. ‘City Cabs Invoice June’ into the details box so
that the record is traceable. To record travel by individual users, separate the
journeys for each user then enter distance totals separately for each into Claim
Expenses.

2.4 Taxi Journeys Inputting
Taxi journeys where the cost has been recorded but the locations have not can be
tricky to input. An estimate can be made using similar taxi journeys where the
distance has been recorded. However, this should only be done with journeys
within the same city as even nearby cities such as Edinburgh and Glasgow can
vary in their taxi costs per mile.

Example: There is a taxi receipt for £5.10 that has no other details attached to it
except that it is an Edinburgh Taxi firm and the date. Another Edinburgh Taxi
receipt dated a week later for £5.20 has recorded start and finish points. These
can be used to provide a good estimate of emissions when entering the £5.10
journey making sure to use the date, user, project, budget and cost from the appropriate journey.

2.5 Flat fares and travel passes

Bus, tube or tram journeys are often recorded on tickets but occasionally (such as on Edinburgh’s Lothian Bus) fares are a flat charge regardless of length of journey or travel passes are used. This can be tricky to deal with. In the absence of any data on journey length it is acceptable to use existing journey data for the locality to make an estimate of average journey length for the same locality and apply this to any journeys of unknown length.

Example: Company Z has 20 bus journeys over their year of travel. 7 of them have information about the start and finish point. Sum these 7 and divide by 7 to calculate an average bus journey distance. Use this distance for the remaining 13 journeys that do not have start or finish points.