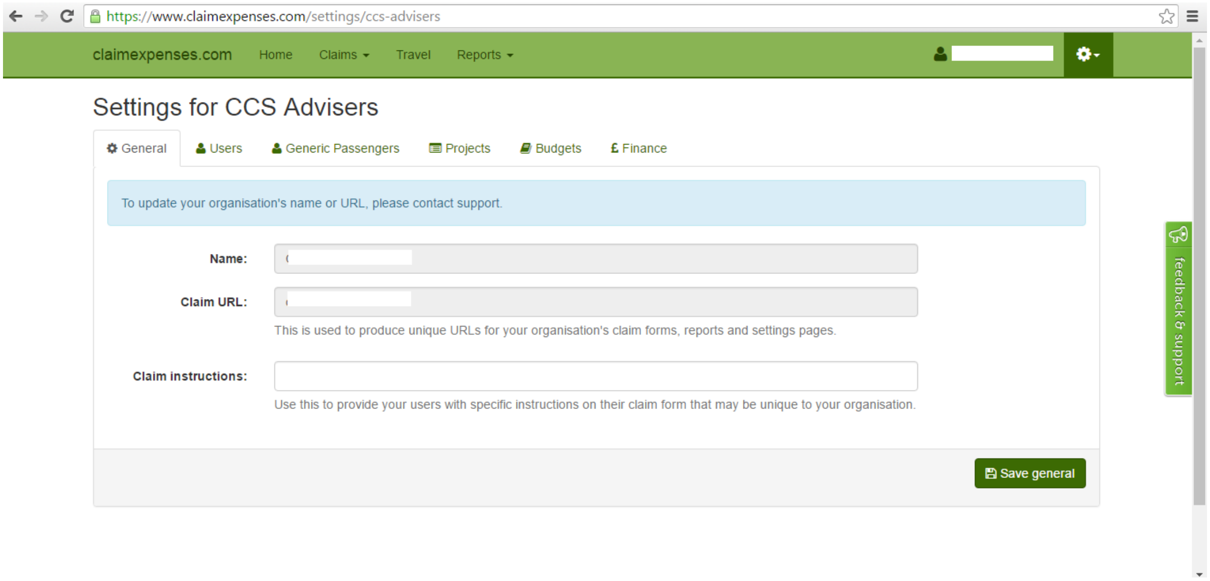
Claim Expenses Start Up Guide for Finance Users

A short guide to help **Finance Users** on your next steps after registering with Claim Expenses

Setting up your Account

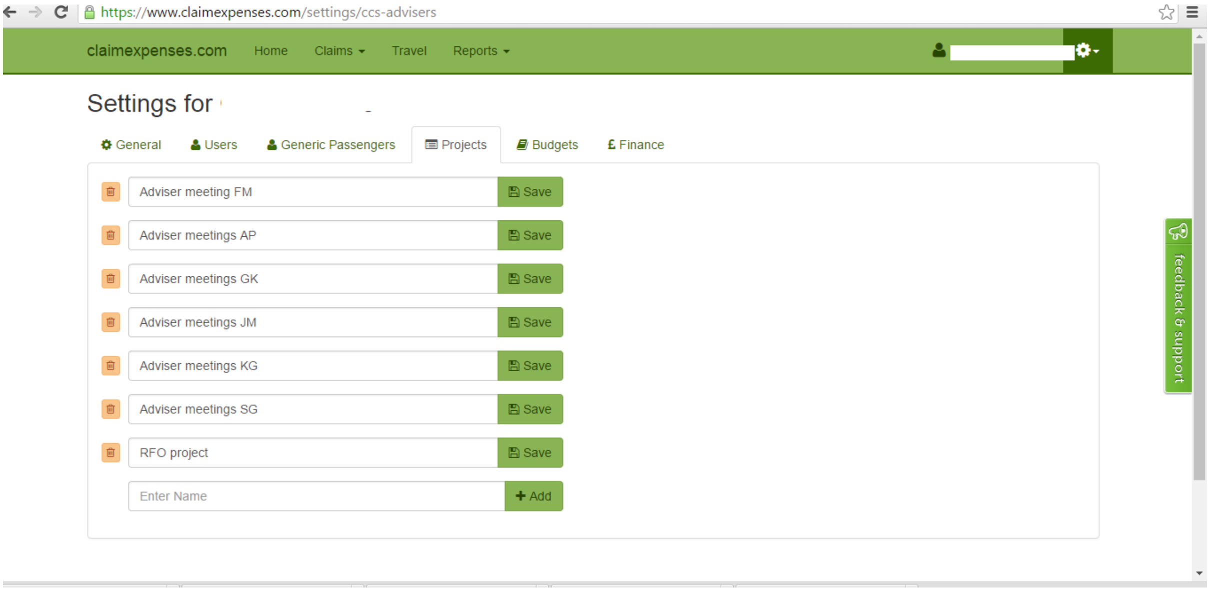


Once you've logged in to Claim Expenses click on the 'settings wheel' at the top right of the page to display the settings tabs. By selecting the appropriate tab, you can add users, generic passengers, projects, budgets and mileage rates.

Users are added by selecting the **Add New** button at the bottom of the users list and entering an email address in the form which is displayed. The user will receive an activation email and will then be able to log on to the claimexpenses.com site to enter claims. Generic passengers are added by selecting the **+ Add** button at the bottom of the generic users list and entering a group name in the blank text box displayed (this can be any name e.g. 'Dancers', 'Volunteers' etc).

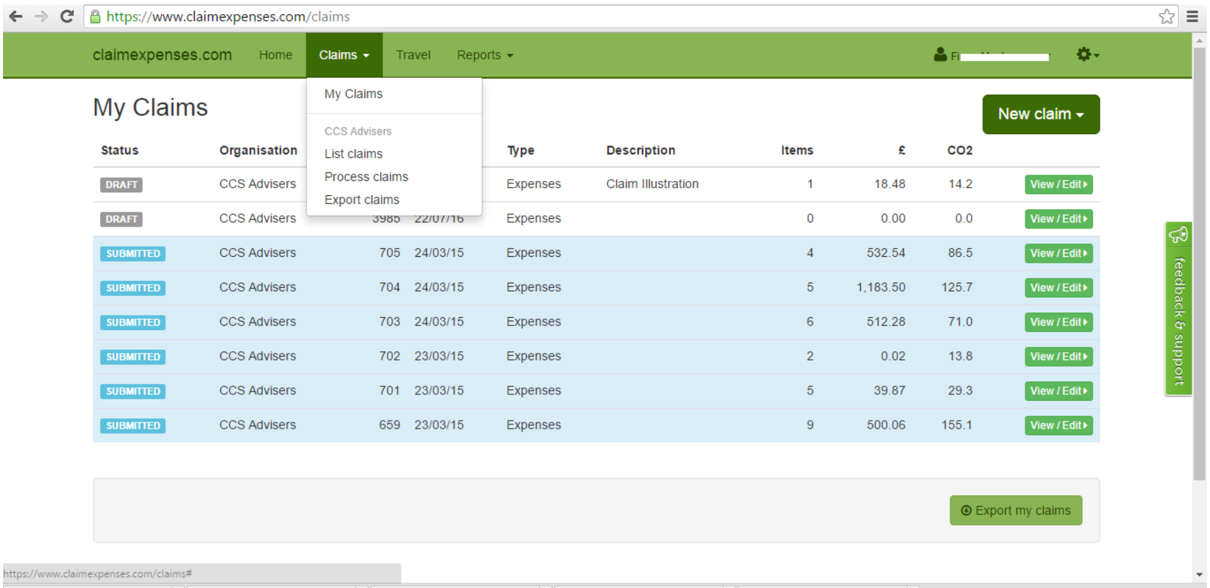
Adding Projects and budgets

Projects and budgets are added in the same way as Generic passengers. At least one project and one budget must be defined but the Finance Administrator is free to define the names and number of each to suit their own financial recordkeeping. Budgets are sub categories of Projects. Claimexpenses produces reports on amounts of travel and cost booked against each of the Projects.

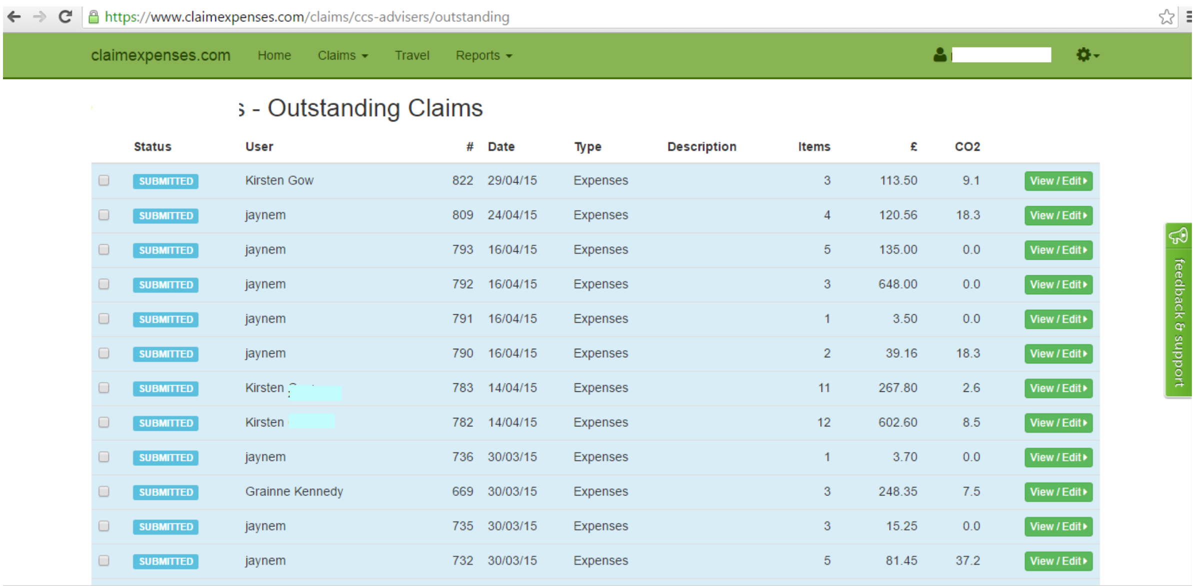


For each category in settings a new item may be added by going to the bottom of the existing item list, entering the name of the next item and clicking on the 'Save' button. Item names may be edited by clicking in to the text box and items removed by clicking on the dustbin symbol.

Processing Claims

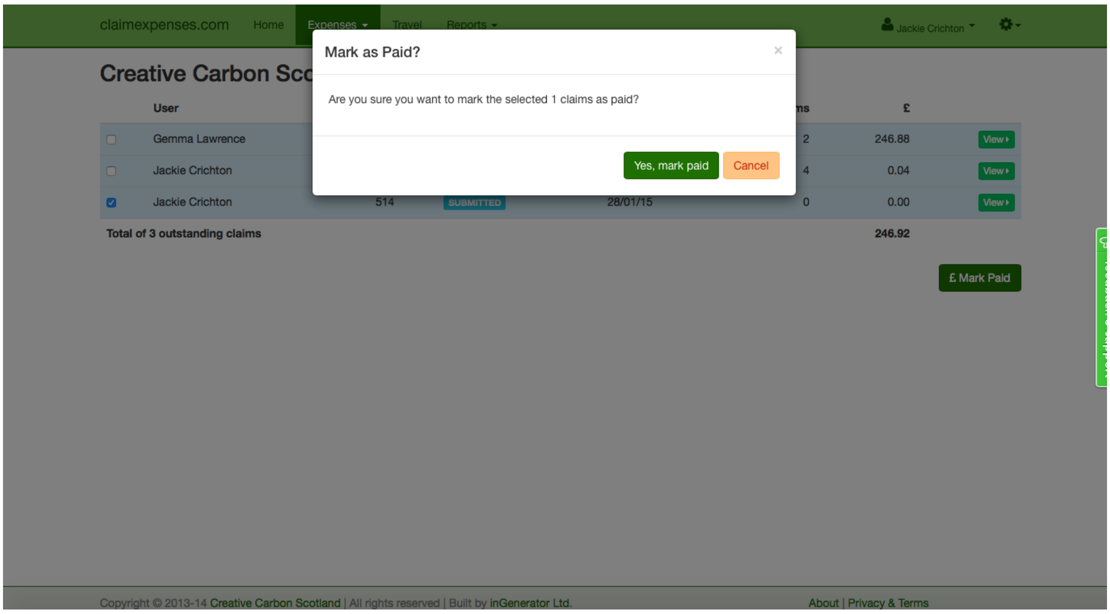


Click on the top 'Expenses' tab. This will show a drop down menu. You can either click on 'List Claims' to see a list of your organisation's claims or 'Process Claims' in order to review and approve claims.

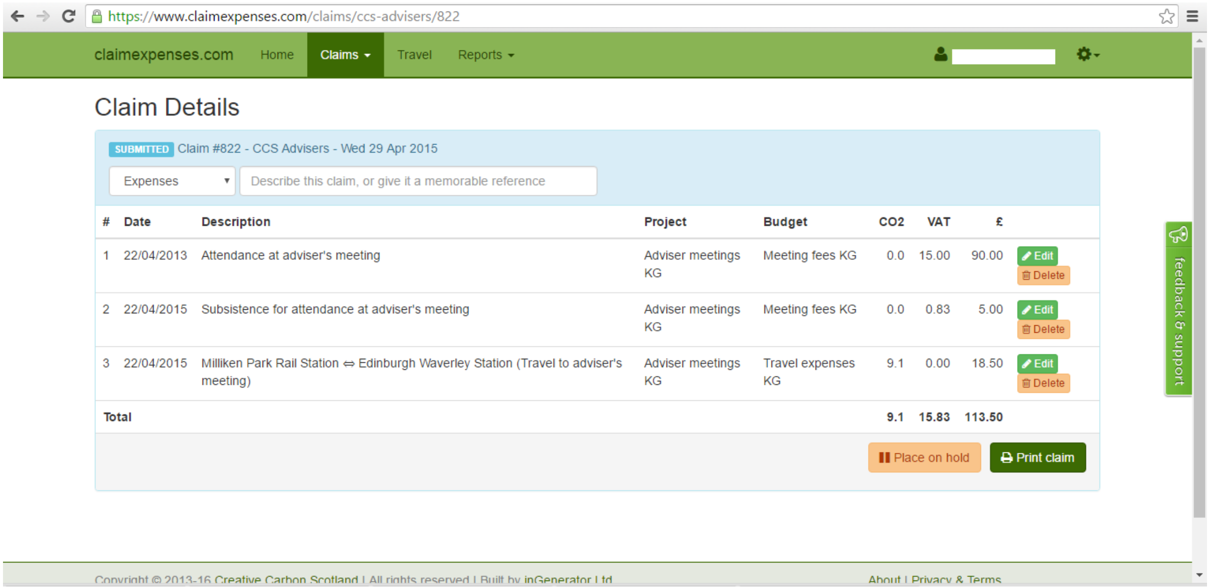


Status	User	#	Date	Type	Description	Items	£	CO2	
SUBMITTED	Kirsten Gow	822	29/04/15	Expenses		3	113.50	9.1	View / Edit
SUBMITTED	jaynem	809	24/04/15	Expenses		4	120.56	18.3	View / Edit
SUBMITTED	jaynem	793	16/04/15	Expenses		5	135.00	0.0	View / Edit
SUBMITTED	jaynem	792	16/04/15	Expenses		3	648.00	0.0	View / Edit
SUBMITTED	jaynem	791	16/04/15	Expenses		1	3.50	0.0	View / Edit
SUBMITTED	jaynem	790	16/04/15	Expenses		2	39.16	18.3	View / Edit
SUBMITTED	Kirsten	783	14/04/15	Expenses		11	267.80	2.6	View / Edit
SUBMITTED	Kirsten	782	14/04/15	Expenses		12	602.60	8.5	View / Edit
SUBMITTED	jaynem	736	30/03/15	Expenses		1	3.70	0.0	View / Edit
SUBMITTED	Grainne Kennedy	669	30/03/15	Expenses		3	248.35	7.5	View / Edit
SUBMITTED	jaynem	735	30/03/15	Expenses		3	15.25	0.0	View / Edit
SUBMITTED	jaynem	732	30/03/15	Expenses		5	81.45	37.2	View / Edit

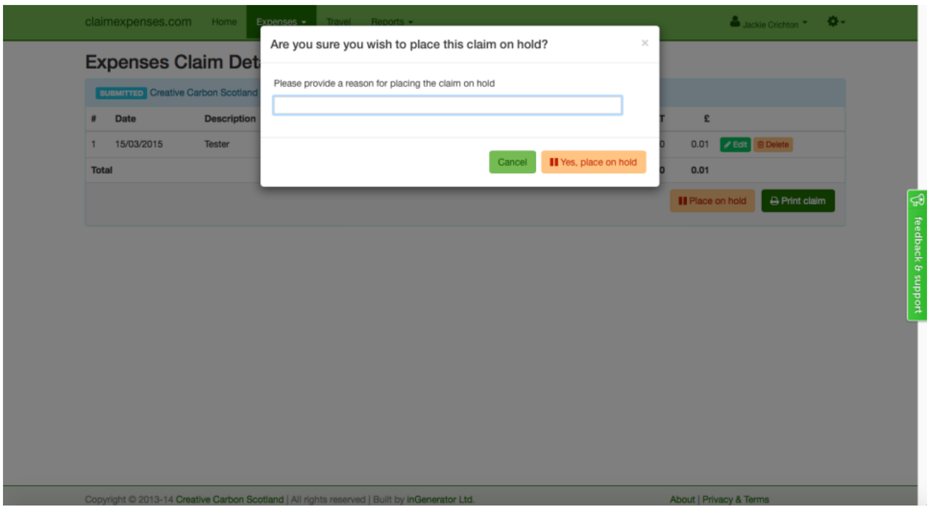
If you choose ‘Process Claims’ this list will appear, these are ‘Outstanding Claims’. If all the visible claims have been reviewed, approved and paid you can check the tick box on the left and then click ‘£ Mark Paid’.



This will bring up a confirmation box as shown on the picture on the left. To finalise the claim as ‘Paid’ click ‘Yes, Mark Paid’



From the 'Process Claims' Page you can view details of each claim by clicking on the 'view' button on the right of the screen. This take you to a page that will show the details of the claims. If you are unsure about anything within the claim you click 'Place on hold.'



If you choose to place a claim on hold you will be asked why in a pop up box (as shown on the left). The text that you write in this box will be visible to the user whose claim you queried as shown in the next picture.

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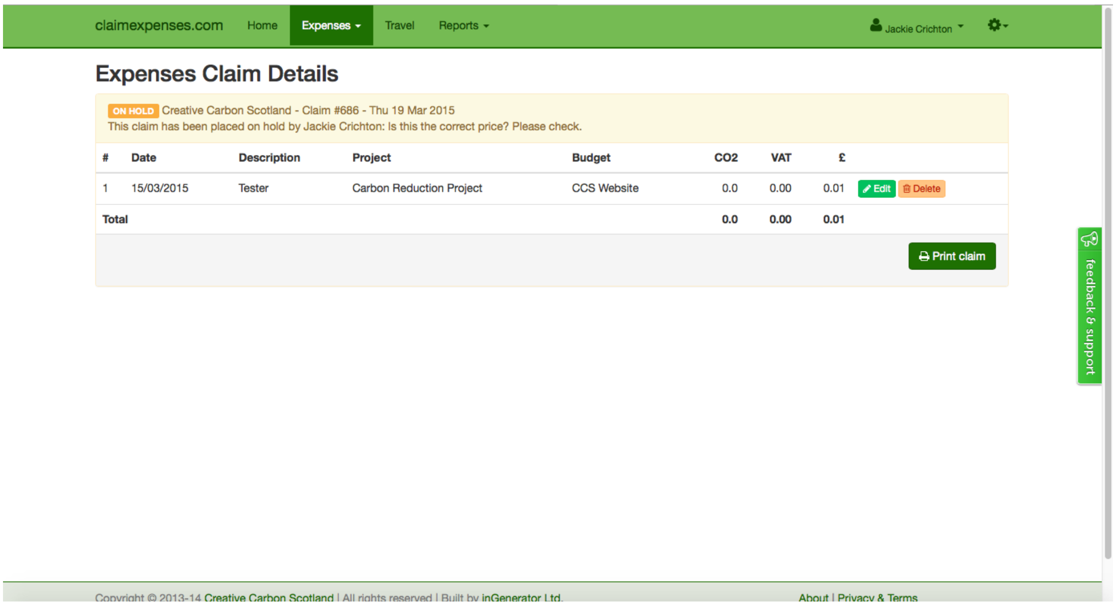

This then gives the user the opportunity to view the query, rectify any errors and resubmit the expense. The resubmitted claim will then be updated and visible to you in your 'Process Claims' list. If the problem has been solved (and you have paid the claim), you can then mark the claim as paid (you cannot take the claim 'off hold') which will complete the process.