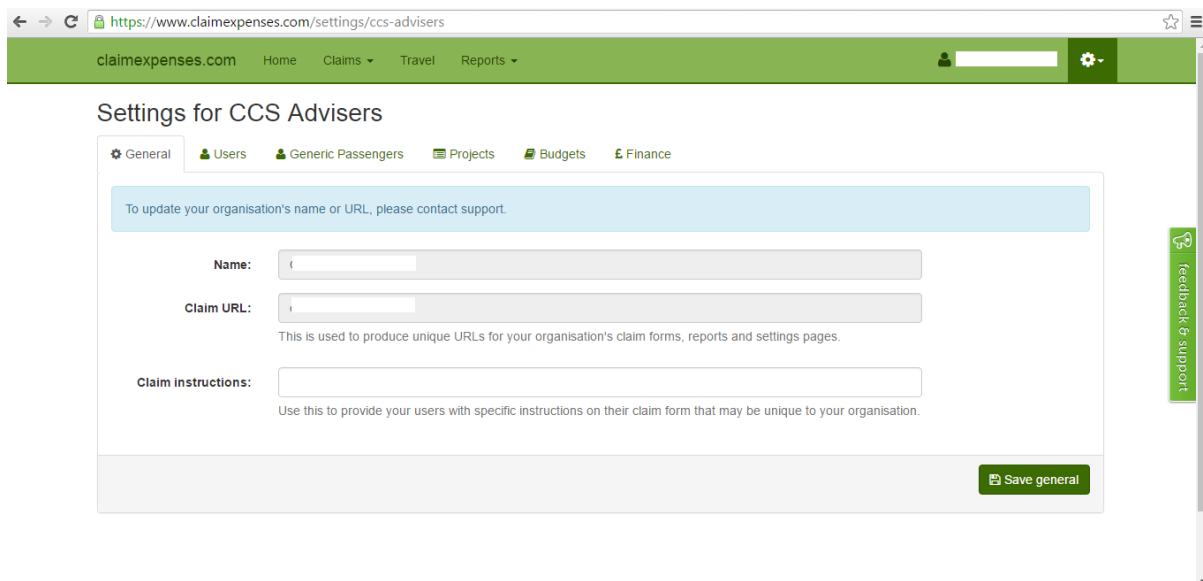


Claim Expenses Start Up Guide for Finance Users

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

Setting up your Account



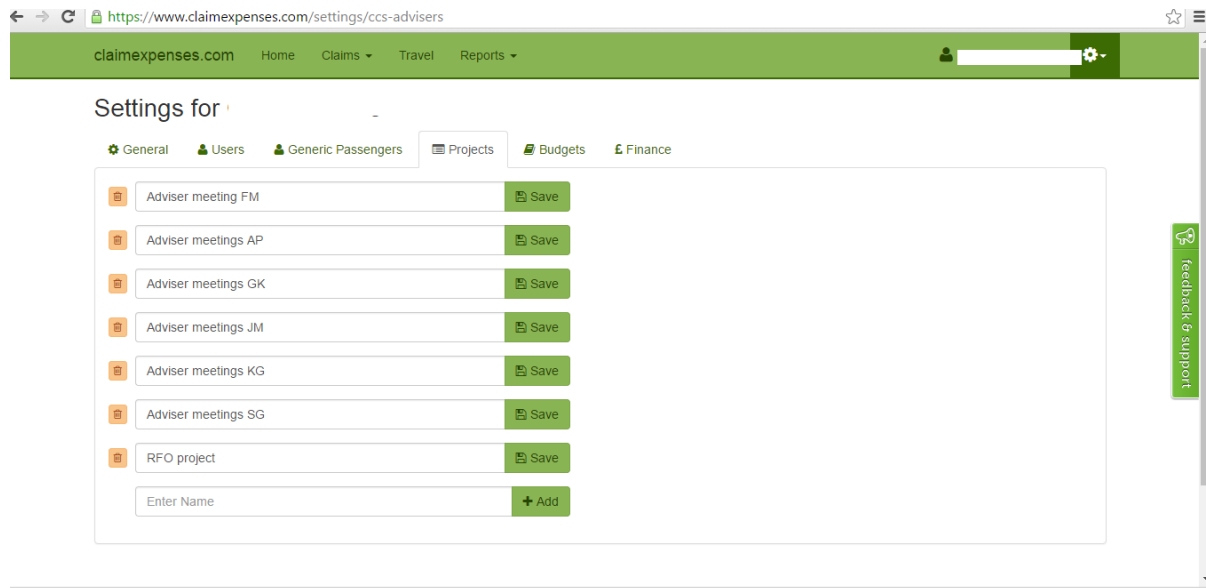
The screenshot shows the 'Settings for CCS Advisers' page. The 'General' tab is selected. It contains a message: 'To update your organisation's name or URL, please contact support.' Below this are three input fields: 'Name:', 'Claim URL:', and 'Claim instructions:'. The 'Claim URL:' field has a note: 'This is used to produce unique URLs for your organisation's claim forms, reports and settings pages.' The 'Claim instructions:' field has a note: 'Use this to provide your users with specific instructions on their claim form that may be unique to your organisation.' A 'Save general' button is located at the bottom right of the form area. On the right side of the page, there is a vertical button labeled 'feedback & support'.

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).

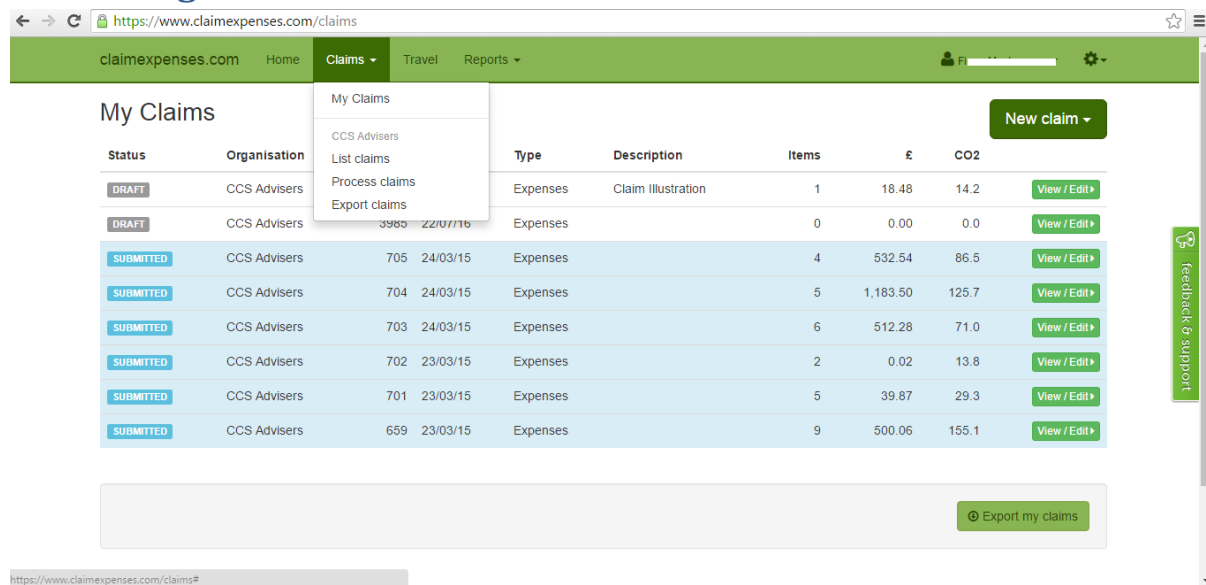
Adding Projects and budgets

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



Status	Organisation	Type	Description	Items	£	CO2
DRAFT	CCS Advisers	Expenses	CLAIM Illustration	1	18.48	14.2
DRAFT	CCS Advisers	Expenses	CLAIM Illustration	0	0.00	0.0
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	4	532.54	86.5
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	5	1,183.50	125.7
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	6	512.28	71.0
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	2	0.02	13.8
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	5	39.87	29.3
SUBMITTED	CCS Advisers	Expenses	CLAIM Illustration	9	500.06	155.1

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.

← → ↻ <https://www.claimexpenses.com/claims/ccs-advisers/outstanding> ☆

claimexpenses.com Home Claims Travel Reports

Outstanding Claims

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

feedback & support

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'.

claimexpenses.com Home Expenses Travel Reports Jackie Crichton

Creative Carbon Scotland

User

<input type="checkbox"/>	Gemma Lawrence								
<input type="checkbox"/>	Jackie Crichton								
<input checked="" type="checkbox"/>	Jackie Crichton	514	28/01/15	SUBMITTED		0	0.00		View

Total of 3 outstanding claims

246.92

[£ Mark Paid](#)

Mark as Paid?

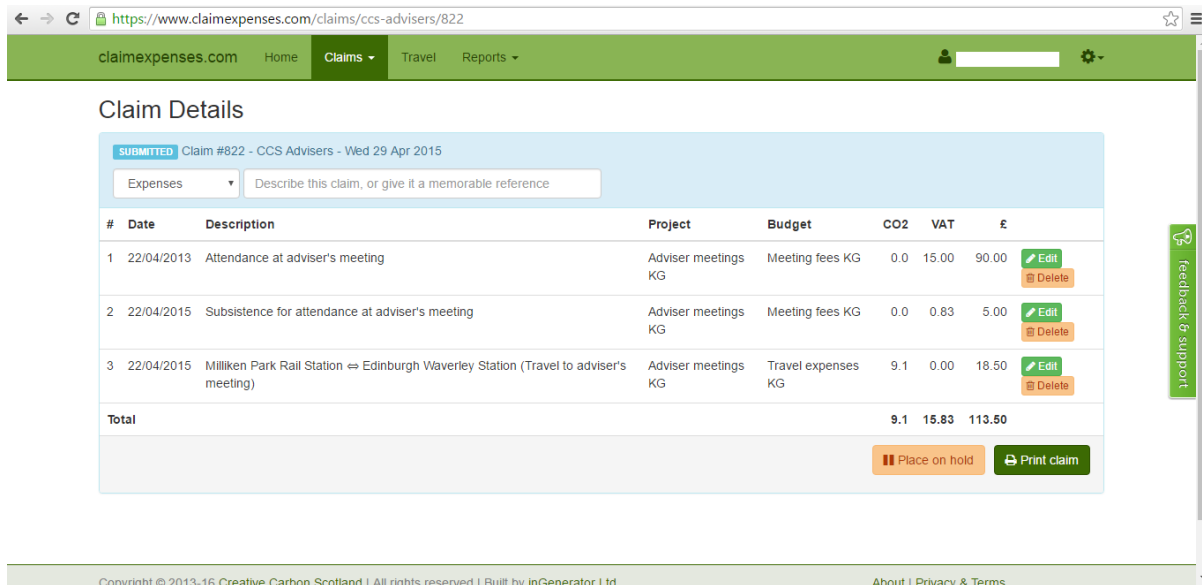
Are you sure you want to mark the selected 1 claims as paid?

[Yes, mark paid](#) [Cancel](#)

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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'



Claim Details

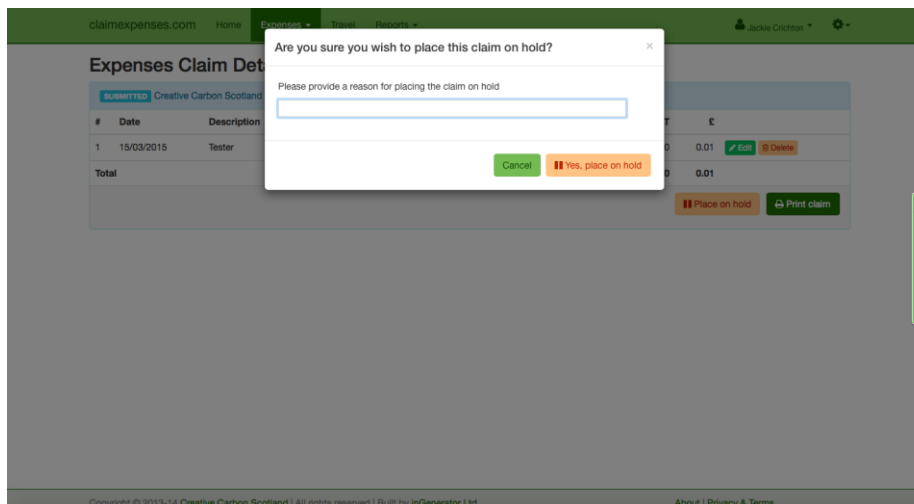
SUBMITTED Claim #822 - CCS Advisers - Wed 29 Apr 2015

Expenses Describe this claim, or give it a memorable reference

#	Date	Description	Project	Budget	CO2	VAT	£
1	22/04/2013	Attendance at adviser's meeting	Adviser meetings KG	Meeting fees KG	0.0	15.00	90.00
2	22/04/2015	Subsistence for attendance at adviser's meeting	Adviser meetings KG	Meeting fees KG	0.0	0.83	5.00
3	22/04/2015	Milliken Park Rail Station ⇌ Edinburgh Waverley Station (Travel to adviser's meeting)	Adviser meetings KG	Travel expenses KG	9.1	0.00	18.50
Total					9.1	15.83	113.50

Place on hold Print claim

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.'



Are you sure you wish to place this claim on hold?

Please provide a reason for placing the claim on hold

Cancel Yes, 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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Home
Expenses
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Reports
Jackie Crichton

Expenses Claim Details

ON HOLD Creative Carbon Scotland - Claim #686 - Thu 19 Mar 2015
This claim has been placed on hold by Jackie Crichton: Is this the correct price? Please check.

#	Date	Description	Project	Budget	CO2	VAT	£	
1	15/03/2015	Tester	Carbon Reduction Project	CCS Website	0.0	0.00	0.01	Edit Delete
Total					0.0	0.00	0.01	

[Print claim](#)

Feedback & support

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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.