

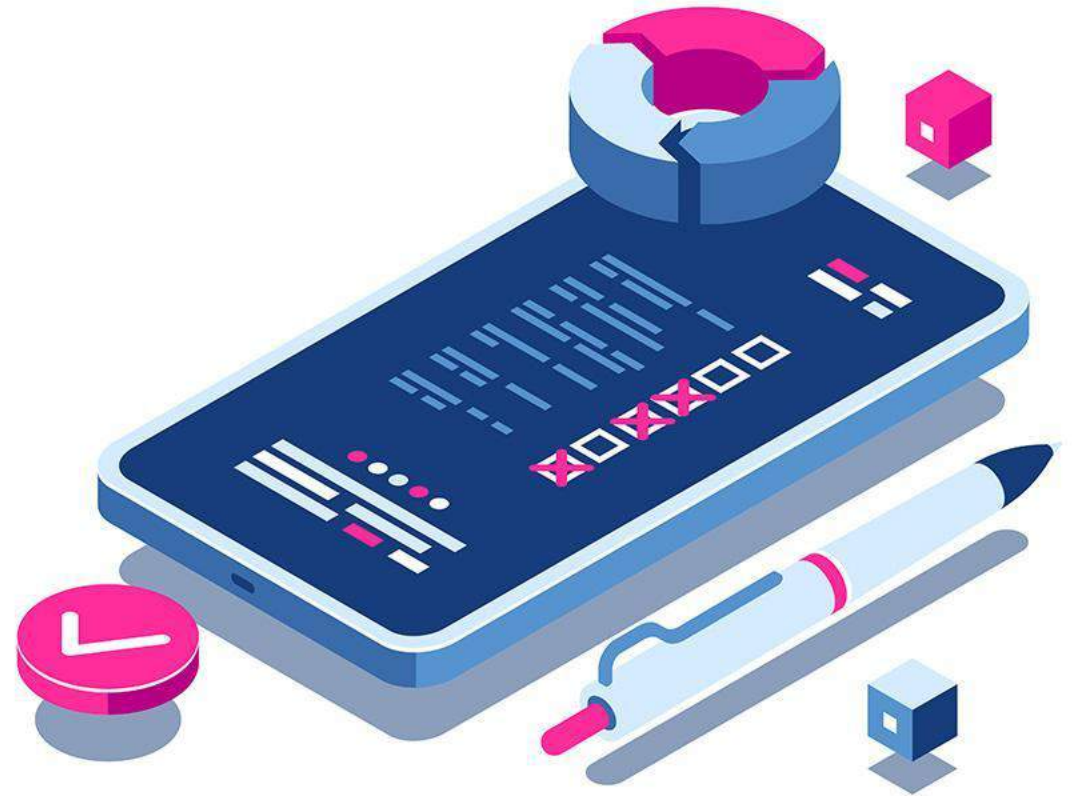


Welcome to ECLAIM Mobile Application, your go-to solution for seamless and compliant expense management. Our mobile application is designed to streamline the creation, submission, and approval of expenses while adhering to the established policies of all stakeholders within the company. Whether you're an Expense creator, Approver, Commercial executive, or Zone Commercial Manager, E CLAIM Mobile Application is here to simplify and enhance your expense management experience.



Key Features

Stay informed with real-time notifications on expense status, approvals, and rejections. This feature enhances communication and expedites the expense management process.



How it Works

Expense Creation:

Employees can easily create expenses using the mobile app, ensuring that all necessary details and receipts are attached for a comprehensive submission.

Policy-Based Approvals:

Expenses follow a hierarchical approval process, adhering to HR policies. Immediate reporting officers, commercial executives, and Zone Commercial Managers play key roles in the approval chain.

Commercial Oversight:

Commercial executives have control over the expense management process, ensuring that expenses are in line with company policies and financial guidelines.

Zone-Wise Management:

Zone Commercial Managers oversee expenses within their designated zones, ensuring consistency and compliance across the organization.





Experience the Future of Expense Management with E CLAIM Mobile Application - Where Efficiency Meets Compliance!

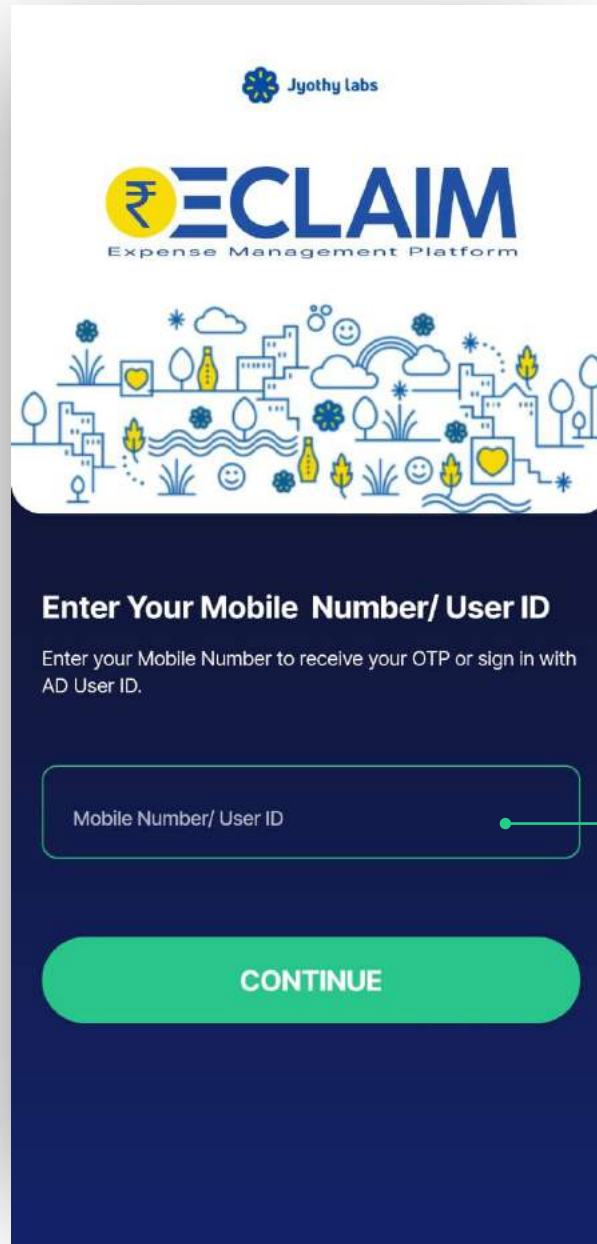


Index

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User Login



The image shows a mobile application login screen for ECLAIM. At the top, there is a logo for 'Jyothy labs' and the main logo for 'ECLAIM Expense Management Platform'. Below the logos is a decorative horizontal band with various icons representing nature, technology, and business. The main content area has a dark blue background. It features a title 'Enter Your Mobile Number/ User ID' and a subtitle 'Enter your Mobile Number to receive your OTP or sign in with AD User ID.' Below this is a white text input field with the placeholder text 'Mobile Number/ User ID'. At the bottom of the form is a large green button labeled 'CONTINUE'.

Login using your
Mobile Number or LDAP ID

Password Entry

Jyothy Labs

ECLAIM
Expense Management Platform

Verify User ID
Type your given password that associated with this ID kevin

Wrong User ID? [Go Back](#)

Password

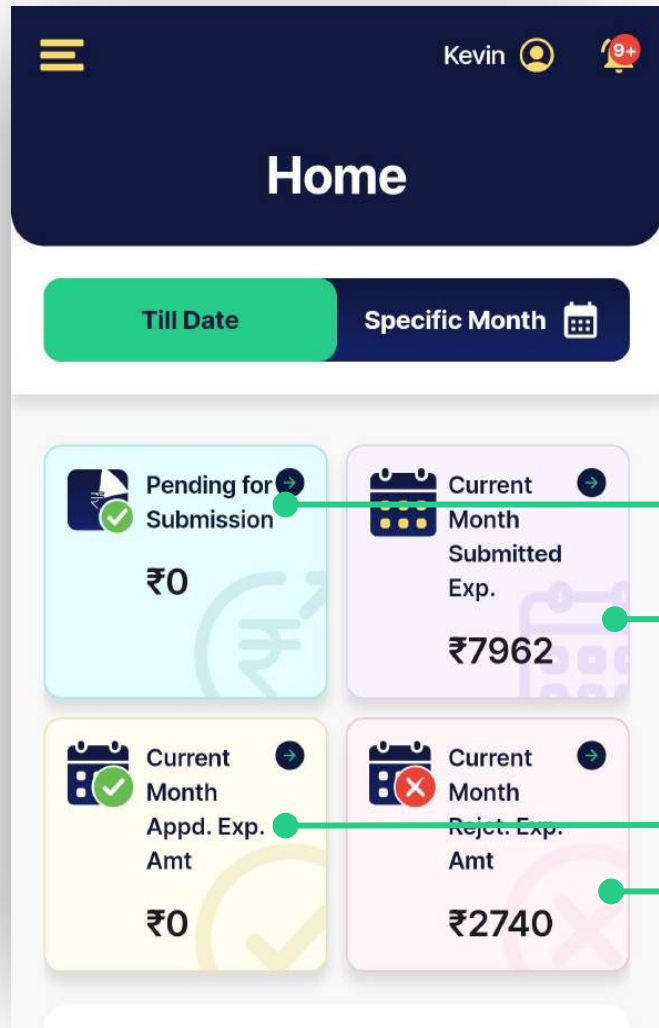
CONTINUE

For Mobile #

Enter OTP

For LDAP

Enter your Password.



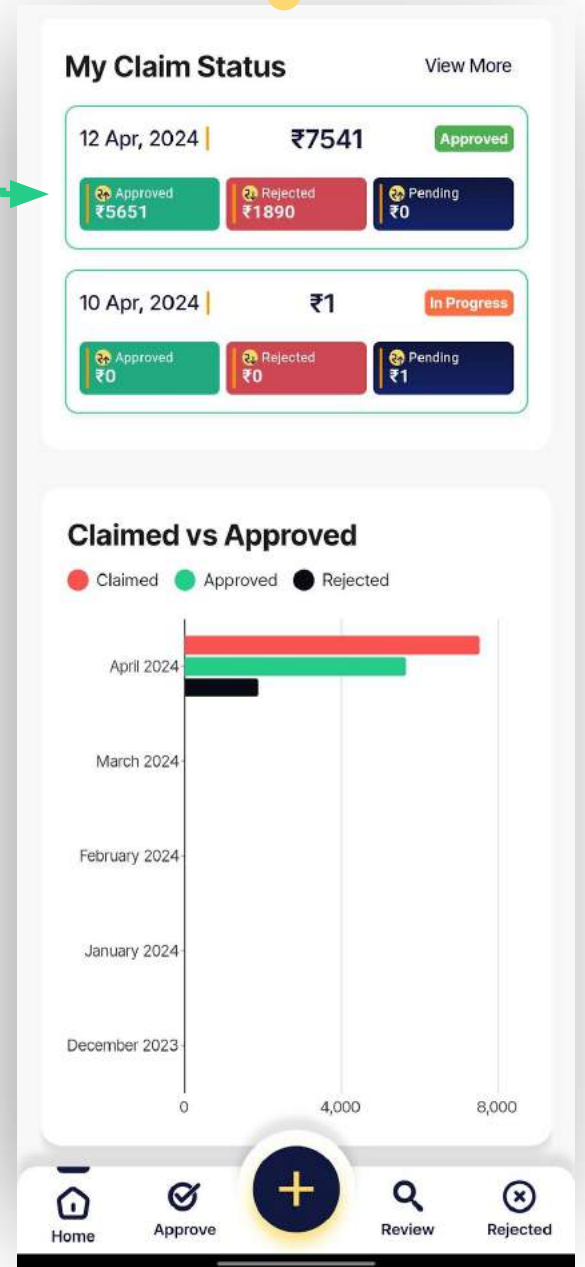
Pending for submission : Total Expense which are "Saved" but pending for submission.

Current month submitted Exp: Total Expenses submitted in the current month.

Current month Appd. Exp Amt: Total Expense Amount approved for the current month.

Current month Rejct. Exp Amt: Total Expense Amount rejected for the current month.

All your recent claims' statuses, based on their submitted dates, can be viewed here



Notifications & Profile

Home

Kevin

Till Date | **Specific Month**

Pending for Submission
₹0

Current Month Submitted Exp.
₹7962

Current Month Appd. Exp. Amt
₹0

Current Month Rejct. Exp. Amt
₹2740

My Claim Status [View More](#)

08 Mar, 2024 | ₹50 **In Progress**

Home | Review | **+** | Policy | Rejected

Notifications

Kevin

Select All

Search Notifications

- Expenses rejected**
about a month ago
Your expenses have been Rejected.
- Expenses approved**
about a month ago
Your expenses have been approved, sent for HR processing.
- Expenses rejected**
about a month ago
Your expenses have been Rejected.
- Expenses rejected**
about a month ago
Your expenses have been Rejected.
- Expenses approved**
about a month ago
Your expenses have been approved, sent for HR processing.
- Expenses rejected**
about a month ago
Your expenses have been Rejected.

Home | Approve | **+** | Review | Rejected

My Account

Kevin

Kevin
Employee ID: #Kevin

Designation:
FIELD OFFICER

Mail:
kevin@mail.com

Phone:
8281105183

Approval Matrix:

- L1-Approver
1 **RAVI RAZDAN**
- Commercial Executive Role
3 **ADESH M PATIL**
- ZCM
4 **HEMANTHA KUMAR**

Location:
Blr Regnal Off

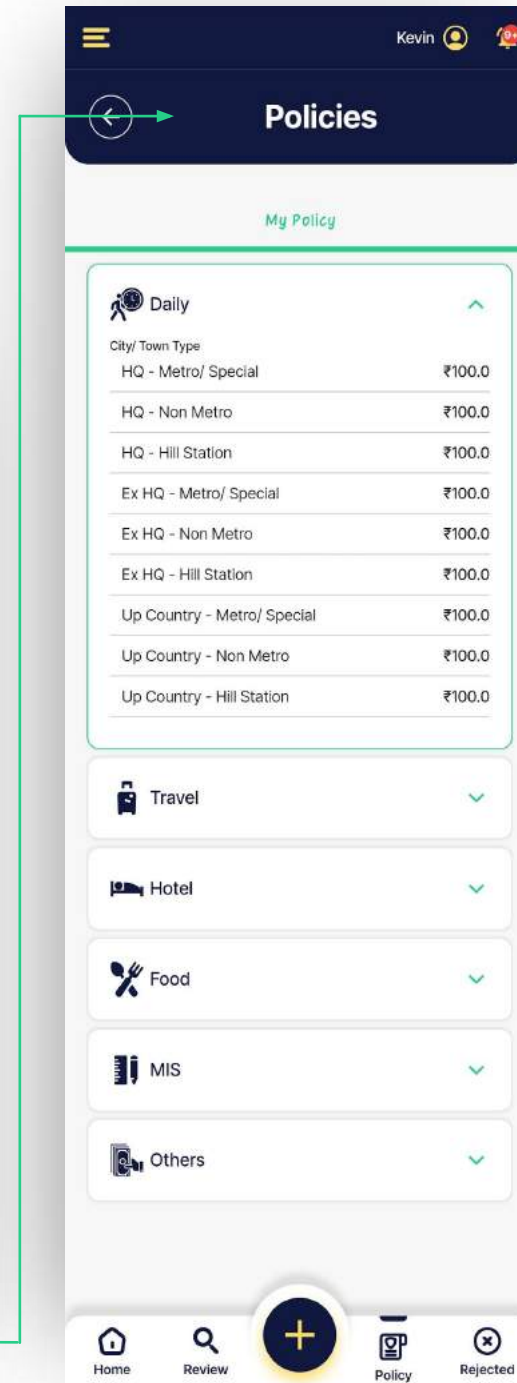
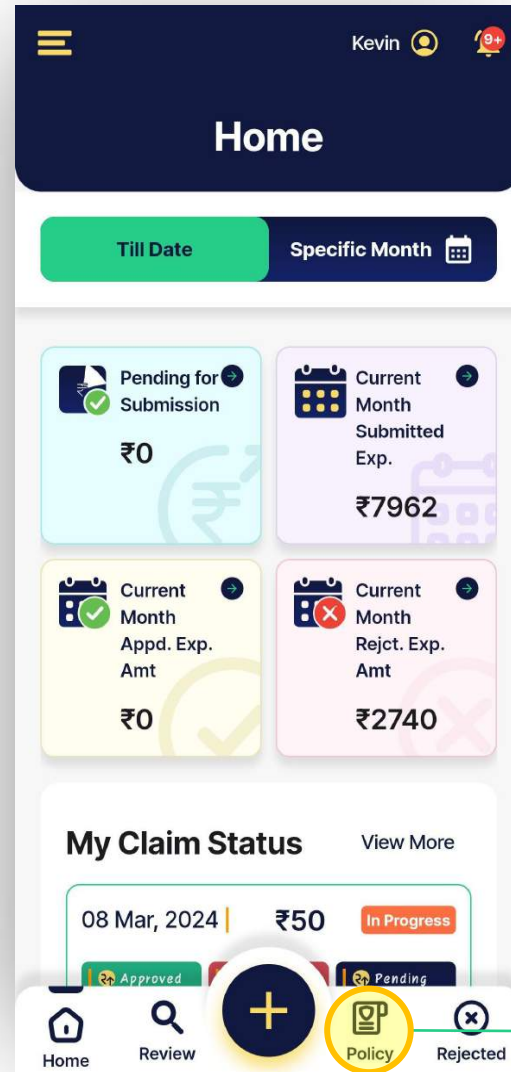
Zone:
South2

Function:
Sales

Department:
GT SALES

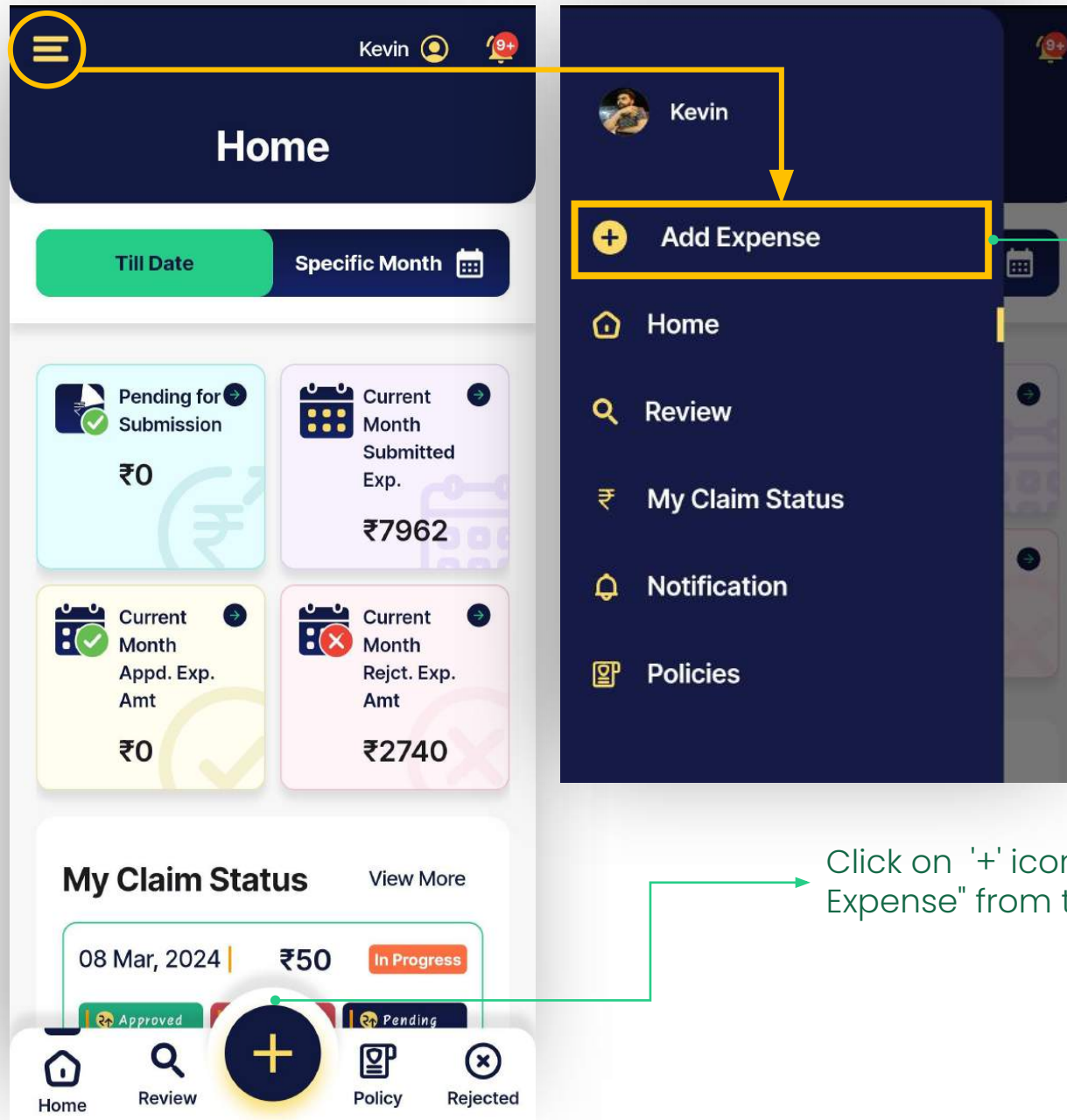
Requester Dashboard & their Policy

Requester Dashboard



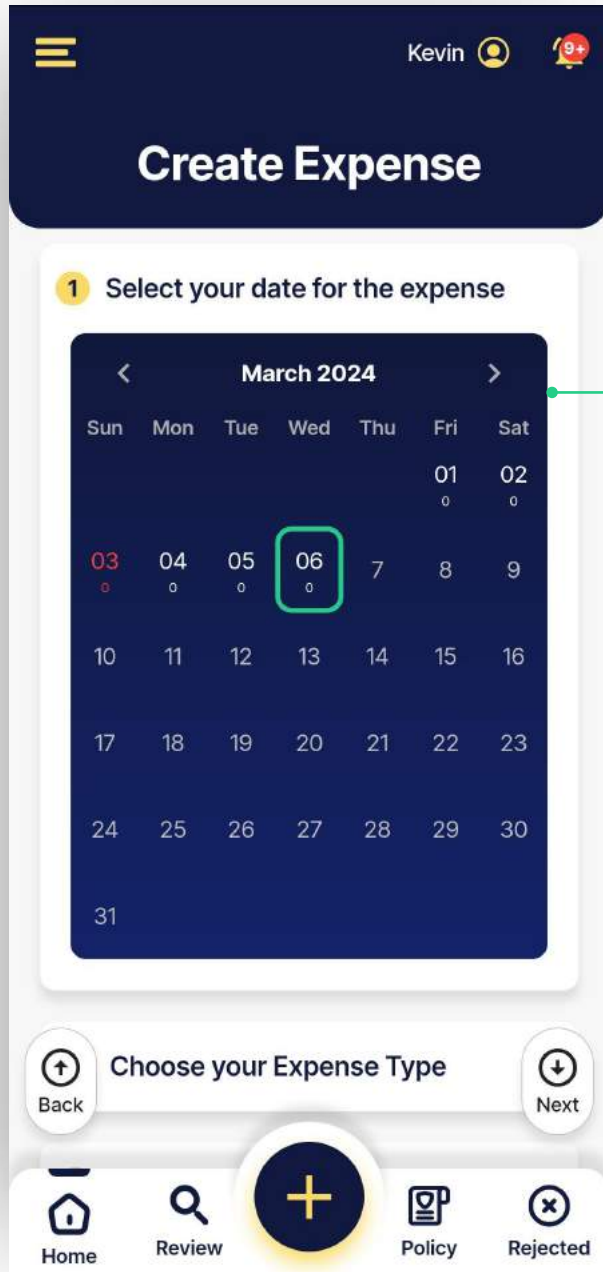
Note : The user can view the allowed Policies and create expense based on that policy. Creating expenses exceeding the allowed amount, will be considered a violation.

Create Expense Flow Screens



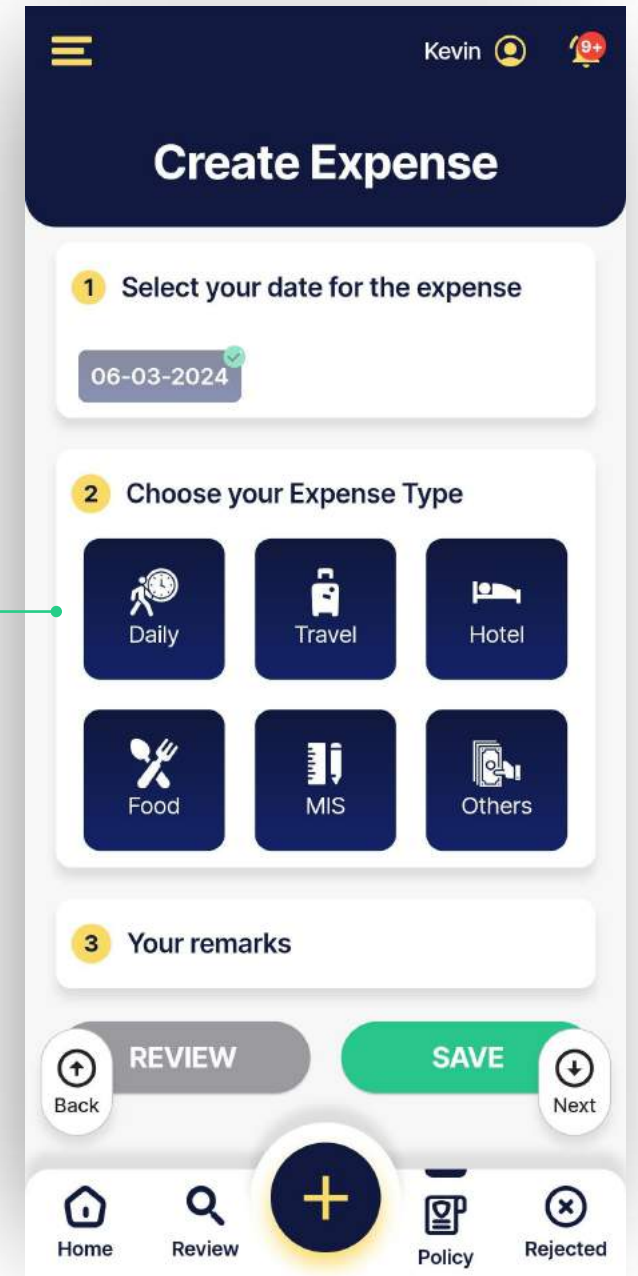
Click on '+' icon OR select "Add Expense" from the Menu bar

Select Expense Date & Type

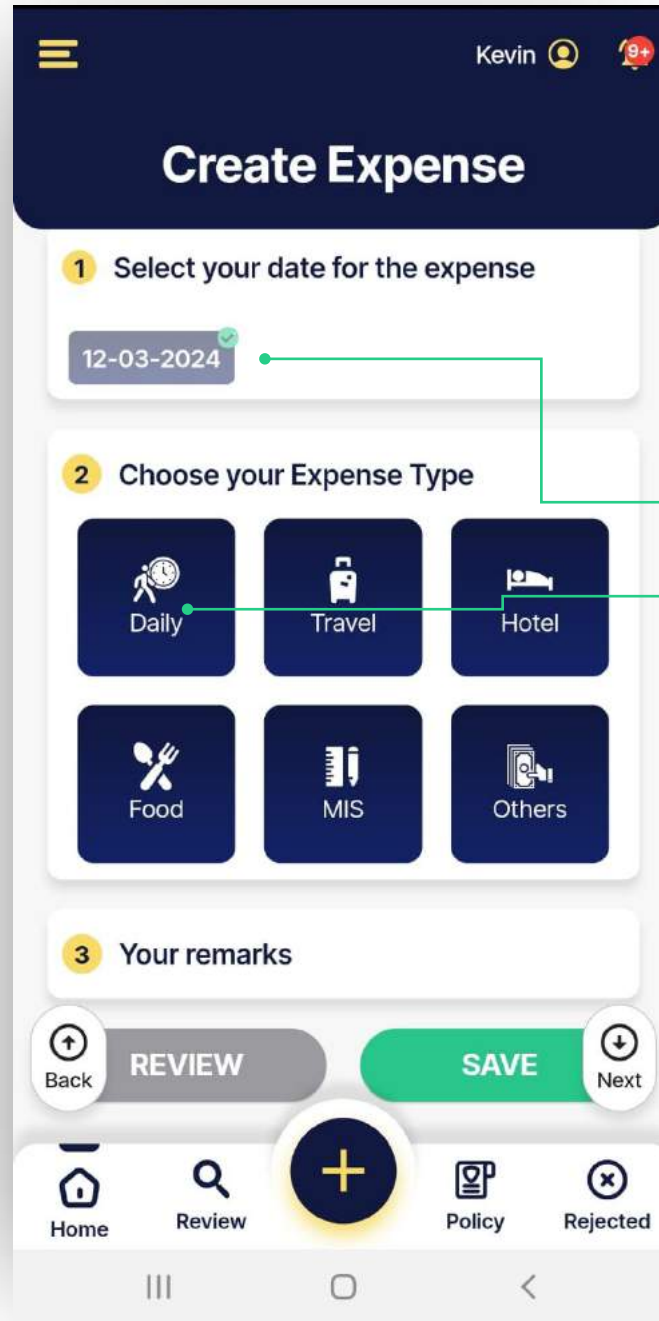


Choose the date of your expense from the calendar

Select the expense type from the given options



Create Expense Type - Daily



Select Date

Click on the Expense Type DAILY

Create Expense Type - Daily

The screenshot shows the 'Create Expense' screen in a mobile application. The user is Kevin, and there are 9+ notifications. The screen is titled 'Create Expense' and is at step 2, 'Choose your Expense Type'. The interface includes several sections: 'Expense Type' (Daily, Travel, Hotel, Food, MIS, Others), 'DA Type' (Headquarter, Ex-Headquarter, Up Country), 'City/ Town Type' (Metro/ Special, Non Metro, Hill Station), 'Market/ Town' (Location input field), 'Day Type' (Full Day, Half Day), and 'DA for the Day' (₹100.00). The bottom navigation bar has icons for Home, Review, Policy, and Rejected. Annotations with green arrows point to various elements: 'Select DA type' points to the 'Daily' button; 'Select City/Town Type' points to the 'Headquarter' and 'Non Metro' buttons; 'Enter market or location' points to the 'Location' input field; 'Select Day type' points to the 'Half Day' radio button; and 'DA For the day gets Populated from the Policy configured.' points to the '₹100.00' value.

Select DA type

Select City/Town Type

Enter market or location

Select Day type

DA For the day gets Populated from the Policy configured.

Create Expense Type - Daily

3 Your remarks

Enter Remarks

REVIEW SAVE

Click remarks, then type your remarks (optional)

Click the 'REVIEW' button to review the details you entered.

Click save

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 13-03-2024

Daily

DA Type City/Town Type

Ex-Headquarter Metro/ Special

Market/ Town

Agra

Day Type Amount

Full Day ₹100.00

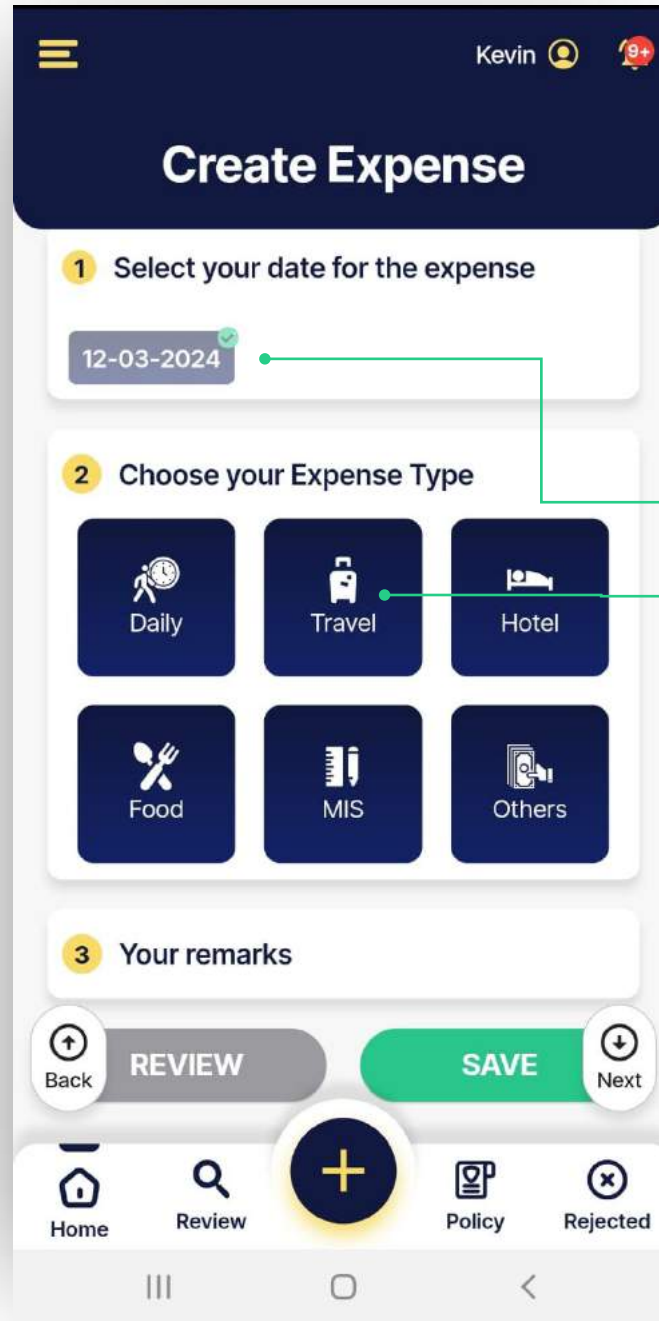
Remarks

test

SAVE

Home Review Policy Rejected

Create Expense Type - Travel



Select Date

Click on the Expense Type TRAVEL

Kevin 9+

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Car Bike Auto

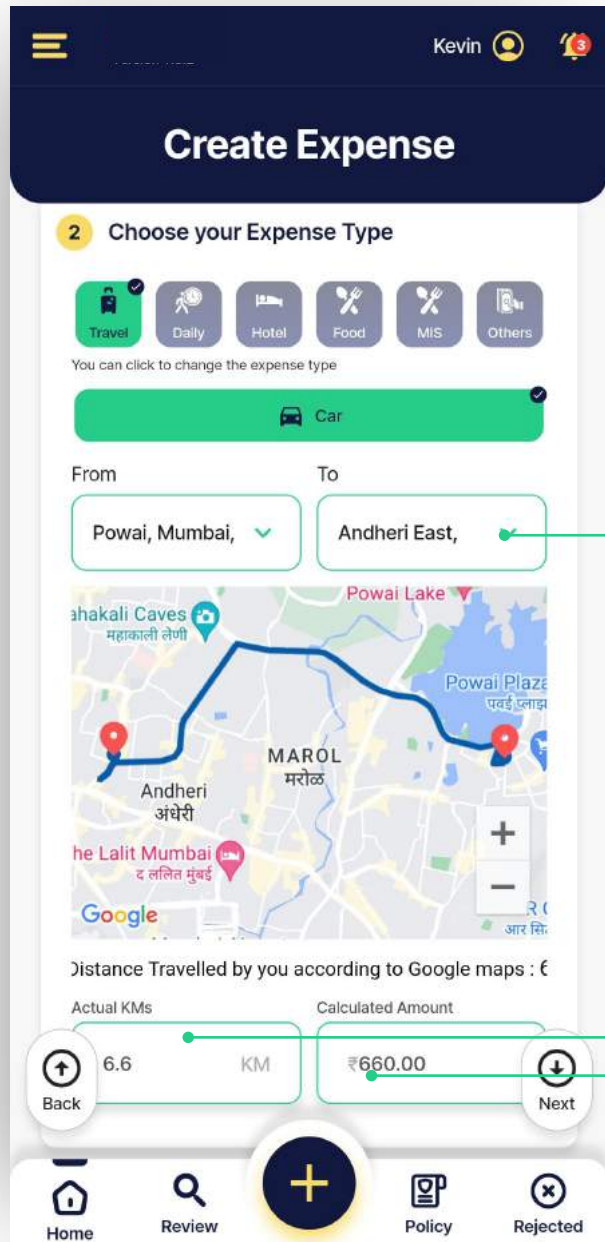
Bus Taxi Metro

Train Flight Ship/ Boat

From To

Select Location Select Location

Select Car



Soft violation - it will alert about your policy violation but you will still be able to submit anyway

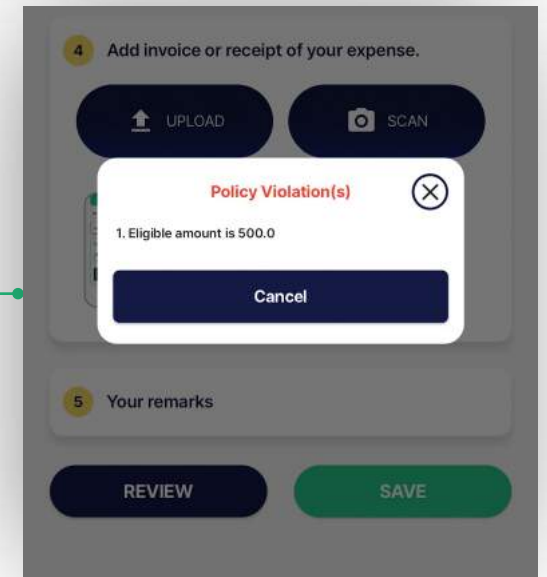
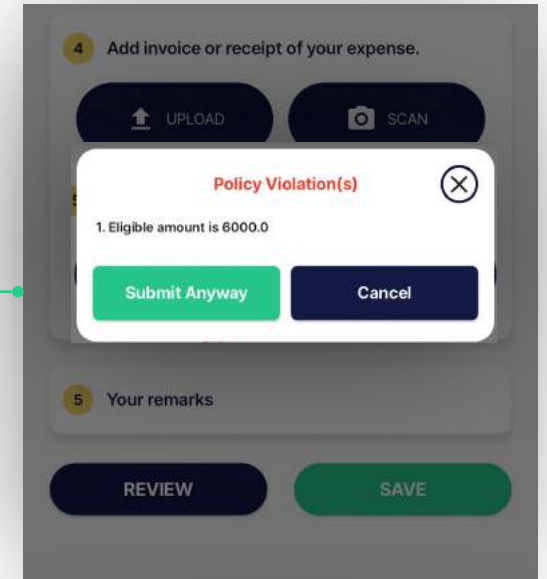
Select "From" and "To" locations.

The actual kilometers are displayed based on the Google locations provided

The calculated amount is based on the kilometers traveled.

Hard violation - it will not allow you to add your expense

NOTE: The actual kilometers can be edited based on the distance traveled."



Create Expense Type - Travel > Car

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW **SAVE**

Add Invoice or receipt of your Expense

1. Click remarks, then type your remarks (optional)

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

✓

Your Expense Updated

OK **ADD MORE**

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel **Car**

From
Ernakulam, Kerala, India

To
Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹4760.00

Invoice Images

Remarks
test

SAVE

Kevin

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

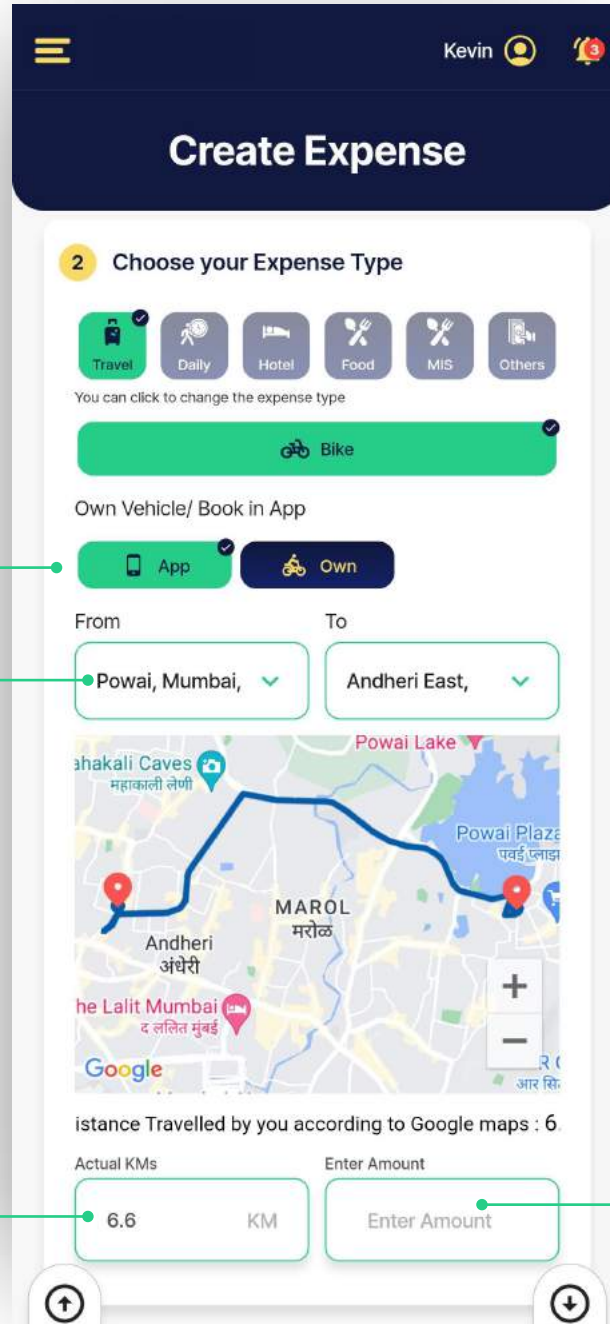
Travel Daily Hotel Food MIS Others

You can click to change the expense type

Car Bike Auto Bus Taxi Metro Train Flight Ship/ Boat

From To

Select Bike



Select Own vehicle / Book In App

Select From & To locations

App Bike - The actual kilometers are displayed based on the Google locations provided

App Bike - Enter Amount

NOTE: Own Bike - The actual kilometers can be edited based on the distance traveled. The Amount will be calculated based on the Per km cost as per your eligibility.

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Invoice or receipt of your Expense

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Create Expense

Expense Summary 14-03-2024

Travel Bike - Own

From Ernakulam, Kerala, India

To Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹4760.00

Remarks Test

SAVE

Kevin

Create Expense

1 Select your date for the expense

12-03-2024

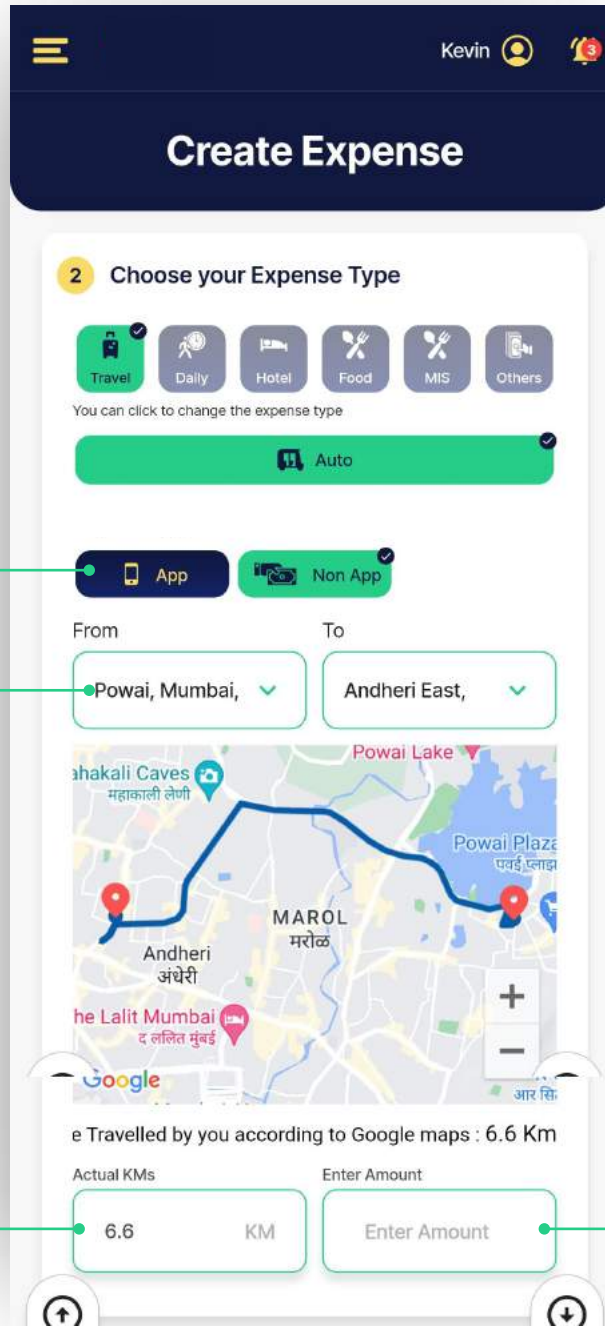
2 Choose your Expense Type

You can click to change the expense type

Car Bike Auto Bus Taxi Metro Train Flight Ship/ Boat

From To

Select Auto



Select the Type

Select From & To locations

The actual kilometers are displayed based on the Google locations provided

Enter Amount

NOTE: The actual kilometers can be edited based on the distance traveled."

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Invoice or receipt of your Expense

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel Auto - App

From Ernakulam, Kerala, India

To Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹110

SAVE

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Car Bike Auto

Bus Taxi Metro

Train Flight Ship/ Boat

From To

Select Location Select Location

Select Bus

Kevin

Create Expense

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Bus

From: Powai, Mumbai To: Andheri East

Distance Travelled by you according to Google maps : 6

Actual KMs: 6.6 KM Enter Amount: Enter Amount

3 Select type of ticket and duration

Select From & To locations

The actual kilometers are displayed based on the Google locations provided

Enter Amount

NOTE: The actual kilometers can be edited based on the distance traveled."

3 Select type of ticket and duration

Type of ticket

Daily Pass

From Date To Date

Select Date Select Date

Select type of ticket and duration

- Daily/Pass
- If Pass - select the From and To Date of the Pass

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Bus ticket/Bus pass Copy

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 13-03-2024

Travel Bus

From Nariman Point, Mumbai, Maharashtra, India

To Andheri East, Mumbai, Maharashtra, India

G.Map Distance	Actual KMS	Amount
25.8 KMS	25.8 KMS	₹50

Type of ticket Daily

Invoice Images

SAVE

Kevin

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

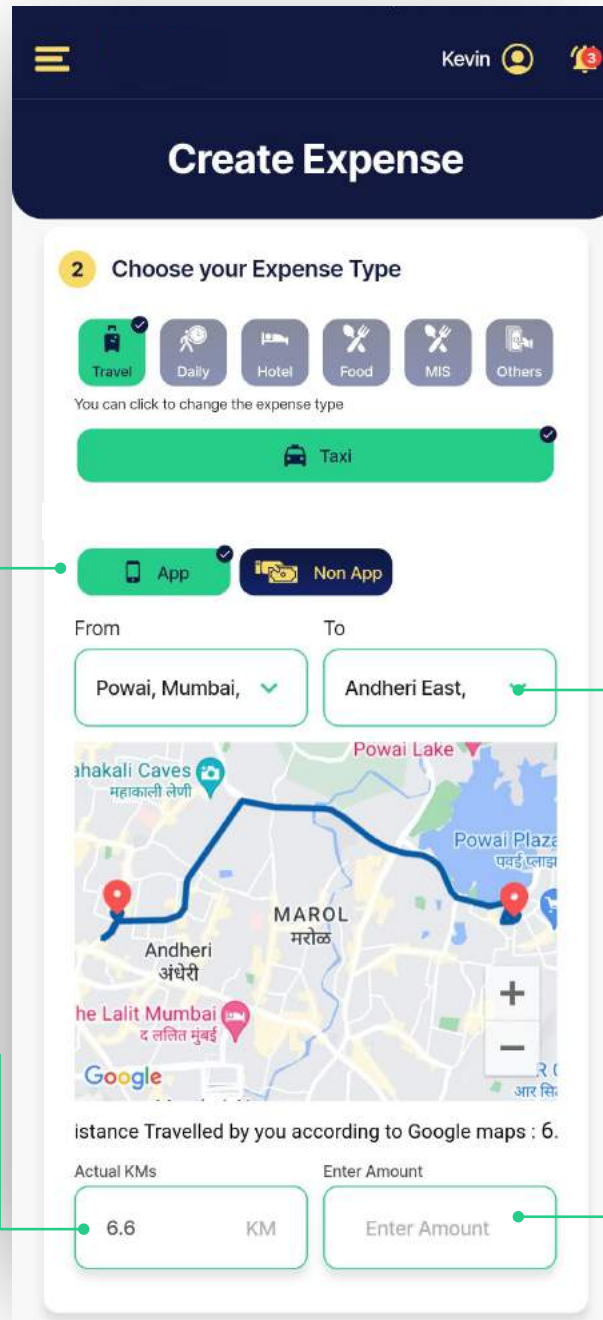
Car Bike Auto

Bus Taxi Metro

Train Flight Ship/ Boat

From To

Select Taxi



Select the Type

Select From & To locations

Enter the Amount

The actual kilometers are displayed based on the Google locations provided

NOTE: The actual kilometers can be edited based on the distance traveled."

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Invoice or receipt of your Expense

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel Taxi - Non App

From Ernakulam, Kerala, India

To Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹1200

SAVE

Kevin

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Car Bike Auto

Bus Taxi Metro

Train Flight Ship/ Boat

From To

Select Location Select Location

Select Metro

The screenshot shows the 'Create Expense' app interface. At the top, the user's name 'Kevin' and a notification icon are visible. The main heading is 'Create Expense'. Below this, there is a section titled '2 Choose your Expense Type' with several icons: Travel (selected), Daily, Hotel, Food, MIS, and Others. A note says 'You can click to change the expense type'. Below the icons is a 'Metro' button. Underneath, there are 'From' and 'To' location dropdowns showing 'Powai, Mumbai' and 'Andheri East'. A map shows a route between these two locations with a blue line. Below the map, it says 'Distance Travelled by you according to Google maps : 6.6 Km'. At the bottom of this section, there are two input fields: 'Actual KMs' with '6.6' and 'KM', and 'Enter Amount' with a placeholder 'Enter Amount'. Below this is a section titled '3 Select type of ticket and duration'.

NOTE: The actual kilometers can be edited based on the distance traveled."

Select From & To locations

The actual kilometers are displayed based on the Google locations provided

Enter Amount

This is a close-up of the '3 Select type of ticket and duration' section. It has a title '3 Select type of ticket and duration'. Under 'Type of ticket', there are two options: 'Daily' with an unselected radio button and 'Pass' with a selected radio button. Below this, there are 'From Date' and 'To Date' fields, each with a 'Select Date' label and a calendar icon.

Select type of ticket and duration

- Daily/Pass
- If Pass - select the From and To Date (validity)

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Metro pass/ticket copy

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel Metro

From Ernakulam, Kerala, India

To Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹100

Type of ticket	From Date	To Date
Pass	12-03-2024	12-03-2024

Remarks test

SAVE

Kevin

Create Expense

1 Select your date for the expense

12-03-2024

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Car Bike Auto

Bus Taxi Metro

Train Flight Ship/ Boat

From To

Select Location Select Location

Select Train

The screenshot shows the 'Create Expense' app interface. At the top, there is a dark blue header with a menu icon, the name 'Kevin', and a notification icon with the number '3'. Below the header is a white card titled '2 Choose your Expense Type'. This card contains several options: 'Travel' (selected with a checkmark), 'Daily', 'Hotel', 'Food', 'MIS', and 'Others'. Below these is a sub-section for 'Train' with a train icon and a checkmark. Underneath, there are buttons for 'Train Class' including 'EC', '1AC', '2AC', '3AC', 'SL', and 'General'. Below the class selection are two dropdown menus for 'From' (Powai, Mumbai) and 'To' (Andheri East). At the bottom of this card is an 'Enter Amount' input field. Below the main card is another white card titled '3 Select type of ticket and duration'.

Select Train Class

Select From & To locations

Enter Amount

The screenshot shows the '3 Select type of ticket and duration' app interface. It features a 'Type of ticket' section with 'Daily' (unselected) and 'Pass' (selected with a checkmark). Below this are 'From Date' and 'To Date' sections, each with a 'Select Date' button and a calendar icon.

Select type of ticket and duration

- Daily/Pass
- If Pass - select the From and To Date (validity)

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Train ticket/Pass Copy

1. Click on remarks, then type your remarks (optional).

2. Click the 'Review' button to review the details you entered.

3. Click the "save" button.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel Train - 1AC

From Ernakulam, Kerala, India

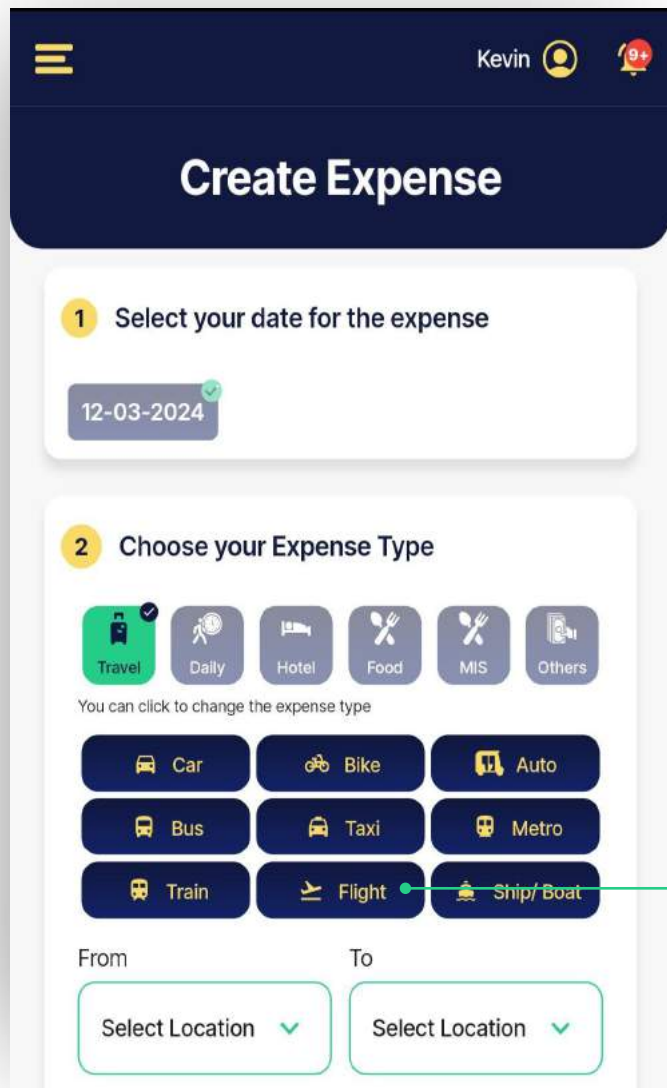
To Chalakudy, Kerala, India

G.Map Distance	Actual KMS	Amount
47.6 KMS	47.6 KMS	₹100

Type of ticket Daily

Remarks test

SAVE



Select Flight

Kevin

Create Expense

2 Choose your Expense Type

Travel Daily Hotel Food MIS Others

You can click to change the expense type

Flight

Flight - Class

Business First Economy

From To

United Arab Mumbai

Enter Amount

Enter Amount

Select Flight Class

Select From & To locations

Enter Amount

Create Expense Type - Travel > Flight

3 Add invoice or receipt of your expense.

4 Add your pre-approved confirmation

5 Your remarks

REVIEW SAVE

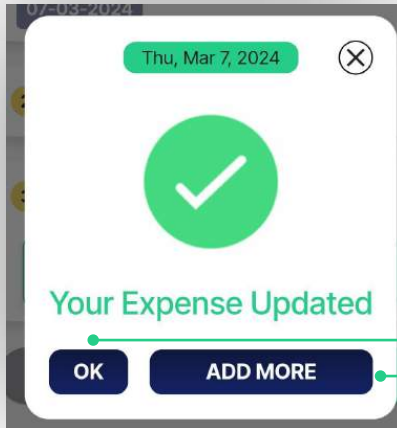
Add Flight ticket copy

1. Upload pre-approved confirmation document

2. Click on remarks, then type your remarks (optional).

3. Click the "save" button.

Click the 'Review' button to review the details you entered.



1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin

Create Expense

Expense Summary 12-03-2024

Travel Flight - First

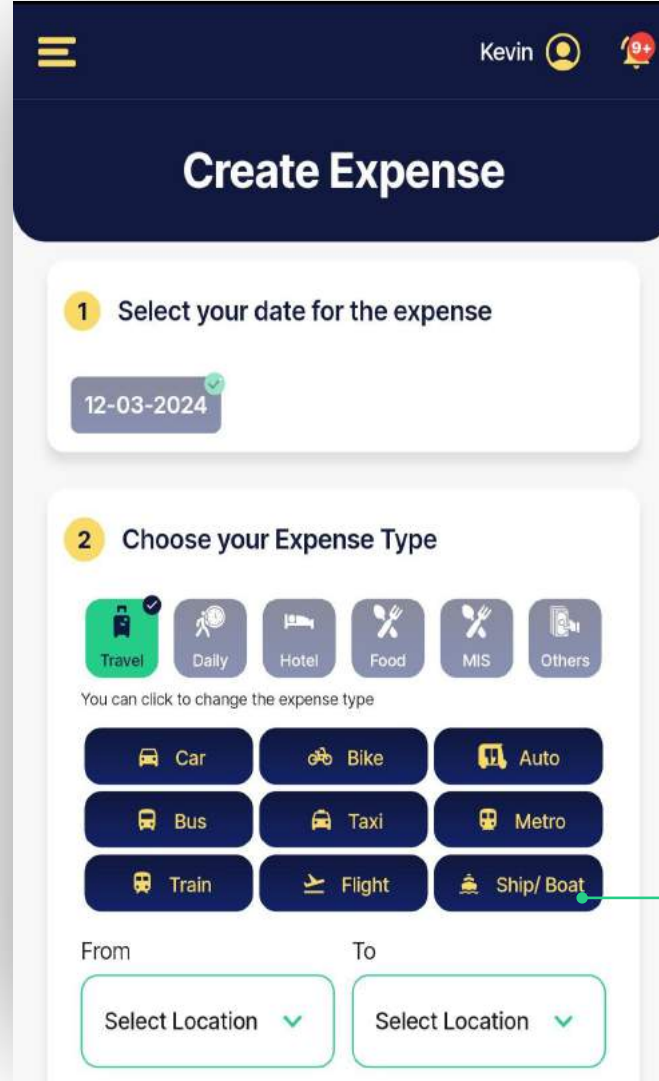
From Dubai - United Arab Emirates

To Mumbai, Maharashtra, India

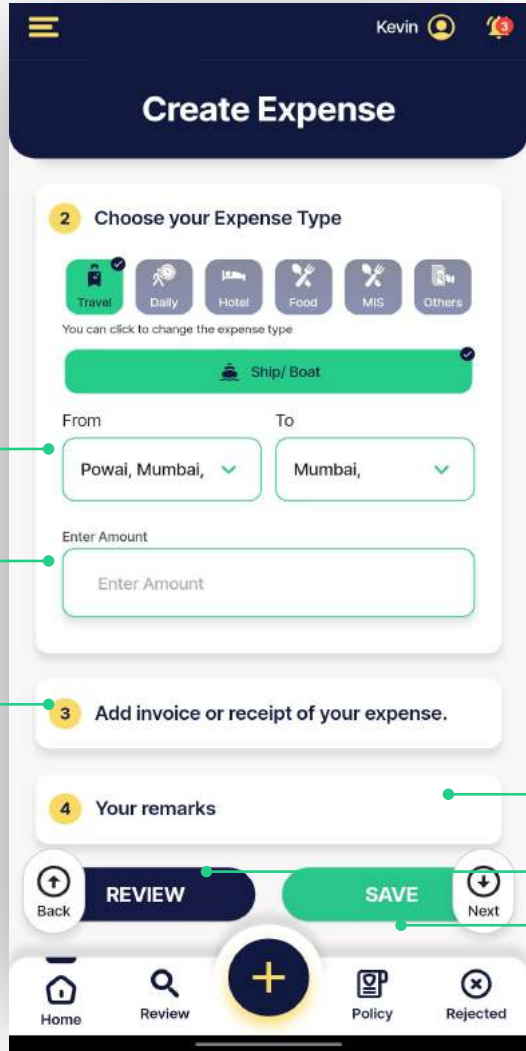
G.Map Distance	Actual KMS	Amount
0.0 KMS	0.0 KMS	₹7000

Remarks test

SAVE



Select Ship/Boat



Select From & To locations

Enter Amount

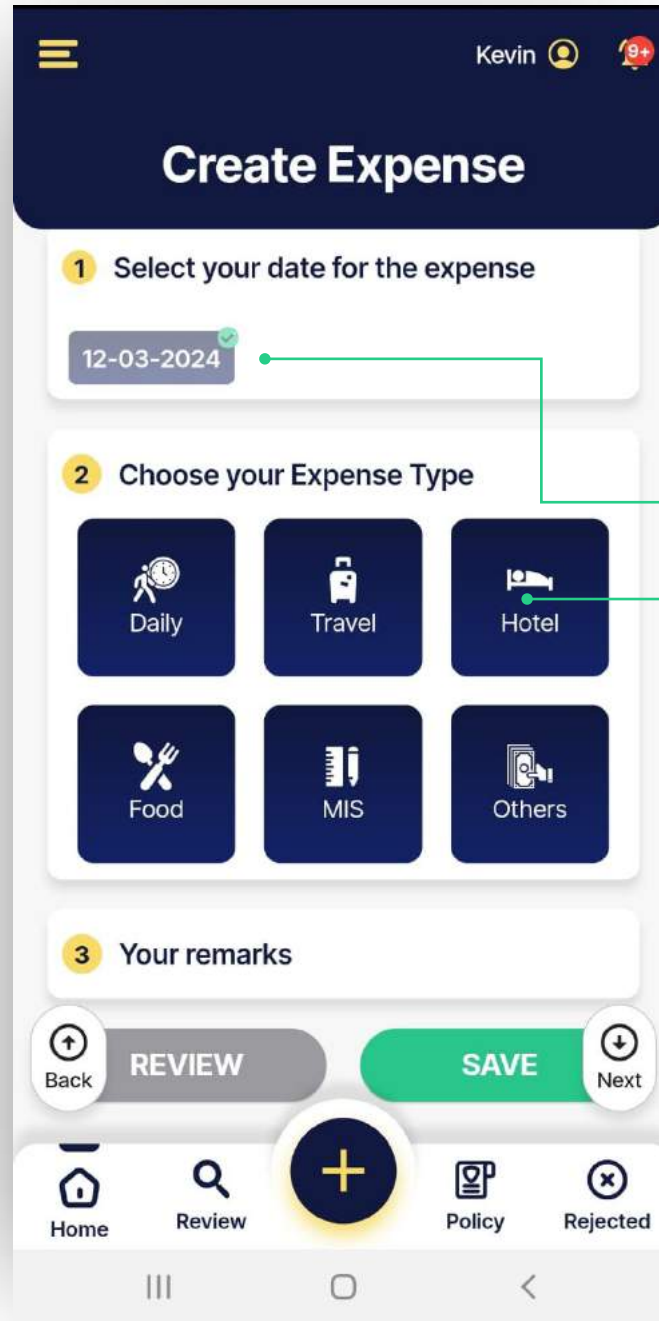
Add Invoice or receipt of your Expense

Click on remarks, then type your remarks (optional).

Click Review button to review the details you entered

Click Save button

Create Expense Type - Hotel



Select Hotel stay - From & To Date

Click on the Expense Type Hotel

Create Expense Type - Hotel

Kevin 9+

Create Expense

Hotel Daily Travel Food MIS Others

You can click to change the expense type

Metro/ Special Town Non Metro

From Date To Date

Select Date Select Date

3 Details of the Hotel

4 Enter Total Hotel Expense

5 Add invoice or receipt of your expense.

6 Your remarks

Back REVIEW SAVE Next

Home Review Policy Rejected

Select the Town type

Select From & To Date

Enter details of the Hotel

Create Expense Type - Hotel Details

3 Details of the Hotel

Name of the Hotel

Enter name of the hotel

Enter Name of the Hotel

Select Star rating of the hotel

Select Star rating of the hotel

Select hotel star rating

Select State

Select State

Select State

Location

Enter location name

Enter location

GST No.

Enter GST number

Enter Hotel GST Number(if any)

Enter the total hotel Expense
(It's automatically
calculated based on the
details you input for GST and
lodging)

0/15

GST for other amount

GST For Other Amount

0

GST For Lodging

0

GST for lodging

Other Amount (Pre Tax)

0

Lodging Amount (Pre Tax)

0

Lodging Amount (Pre Tax)

Other Amount (Pre Tax)

4 Enter Total Hotel Expense

Note : "If there's no GST number, skip the GST field and enter the Other Amount and Lodging Amount."

If GST no. is not provided, eligibility will be considered inclusive of all four components i.e. GST for Other, GST for lodging, Other Amount and lodging (Pre Tax), else Eligibility will be considered for components other than GST for Lodging.

Create Expense Type - Hotel Details

5 Add invoice or receipt of your expense.

6 Your remarks

Enter Remarks

REVIEW SAVE

Add Hotel Bill Copy

Click remarks, then type your remarks (optional)

Click the 'Review' button to review the details you entered.

Click save

Thu, Mar 7, 2024

✓

Your Expense Updated

OK ADD MORE

1. Click 'OK' to update your expenses.

2. Click 'ADD MORE' if you have additional expenses to create

Kevin 9+

Create Expense

Expense Summary 13-03-2024

From Date To Date
Hotel 13-03-2024 13-03-2024

Name of Hotel Star Rating State
abc hotel 4 - Star Bihar

Location GST No.
location abc ETGSFHTGB324600

GST For Other Amount GST For Lodging
500 500

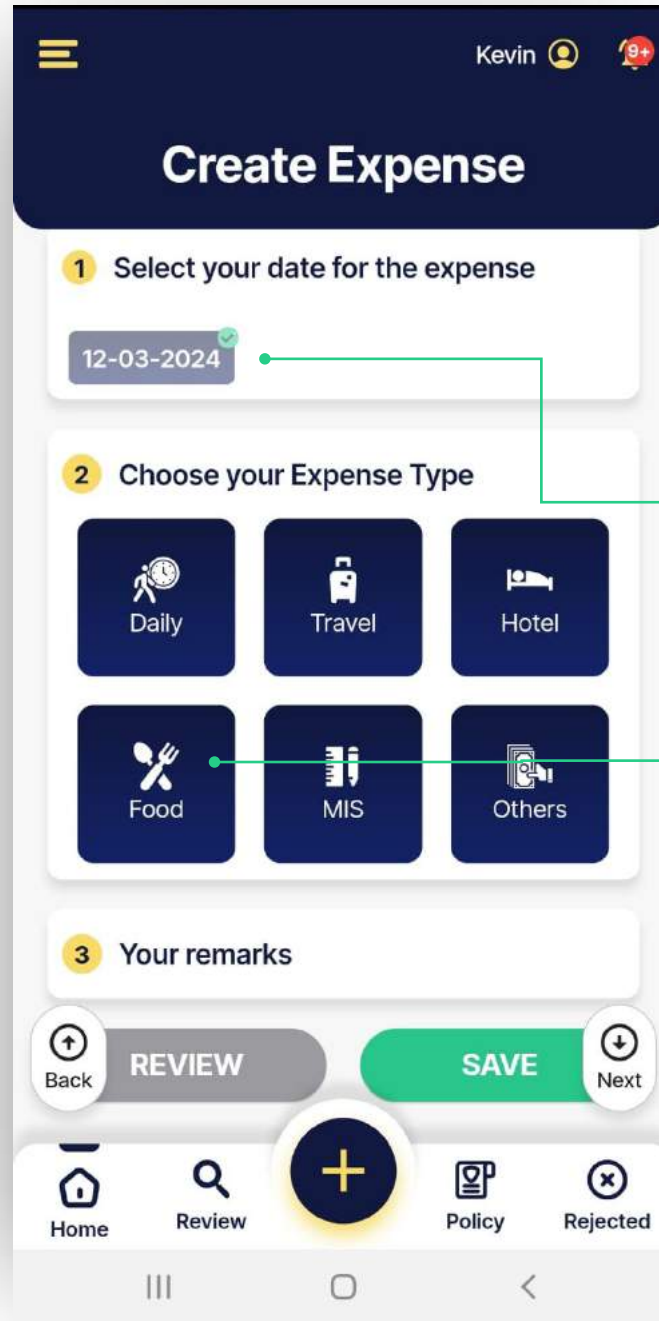
Other Amt Include Food Lodging Amount Expense Amount
500 500 ₹ 2000.0

Remarks
Test

SAVE

Home Review + Policy Rejected

Create Expense - Food



Select Date

Click on the Expense Type Food

Create Expense - Food

The screenshot shows the 'Create Expense' app interface. At the top, there's a header with a menu icon, the name 'Kevin', and notification icons. The main title is 'Create Expense'. Below it, there are three numbered steps: 1. 'Select your date for the expense' with a date picker set to '14-03-2024'. 2. 'Choose your Expense Type' with icons for Food, Daily, Travel, Hotel, MIS, and Others. The 'Food' icon is selected. Below the icons, there's a text input field for 'Market/ Town' with a 'Type' placeholder. Underneath, there are two radio buttons for 'Type': 'My Self' (checked) and 'No'. Below that is an 'Expense Amount' input field with the placeholder 'Enter expense amount'. At the bottom, there's a 'Select duration' section with a 'Single' button selected. A bottom navigation bar contains icons for Home, Review, a central '+' button, Policy, and Rejected.

Myself: Choose this if the transaction is for you.
No: Choose this if the transaction involves others as well.

This section provides a detailed view of the 'Type' and 'Select duration' steps with annotations. The 'Type' section shows two radio buttons: 'My Self' (unselected) and 'No' (selected). A yellow arrow points from the 'No' button to the text 'Select NO'. Below this is a text input field for 'Number of people' with the placeholder 'Enter number of people' and a green arrow pointing to it with the text 'Enter the number of people involved'. Below that is another text input field for 'Expense Amount' with the placeholder 'Enter expense amount' and a green arrow pointing to it with the text 'Enter Amount'. The 'Select duration' section shows two radio buttons: 'Single' (unselected) and 'Multiple' (selected). A yellow arrow points from the 'Multiple' button to the text 'Click on 'Single' for single day'. Below this are two date pickers: 'From Date' and 'To Date', both with the placeholder 'Select Date' and a calendar icon. A green arrow points from the 'To Date' field to the text 'For multiple days, select 'Multiple' option and then choose the date range.'.

Create Expense - Food

5 Add invoice or receipt of your expense. → Add Food bill Copy

6 Your remarks

Enter Remarks → Click remarks, then type your remarks (optional)

REVIEW → Click the 'REVIEW' button to review the details you entered.

SAVE → Click save

Thu, Mar 7, 2024

✓

Your Expense Updated

OK → 1. Click 'OK' to update your expenses.

ADD MORE → 2. Click 'ADD MORE' if you have additional expenses to create

Kevin 9+

Create Expense

Expense Summary 13-03-2024

Food market

Type	No. Of People	Expense Amount
Others	2	₹ 1200

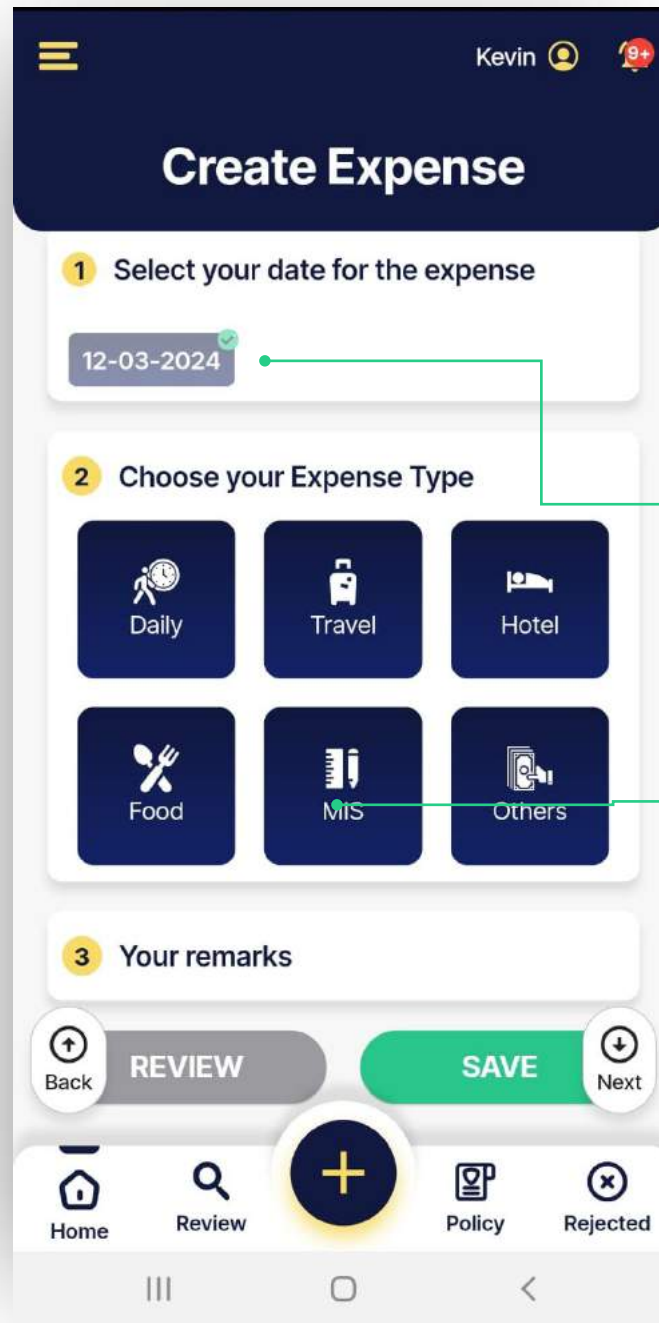
Duration

Single Day

SAVE

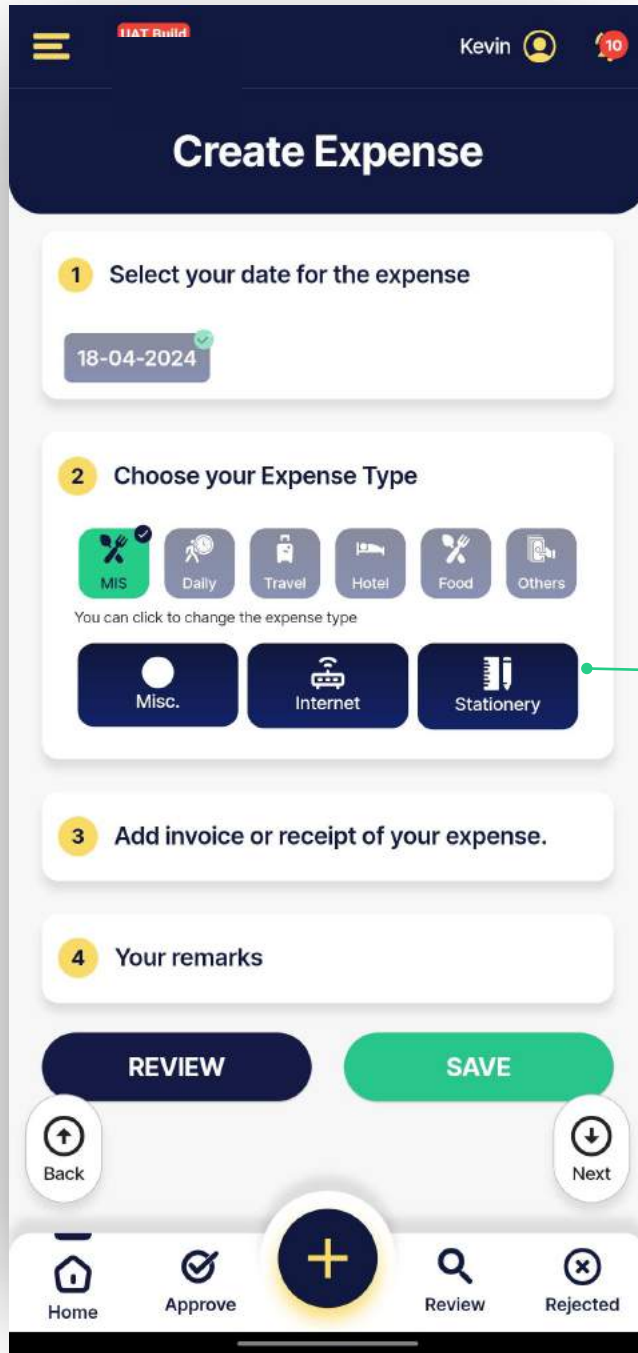
Home Review + Policy Rejected

Create Expense Type - MIS

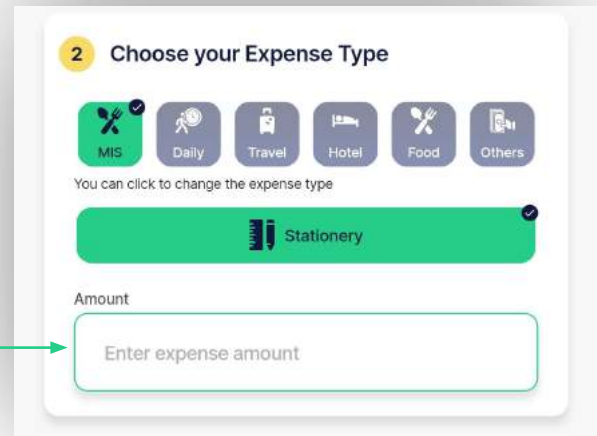
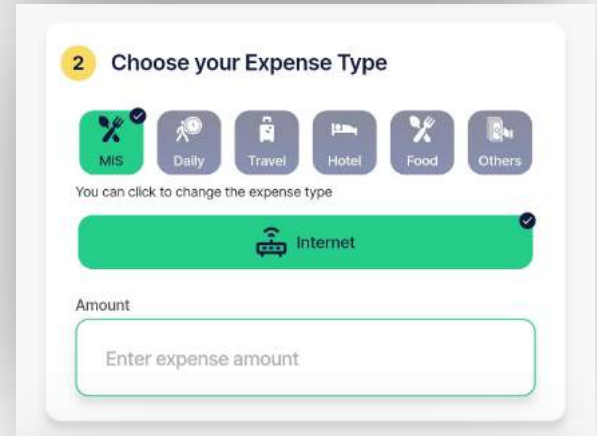
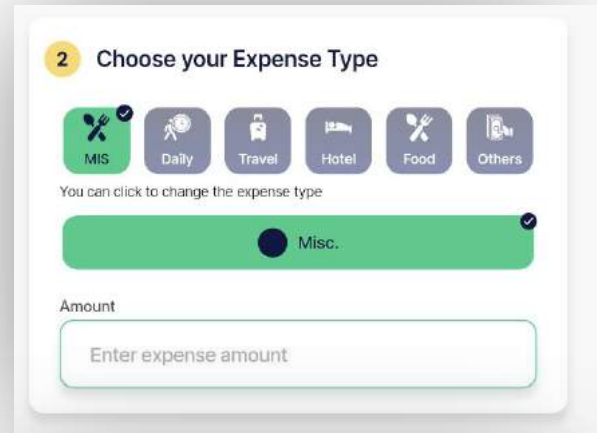


Select Date

Click on the Expense Type MIS



Choose the Sub Types either Misc, Internet, Stationery



Enter amount

5 Add invoice or receipt of your expense.

6 Your remarks

Enter Remarks

REVIEW SAVE

Annotations:
- Add Invoice or receipt of your Expense
- Click remarks, then type your remarks (optional)
- Click the 'REVIEW' button to review the details you entered.

Thu, Mar 7, 2024

Your Expense Updated

OK ADD MORE

Annotations:
- Click save
- 1. Click 'OK' to update your expenses.
- 2. Click 'ADD MORE' if you have additional expenses to create

Note: For Misc ,internet & stationery you can Review individually and Submit

Create Expense Type - Others

Create Expense

Kevin

1 Select your date for the expense

19-04-2024

2 Choose your Expense Type

Others Daily Travel Hotel Food MIS

You can click to change the expense type

Business Meeting Training Buy Your Own Device

Printing Festival Monthly Meeting

Other

Expense Amount

0.0

3 Add invoice or receipt of your expense.

4 Your remarks

REVIEW SAVE

Select the expense Type

Business Meeting

Training

Buy your own device

Printing

Festival

Monthly meeting

Others

Add invoice or receipt of your Expense

Adding Remarks & Saving Expense

3 Add invoice or receipt of your expense.

4 Your remarks

Enter Remarks

REVIEW SAVE

Add Invoice or receipt of your Expense

Click remarks, then type your remarks (optional)

Click save

Thu, Mar 7, 2024

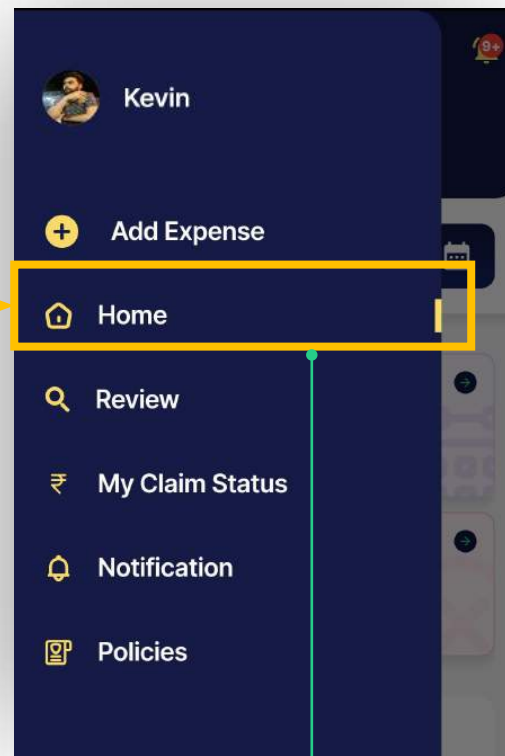
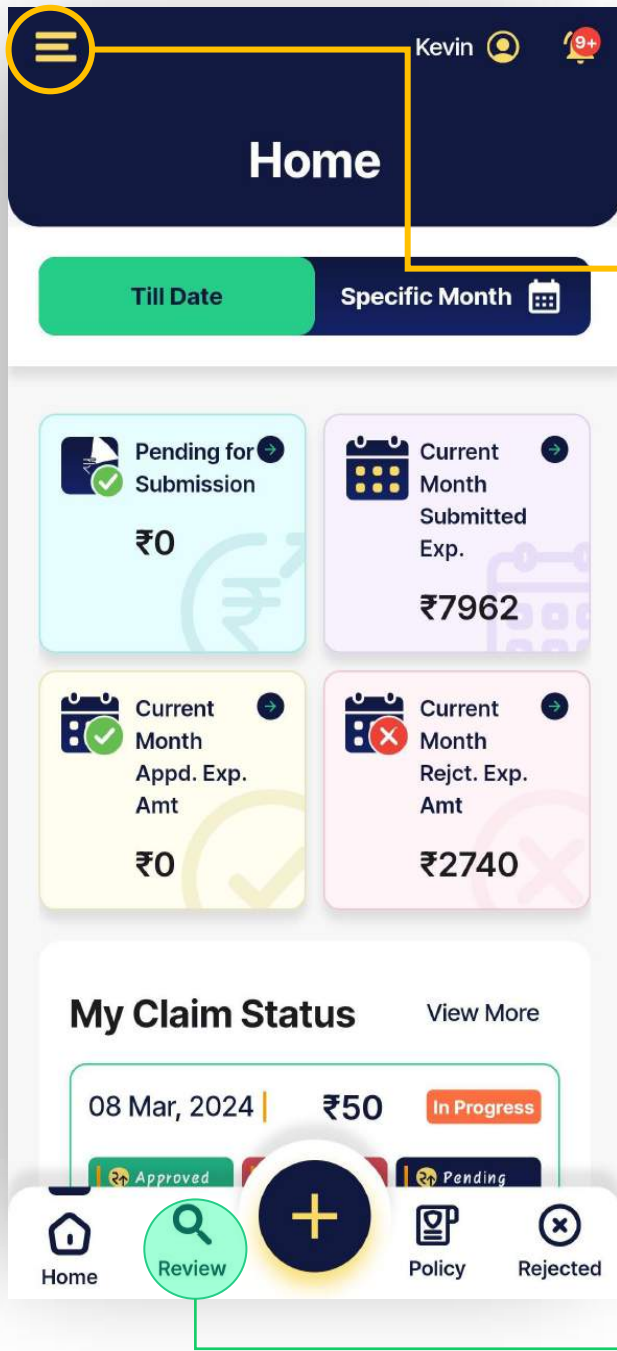
✓

Your Expense Updated

OK ADD MORE

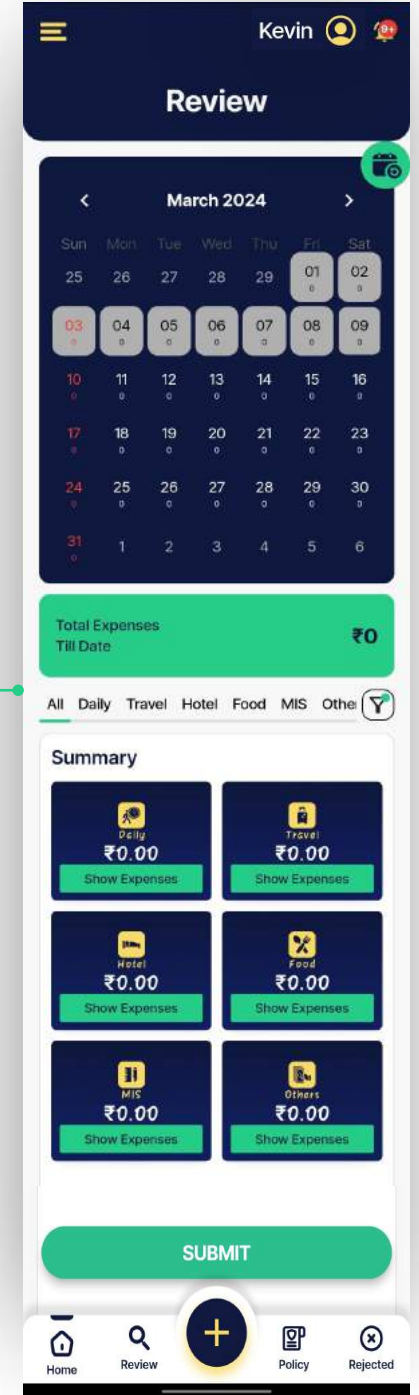
1. Click 'OK' to update your expenses.
2. Click 'ADD MORE' if you have additional expenses to create

Review & Submit Expense Flow

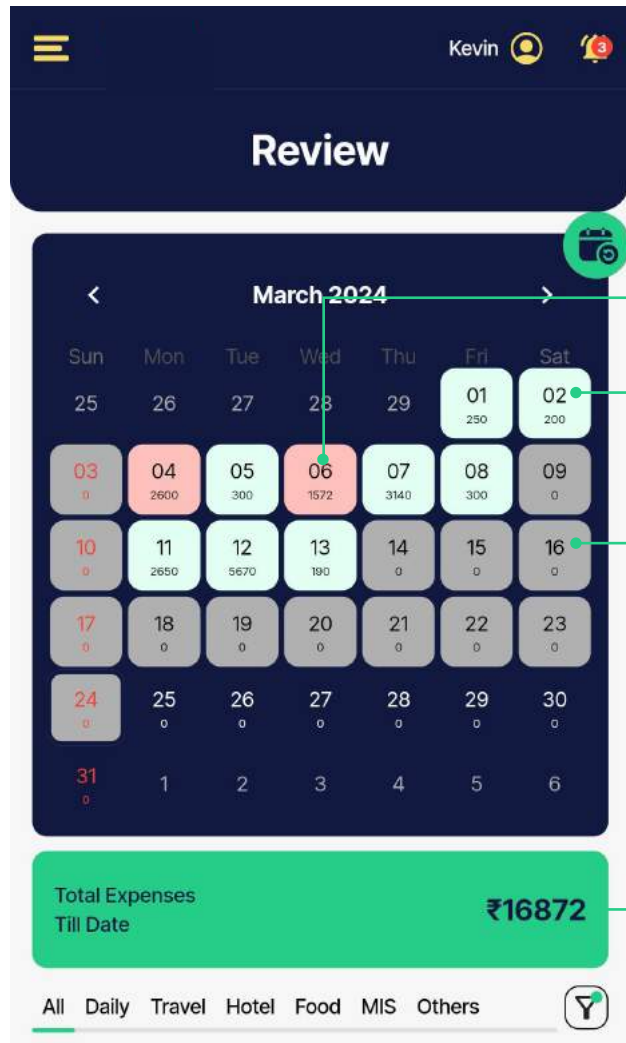


Click the Review From the Dashboard/Menu

Review Screen



Review & Submit Expense Flow



Red: Violated expenses.

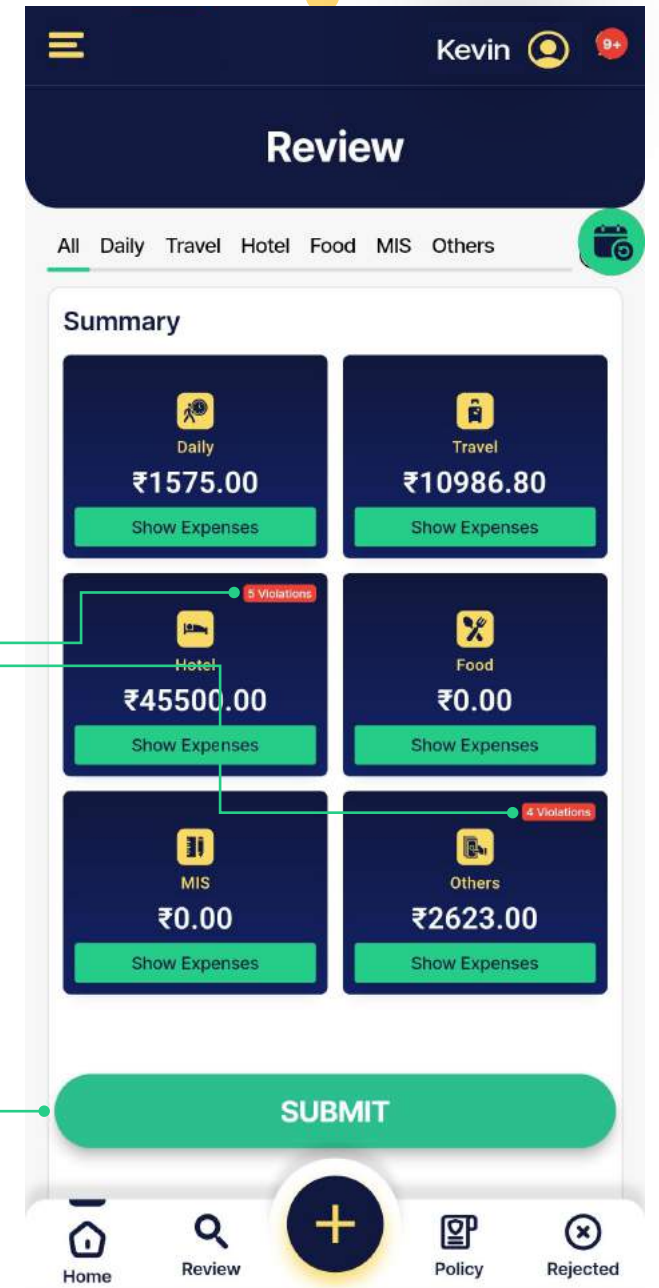
Light green: Expenses created without any policy violations.

Gray: No expense on this date.

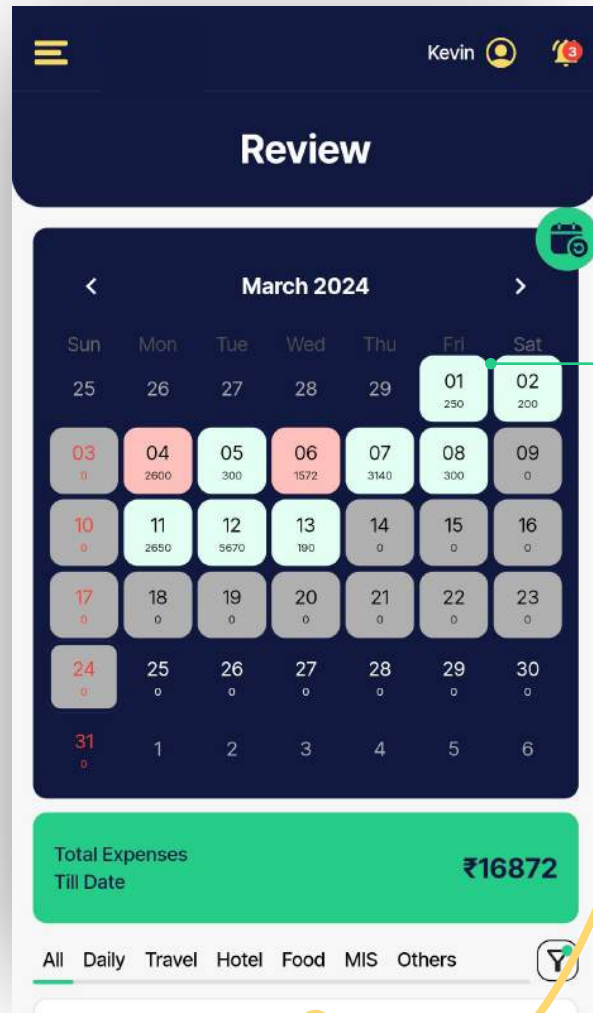
The red icon indicates that the policy has been violated

Total expenses till date

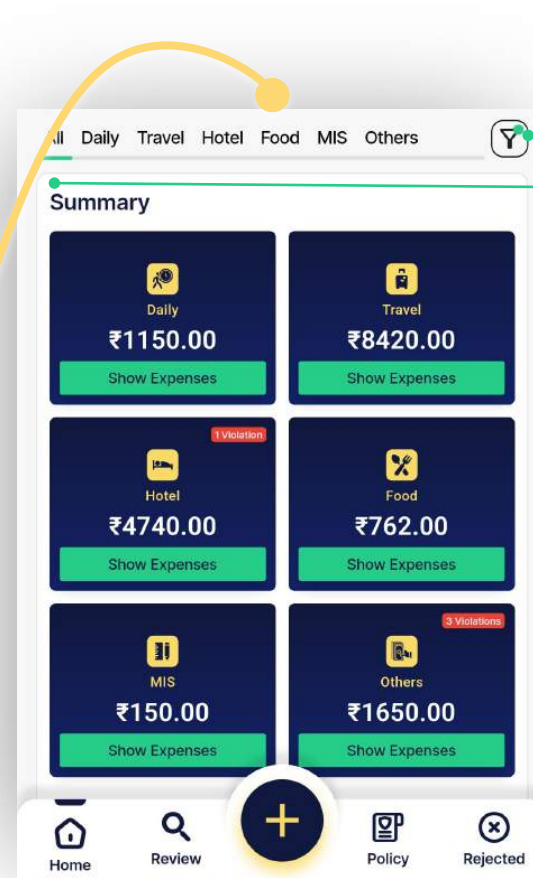
"You can submit all your expenses by clicking the 'Submit button.'"



Review Expense using filters



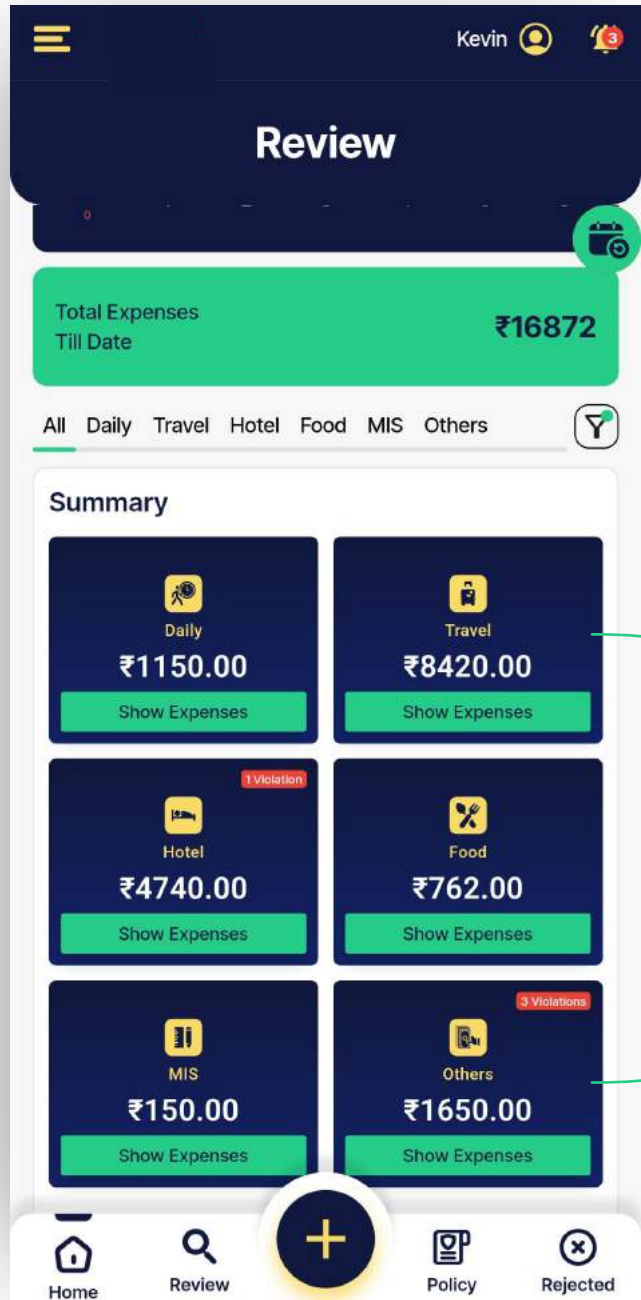
Choose an individual date to view the expenses for that specific date



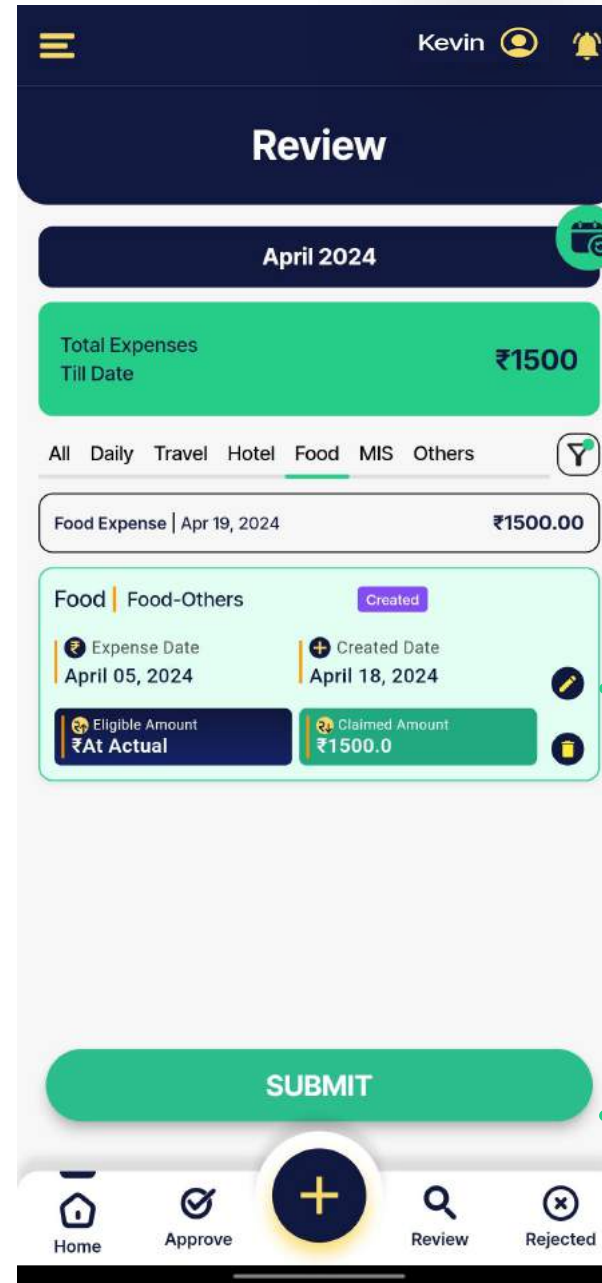
- Click on the 'Filter' button or icon.
- Select the criteria you want to filter by, such as Category, Status, Roles, Date, Amount, Policy Violation. Click 'Apply'
- To remove the filter and again view all expenses again, click on the "RESET" button."

Summary screen - Can click on individual Expense types to see the details.

Review & Submit Expense Flow



"Click on the summary you wish to review"

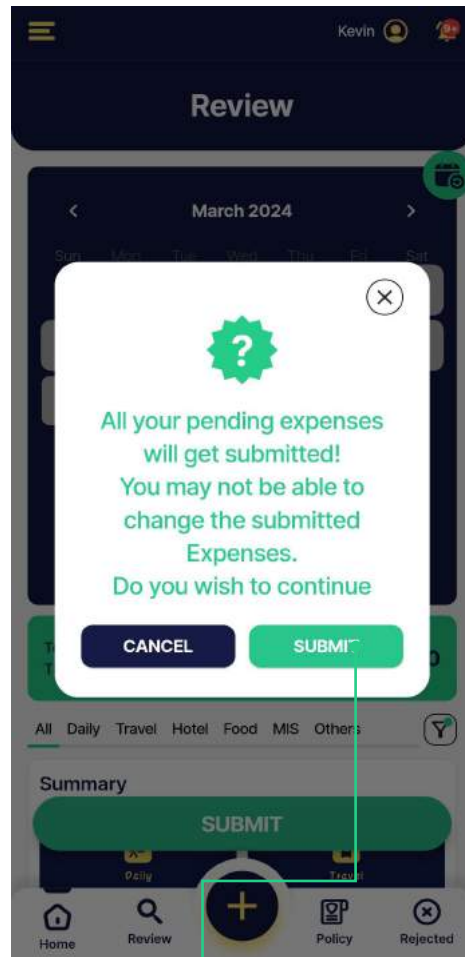


Click on any summary to see the overall review page . You can edit or delete if needed.

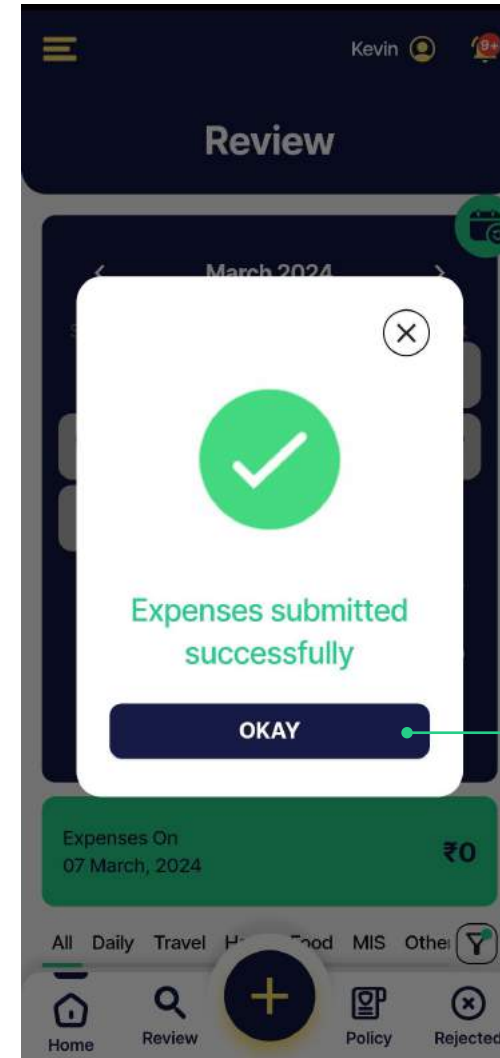
Before submitting You can edit or delete the expense using the edit or delete button.

Click "Submit"

Submitting Expense



Click the Submit Button on the pop up.



Click OKAY Expense submitted successfully

Note :Ensure you have reviewed correctly. Once the expense is submitted, you cannot go back.

View submitted Expenses

Home

Kevin

My Dashboard | Approver Dashboard

Till Date | Specific Month

Pending for Submission ₹123	Current Month Submitted Exp. ₹17086
Current Month Appd. Exp. Amt ₹0	Current Month Rejct. Exp. Amt ₹800

My Claim Status | View More

19 Apr, 2024 | ₹17086 | In Progress

Approved ₹0	Rejected ₹800	Pending ₹16286
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Home | Approve | + | Review | Rejected

Review

Kevin

March 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	01 250	02 200
03 0	04 2600	05 300	06 1572	07 3140	08 300	09 0
10 0	11 2650	12 5670	13 190	14 0	15 0	16 0
17 0	18 0	19 0	20 0	21 0	22 0	23 0
24 0	25 0	26 0	27 0	28 0	29 0	30 0
31 0	1	2	3	4	5	6

Expenses Submitted on 01 Apr, 24 - 30 Apr, 24 | ₹17086

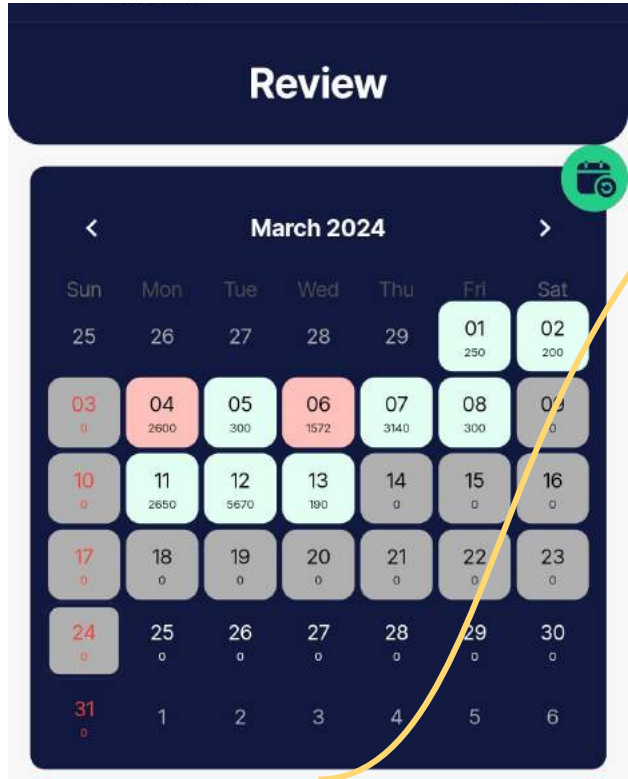
All | Daily | Travel | Hotel | Food | MIS | Others

Summary

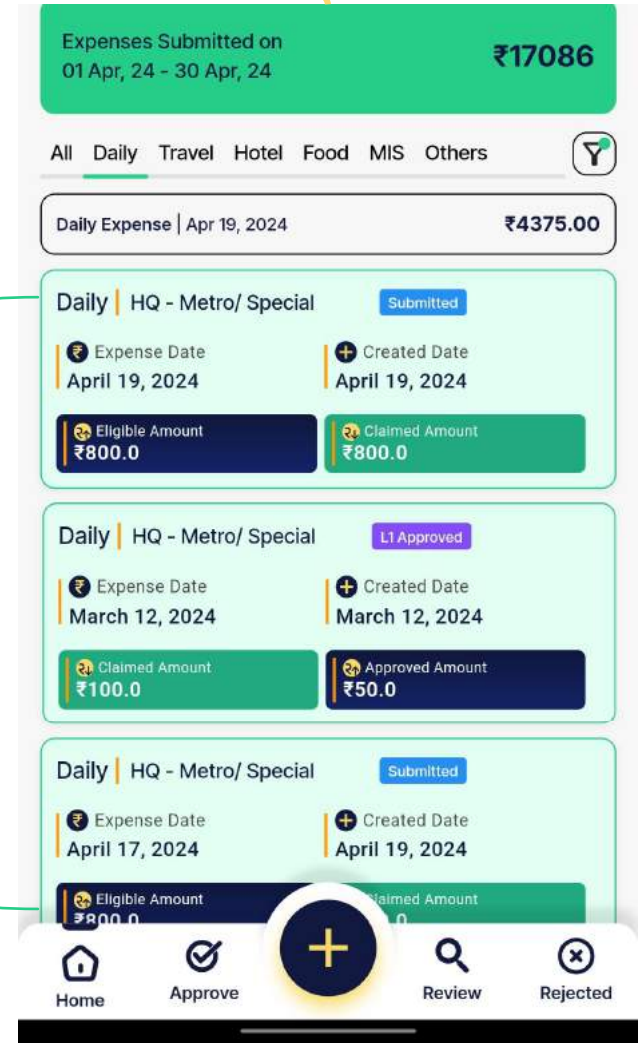
Daily ₹4375.00 1 Violation Show Expenses	Travel ₹1902.00 Show Expenses
Hotel ₹2259.00 Show Expenses	Food ₹7501.00 2 Violations Show Expenses
MIS ₹0.00 Show Expenses	Others ₹1049.00 3 Violations Show Expenses

Home | Approve | + | Review | Rejected

View Submitted Expenses & it's status

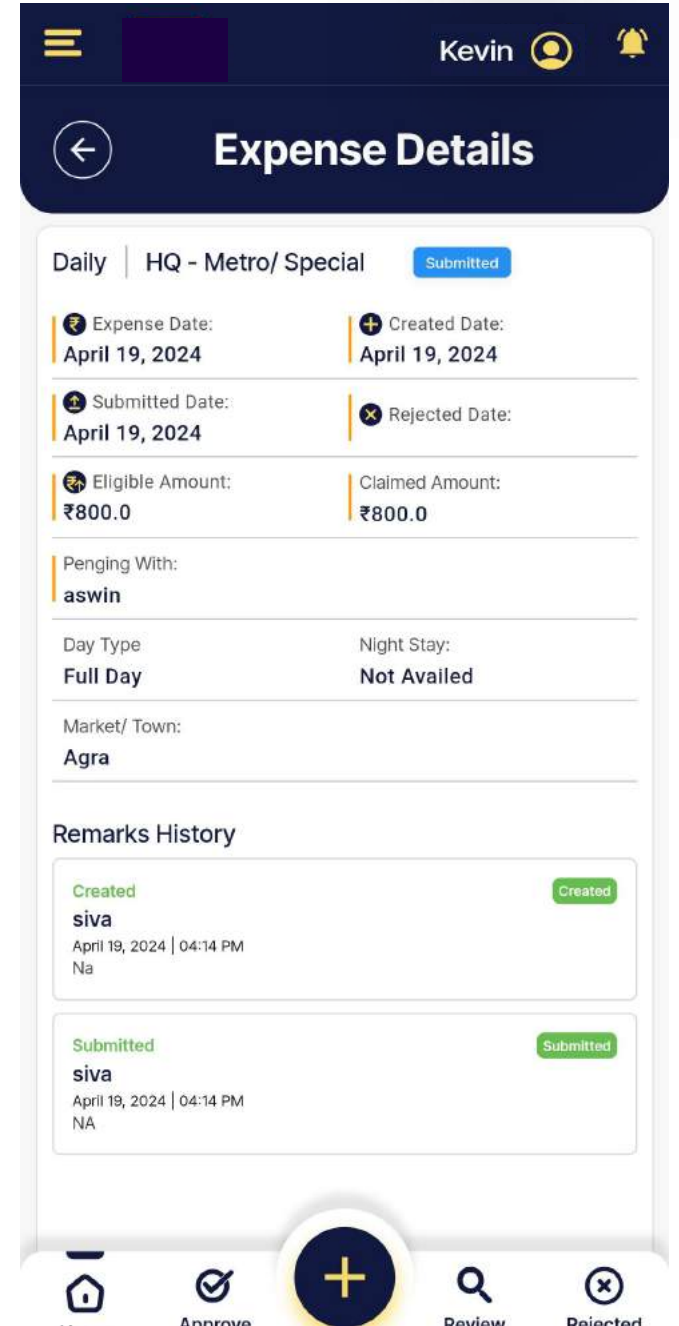


Click on particular expense summary you can see the details



View the status of expenses here

- > Under review
- > Submitted
- > Approved
- > Rejected



View Rejected Expenses & Resubmit

My Dashboard Approver Dashboard

Till Date Specific Month

Pending for Submission ₹123

Current Month Submitted Exp. ₹17086

Current Month Appd. Exp. Amt ₹0

Current Month Rejt. Exp. Amt ₹800

My Claim Status View More

19 Apr, 2024 | ₹17086 In Progress

Approved ₹0 Rejected ₹800 Pending ₹16286

Rejected

April 2024

Total Expenses April ₹800

All Daily Travel Hotel Food MIS Others

Daily Expense | Apr 19, 2024 ₹800.00

Daily | HQ - Metro/ Special Rejected

Expense Date: April 19, 2024 Created Date: April 19, 2024

Eligible Amount: 800.0 Claimed Amount: ₹800.0

Kevin

Expense Details

Daily | HQ - Metro/ Special Rejected

Expense Date: April 19, 2024 Created Date: April 19, 2024

Submitted Date: April 19, 2024 Rejected Date: April 19, 2024

Eligible Amount: ₹800.0 Claimed Amount: ₹800.0

Pending With:

Day Type: Full Day Night Stay: Not Available

Market/ Town: Agra

Remarks History

- Created siva April 19, 2024 | 04:14 PM Na
- Submitted siva April 19, 2024 | 04:29 PM NA
- L1 Approver aswin April 19, 2024 | 05:00 PM u

DELETE EDIT

Home Approve + Review Rejected

Kevin

Create Expense

1 Select your date for the expense

April 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	01 400	02 646	03 234	04 856	05 87	06 56
07 0	08 3022	09 567	10 123	11 67	12 470	13 0
14 0	15 100	16 220	17 3344	18 0	19 800	20 0
21	22	23	24	25	26	27
28	29	30				

2 Choose your Expense Type

Daily Headquarter Metro/ Special

Full Day ₹800.0

3 Add invoice or receipt of your expense.

4 Your remarks

REVIEW SAVE & SUBMIT



Approver Section





Click on Approver Dashboard

A. Pending Requests :

1. Total Pending Requests: Total expense amount of pending requests awaiting your approval.
2. Current Month Pending Requests :Total expense amount of pending requests awaiting your approval for the current month.
3. Till Previous Month Pending Requests: Total expense amount of pending requests from the previous month awaiting your approval.

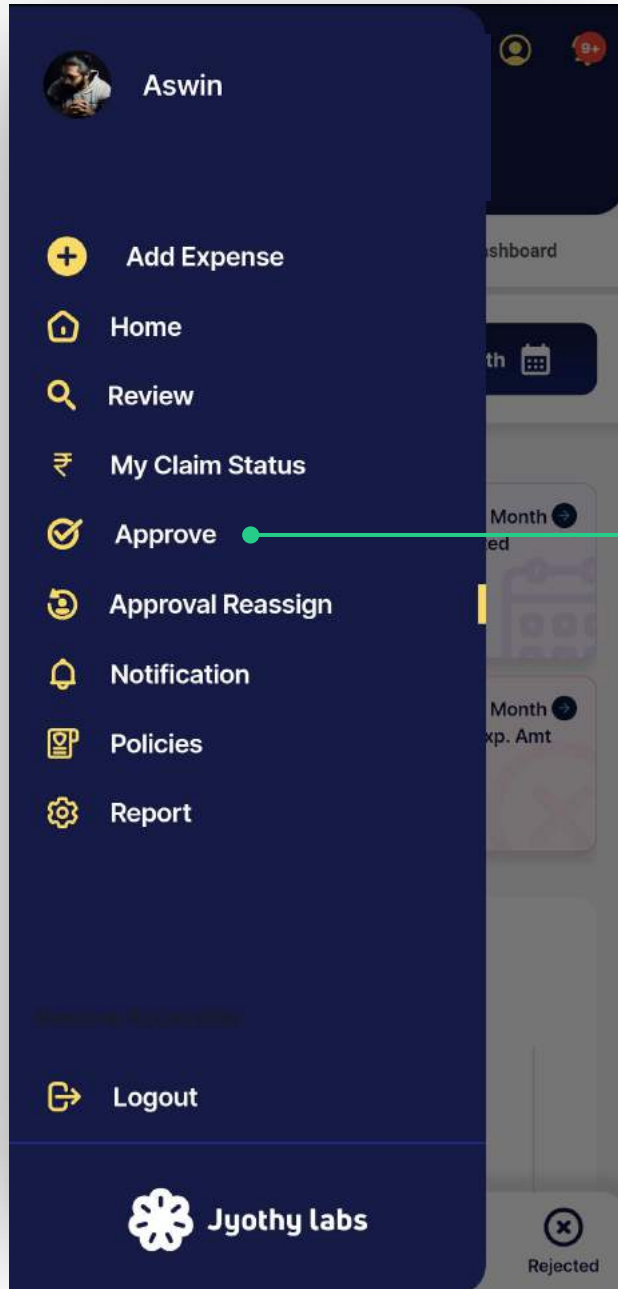
B. Requests & Expenses (For the current month)

1. Pending for the Month : The total employee Count and expense Amount pending for the month.
2. Approved Expenses : Total total employee Count and expense Amount approved for the month.
3. Rejected Expenses : Total total employee Count and expense Amount Rejected for the Month
4. Total Expenses : The total employee Count and expense Amount received for the month..

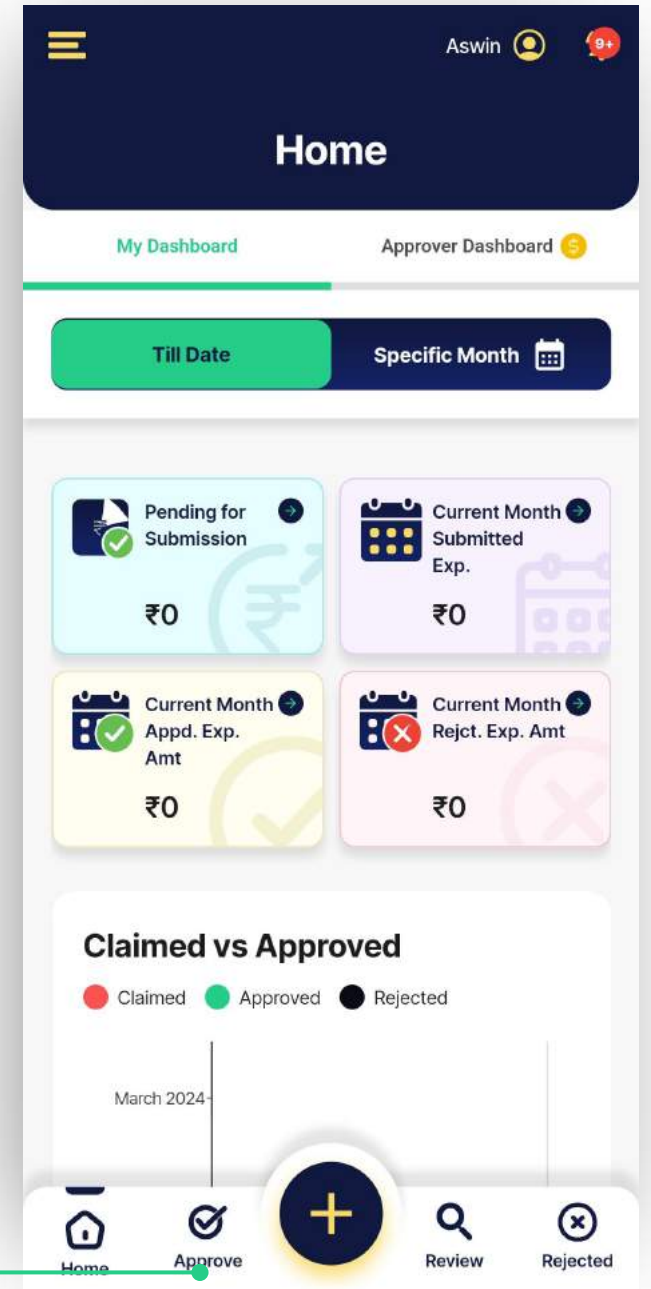
C. Pending Requests :

1. Displays recent pending requests.

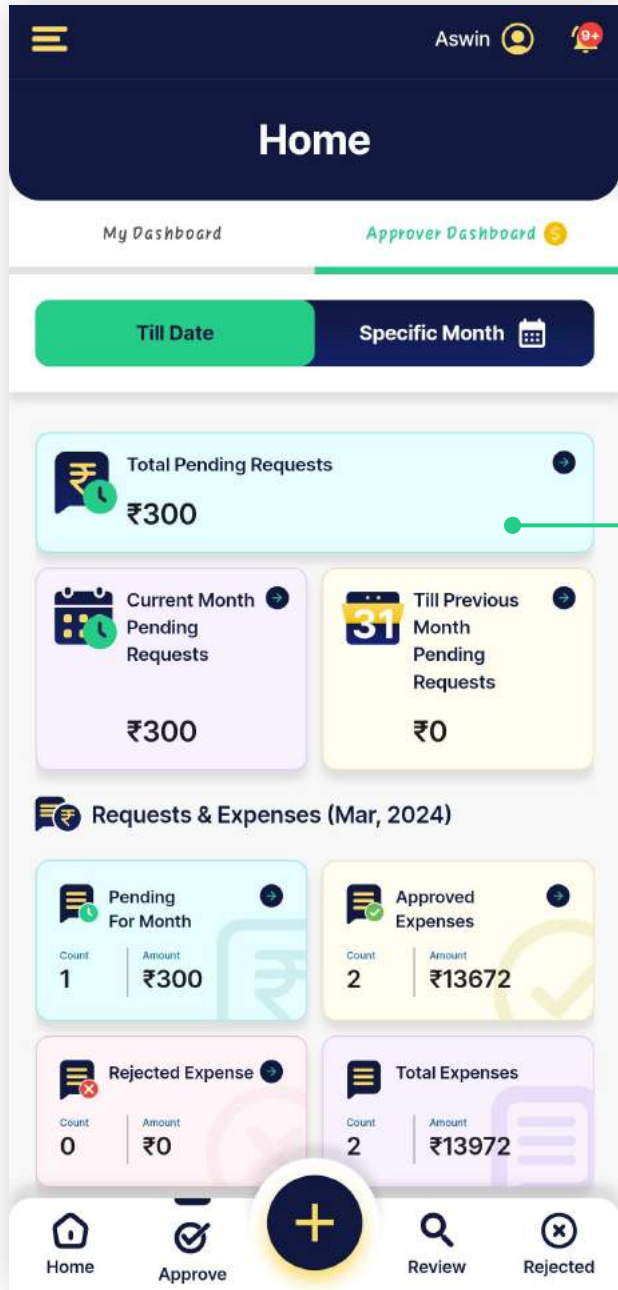
Click to review & Approve



Click on the 'Approve' button to view the list of expenses awaiting approval.



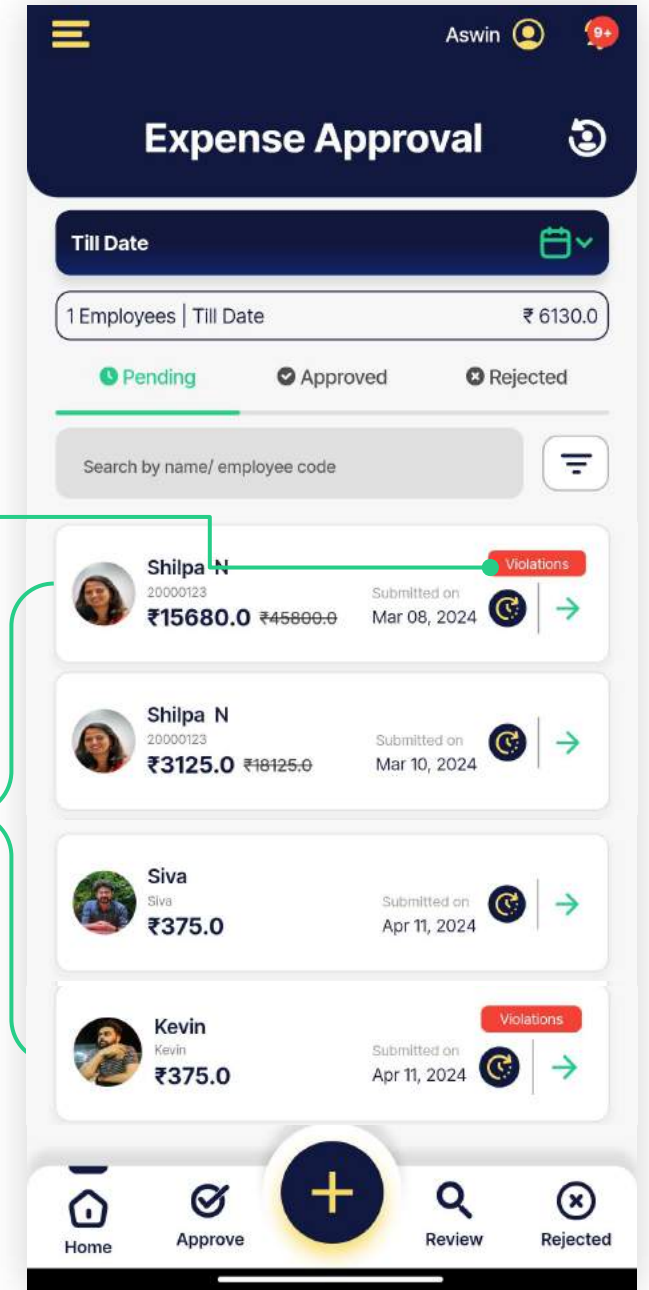
Pending Approval



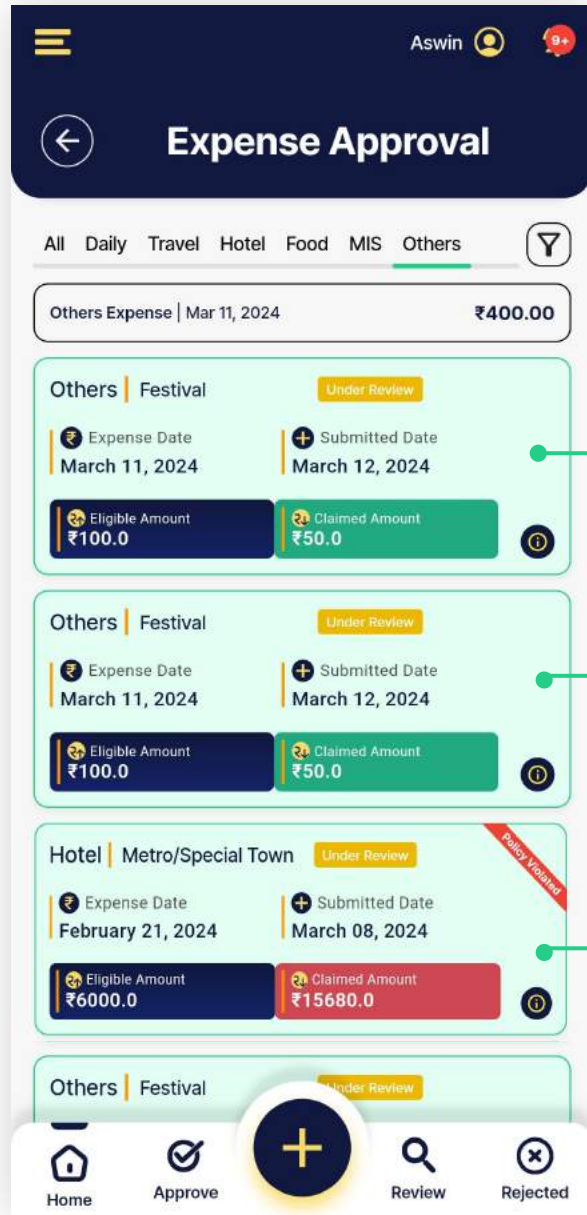
Click on "Total Pending Requests" or "Pending For Month".

The red icon indicates that the policy has been violated

Select the employee.



View and Approve Expense



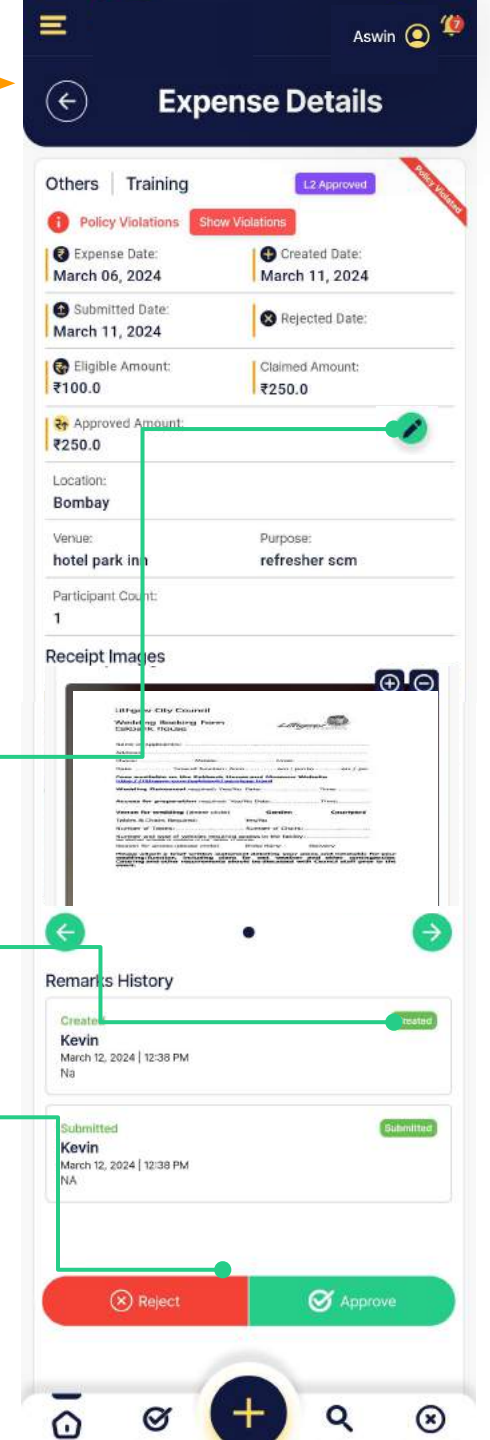
Click on the specific expense to view the details of the expenses requested for approval

Click the Edit icon to edit/adjust the claimed amount if needed.

View the remarks history of the expenses from 'Create' status to 'Approved/Rejected' status

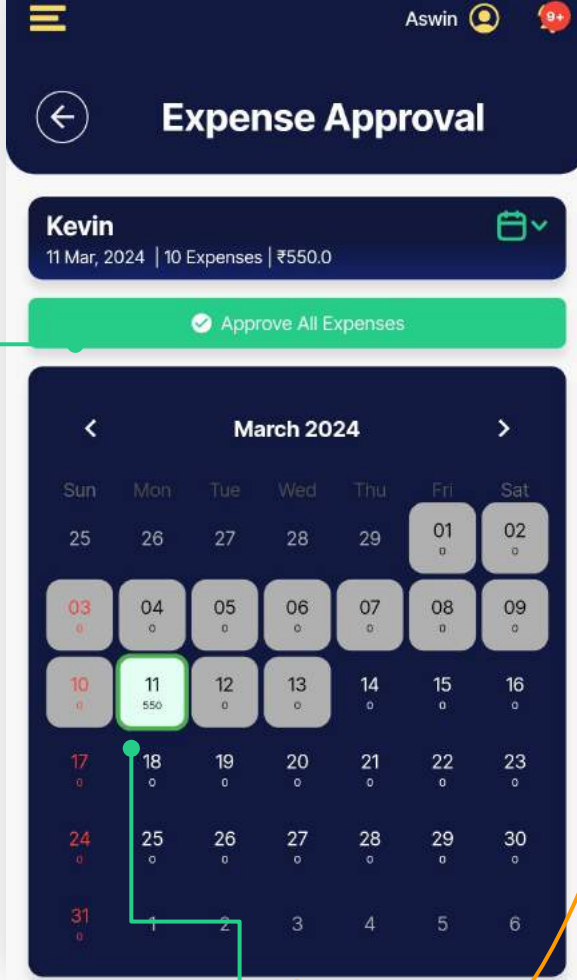
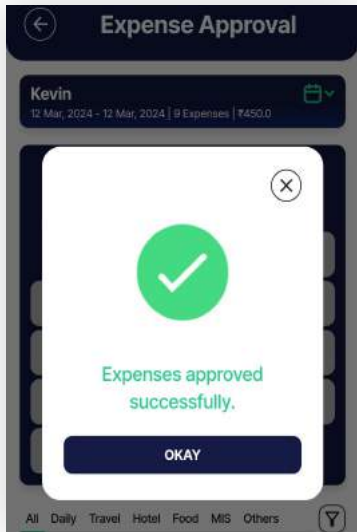
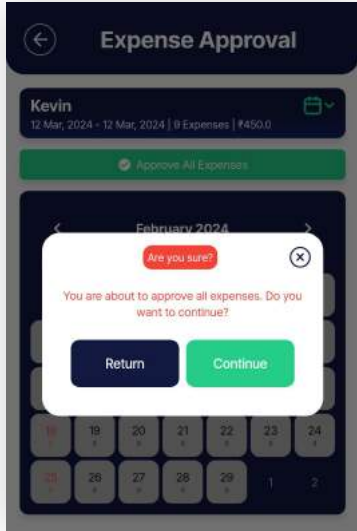
Click Approve or Reject expense

Note : Please review the expense details before approving. Once approved, the action cannot be reverted.



View and Approve Expense

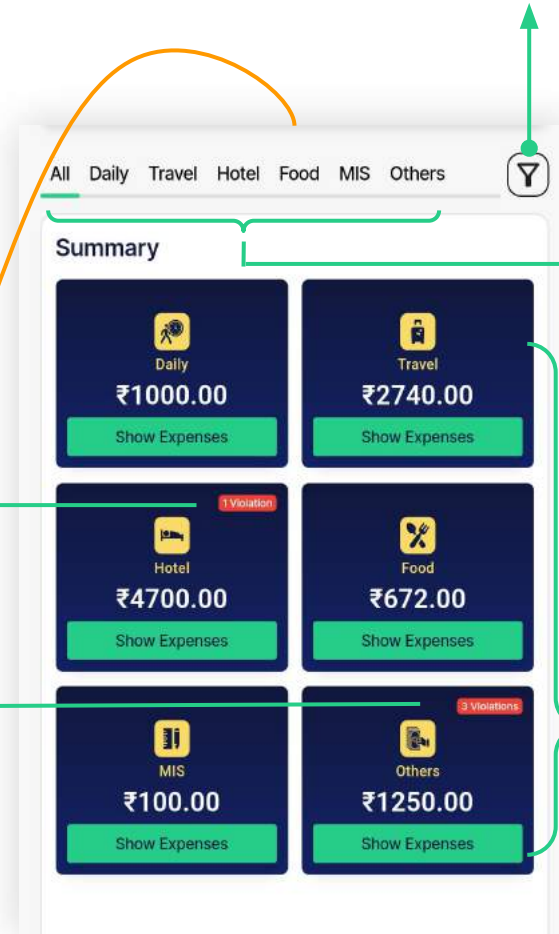
Click "Approve All Expenses" to approve all the requests for the employee.



Select a date to view expenses for the particular date

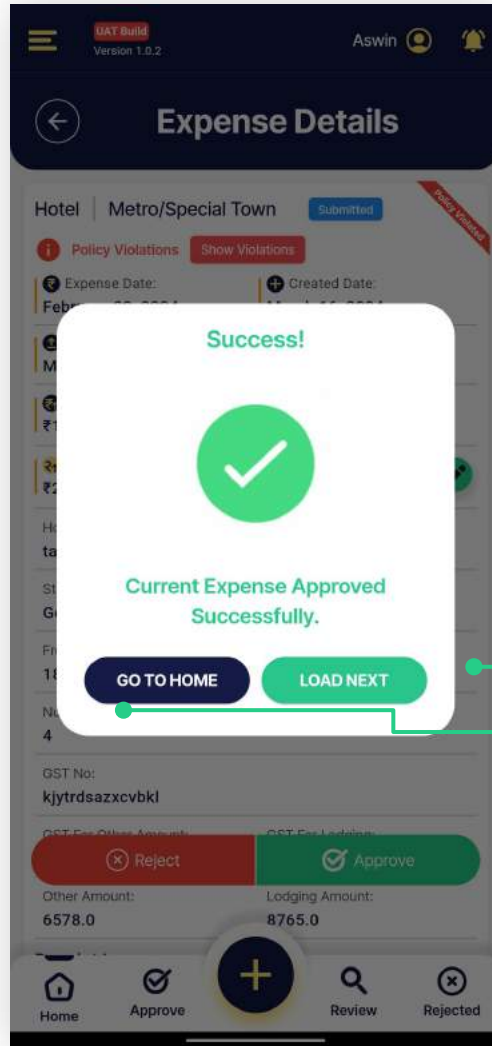
The red icon indicates that the policy has been violated

1. Click on the 'Filter' button or icon.
2. Select the criteria you want to filter by, such as Category, Status, Roles, Date, Amount, Policy Violation. Click 'Apply'
3. To remove the filter and view all expenses again, click on the 'RESET' button."



Summary screen - Can click on individual Expense types to see the details.

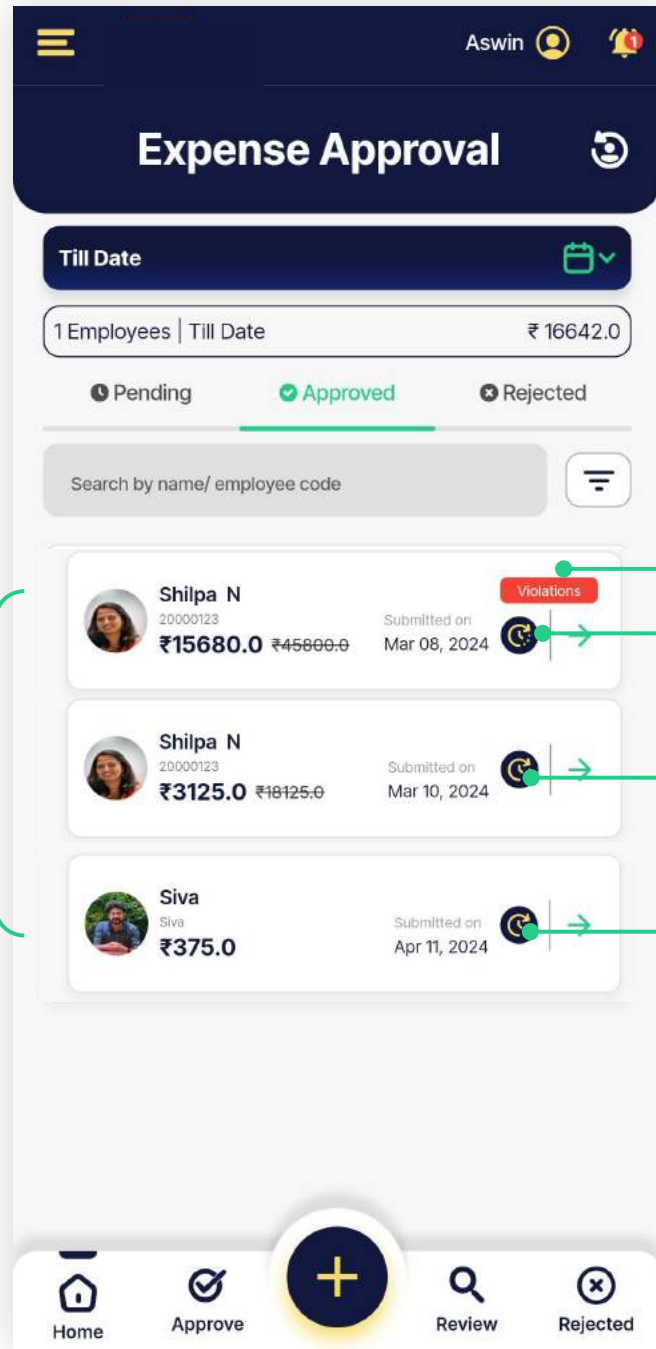
Load Next Action Button



Click 'Load Next' to approve the next Expense request under the same Expense of that Employee.

Click Home to redirect to the dashboard

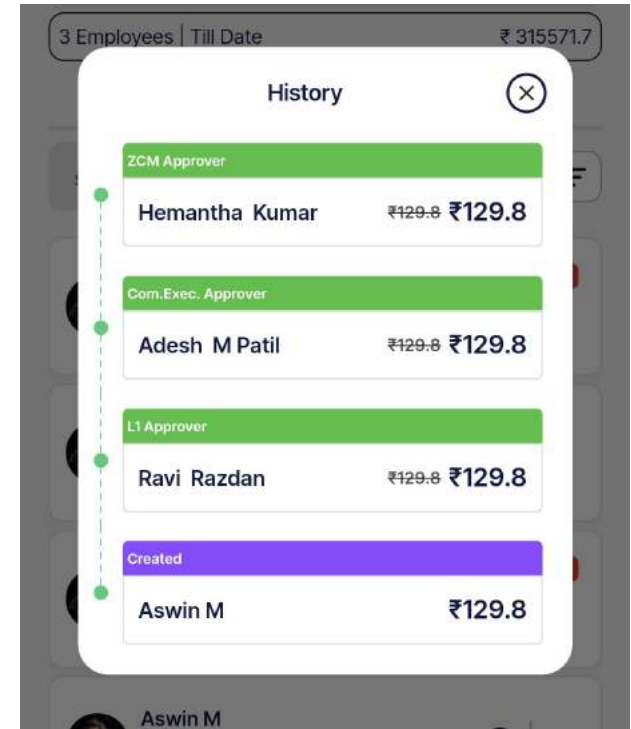
Approved Expenses



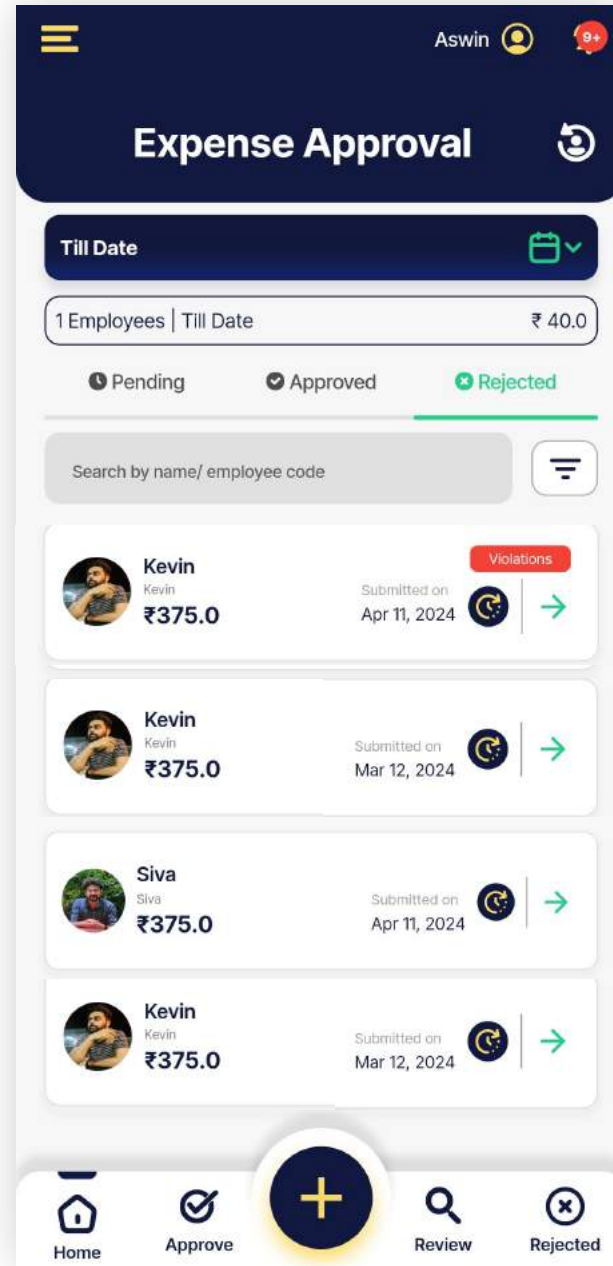
Select the employee to view the details

The red icon indicates that the policy has been violated. (Please note that it has already been approved.)

Click on the icon to view the history



Rejected Expenses



Click on Rejected expense request to view the details



Happy EClaiming 👍 😄