How to Create Expense Claim

This video will show users how to Create Expense Claim

Navigate to HRMS, Expense Claim, Create New.
Fill in Expense Date, Category, Description, Amount.
Click Save when done.

STEP-BY-STEP:
1. Go to HRMS menu
2. Select Expense Claim
3. Click Create New
If user’s login account is linked to the Employee’s record, the Employee will be selected on the header of the new Expense Claim document.
4. Enter mandatory fields in the Expense Claim Items tab: Date, Category, Description, Amount, etc. (mandatory fields in red color or marked with red x)
5. Click the + button on the top right of the table or press ENTER to save the expense claim line item. User can add multiple line items in the same document.
6. For foreign currency, enter the actual amount or exchange rate in the Set Exchange Rate dialog window.
7. Click Save button when done.
On the Notes / Attachments tab, user can add notes or attach receipt / invoice files for reference.
8. Click Submit For Approval button to submit the Expense Claim document.
9. Approving officer / user with access right can approve and post the Expense Claim document.
10. In the Organization module – Default Settings for HRMS, user with access right can set the Tolerance Level percentage for the exchange rate.