



# Online Expenses User Guide

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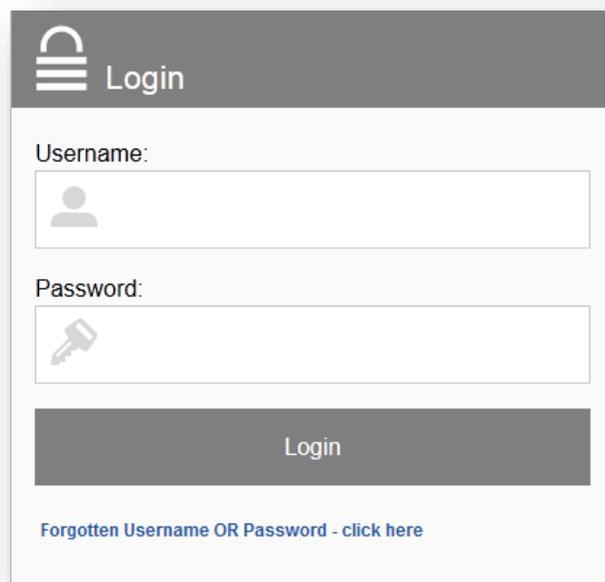
## **Welcome To Online Expenses**

By using Clipper Contracting's online expenses module you will be able to submit expenses electronically via your home computer, tablet or mobile phone using the secure web portal from any location with internet access. You will be able to view your previously submitted expense claims and their associated status.

By using the portal in this way you will be able to track your own expenses from initial creation through to final payment as well as being able to view current and previous payslips and send us messages.

## **Log in to your account**

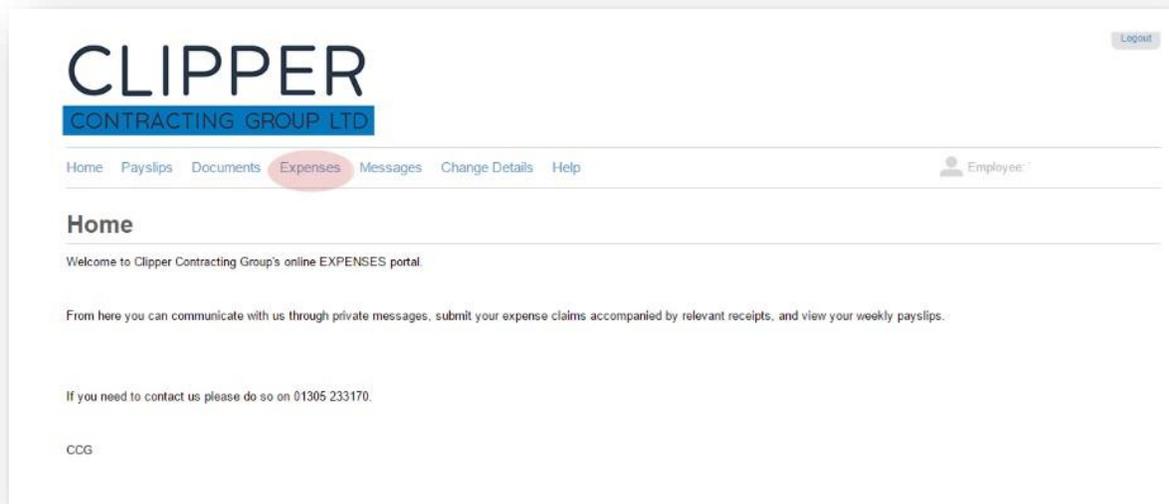
A first time account activation will be emailed to you with a link to take you to your username and to choose a password. If you haven't received this please contact us. Once you have chosen your password it will take you to a web page that looks like the below.



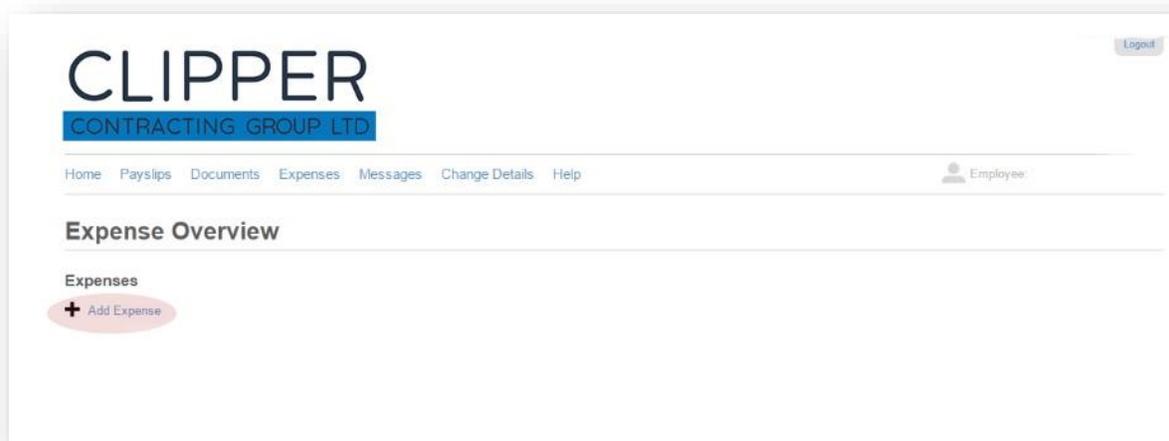
The image shows a login form with a dark grey header containing a padlock icon and the word "Login". Below the header, there are two input fields: "Username:" with a person icon and "Password:" with a key icon. A dark grey "Login" button is positioned below the password field. At the bottom, there is a blue link that reads "Forgotten Username OR Password - click here".

Enter your username and chosen password and you will be taken to the home screen.

## Home screen



Click on the Expenses link (in red above) and you will be taken to the below screen



**To add an expense** click the add expenses button and you will be taken to the next screen

The screenshot shows the 'Expense Entry' form in the CLIPPER system. The form includes fields for Date, Expense (a dropdown menu), Amount, and Description. There is also a Receipt field with a small icon and a checkbox for 'Add another expense'. A 'Save' button is located at the bottom right of the form area.

To submit an expense – firstly click the date box and select the date on which you incurred the expense from the calendar that will appear.

This screenshot shows the 'Expense Entry' form with the 'Expense' dropdown menu open. The menu lists various expense categories such as 'Incidental costs with overnight subsistence', 'Travel', 'Other Travel', 'Subscriptions/Books/Journals and Training Courses', 'Subsistence daily - 5 to 10 hours (E5)', 'Subsistence daily - over 10 hours (E10)', 'Subsistence finish after 8pm (Irregular)', 'Subsistence start before 6am (Irregular)', 'Telephone', 'Tools, Materials, Work Clothes', 'Working away from home Accommodation', and 'Working away from home subsistence'. The 'Travel' option is currently selected and highlighted in blue.

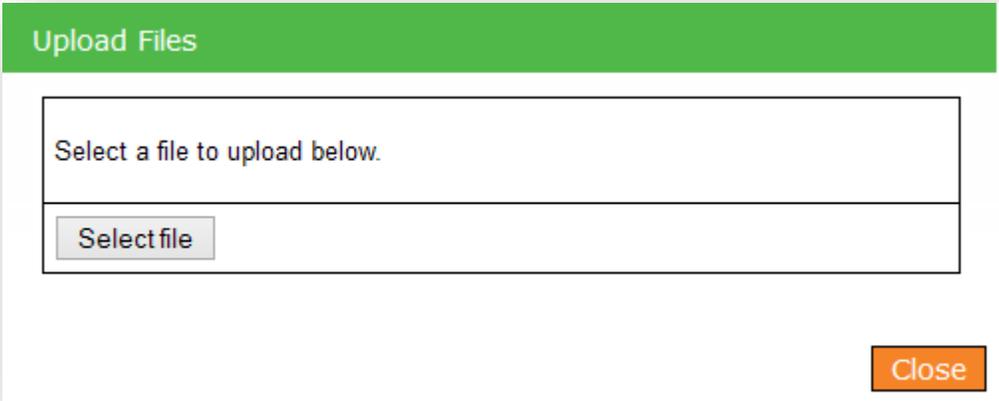
**NOTE** This is the date you incurred the expense, not the date you're filling it in.

Choose your expense type.

Please refer to our Expenses policy for a detailed breakdown of what you can claim and offset.

- Mileage – fill in your car details and your journey details as instructed. These will be remembered the next time you want to enter a mileage claim. Add different journeys to your account as you make them. **Receipt required**

You are able to upload an image of the receipt for the expense you are claiming. This can be done by clicking on the paperclip icon and will generate the following box:



Here you can select a file from your device by clicking select file

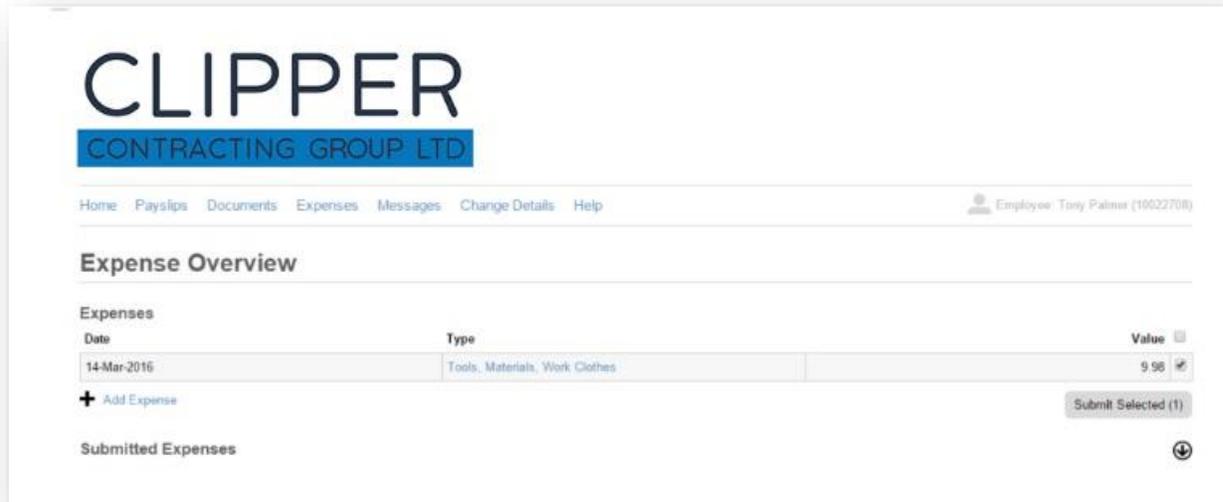


Clicking the upload file button will send the receipt image. When the image has uploaded, click CLOSE.

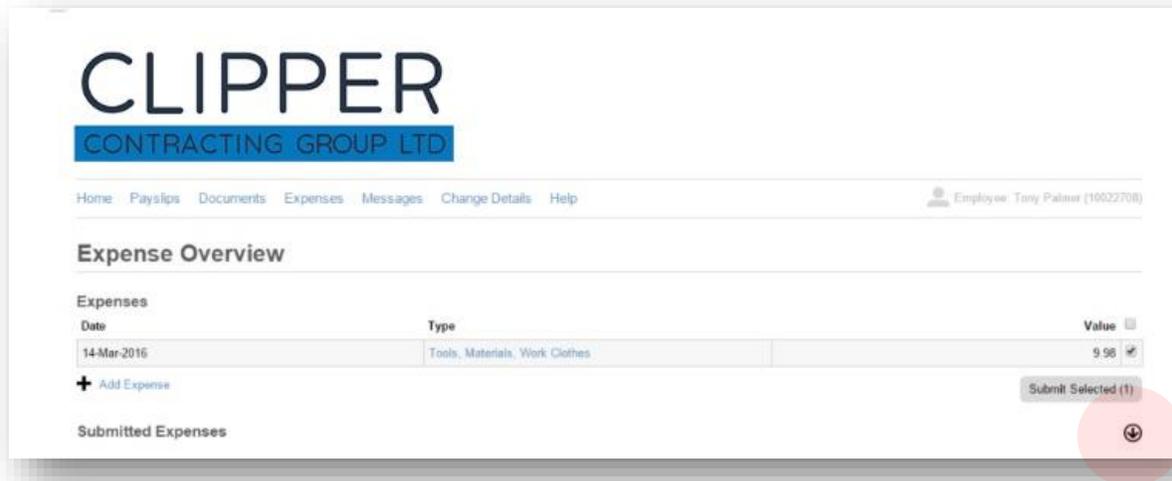
Expenses can be images or PDF files under 10MB in size, but not documents such as Microsoft Word or Excel.

Clicking the 'Save expense' button at the bottom will save the expense for later completion.

**Your expense claim will not be submitted until you have saved it AND clicked the lock and submit button which will be visible after you have saved the expense. See below diagram.**



### **View Submitted Expenses**



By clicking the arrow you can check your submitted expense and check its status

# CLIPPER

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Employee: Tony Palmer (10022708)

## Expense Overview

### Expenses

Date	Type	Value
14-Mar-2016	Tools, Materials, Work Clothes	9.98

+ Add Expense

Submit Selected (1)

### Submitted Expenses

Submitted Date	Group ID	Status
14-Mar-2016	661341	Submitted

The status of your expenses are shown on the right hand side.

- Orange – Submitted, awaiting approval
- Green – approved
- Red – not approved. You'll see a message with the reason for the rejection.