Frequently occurring notifications in expense claims

Red notification - Out of policy/location of stay does not match.
In order to process the expense claim correctly, hover the mouse over the red notification to read what needs to be changed.

In this case, the location entered does not match the location where you stayed.
Open the line by clicking the expense category, and change the destination to the correct location.

Click (1) 'Save' and (2) 'Close'.

View
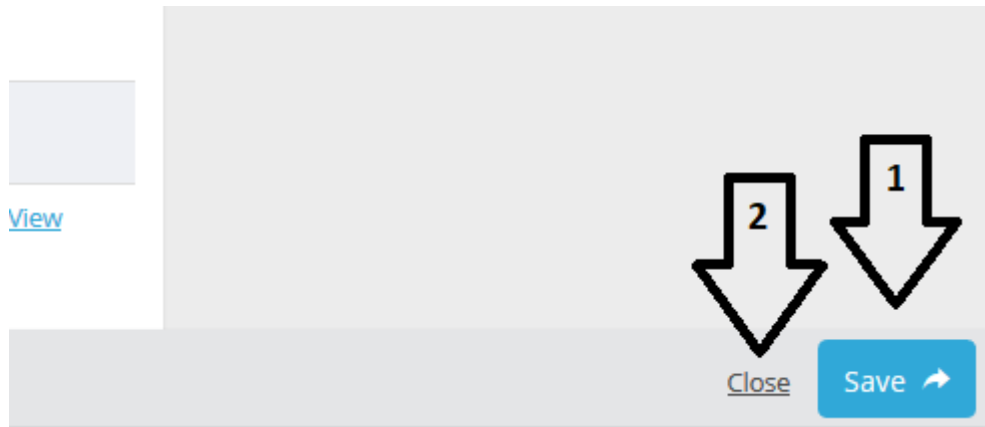
Red notification - Out of policy/for this expense category, approval and a comment are required.

Explanation: If the hotel costs more than the standard rate, the expense claim must include a reason.

Open the expense claim by clicking the relevant field (in this case 'Hotel name').

1. Enter the reason in the 'Comment' field.
2. Click the checkbox to confirm that the competent authority has approved exceeding the standard rate.

'vinkje' te zetten.

ⓘ Hotel name | ⓘ City/Town

SOFITEL MADRID | MADRID

ⓘ Country/City

🇪🇸 Madrid

Gross total amount ⓘ | ⓘ Quantity

560.00 | EUR | 3

ⓘ Comment

due to a conference in this period all hotels were overpriced
ok from manager Jan Jansen to book at this price

Delete this receipt

Expense Details ⓘ

ⓘ From

24/03/2020

ⓘ Until

27/03/2020

Additional info ⓘ

Breakfast: ⓘ

Inclusief

Hotel paid by: ⓘ

Reiziger

Approval manager on costs ⓘ

☑

Status Travel Request

| Transaction date | 27/03/2020 0:00:00 | Payment method: | Other |
| Posting date | 20/03/2020 10:33:00 | Status Travel Request: | Draft |

Then click (1) 'Save' and (2) 'Close'.

View

Close   Save →
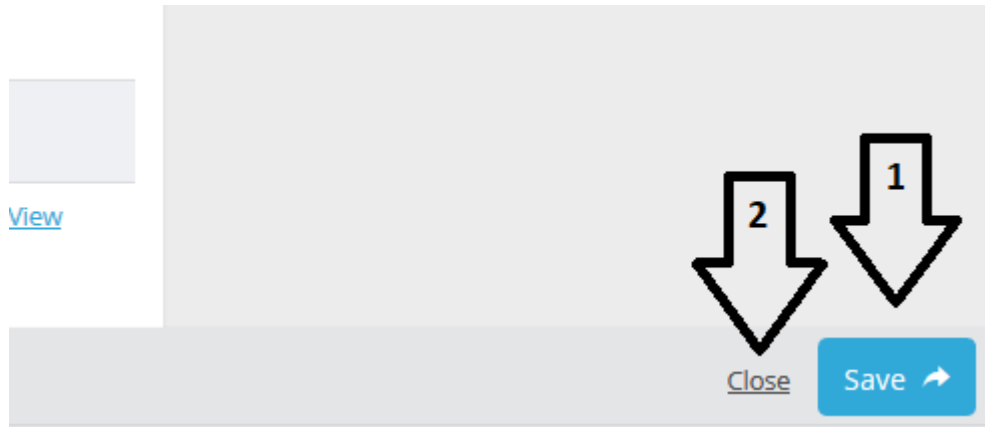
The notification in the Transaction List is now coloured orange.

However, this is only a notification and by no means an obstacle to submitting the claim for approval.

538615 - Madrid dienstreis
Reference: 1002-21670 | Company: TEM 3W Cytric

From	Until
09/03	27/03
2020	2020

Approver(s)	Total Amount	Amount to be reimbursed	# Transactions
Alexander Christian Kofman	589.00 EUR	589.00 EUR	4

Opmerking van de declarant

Enter comment here

⊖ Transaction List ⊙

		Date (dd/mm/yyyy) ⯆	Country/City ⯆	Expense Category ⯆	Type	Quantity ⯆	Unit price	Paid amount ⯆		Approval	Control		
☐	◯	10/03/2020	🇳🇱 Netherlands	Other - Passport/Visa costs	🗐	1	15.00 EUR	15.00 EUR 15.00 EUR	✅	✎ Draft	✎ Draft	ⓘ	⌄
☐	◯	27/03/2020	Madrid	Other - Daily allowance	🛄			0.00 EUR	⚠	✎ Draft	✎ Draft	ⓘ	⌄
☐	◯	27/03/2020	Madrid	Hotel - Hotel incl taxes (cost for department)					⚠	✎ Draft	✎ Draft	ⓘ	⌄
☐	◯	27/03/2020	Madrid	Transport - Transport airport / station - meeting				14.00 EUR	✅	✎ Draft	✎ Draft	ⓘ	⌄

Info/Transaction data   **Amount**   **Comment**   ✕

⚠ Out of policy   0.00 EUR   Transaction not within travel period(
(View Rule));

➕ Add a new Expense ⯆

At the top of the screen, you will see 'In accordance with policy' (*Conform beleid*). This means that you can now submit the expense claim.

Expenses

Costs to be allocated

New expenses

New mileage own transportation.

New allowances

Reports

Personal expenses

Search 🔍

Reports

✏️ 🖨️ ➡️ ✅ ✕

✅ Conform beleid ⬅️

Uw declaratie is klaar om verzonden te worden !

From	Until
09/03	27/03
2020	2020

538615 - Madrid dienstreis
Reference: 1002-21670 | Company: TEM 3W Cytric

Approver(s) Alexander Christian Kofman	Total Amount 589.00 EUR	Amount to be reimbursed 589.00 EUR	# Transactions 4

Opmerking van de declarant

Enter comment here

⊖ **Transaction List** ⓘ