



Employee Guide -
Submitting Expenses

v1.0 Sep 2018

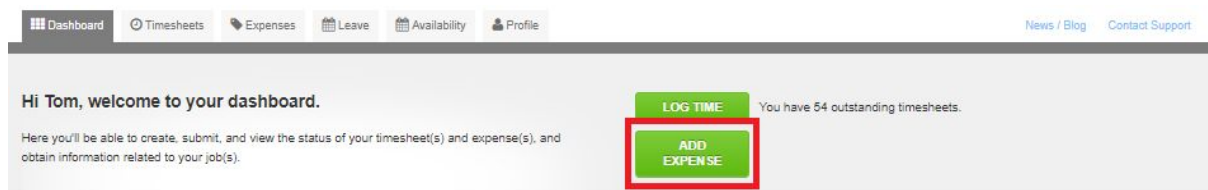
Step 1: Logging In

The first step is to log into your Astute Payroll account.

The image shows the Astute Payroll login interface. At the top is the 'astutepayroll' logo. Below it are two input fields: 'Username' and 'Password'. The 'Username' field has a cursor inside. Below the password field is a 'Remember Me' checkbox which is checked. To the right of the checkbox is a green 'Log In' button. At the bottom of the login box are two links: 'Forgot Password' and 'Contact Support'.

Step 2: Navigate to the Expense tab

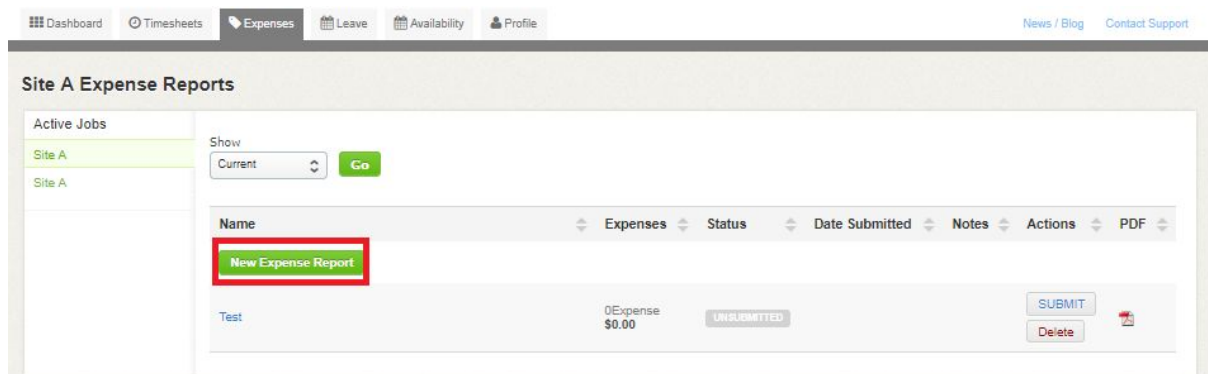
Once the browser logs you in, your Dashboard will display. On the right of your screen, click the green 'Add Expense' box.

The image shows the top section of the dashboard. The header has a menu with 'Dashboard' (selected), 'Timesheets', 'Expenses', 'Leave', 'Availability', and 'Profile'. On the right of the header are links for 'News / Blog' and 'Contact Support'. Below the header, a welcome message says 'Hi Tom, welcome to your dashboard.' followed by a description of the dashboard's functionality. To the right of the message are two green buttons: 'LOG TIME' and 'ADD EXPENSE'. The 'ADD EXPENSE' button is highlighted with a red rectangle. A notification next to the buttons says 'You have 54 outstanding timesheets.'

You can also click the Expenses tab in the header menu of your Dashboard.

Step 3: Create a New Expense Report

Clicking 'Add Expenses' will navigate to a page that displays your expense reports. Click on 'New Expense Report'.

The image shows the 'Site A Expense Reports' page. On the left is a sidebar with 'Active Jobs' and 'Site A' listed. The main area has a 'Show' dropdown set to 'Current' with a 'Go' button. Below this is a table with columns: Name, Expenses, Status, Date Submitted, Notes, Actions, and PDF. The first row in the table has a 'New Expense Report' button highlighted with a red rectangle. Below the table, there is a summary row showing '0 Expense \$0.00' and an 'UNSUBMITTED' status. At the bottom right are 'SUBMIT' and 'Delete' buttons.

If no expense reports have previously been created, you will not see the New Expense Report option and can move straight onto step 4.

Step 4: Name the Expense Report

Enter a name for the expense report in the Name field, then click Save. After you have clicked save, click on the report name.

Site A Expense Reports

Active Jobs

- Site A
- Site A

Show: Current Go

Name: Expenses Test SAVE

Test 0 Expense \$0.00 UNSUBMITTED SUBMIT Delete

Step 5: Add an Expense

To add an expense, select New Expense from the top right corner.

Expenses Test

New Expense Submit Report

Report Notes

Save Notes

A separate line can be added to the expense report for each relevant expense. In this screen, you will be able to add any necessary notes to your report.

Step 6: Enter the Expense Details

The expense details will need to be entered in and saved before any supporting documents (eg receipts, approval emails) can be attached.

Make sure that the data is correct, then type in the Amount and select a category. The Tax Amount will calculate automatically based on the option you have selected in the Tax Type drop down field. Once the expense details are recorded, click Save.

Dashboard Timesheets Expenses Leave Availability Profile News / Blog Contact Support

< Back Expenses Test New Expense Submit Report

Active Jobs
Site A
Site A

Date: 1.10.2018 Amount: \$10 Tax Type: GST Tax Amount: \$0.91 Category: None Project: Save the expense before attaching files. Save Delete

Report Notes
Sample sample sample Save Notes

Step 7: Attach Your Documents

Once the expense is saved, click the 'files' button in the Attachments column to attach your supporting documents. Click 'Upload a File', then select the required file and attach.

Dashboard Timesheets Expenses Leave Availability Profile News / Blog Contact Support

< Back Expenses Test Expense saved successfully. New Expense Submit Report

Active Jobs
Site A
Site A

Date: 1.10.2018 Amount: \$10.00 Tax Type: GST Tax Amount: \$0.91 Category: None Project: files... Edit Delete

Files that have been successfully attached will list in the Attachments column. These can be viewed by clicking on the file's name or deleted by clicking the red 'x'.

Dashboard Timesheets Expenses Leave Availability Profile News / Blog Contact Support

< Back Expenses Test New Expense Submit Report

Active Jobs
Site A
Site A

Date: 1.10.2018 Amount: \$10.00 Tax Type: GST Tax Amount: \$0.91 Category: None Project: Upload a File 1c.PNG x Edit Delete

For each receipt, create a new expense within the report you've created.

Step 8: Submit the Expense Report

Once the required expenses have been entered and you've attached the documents, you can submit the report by clicking Submit Report.

Dashboard Timesheets Expenses Leave Availability Profile News / Blog Contact Support

< Back Expenses Test Expense saved successfully. New Expense Submit Report

Active Jobs
Site A
Site A

Date	Amount	Tax Type	Tax Amount	Category	Project	Notes	Attachments	Actions
1.10.2018	\$10.00	GST	\$0.91	None			files...	Edit Delete

Step 9: Confirm the Expense Report Status

Your browser will refresh and return to the Expense Reports list, showing the report that you have submitted with a status of Awaiting Approval.

Dashboard Timesheets Expenses Leave Availability Profile News / Blog Contact Support

Site A Expense Reports

Active Jobs
Site A
Site A

Show
Current Go

Name	Expenses	Status	Date Submitted	Notes	Actions	PDF
New Expense Report						
Expenses Test	1Expense \$10.00	AWAITING APPROVAL	01.10.2018			