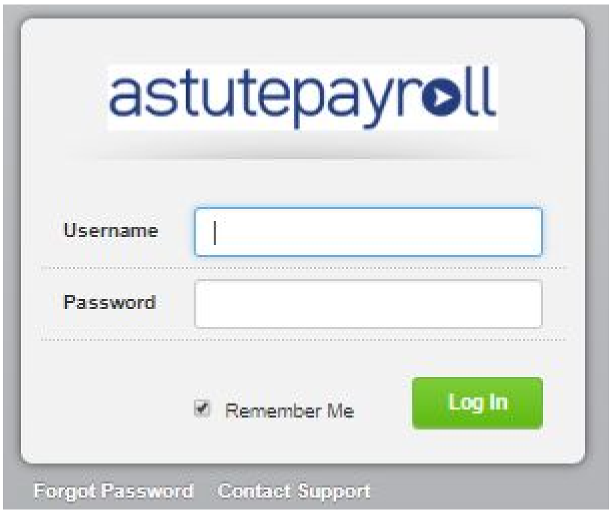
astutepayroll

Employee Guide - Submitting Expenses

v1.0 Sep 2018

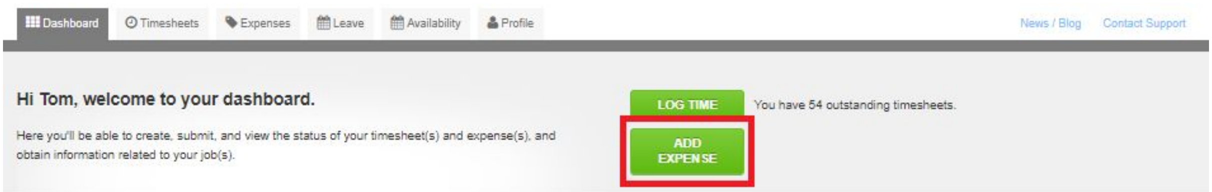
Step 1: Logging In

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



Step 2: Navigate to the Expense tab

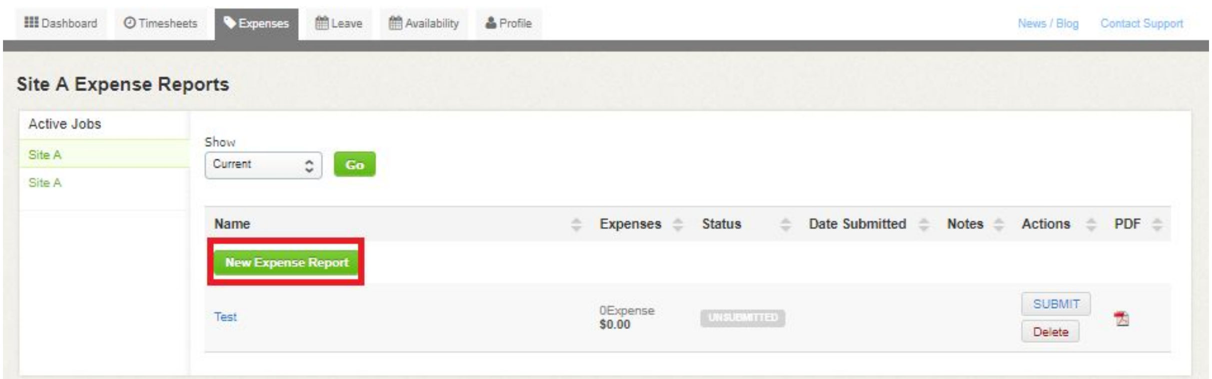
Once the browser logs you in, your Dashboard will display. On the right of your screen, click the green 'Add Expense' box.



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

Step 3: Create a New Expense Report

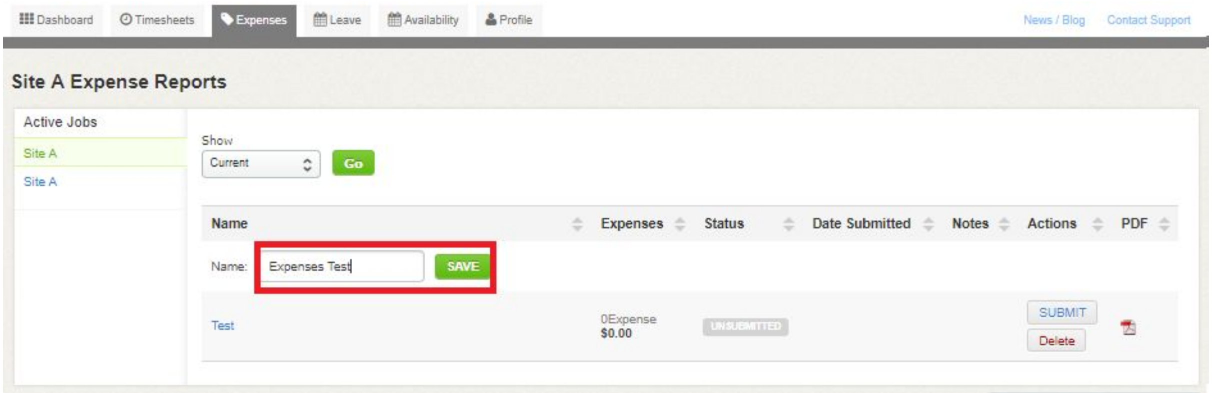
Clicking 'Add Expenses' will navigate to a page that displays your expense reports. Click on 'New Expense Report'.



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

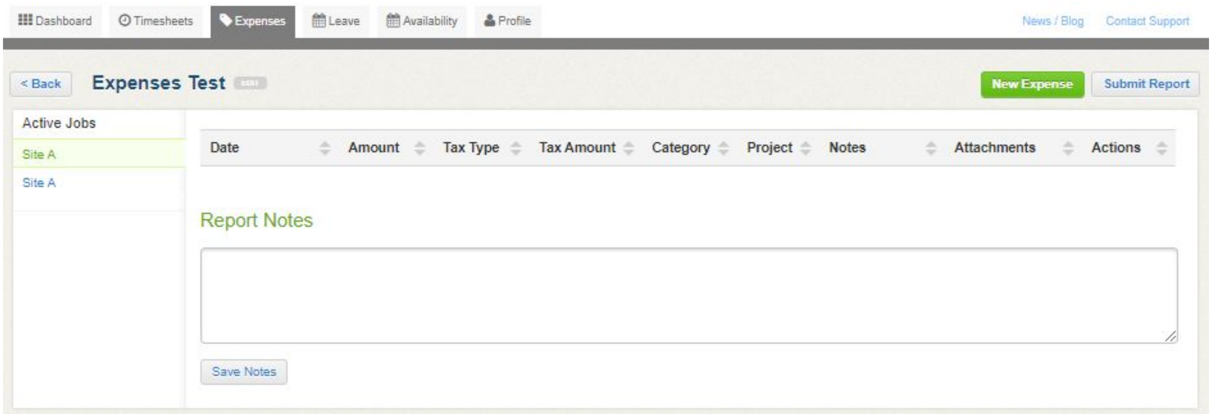
Step 4: Name the Expense Report

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



Step 5: Add an Expense

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

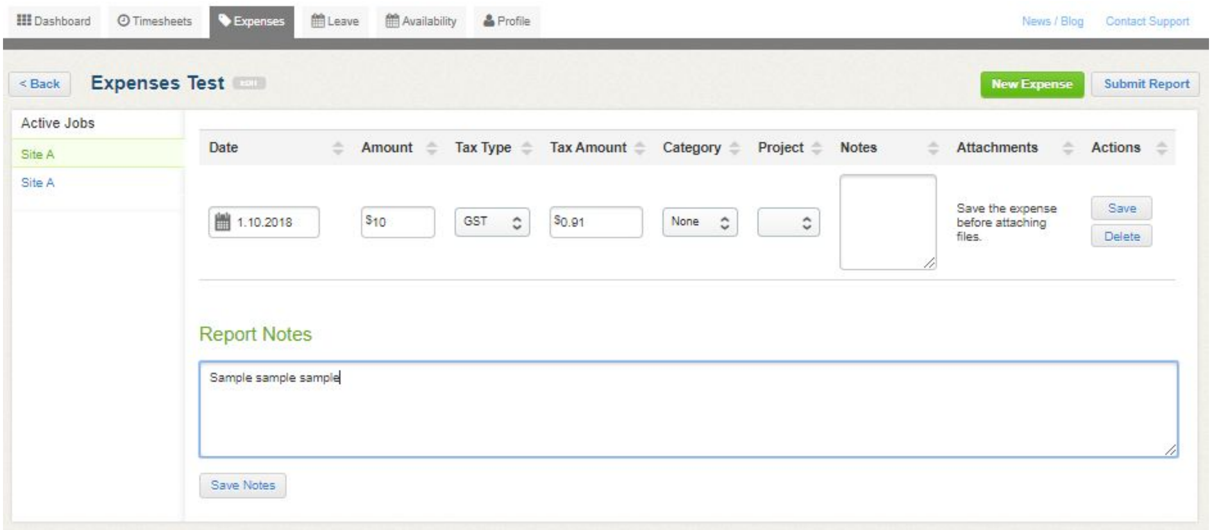


A separate line can be added to the expense report for each relevant expense. In this screen, you will be able to add any necessary notes to your report.

Step 6: Enter the Expense Details

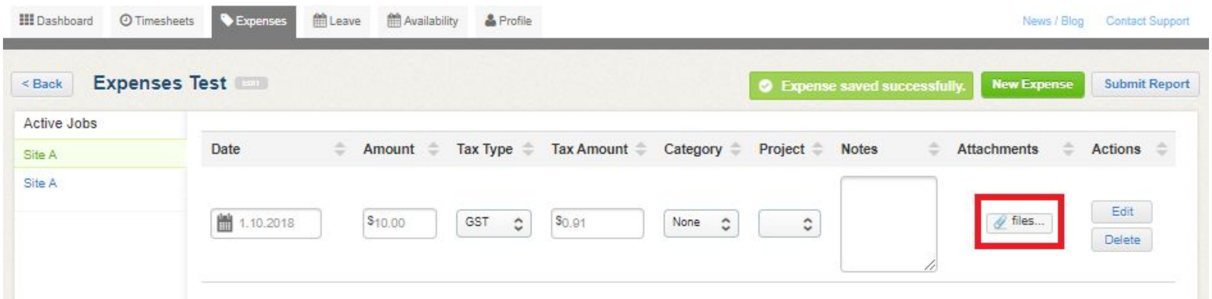
The expense details will need to be entered in and saved before any supporting documents (eg receipts, approval emails) can be attached.

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.

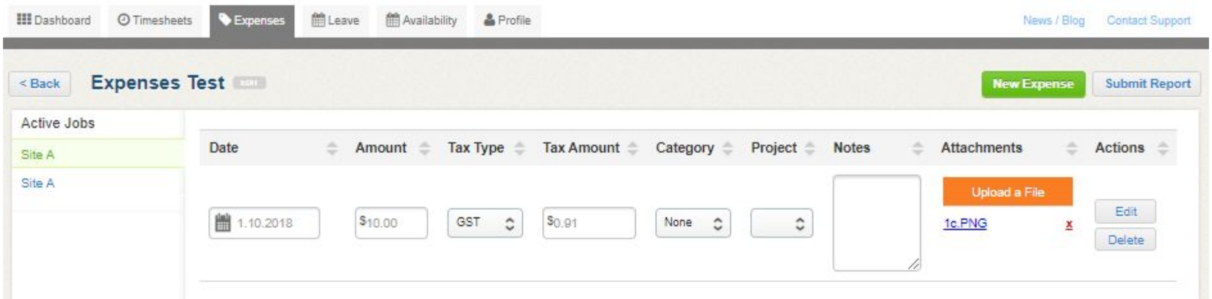


Step 7: Attach Your Documents

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.



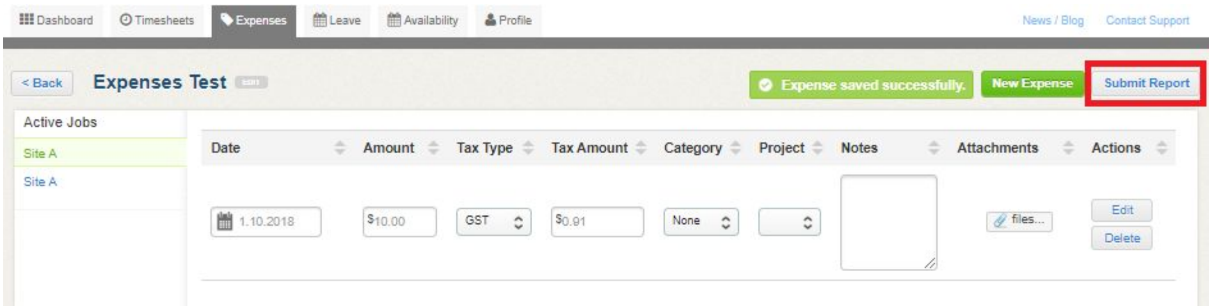
Files that have been successfully attached will list in the Attachments column. These can be viewed by clicking on the file's name or deleted by clicking the red 'x'.



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.



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.