Raising an expense claim in Proactis 2014.

Click on the expense tab followed by create an expense claim

All expense claims need a title.

The currency will default to pounds sterling so you may wish to change this and if claiming on behalf on someone else change the claimant user.

In the left menu you will see these options, first pre-set the account codes you are going to use to save you from having to do this line by line. Click on defaults.

Enter the Element 2 and 3 codes only as the element 1 will pull through when you select the expense item. Then click store and apply nominal.
Now add your claim lines.

If you leave the item search boxes blank and click on search you will get a list of items you are able to add.

You can add an item by clicking the basket at the side of the description. When you have selected all the items you need click the return selected items button.

If you want to add the account codes line by line or change any of them from the default code you set previously, go to the “coding” tab for the item.
Here you can change the element 2 and 3 codes if you wish.

Mileage lines are now grouped together

You enter the date of the travel, put from and where detail and the number of miles. Choose the mileage rate and if it was a single or return journey

When complete click on OK

When your claim is complete you can submit
Don’t forget that you will need to send any receipts with a printed version of your claim to your finance office and once authorised THEY will need to send on to the payroll office.