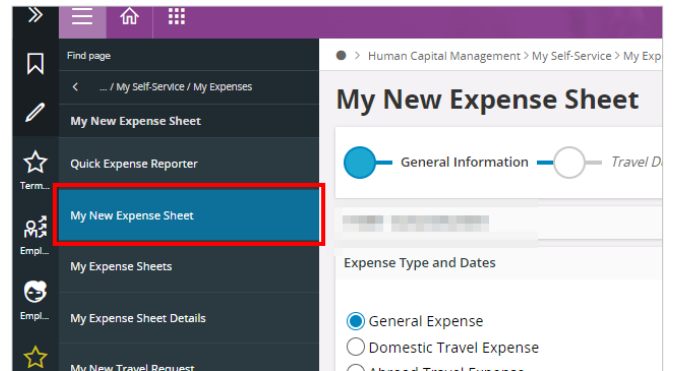
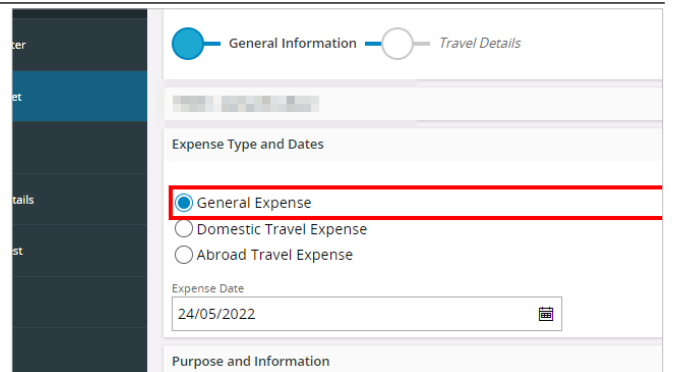


## How to create a new expense sheet

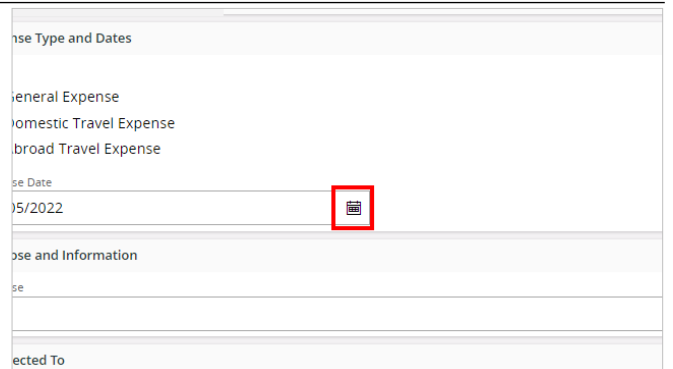
Click on **My New Expense Sheet** or click on the link **my IFS Self Service** from your home/Lobby page (submit New Expense)



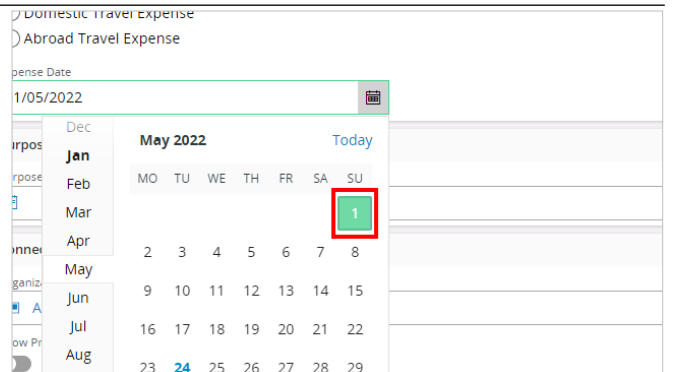
Click on **General Expense**



Click on the calendar button

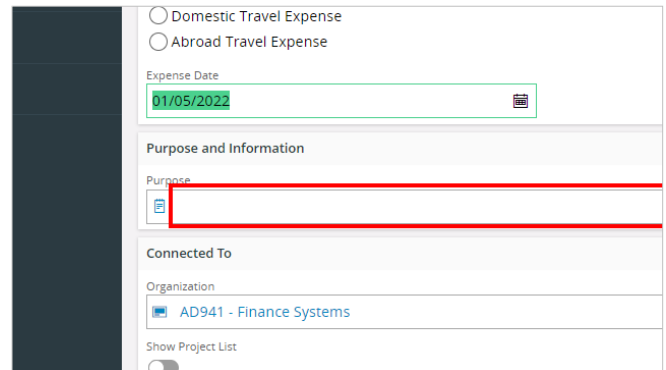


Select the date for the expense period, usually the first day of that month



## How to create a new expense sheet

Click on the **Purpose** field



Domestic Travel Expense  
Abroad Travel Expense

Expense Date  
01/05/2022

Purpose and Information

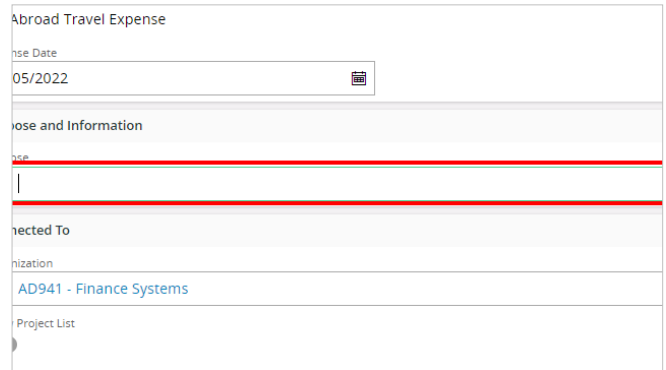
Purpose  
[Redacted]

Connected To

Organization  
AD941 - Finance Systems

Show Project List

Enter the reason for the claim, for example **Expenses for May 2022**.



Abroad Travel Expense

Expense Date  
05/2022

Purpose and Information

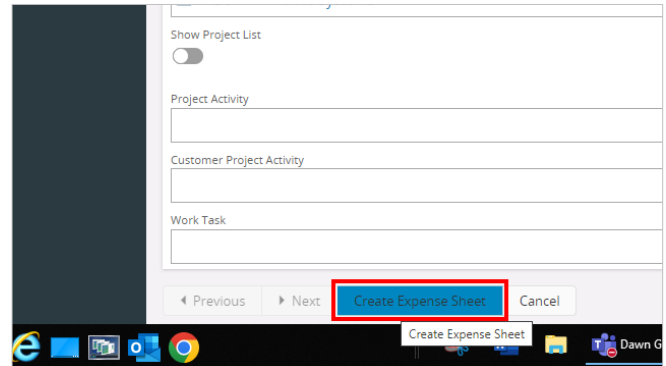
Purpose  
Expenses for May 2022

Connected To

Organization  
AD941 - Finance Systems

Project List

Click on **Create Expense Sheet**



Show Project List

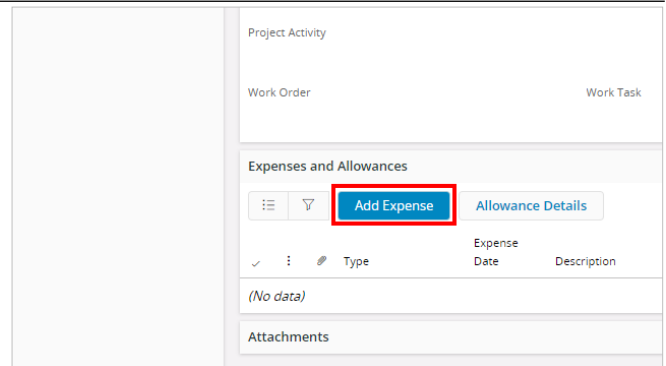
Project Activity

Customer Project Activity

Work Task

Previous Next Create Expense Sheet Cancel

Click on the button **Add Expense**



Project Activity

Work Order

Work Task

Expenses and Allowances

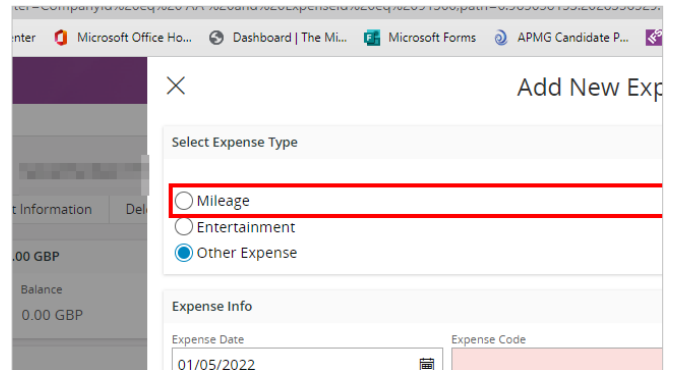
Add Expense Allowance Details

✓	:	Type	Expense Date	Description
(No data)				

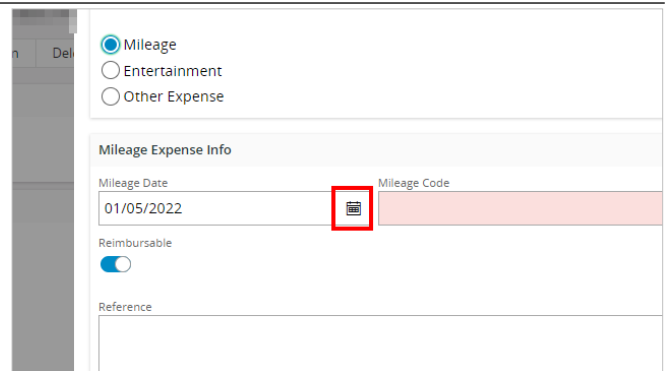
Attachments

## How to create a new expense sheet

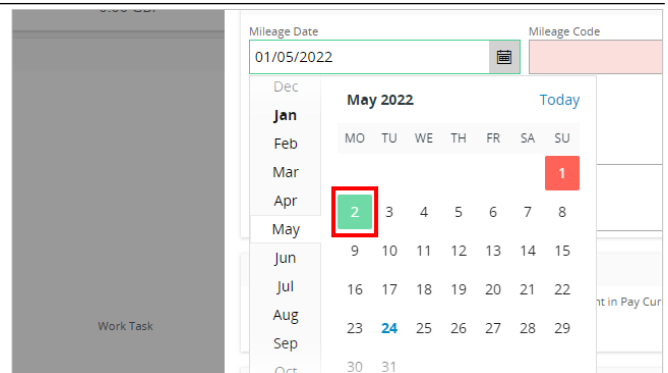
Select **Mileage**



Click on the **Mileage Date**



Select the date for this line of the claim



Click on the dropdown button for **Mileage Code**



## How to create a new expense sheet

Select the mileage code

	Midcounties Vehicle Diesel 1600 cc or less MCC DIE A
	Additional Passengers for MCC Vehicles ADDPASSMCC
Price	PO / Retail Delivery Driver Rate DELIVERIES
	Midcounties Vehicle Diesel 1601-2000 cc (Description) MCC DIE B (code)
	Midcounties Vehicle Diesel over 2000cc
Price Systems	

Make sure reimbursable is slide to the right

Reimbursable Amount - 0.00 GBP	<input type="radio"/> Entertainment <input type="radio"/> Other Expense
Balance 0.00 GBP	<b>Mileage Expense Info</b> Mileage Date: 02/05/2022 Reimbursable: <input checked="" type="checkbox"/>
	Reference
	Mileage Amounts

Click on the **Reference** field

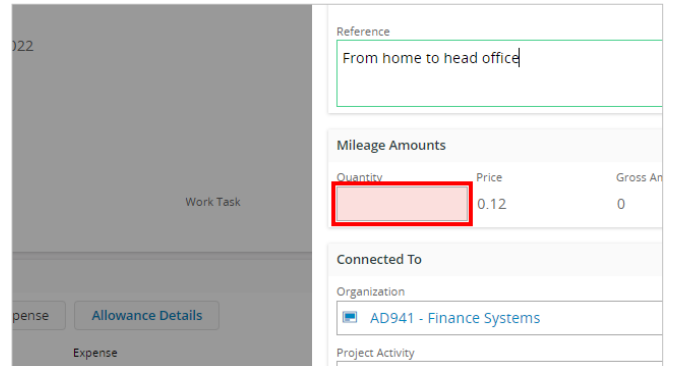
0.00 GBP	<b>Mileage Expense Info</b> Mileage Date: 02/05/2022 Mileage Code: MCC DIE B - Midcounties Vehicle Diesel Reimbursable: <input checked="" type="checkbox"/>						
	Reference						
	Mileage Amounts						
Work Task	<table border="1"> <thead> <tr> <th>Quantity</th> <th>Price</th> <th>Gross Amount in Pay Curr.</th> </tr> </thead> <tbody> <tr> <td></td> <td>0.12</td> <td>0</td> </tr> </tbody> </table>	Quantity	Price	Gross Amount in Pay Curr.		0.12	0
Quantity	Price	Gross Amount in Pay Curr.					
	0.12	0					

Enter the reason for the journey

02/05/2022	MCC DIE B - Midcounties Vehicle Diesel								
Reimbursable	<input checked="" type="checkbox"/>								
Reference									
Mileage Amounts									
<table border="1"> <thead> <tr> <th>Quantity</th> <th>Price</th> <th>Gross Amount in Pay Curr.</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td></td> <td>0.12</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Quantity	Price	Gross Amount in Pay Curr.	Total		0.12	0	0	
Quantity	Price	Gross Amount in Pay Curr.	Total						
	0.12	0	0						
Connected To									

## How to create a new expense sheet

Click on the **Quantity Field**



Reference  
From home to head office

Mileage Amounts

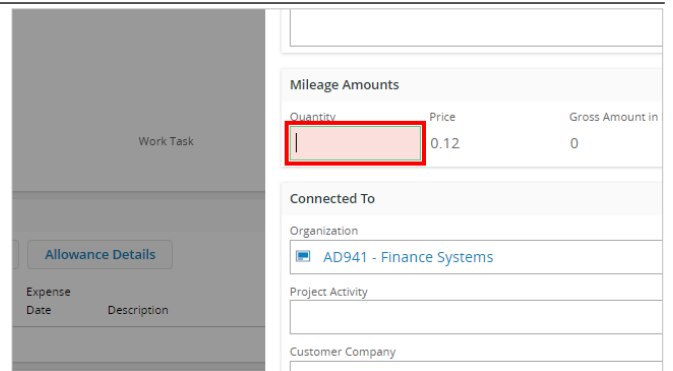
Quantity	Price	Gross Amount
	0.12	0

Connected To

Organization  
AD941 - Finance Systems

Project Activity

Enter the number of miles in the claim



Mileage Amounts

Quantity	Price	Gross Amount in
	0.12	0

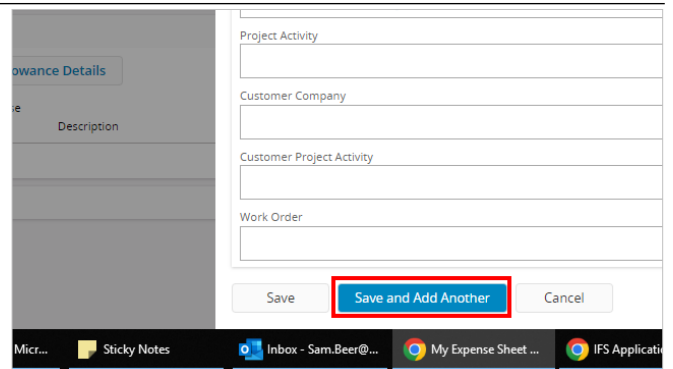
Connected To

Organization  
AD941 - Finance Systems

Project Activity

Customer Company

Click on the **Save and Add Another** to add another line to the expense sheet



Project Activity

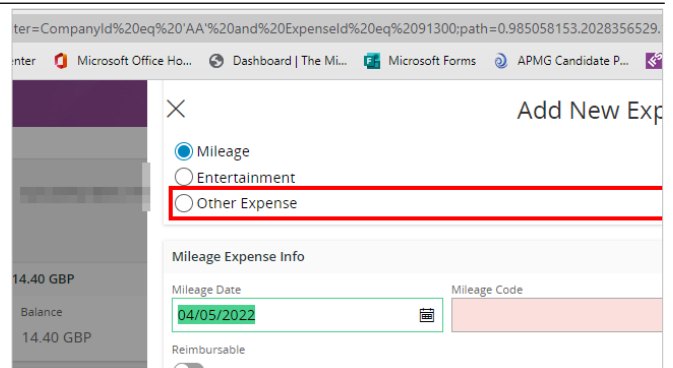
Customer Company

Customer Project Activity

Work Order

Save Save and Add Another Cancel

Click on the **Other Expense**



Add New Expense

☒ Mileage  
☐ Entertainment  
☐ Other Expense

Mileage Expense Info

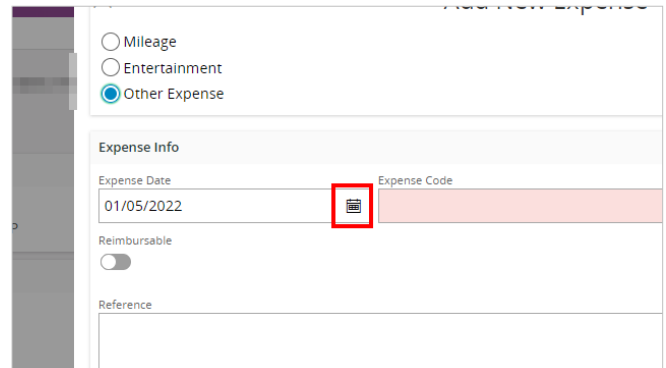
Mileage Date  
04/05/2022

Mileage Code

Reimbursable  
☐

## How to create a new expense sheet

Click on the date button



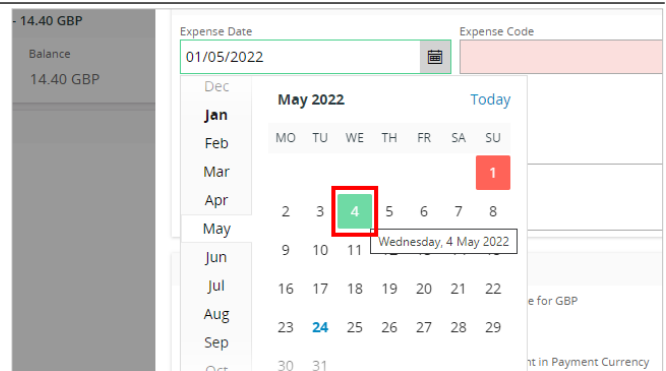
Expense Info

Expense Date: 01/05/2022 📅 Expense Code

Reimbursable: ☐

Reference

Select the date the claim is for



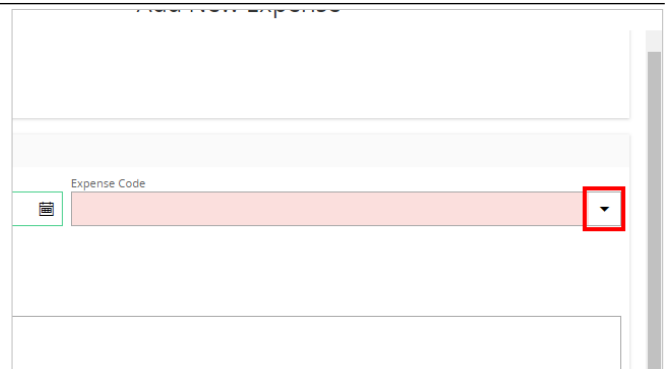
Expense Date: 01/05/2022 📅 Expense Code

May 2022

MO	TU	WE	TH	FR	SA	SU
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Wednesday, 4 May 2022

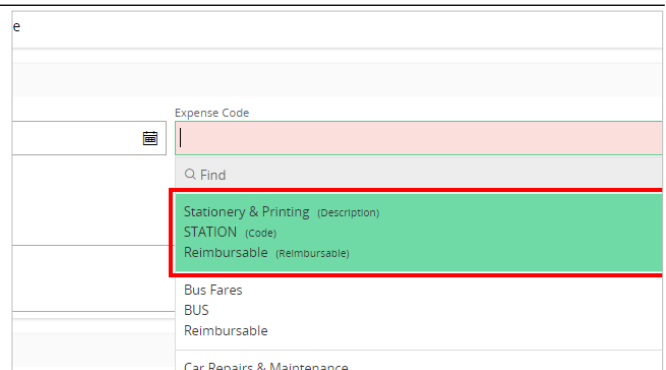
Click on the dropdown button for the **Expense Code**



Expense Code

▼

Select the expense code



Expense Code

Find

Stationery & Printing (Description)
STATION (code)
Reimbursable (Reimbursable)
Bus Fares
BUS
Reimbursable
Car Repairs & Maintenance

## How to create a new expense sheet

Click on the **Reference** field

14.40 GBP  
Balance  
14.40 GBP

Expense Info

Expense Date  
04/05/2022

Expense Code  
STATION - Stationery & Pr

Reimbursable  
☒

Reference

Expense Amounts

Currency Code  
GBP - Pound Sterling

Currency Rate for GBP  
1

Enter the reason for the claim

Reimbursable

Expense Info

Expense Date  
04/05/2022

Expense Code  
STATION - Stationery & Pr

Reimbursable  
☒

Reference

Expense Amounts

Currency Code  
GBP - Pound Sterling

Currency Rate for GBP  
1

Gross Currency Amount

Tax Currency Amount

Gross Amount in Payment Currency  
0.00

Tax Amount in Payment Currency  
0.00

Click on the **Gross Currency Amount**

Expense Info

Expense Date  
04/05/2022

Expense Code  
STATION - Stationery & Pr

Reimbursable  
☒

Reference

Expense Amounts

Currency Code  
GBP - Pound Sterling

Currency Rate for GBP  
1

Gross Currency Amount

Tax Currency Amount

Gross Amount in Payment Currency  
0.00

Tax Amount in Payment Currency  
0.00

Enter the value of the claim

Expense Info

Expense Date  
04/05/2022

Expense Code  
STATION - Stationery & Pr

Reimbursable  
☒

Reference

Expense Amounts

Currency Code  
GBP - Pound Sterling

Currency Rate for GBP  
1

Gross Currency Amount

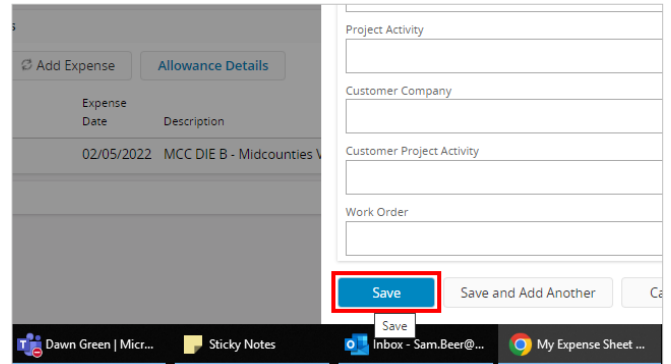
Tax Currency Amount

Gross Amount in Payment Currency  
0.00

Tax Amount in Payment Currency  
0.00

## How to create a new expense sheet

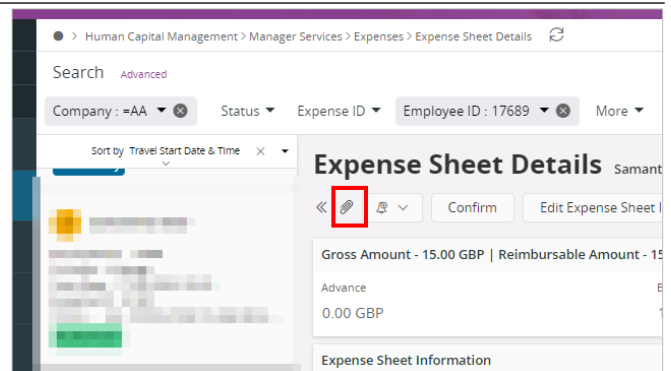
Click on the button **Save**



The screenshot shows a web form titled 'Add Expense'. It has a table with columns 'Expense Date' and 'Description'. Below the table, there are several input fields: 'Project Activity', 'Customer Company', 'Customer Project Activity', and 'Work Order'. At the bottom right, there are three buttons: 'Save' (highlighted with a red box), 'Save and Add Another', and 'Cancel'. The Windows taskbar at the bottom shows 'Dawn Green | Micr...', 'Sticky Notes', 'Inbox - Sam.Beer@...', and 'My Expense Sheet ...'.

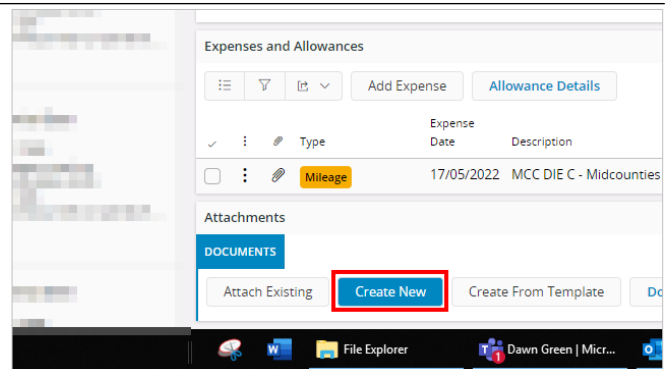
Once the lines of data have been added you need to attach any receipts for your expenses to this sheet. Make sure you saved any photos/scanned documents to your PC prior to this stage

Press the paperclip button at the top of the page



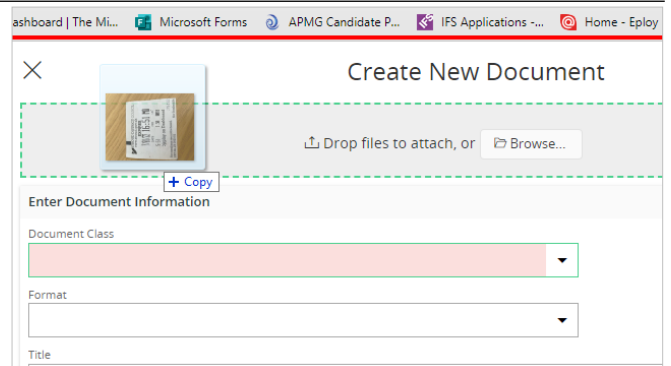
The screenshot shows the 'Expense Sheet Details' page. It has a search bar and filters for 'Company', 'Status', 'Expense ID', and 'Employee ID'. Below the filters, there's a table with columns 'Expense Date' and 'Description'. To the right of the table, there's a section titled 'Expense Sheet Details' with a paperclip icon (highlighted with a red box), a 'Confirm' button, and an 'Edit Expense Sheet' button. Below this, there's a section for 'Expense Sheet Information' showing 'Gross Amount - 15.00 GBP' and 'Reimbursable Amount - 15.00 GBP'.

press the create new button



The screenshot shows the 'Expenses and Allowances' page. It has a table with columns 'Expense Date' and 'Description'. Below the table, there's a section titled 'Attachments' with a 'DOCUMENTS' tab. Under this tab, there are three buttons: 'Attach Existing', 'Create New' (highlighted with a red box), and 'Create From Template'.

Drag and drop (or use the browse button) to attach the file to the screen

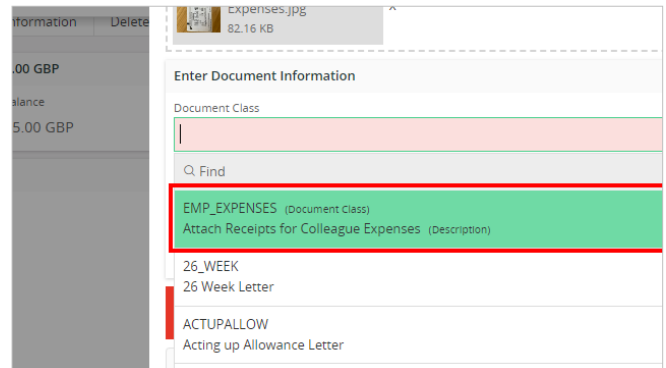


The screenshot shows a 'Create New Document' dialog box. It has a 'Drop files to attach, or Browse...' area. A file icon is being dragged onto this area. Below this, there's a section titled 'Enter Document Information' with fields for 'Document Class', 'Format', and 'Title'.

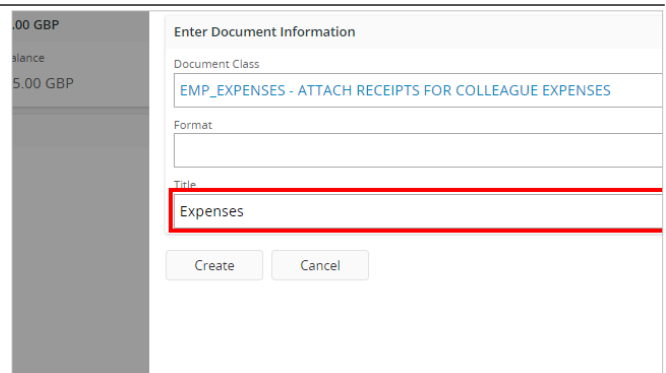


## How to create a new expense sheet

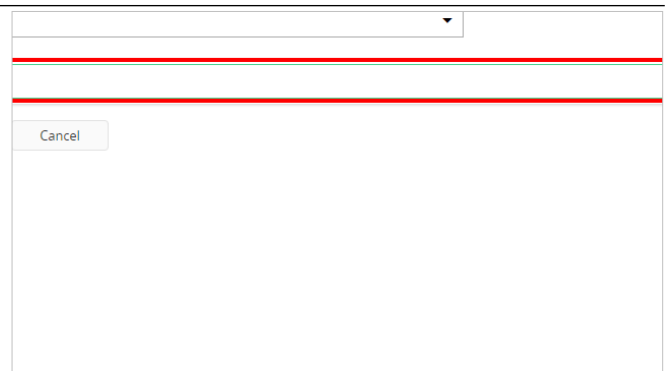
Click on the document class, either start typing EMP or find EMP\_EXPENSES from the drop down list



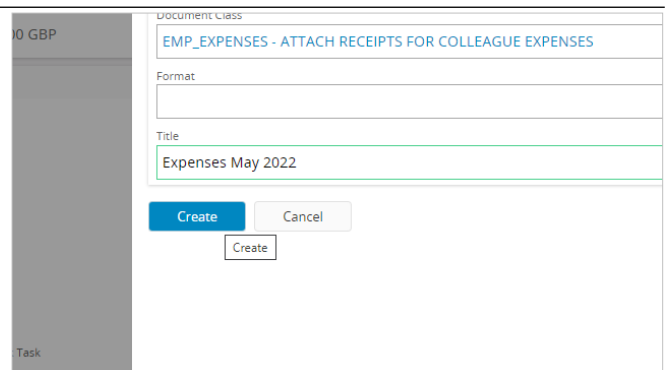
Click on the box **Title**



Give the expenses attachment a name such as Expenses for May 2022.

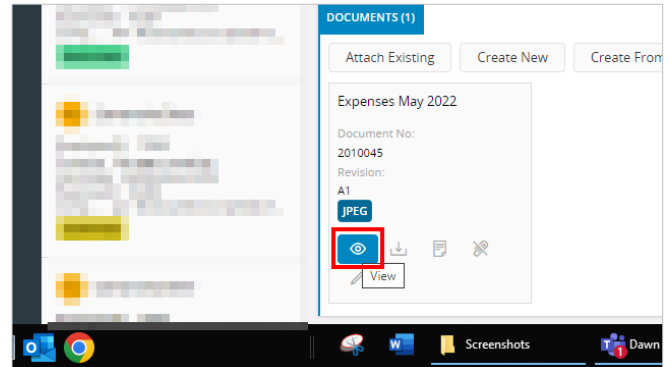


Click create



## How to create a new expense sheet

If you want to double check you have attached the correct document press the view button



Click on the button **Confirm**

