

# Empoortant

## Travel & Expense Management

Simple to use... from Recruitment to Retirement – we call it UnComplex

# Typical challenges in T&E

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# 1

- Paper trail is difficult to track
- Onus on the employee to ensure it reaches finance
- Employee has to physically get it approved by manager
- Claims get delayed if he/she is travelling or manager is travelling
- Employees not aware of eligibility limits
- Leakage due to duplicate claims which are difficult to reconcile
- Claims settled in excess of eligibility
- Employees unaware when to provide supporting vouchers etc
- Innumerable followup calls / emails from employee to finance for status and payment – results in employee dissatisfaction and burden on finance for answering queries

# Important T&E

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## 2

- **Submit claims online**
- **Linked with application for advance payment**
- **Claim number is automatically generated**
- **Employee simply prints the claim form and attaches with vouchers if required**
- **If vouchers not required, claim can be routed to approver**
- **Vouchers verification is routed to processing section and approved or sent to manager for approval.**
- **Workflow rules for Manager's approval can be made optional or mandatory**
- **Employee can see online status of approval and which approver it is pending with**

# Rule-based and dynamic

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# 3

- Approval and workflow rules can be created as per business policy
- Optional Email alerts can be setup to notify approver / employee
- Additional fields can be added to forms as and when required at inception or in the future
- Eligibility rules for various expense categories can be defined
- Dynamic reporting can be provided on division / cost center / employee / expense category basis which is normally not possible through Finance / General ledger modules

# **Rule-based** and dynamic

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# 4

- **Category wise expense eligibility limits**
- **Option to allow / block claim in excess of limits**
- **Expense categories and items can be modified / added at will**
- **Payment through different payment modes**
- **Multi-currency and automatic rate conversion**
- **Travel claim with pre-approved plan and/or advance approval**
- **Multi company / multi currency for each company on the same system**
- **Proxy users – to submit claim on behalf of another employee**

# Sample form - Advance for expenses

main menu Pay Advances Home Print Help Refresh Back

Ref. No.	0000000009	Approval Status : UnApproved
Employee No	27	Employee Name Jitendra Palekar
DATE : 30-OCT-2009		
Advance for	TRAVEL	Travel Advance 8
Currency	USD	Amount 600
<b>APPROVAL</b>		
Amount	<input type="text"/>	
Remarks	Approved by manager	

Internet 100%

# Sample form – Expense claim

<input type="button" value="Prepare"/> <input type="button" value="Change"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>						
Ref. No. <input type="text"/>						
<b>TRAVEL DETAILS</b>						
Travel Advance	<input type="text" value="NONE"/>					
Travel Plan No	<input type="text" value="None"/>					
Travel Type	<input type="text" value="Overseas Travel"/>	Purpose	<input type="text" value="Customer Meeting"/>	Customer/Project	<input type="text" value="GE"/>	
From Date	<input type="text"/>	To Date	<input type="text"/>	Travel Days	<input type="text"/>	
Expenses paid by Company	<input type="text"/>	Client attendees	<input type="text"/>	Travel Receipts	<input type="text"/>	
Remarks for approver	<input type="text"/>					
<b>ITEM DETAILS</b>						
Item	Date	Bill No	Location	Remarks	Currency	Amount
<input type="text" value="Food / Subsistence"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="US Dollar"/>	<input type="text"/>
<b>DECLARATION</b>						
I certify that the expenses above were incurred in connection with official work and as per details submitted in conformance with company policy.						
<b>TAX DETAILS</b>						
Tax Description	Details			Amount		
<input type="text"/>	<input type="text"/>			<input type="text"/>		

# **Service Desk for queries**

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- **Service desk automates the Employee interaction with Travel Desk and Finance for the expense claims and queries**
- **Has in-built email alert mechanism**



# Thank You

**For More Information**

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