User Guide

Claim

User Mode
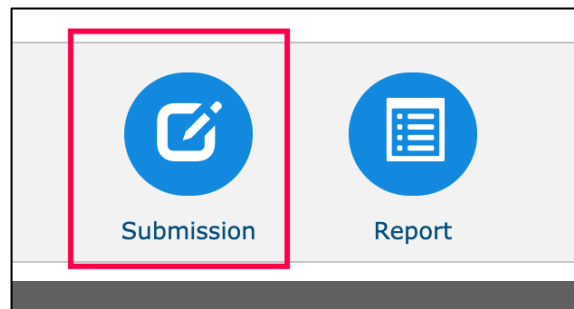
emplX
employee **Xpress**

CONTENTS

1 SUBMISSION SCREEN

Figure 1.1

To perform a claim submission, please follow the steps below or follow as what has shown in Figure 1.1

Claim -> Submission

Figure 1.2

1	Claim entitlement of the employee	3	Drafted Claim, claim(s) yet to submit for approval
2	Claim submission form	4	Claims history, submitted claims

2.1 Claim Form

2.1.1 Add claim as draft

No.	Claim Types	Claim Default Amount (MYR)	Claimed Amount (MYR)	Balance (MYR)	Limit (MYR)	Claim Validity Period
1	Meal	No Limit	0.00	No Limit	No Limit	Weekly, Refresh Day: Monday
2	Mileage Claim	No Limit	120.00	No Limit	No Limit	Monthly

Claim Submission

^ Hide Entitlement

Claim Form   Drafted Claim   Claims History

Claim Title * : Example : Claim for January 2007 or Business Trip to Singapore (1 - 8 Jan 2007)

Receipt / Invoice Date * : 2018-10-26

Claim Types * : Type to Filter

Figure 2.1

Follow the steps to submit a claim:

    i.   Select a receipt/ invoice date

    ii.   Select claim from "Claim Types"

Claim Form   Drafted Claim   Claims History

+ Add to list

Claim Title * :	Example : Claim for January 2007 or Business Trip to Singapore (1 - 8 Jan 2007)
Receipt / Invoice Date * :	2018-10-26
Claim Types * :	Meal
Convert currency from * :	FROM : Malaysian Ringgit (MYR) TO : Malaysian Ringgit (MYR)
Rate * :	0
Claim Amount * :	(Balance: No Limit)
Description * :	
Receipt / Invoice Number :	
Vendor Name :	
Attachment * :	Browser...

Maximum file size per attachment is 3MB. Only .jpeg, .png, .gif & .pdf formats are allowed.

Figure 2.2

As different claim types has a different settings and different fields to key in.

Fill up the compulsory field(s) which has the ✱ indicator and click **+ Add to list** , the claim will be added into a group at the same time the data will be saved into the system.

Figure 2.3

To view click the item below "Add to list" to expand the to view the details as shown in Figure 2.4

Figure 2.4

2.1.2 Add item in drafted claim

To add more things into the group, click [+ New Item] as shown in Figure 2.5 then select claim type and follow back what have been done previously as shown in Figure 2.6
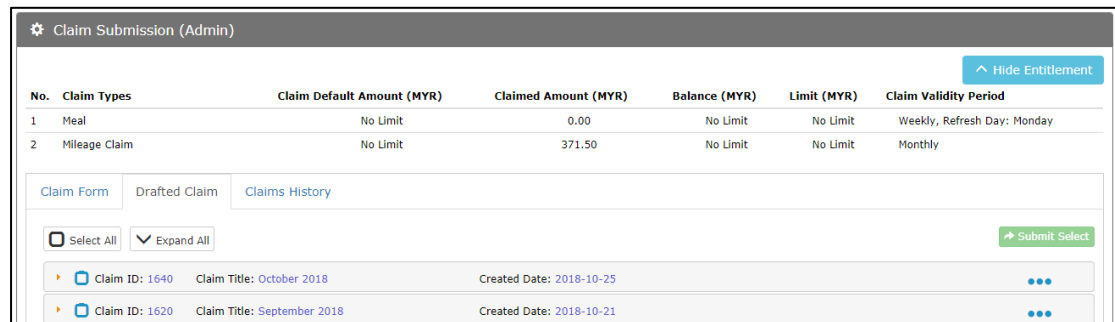
Figure 2.5

Figure 2.6

Figure 2.7

After everything has been finalized, click [Submit] as shown in Figure 2.7 to submit the claim to respective party based on the claim(s) setting(s).

2.2 Drafted Claim

2.2.1 Submit Drafted Claim

Figure 2.8

To submit claim(s), tick the checkbox on the left hand side as shown in Figure 2.8 and Click ![Submit Select] to submit selected claim(s)

2.2.2 Edit Drafted Claim

To edit, simply mouse over the ●●● which shown in Figure 2.9 and click the "Click to Edit" to edit the claim item you wish to edit.
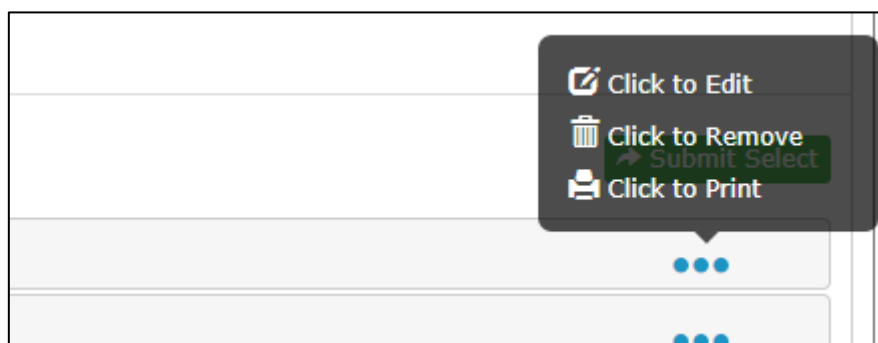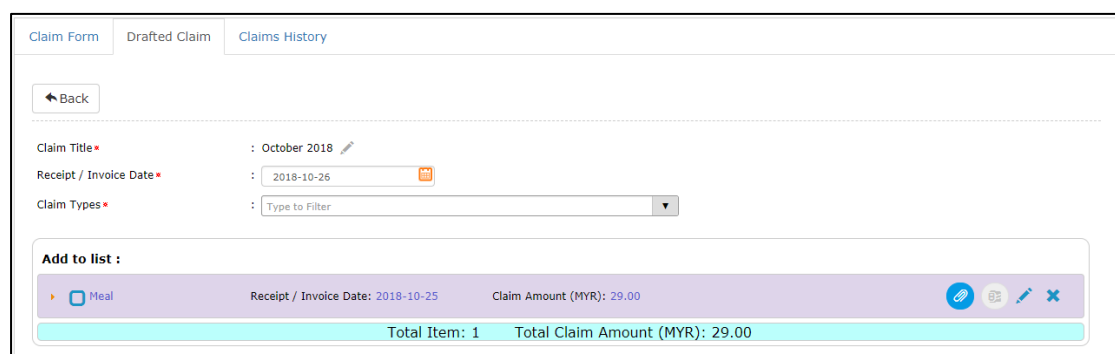

Figure 2.9

2.2.3 Add item in drafted claim

Figure 2.10

To add more things into the group, select claim type and follow back what have been done previously as shown in 2.1.2 Add item in drafted claim, the same concept applicable here as shown in Figure 2.10

2.2.4 Delete drafted claim

To delete, simply mouse over the ●●● which shown in Figure 2.9 and click the "Click to Remove" to delete the claim item you wish to delete.

2.2.5 Print claim

To print, simply mouse over the ●●● which shown in Figure 2.9 and click the "Click to Print" to print the claim. A window will be popped up as shown in Figure 2.11

Figure 2.11

2.3 Claim History
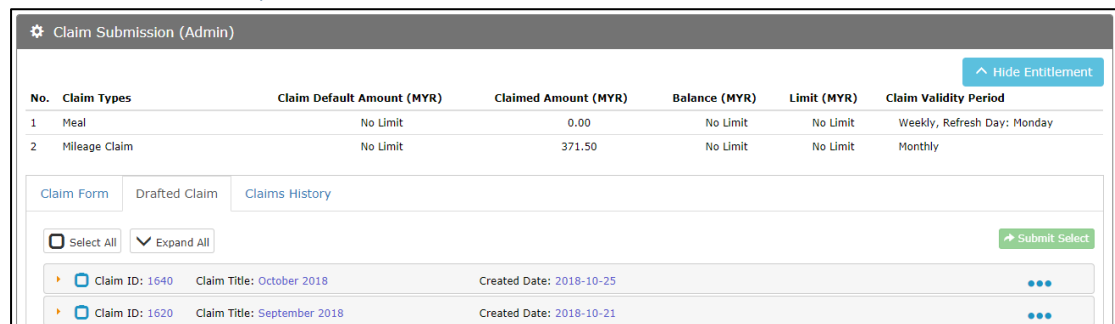
Figure 2.12

Figure 2.13

Figure 2.14

A: Approved

R: Rejected

C: Cancelled

P: Pending

I: Incomplete

PP: Pending Payable

In claim history, admin able to view the previously submitted claim(s) is under which status, can print, cancel (if still pending) and claim(s) that was/were marked as "Incomplete" claim(s).

2.3.1 Submit Incomplete Claim

Figure 2.15

To submit claim(s), tick the checkbox on the left-hand side as shown in Figure 2.14 and Click

→ Submit Select to submit selected claim(s)

Figure 2.16

2.3.2 Edit Incomplete Claim

To edit, simply mouse over the ●●● which shown in Figure 2.14 and click the "Click to Edit" to edit the claim item you wish to edit.

2.3.3 Delete drafted claim

To delete, simply mouse over the ●●● which shown in Figure 2.14 and click the "Click to Remove" to delete the claim item you wish to delete.

2.3.4 Print claim

To print, simply mouse over the ●●● which shown in Figure 2.14 and click the "Click to Print" to print the claim. A window will be popped up as shown in Figure 2.11
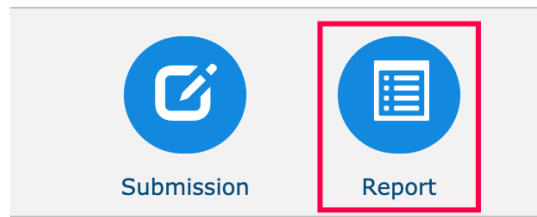
Figure 3.1

To view claim report, please follow the steps below or follow as what has shown in Figure 3.1

Claim -> Report

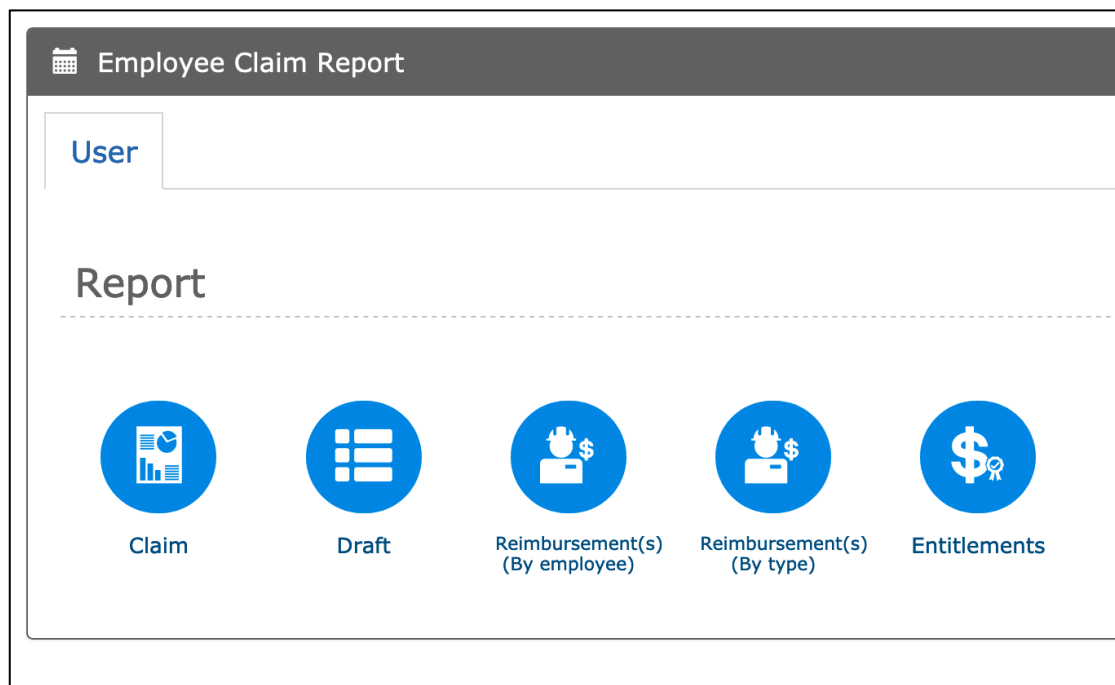Figure 3.2

Click "Claim Report" as shown in Figure 3.2 then a new window will be popped up to show the report
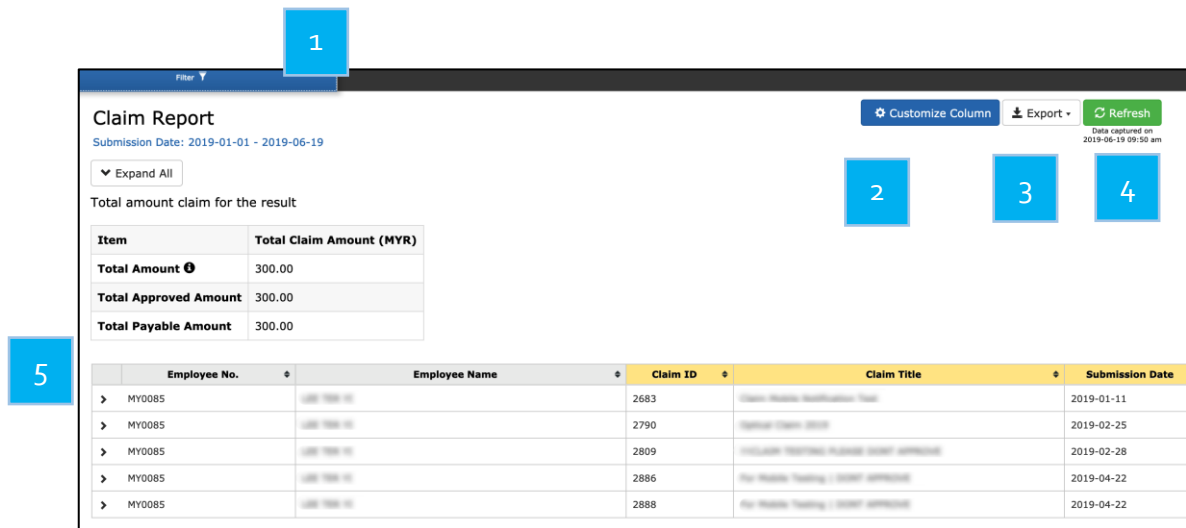
Figure 3.3

1	Filter option	3	Export
2	Enable/disable column options	4	Refresh to get latest data
5	Report content		

Figure 3.4

To filter click the "Filter" at the top-left side which shown in Figure 3.3 and filter options will expand out as shown Figure 3.4. After filtration has been made, click **Retrieve** to retrieve the data based on filtration.
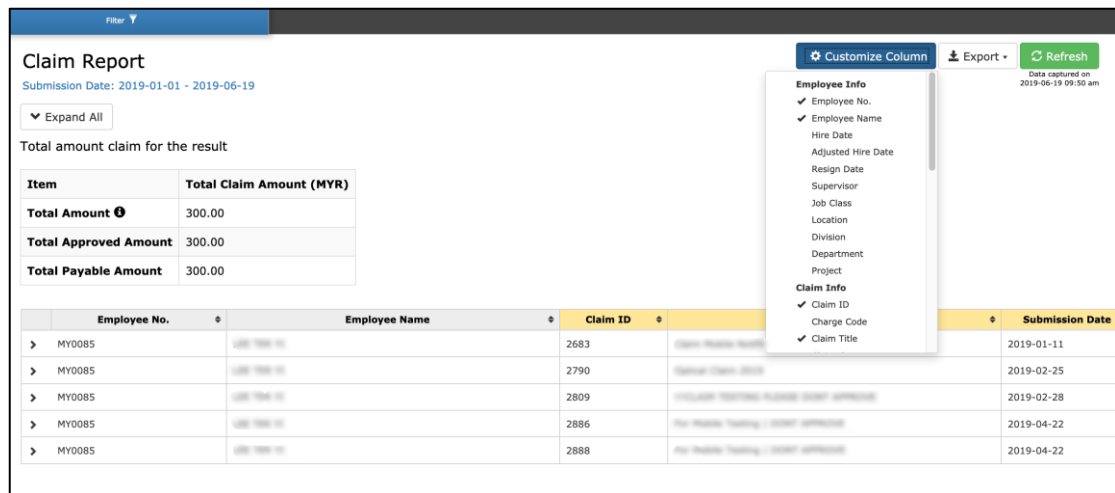
Figure 3.5

To enable/disable the column(s) to show in the report content, click **⚙ Customize Column** as shown in Figure 3.5 and a list of column names will be displayed. Enable/disable based on the report you prefer.
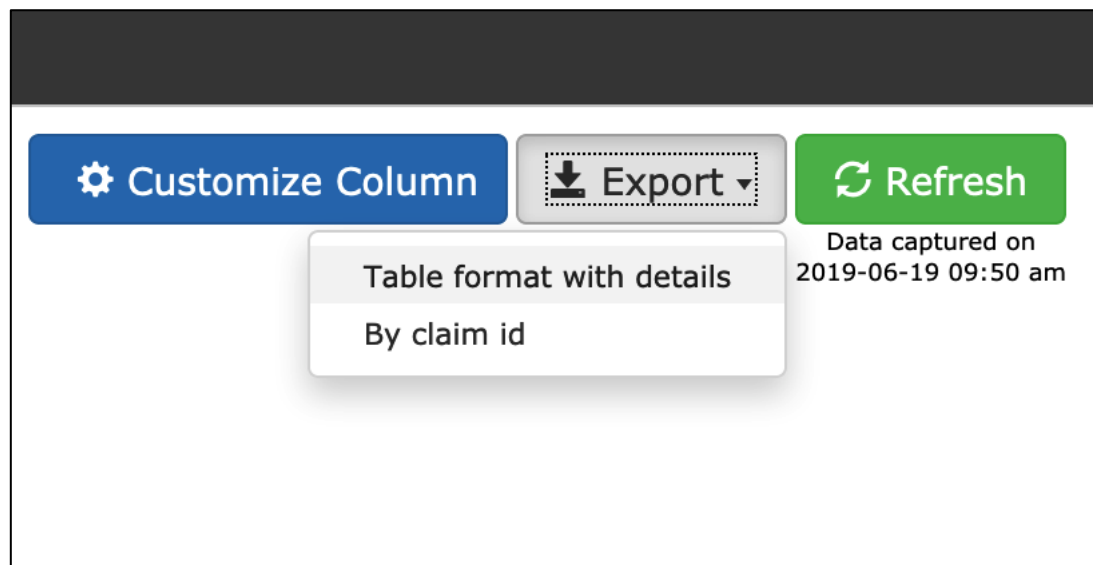

Figure 3.6

To export click the **⬇ Export ▾** as shown in Figure 3.6, a list of option will be shown as shown in Figure 3.6 to export out the format of the report that you want.

The exported report will be based on the "Customize Column" options.