

User Guide

Claim

Finance Approval



CONTENTS

Contents	0
1 Approval Screen	1
2 Approval	2
2.1 Approve or Reject Claim	2
2.2 Incomplete Claim	3
2.3 Request to Change Payable Date	4
3 Summary	5
3.1 Claim Summary	5

1 APPROVAL SCREEN

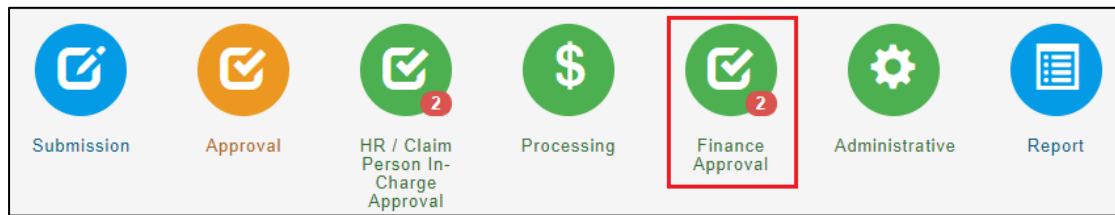


Figure 1.1

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

Claim -> Finance Approval

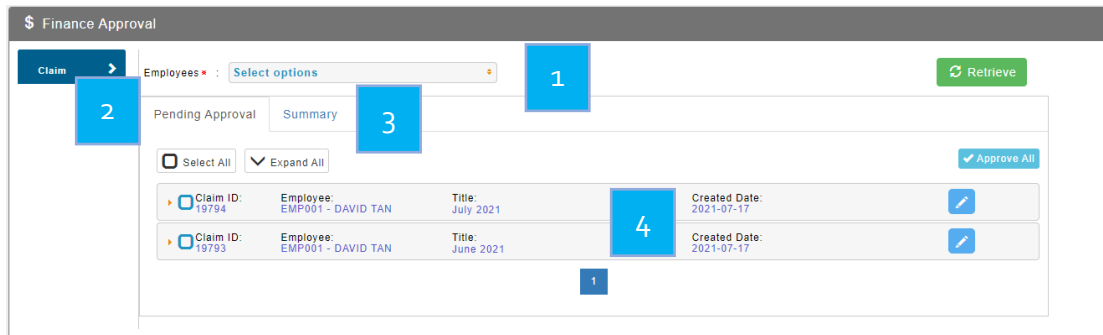


Figure 1.2

1 Employee selections

3 History Tab

2 Pending Approval Tab

4 Pending item list

2 APPROVAL

2.1 Approve or Reject Claim

Claim ID	Employee	Title	Created Date	
19794	EMP001 - DAVID TAN	July 2021	2021-07-17	
19793	EMP001 - DAVID TAN	June 2021	2021-07-17	

Figure 2.1

Claim ID: 19794

Figure 2.2

Claim ID: 19794

Figure 2.3

Title	Created Date	
July 2021	2021-07-17	

Figure 2.4

Follow the steps to approve a claim:

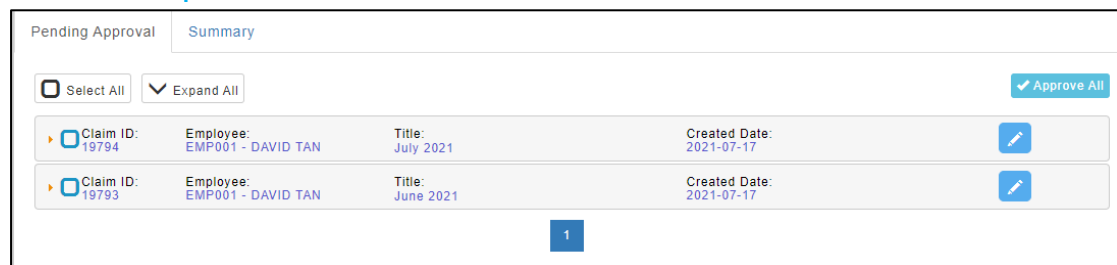
1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Approve Selected** as shown in Figure 2.4 to approve the ticked claim(s)
3. (Optional) Finance approver can expand the item to tick only certain items within the claim group to approve

Follow the steps to reject a claim:

1. Select whichever item to reject by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Reject Selected** as shown in Figure 2.4 to reject the ticked claim(s)
3. (Optional) Finance approver can expand the item to tick only certain items within the claim group to reject

Alternatively, finance approver can click **Approve All** as shown in Figure 2.4 to approve all items straight away.

2.2 Incomplete Claim



Pending Approval		Summary	
<input type="checkbox"/> Select All	<input type="checkbox"/> Expand All	<input type="button" value="Approve All"/>	
<input checked="" type="checkbox"/> Claim ID: 19794	Employee: EMP001 - DAVID TAN	Title: July 2021	Created Date: 2021-07-17
<input type="checkbox"/> Claim ID: 19793	Employee: EMP001 - DAVID TAN	Title: June 2021	Created Date: 2021-07-17

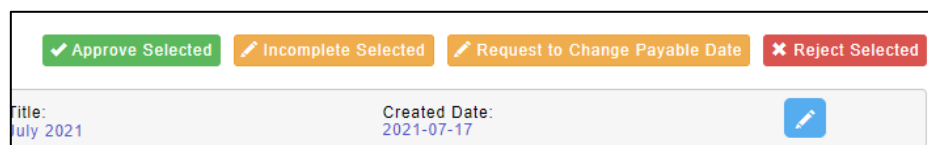
Figure 2.5



Figure 2.6



Figure 2.7



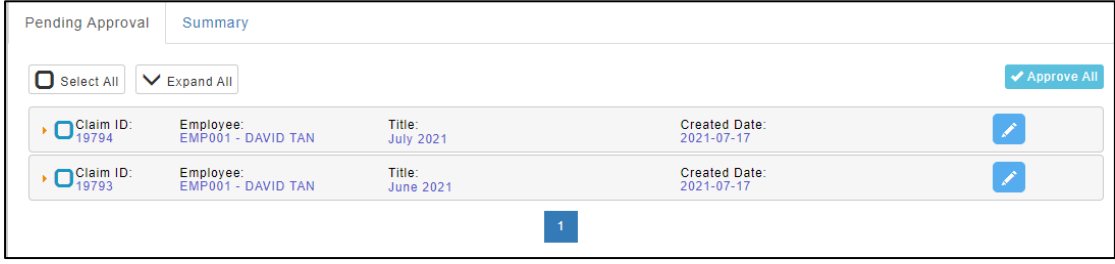
<input type="button" value="Approve Selected"/> <input type="button" value="Incomplete Selected"/> <input type="button" value="Request to Change Payable Date"/> <input type="button" value="Reject Selected"/>			
Title:	Created Date:		
July 2021	2021-07-17		

Figure 2.8

Follow the steps to incomplete a claim:

1. Select whichever item to incomplete by ticking the ☒ which shown in Figure 2.6 it will become as shown in Figure 2.7
2. Click as shown in Figure 2.8 to incomplete the ticked claim(s)
3. (Optional) Finance approver can expand the item to tick only certain items within the claim group to incomplete claim

2.3 Request to Change Payable Date



The screenshot shows a 'Pending Approval' summary page. At the top, there are tabs for 'Pending Approval' and 'Summary'. Below the tabs, there are buttons for 'Select All', 'Expand All', and 'Approve All'. A table lists two claims:

Claim ID	Employee	Title	Created Date	Action
19794	EMP001 - DAVID TAN	July 2021	2021-07-17	[Edit]
19793	EMP001 - DAVID TAN	June 2021	2021-07-17	[Edit]

Below the table, there is a blue button labeled '1'.

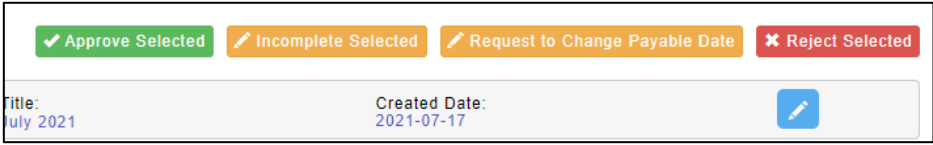
Figure 2.9



Figure 2.10



Figure 2.11



The screenshot shows a row of action buttons: 'Approve Selected' (green), 'Incomplete Selected' (orange), 'Request to Change Payable Date' (orange), and 'Reject Selected' (red). Below these buttons is a table entry for a claim:

Title	Created Date	Action
July 2021	2021-07-17	[Edit]

Figure 2.12

Follow the steps to request to change claim payable date:

1. Select whichever item to request by ticking the ☐ which shown in Figure 2.10 it will become as shown in Figure 2.11
2. Click as shown in Figure 2.12 to request to change the ticked claim(s) payable date.
3. (Optional) Finance approver can expand the item to tick only certain items within the claim group to request to change the claim payable date.

3 SUMMARY

3.1 Claim Summary

Claim item(s) can be view in the summary tab.

The screenshot shows the 'Finance Approval' interface. On the left is a 'Claim' sidebar. The main area has filters for 'Employees' (a dropdown menu) and 'Status' (radio buttons for All, Pending Payable, Incompleted by supervisor / HR, Rejected, Paid, Incompleted by processor, and Rejected by processor). A 'Retrieve' button is in the top right. Below the filters are tabs for 'Pending Approval' and 'Summary'. The 'Summary' tab is active, showing a table with one claim item. The table has columns for Claim ID, Employee, Title, Created Date, and Status. The first row shows Claim ID 19791, Employee EMP001 - DAVID TAN, Title 1, Created Date 2021-07-13, and Status 1A|0R|0C|0P|0I|0PP|0PF. A blue button with the number '1' is below the table.

Claim ID:	Employee:	Title:	Created Date:	Status:
19791	EMP001 - DAVID TAN	1	2021-07-13	1A 0R 0C 0P 0I 0PP 0PF

Figure 3.1

This screenshot provides a detailed view of the claim item. It shows the Claim ID (19791), Employee (EMP001 - DAVID TAN), Title (Meal), and Created Date (2021-07-13). The Status is 1A|0R|0C|0P|0I|0PP|0PF. Below this, there is a section for 'Meal' with a 'Paid' status. It shows the Receipt / Invoice Date (2021-07-13) and the Claim Amount (MYR) (100.00). At the bottom, a summary row shows 'Total Item' as 1 and 'Total Claim Amount (MYR)' as 100.00.

Claim ID:	Employee:	Title:	Created Date:	Status:
19791	EMP001 - DAVID TAN	Meal	2021-07-13	1A 0R 0C 0P 0I 0PP 0PF

Item	Receipt / Invoice Date:	Claim Amount (MYR):
Meal	2021-07-13	100.00

Total Item	Total Claim Amount (MYR)
1	100.00

Figure 3.2