Expenses Reimbursement

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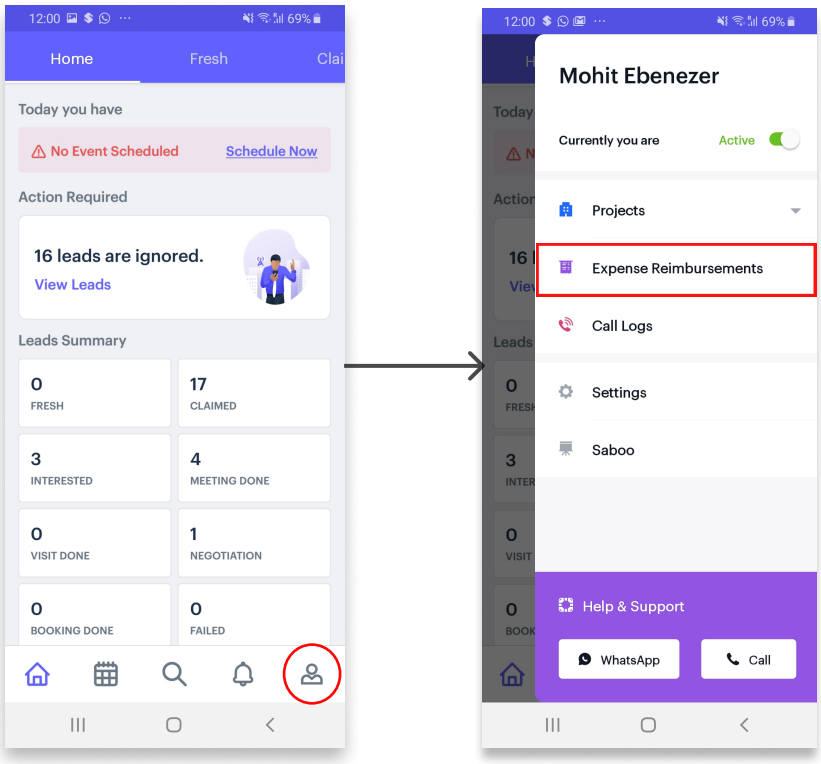
Value Proposition

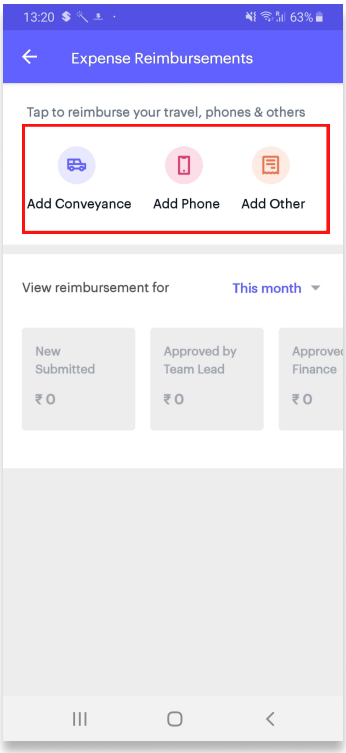
Manage reimbusement requests, approval, and payment processing for conveyance, phone, and other client visit/official expenses.

Reimbursement section in the app



The Expense Reimbursements page can be accessed from the 'Profile' section in the Agent app, and the 'Reimbursements' section in the Dashboard for Leads and Finance teams.

Creating a new reimbursement request



Reimbursement types

Conveyance:

Select this option for reimbursement for commute when meeting clients, channel partners, or any other third-party working on behalf of the client.

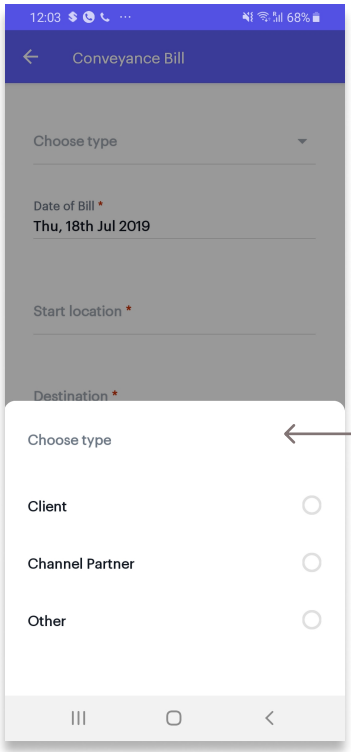
Phone:

Select this option when requesting reimbursement for mobile phone bill.

Other:

Use this option when requesting reimbursement for Staff Entertainment or other expenses (besides conveyance) incurred when working with the client.

Conveyance bill submission

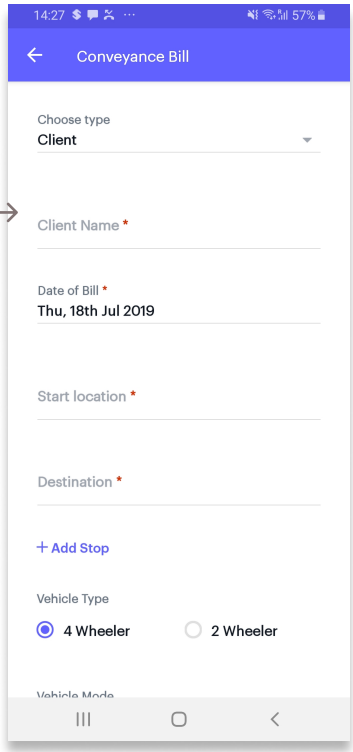


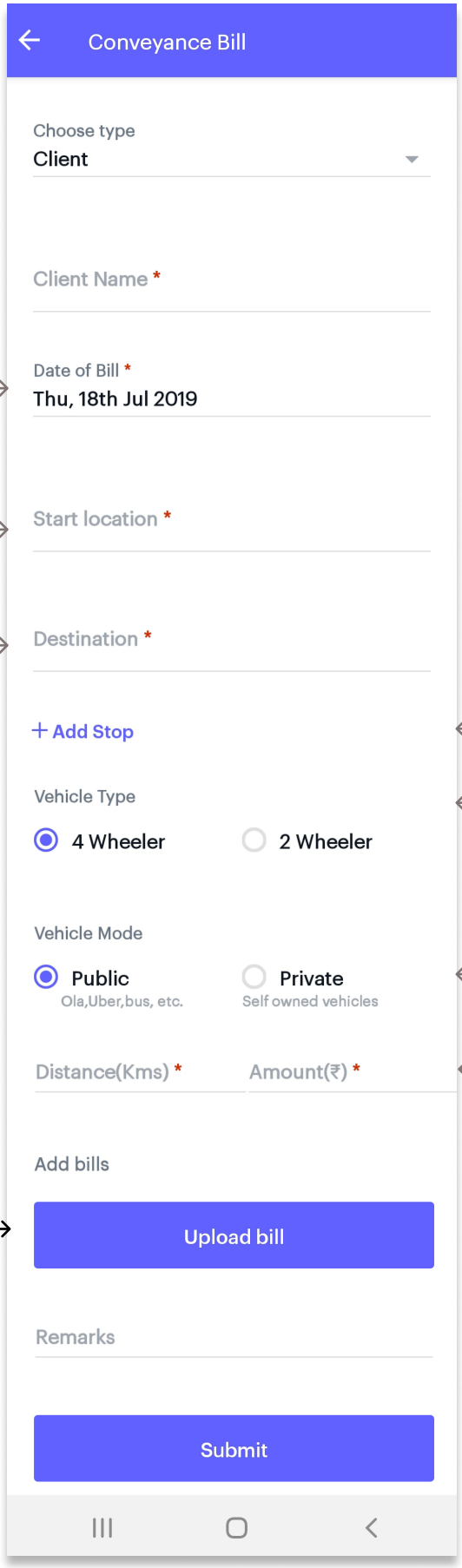
Type

Select the conveyance bill type depending on the party you have had a meeting with.

Client Name

Select the conveyance bill type depending on the party you have had a meeting with.





Date of bill

Make sure the date of the bill entered here is the same as the one printed on the bill that you will be uploading.

Start and destination

Its possible to only select locations from the dropdown list as you begin typing. (Only locations listed on Google maps are allowed)

Upload bill

When uploading bills, you can choose to either take a picture using your mobile phone's camera, or upload images and pdfs. In either case, the bill number would be mandatory in the subsequent screen.

When uploadidng a pdf, you'll also have an option to enter the password in case the file is password protected.

Add stop

Use this option to add locations of stops (if any) between the start location and destination. Again, only locations from the drop down list can be selected.

Vehicle type

Vehicle type can be a two or four wheeler, and should be explicitly mentioned in the bill.

Vehicle mode

Select between public (can be a hired cab or public transport), or 'private', which is your own vehicle (in which case you will not be asked to submit a bill, but will be reimbursed based on the company standard price for each kilometer (automatically populated).

Distance & amount

Mention the distance and amount mentioned in the bill, or in case of an owned vehicle, the distance and amount will be automatically populated.

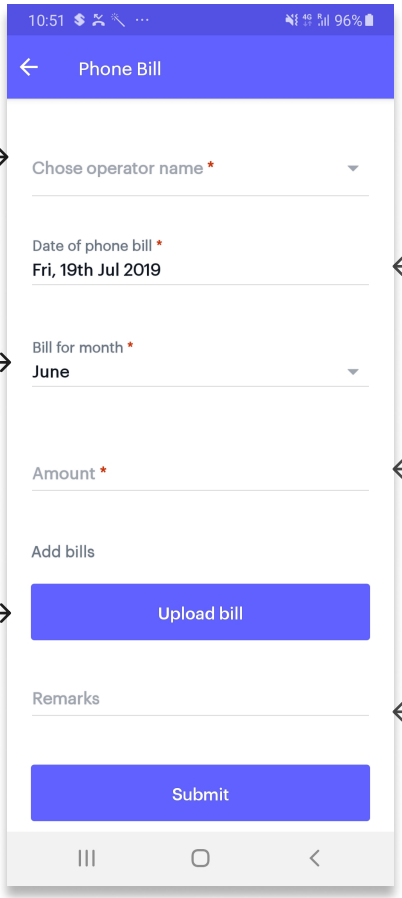
Remarks

While not mandatory, it's extremely useful to mention details of the expense here for seamless approval.

Submit

This movves the reimbursement request to the next stage - team lead approval.

Phone bill submission



Operator

Select from a list of mobile operators like Airtel, Idea, etc.

Month

The month for which the bill is being submitted. You can submit for up to three months in the past.

Upload bill

You can take a picture of the bill using the camera option, or upload an image or pdf. In case of a password protected pdf, make sure to enter the password in the provided placeholder.

Date

Enter the date when the bill was generated by the network provider (should be present on the bill)

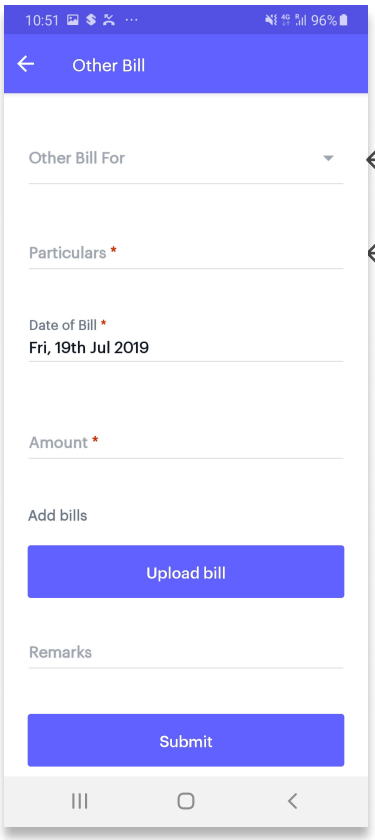
Amount

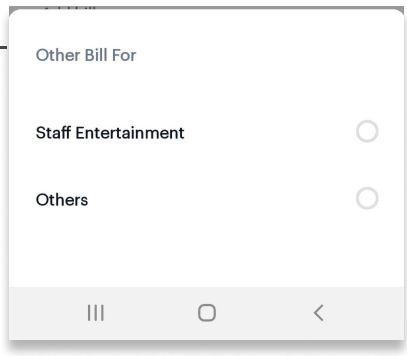
Enter the amount which you want to get reimbursed (the bill amount, or the max amount allowed per company policy, whichever is lower)

Remarks

While not mandatory, detailed remarks help in a seamless approval when required information is entered.

Other bill submission





Bill type

Choose between 'Staff entertainment' (for sponsored dining or other events) and 'Others' for any other kind of bill.

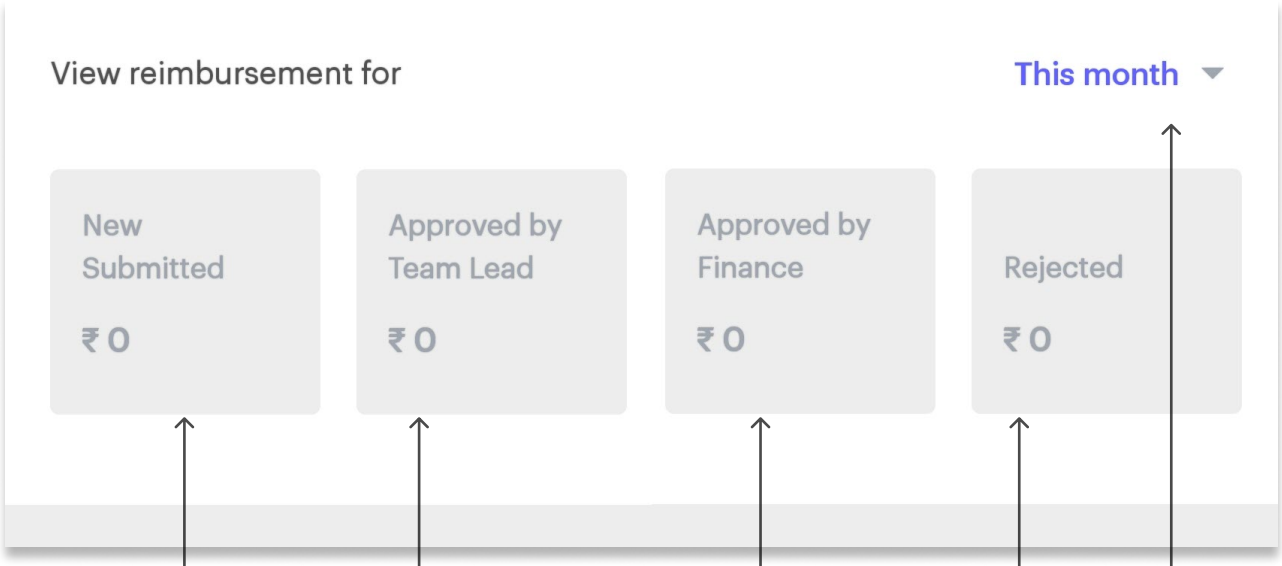
Particulars

Regardless of the bill type selected, it's mandatory to add particulars about the event for which a reimbursement request is being submitted.

Agent submits bill in the agent app → Team lead approves reimbursement in the dashboard → Finance approves reimbursement in the dashboard

Both, the team lead, and the finance team can:
- Edit the amount submitted in the bill and then approve (the agent will be able to see the change in the app).
- Reject the reimbursement request and refer back to the agent.

A rejected bill can be resubmitted with updated information.



New submitted

View all bills that have been submitted in the selected duration, and which are pending team lead approval.

Approved by team lead

The reimbursement request has been approved by the team lead and is now pending finance team approval.

Approved by Finance

The final stage of approval. If the bill is at this stage, it means that your submission has been fully approved and reimbursement will be processed (with changes in amount done by team lead or finance, if any).

Rejected

The bill was not approved by either the team lead, or the finance team. Deails will have been added in the remarks section.

Duration

You can view details of bill submissions done up to three months in the past.

Q. Why was my bill rejected?
A. Details of bill rejection will have been added to the remarks section. For further information, reaching out to the team lead or finance team (depending on who the bill was rejected by) will be best course of action.

Q. Can I submit multiple bills in one request?
A. Yes, there's an option to submit more than one bill for each reimbursement request. However, make sure that you submit separate requests for different events.

Q. What if sometime doesn't seem to working correctly?
A. Reach out to your team lead, or contact technical support.

Q. What if I have different leads for different mandates that I'm working on? Who will the apporval request go to?
A. The approval request will go to the team lead you are mapped to by HR.