

Expense Claims

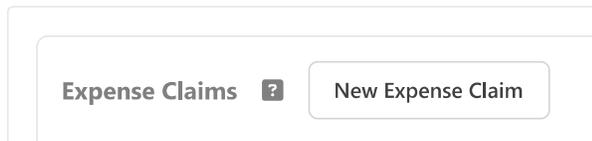
The **Expense Claims** tab in Manager.io allows you to manage and track out-of-pocket expenses incurred by employees or members on behalf of your business or organization. This feature ensures accurate recording of these expenses in your financial records and facilitates proper reimbursement to the individuals involved.



Creating a New Expense Claim

To create a new expense claim:

1. Navigate to the **Expense Claims** tab.
2. Click on the **New Expense Claim** button.



3. Fill in the necessary details for the expense claim, such as the date, payer, payee, description, accounts, and amount.
4. Click **Create** to save the expense claim.

Understanding Expense Claim Fields

When creating or reviewing expense claims, you'll encounter several key fields:

- **Date:** The date the expense was claimed.
- **Reference:** A unique identifier for the expense claim.
- **Paid By:** The name of the employee, capital account member, or payer who incurred the expense on behalf of the company.
- **Payee:** The name of the payee who was paid.
- **Description:** A description of the expense claim.

- **Accounts:** The accounts from your Chart of Accounts associated with this expense claim, indicating the categories the expense has been allocated to.
- **Amount:** The total amount of the expense claim.

Managing Expense Claims

After logging expense claims, you can process them for reimbursement. Manager.io ensures precise tracking of these expenses, so they are properly reflected in your organization's financial records, and employees or members are reimbursed accordingly.

Regularly review the **Expense Claims** tab to monitor outstanding claims and manage reimbursements efficiently.

By utilizing the **Expense Claims** feature in Manager.io, you can streamline the reimbursement process, maintain accurate financial records, and ensure transparency in managing out-of-pocket expenses incurred by your team.