

Expense Claim Presentation

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Introduction

Expense claim flows are essential for managing and streamlining employee expenses.

Here's an overview of how Nodify BPM's Expense Claim typically work and its key features:

1. Submission

Employee Submission:

- Employees submit their expense claims through Nodify interface.
- They can upload receipts, invoices, and other supporting documents.
- Expense categories (e.g., travel, food, accommodation) and details such as dates, amounts, and purpose are filled out.

2. Approval Workflow

Automated Routing:

- Once submitted, the claim is automatically routed to the appropriate manager or department head for approval.
- Approval hierarchies can be set based on the employee's role, department, or expense amount.

Notifications and Reminders:

- Approvers can be received notifications via email alerts.
- Reminders are sent if an expense claim is pending approval for too long.

3. Verification and Validation

- Requestor's Manager and in some cases, a finance team member may need to manually review expense if the expense exceeds specific amount.

4. Approval or Rejection

Manager Approval:

- Managers review the claim details and supporting documents.
- They can approve, reject, or request more information.

Multi-level Approval:

- High-value claims may require multiple levels of approval. For instance, if the expenses below 1000\$ direct manager approval is sufficient whereas for the ones above \$ 1000, second manager approval is required.

Tracking and Reporting:

- Employees can track the status of their claims.
- Detailed reports and dashboards provide insights into expense patterns, policy violations, and reimbursement timelines.

5. Integration

ERP Integration:

- Expense claim process often integrates with ERP (Enterprise Resource Planning) systems for financial accounting and reporting.
- This ensures accurate recording of expenses in the company's financial books.

HR Integration:

- Integration with HR systems helps to validate employee and manager information.

Benefits

- **Efficiency:** Automation reduces the time and effort required to submit, approve, and process expense claims.
- **Visibility:** Real-time tracking and reporting provide transparency into expense management.
- **Compliance:** Ensures adherence to company policies and regulatory requirements.
- **Employee Satisfaction:** Streamlined processes and timely reimbursements enhance employee satisfaction.

Nodify's Expense Claim system streamlines employee expense management through automated submission, multi-level approval workflows, and integration with ERP and HR systems. It enhances efficiency, visibility, compliance, and employee satisfaction by automating processes, providing real-time tracking, and ensuring timely reimbursements. The system supports multi-level approvals, such as requiring finance approval for configurable-value claims, ensures tax compliance, and offers detailed reporting for improved accuracy and transparency.