

Expense claims

Human resources and payroll

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Expense claims

Let staff claim business expenses, approve them and reimburse.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

An **Expense Claim** records money an employee spent for the business, such as fuel or airtime. After approval, it is paid back to them.

Prerequisites

Set up **Expense Claim Types** (search for it), each linked to an expense account. Set an **Expense Approver** on each employee.

Steps

1. The employee opens **Expense Claim**, clicks **Add**, and chooses the **Date**.
2. In the **Expenses** table, adds each item with the **Expense Type**, **Amount** and description. They attach receipts.
3. They save and submit for approval.
4. The approver opens it, sets **Approval Status** to *Approved* or *Rejected*, and submits.
5. Accounts clicks **Create > Payment Entry** to reimburse, or the amount is added to the next payroll.

Practical example

A driver spends KES 3,500 on fuel and attaches the receipt. The supervisor approves, and finance pays the amount by M-Pesa and records the payment against the claim.

Important notes

- Always require receipts.
- The status moves from *Unpaid* to *Paid* once the payment is recorded.

Common mistakes

- Paying outside the system, so the claim stays *Unpaid*.

Next steps

Return to Human resources overview.

Related documentation

- Running payroll and payslips
- Recording customer and supplier payments