








Justlogin HR Cloud

A Guide to eForm (Superadmin User)



A large, colorful geometric graphic in the top-left corner, composed of many overlapping triangles in shades of blue, orange, and red, creating a complex, abstract shape.

Agenda

-  Forms Setup
-  Forms Sample Emails Notification
-  Forms Administrator
-  Forms Report
-  Forms Usage (User Perspective)



Forms Setup



Setting up of Form



Welcome, Jocelyn Ma. | My Role | Help | FAQ | Justlogin Express BETA

eForm | eLeave | eTimecharge | eSurvey | eTimeclock | eAdmin | eStaff | ePayroll | eBenefit

Forms | **Step 1** | Form History | Action History | **Form Administration** | Reports | Form Data

Role Selection | Form Library | Email Password Option | Transfer To ePayroll | Select Form Admin

Form Library

SNo	Form Name	Form Preview	Print Preview	Workflow Diagram	Status
1.	Overseas Expense Claim Form				Enabled
2.	Smart Local Transport Claim Form				Enabled
3.	Local Expense Claim Form				Enabled
4.	Transport Claim Form				Disabled
5.	Medical Claim Form				Disabled
6.	Overtime Meals & Transport Reimbursement Form				Disabled
7.	Entertainment Claim Form				Disabled
8.	Software Upload Request Form				Disabled
9.	Petty Cash Claim Form				Disabled

Enable **Disable**

Difference between Smart Local and Local Expense is "Smart Local." is able to calculate the distance automatically and

- These are the expense forms available on the module
- Check the box to enable or disable the expense forms
- You should perform this task before selecting your approval tiers and setting the reminders

Form Administration



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Pending Actions | Form History | Action History | **Form Administration** | Reports | Form Data


Role Selection | Reminder Setup | Form Library | Email Password Option | Transfer To ePayroll | Select Form Admin

Role Selection

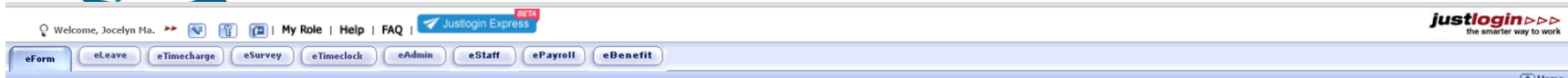
Form Name	Display Below The Form
1. Smart Local Transport Claim Form	<input checked="" type="checkbox"/>
2. Overseas Expense Claim Form	<input checked="" type="checkbox"/>
3. Local Expense Claim Form	<input checked="" type="checkbox"/>

+ Open the Role List

Role Selection | Reminder Setup | Form Library | Email Password Option | Transfer To ePayroll | Select Form Admin

 Setup verification officers, approving officers and finance roles for form's approval

Role Selection



Smart Local Transport Claim Form

Role Description	Who?	Display None?	CC to others?
1. Applicant	initiator Daphne Suherman Karen Teo	<input type="checkbox"/>	<input type="checkbox"/> Enter email separated by ;
2. Verification Officer	selected Brian Tay	<input type="checkbox"/>	Enter email separated by ; when [dropdown]
3. Approving Officer	selected Jocelyn Ma	<input type="checkbox"/>	Ent
4. Finance Officer	selected		Enter email separated by ; when [dropdown]

Step 3

Click to select the approving managers from a dropdown list of employees

Display None?

CC to others?

Include list of email addresses for personnels requiring notifications of the form submission

Check the box if there are employees who do not require multi-tier of approval

- Applicant would be the employees themselves
- Verification Officer is the first layer of approval upon employees' form submission
- Approving Officer is the second layer of approval, email will be route automatically upon first tier's approval
- Finance officer is the final approval, similarly, email will route automatically upon second tier's approval

Reminder Setup



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Step 4

Pending Actions | Form History | Action History | Form Administration | Reports | Form Data


Role Selection | Reminder Setup | Form Library | Email Password Option | Transfer To ePayroll | Select Form Admin

Role Selection

Form Name	Display Below The Form
1. Smart Local Transport Claim Form	<input checked="" type="checkbox"/>
2. Overseas Expense Claim Form	<input checked="" type="checkbox"/>
3. Local Expense Claim Form	<input checked="" type="checkbox"/>

+ Open the Role List

Role Selection | Reminder Setup | Form Library | Email Password Option | Transfer To ePayroll | Select Form Admin

 Create reminder templates for various approval if there is no action within a day

Reminder Setup



Reminder Setup - Google Chrome

https://.../GenericReminder/DefineFormReminders.aspx?moduleid=12004&remindertypeid=414F2F279F72465783E92BBC48ABBDB5-2&remindertypename=...

Step 5

Enable Reminder
 CC To Form Admin

Send Reminder if action is pending for more than days

eForm Reminder: {form-name}

{FORM-NAME} FROM {NAME}

Hi {name},

The form [{form-reference-number}](#) submitted by {created-by} has been processed ("{action}") by {last-action-by}. It has been pending for your action for {triggerdays}.

Please view the form to {approval-action} it.

VIEW DETAILS

Previously...

{by-who} - {last-action-role}
{action}: {last-action-date}

Note: This e-mail message was sent from a notification-only address that cannot accept incoming e-mail. Please do not reply to this message.

RESET **SUBMIT**

S No.	Title	Action	CC To Form Admin
1	eForm Reminder: {form-name}	EDIT DELETE	<input type="checkbox"/>

- ✈ Check the box to Enable Reminder
- ✈ Check the box to cc the reminder to the administrator (usually not advisable as admin will end receiving a lot of emails)
- ✈ Click Submit to save the settings
- ✈ Content of the template is unique to each approval tier hence the template cannot be edited

Email Password Option



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Forms | Pending Actions | Form History | Action History | Form Administration | Reports | Form Data

Role Selection | Reminder Setup | Form Library | **Email Password Option** | Transfer To ePayroll | Select Form Admin

Email Password Option

SNo	Form Name	Form Preview	Status
<input type="checkbox"/> 1.	Smart Local Transport Claim Form		Password Not Required
<input type="checkbox"/> 2.	Overseas Expense Claim Form		Password Not Required
<input type="checkbox"/> 3.	Local Expense Claim Form		Password Not Required

[Enable](#) [Disable](#)

Instruction: To allow users to access eforms via email link without entering password, please select required forms and click on 'Disable' button. To allow users to access eforms via email link with password, please select required forms and click on 'Enable' button.

Step 6

- ✈ To enable or disable password function for approving managers
- ✈ Enable password function means approving managers have to key in a password before they can access the email links from their email
- ✈ Disable password means they can access the module and approve through the expenses without the added security

Transfer to ePayroll



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Forms | Pending Actions | Form Administration | Action History | Form Administration | Reports | Form Data

Role Selection | Reminder Setup | Form Library | Email Password | **Transfer To ePayroll** | Select Form Admin

Transfer To ePayroll (*Please click [here](#) to view the instructions.)

Form Name: All Forms

User Name: [input] [icon] [icon]

Dept: All Depts

Start Date: 5/12/2016 [icon] End Date: 5/12/2016 [icon] (mm/dd/yy)

Date Based on: Submission

Form ID: [input] [Go]

- Select the expense form
- Select user or department
- Select a date range
- Select date base
- Click go and generate the data to transfer to ePayroll for processing together with monthly payroll

(This function is only applicable if you are using Justlogin's ePayroll)

Select Form Admin



Step 8

Forms	Pending Actions	Form History	Action History	Administration	Reports
Role Selection	Reminder Setup	Form Library	Email Password Option	Transfer To ePayroll	Select Form Admin

Select Form Admin

Smart Local Transport Claim Form	<input type="text" value="X Jocelyn Ma"/>	
Overseas Expense Claim Form	AIELLEN GAMBOA CASTILLO	
Local Expense Claim Form	ANICETO ANGELICA LIQUIGAN	
	AUBREY CHIEW	
	Brian Tay	
	CANDY ONG WAN RONG	
	CANTOS RITCHAN PIDLAOAN	
	CANTOS RITCHAN PIDLAOAN	
	Daphne Suherman	
	DAYNA ONG SHU MIN	
	DOMINIC SOH JUEN AHN	
	FAUZIAH BINTE MUSA	

Assign form administrators for the respective expense forms

Form Data



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Step 9

Dropdown List | Exchange Rate | Interface Setup | Account Code

Form Data

This is a customised tab for maintenance and update of table/data used by eForm.

Dropdown List | Exchange Rate | Interface Setup | Account Code

- Setup the type of currency expense for Overseas Expense Claim Form
 - Setup the monthly exchange rate for Overseas Expense Claim Form
 - Setup interface's data to sync the expenses to payroll elements
- (This is only applicable for companies using Justlogin's ePayroll)**

Create or Delete Currency



https://www.justlogin.com/eform1/List_Details.asp - Google Chrome

https://www.justlogin.com/eform1/List_Details.asp

List Name : Currency ▾

Export Value	Display Value
<input type="checkbox"/> AUD	AUD
<input type="checkbox"/> EUR	EUR
<input type="checkbox"/> GBP	GBP
<input type="checkbox"/> HKD	HKD
<input type="checkbox"/> INR	INR
<input type="checkbox"/> JPY	JPY
<input type="checkbox"/> KRW	KRW
<input type="checkbox"/> MYR	MYR
<input type="checkbox"/> NZD	NZD
<input type="checkbox"/> SGD	SGD
<input type="checkbox"/> THB	THB
<input type="checkbox"/> TWD	TWD
<input type="checkbox"/> USD	USD
<input type="checkbox"/> RMB	RMB
<input type="checkbox"/> IDR	IDR
<input type="checkbox"/> PHP	PHP
<input type="checkbox"/> VND	VND
<input type="checkbox"/>	
<input type="checkbox"/>	

User Name	Access Time	Action
Jocelyn Ma	5/3/2016 4:42:39 PM	Add New
Jocelyn Ma	5/5/2016 4:00:59 PM	Add New
Jocelyn Ma	5/5/2016 4:01:46 PM	Delete Record
Jocelyn Ma	5/12/2016 1:55:35 PM	Delete Record

Form Data



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Step 10

Pending Actions | Form History | Action History | Form Administration | Reports | Form Data

Dropdown List | Exchange Rate | Interface Setup | Account Code

This is a customised tab for maintenance and update of table/data used by eForm.

 Exchange rate needs to be updating on a weekly / monthly basis manually!



Update Exchange Rate



https://www.justlogin.com/eform1/Exchange_rate.asp - Google Chrome

https://www.justlogin.com/eform1/Exchange_rate.asp

Month : May Year : 2016

Base Currency : SGD


No.	Currency	Rate	Sequence
<input type="checkbox"/> 0	AUD	0.99	1
<input type="checkbox"/> 1	EUR	0.64	2
<input type="checkbox"/> 2	GBP	0.51	3
<input type="checkbox"/> 3	HKD	5.73	4
<input type="checkbox"/> 4	INR	49.12	5
<input type="checkbox"/> 5	JPY	78.86	6
<input type="checkbox"/> 6	KRW	853.93	7
<input type="checkbox"/> 7	MYR	2.95	8
<input type="checkbox"/> 8	NZD	1.07	9
<input type="checkbox"/> 9	THB	25.86	10
<input type="checkbox"/> 10	USD	0.74	11
<input type="checkbox"/> 11	RMB	4.79	12
<input type="checkbox"/> 12	IDR	9783.93	13
<input type="checkbox"/> 13	PHP	34.73	14
<input type="checkbox"/> 14	VND	16358.82	15
<input type="checkbox"/> 15	AUD		

User Name	Access Time	Action
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:14:00 PM	Update Record
Jocelyn Ma	5/5/2016 4:13:59 PM	Add New
Jocelyn Ma	5/5/2016 4:13:59 PM	Add New
Jocelyn Ma	5/5/2016 4:13:59 PM	Update Record
Jocelyn Ma	5/5/2016 4:10:50 PM	Update Record
Jocelyn Ma	5/5/2016 4:10:50 PM	Update Record
Jocelyn Ma	5/5/2016 4:00:00 PM	Copy Previous Month Records

Form Data



This is a customised tab for maintenance and update of table/data used by eForm.

 Interface Setup is mainly for the pay elements (fields) to be setup to be route successfully to ePayroll.

Interface Expenses with Payroll Elements



justlogin.com - Google Chrome

https://www.justlogin.com/eform1/InterfaceToePayroll.asp

Link expense types to pay element IDs:

You can link the Expense Types (typically used in Expense Claim Form) to their respective pay elements set up in ePayroll.

Expense Type	Pay Element ID
Mobile	NA
Medical	NA
Insurance	NA
Transport	NA
Entertainment	NA
Travel - Flight	NA
Travel - Accommodation	NA
Travel - Entertainment	NA
Travel - Local Transport	NA
Per Diem	NA
Travel - Travel Insurance	NA
Travel - Laundry	NA
Travel - Parking & Tolls	NA
Parking & Tolls	NA
Office Expenses - Miscellaneous	NA
Office Equipments	NA



The expense codes have to sync with the payroll elements in order to map the expense claim data in ePayroll

Link forms to expense types:

This is for Forms that have a Total Amount field to be linked to the Expense Type so that the total amount can be linked to Pay Element based on the set up above.

Form	Expense Type	Expense Type Field	Account Code Field	Total Field	Amount Field	GST	Before GST
Local Expense Claim Form	use expense types within the form	Type of Expense	Account Code	Total Amount	NA	GST Amt	Before GST
Overseas Expense Claim Form	use expense types within the form	Type of Expense	Account Code	Local Currency	NA	NA	NA
Smart Local Transport Claim Form	use expense types within the form	Transport Type	NA	Amount	NA	NA	NA

[Update](#) [Reset](#)

Form Data



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Forms | Pending A | **Step 12** | Action History | Form Administration | Reports | **Form Data**

Dropdown List | Exchange Rate | Interface Setup | **Account Code**

This is a customised tab for maintenance and update of table/data used by eForm.

Dropdown List | Exchange Rate | Interface Setup | Account Code

Create Expense Type



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Forms | Pending Actions | Form History | Action History | Form Administration | Reports | Form Data

Dropdown List | Exchange Rate | Interface Setup | Account Code

Account Code

Integrate with Quickbooks Online
Only accounts with account codes set up in Quickbooks Online will be shown here.

Paid To

<input type="checkbox"/>	Account Code	Expense Type	
<input type="checkbox"/>	8401	Entertainment	X
<input type="checkbox"/>	8202	Insurance	X
<input type="checkbox"/>	8201	Medical	X
<input type="checkbox"/>	8101	Mobile	X
<input type="checkbox"/>	8602	Office Equipments	X
<input type="checkbox"/>	8601	Office Expenses - Miscellaneous	X
<input type="checkbox"/>	8302	Parking & Tolls	X
<input type="checkbox"/>	8505	Per Diem	X
<input type="checkbox"/>	8301	Transport	X
<input type="checkbox"/>	8502	Travel - Accomodation	X
<input type="checkbox"/>	8503	Travel - Entertainment	X
<input type="checkbox"/>	8501	Travel - Flight	X
<input type="checkbox"/>	8507	Travel - Laundry	X
<input type="checkbox"/>	8504	Travel - Local Transport	X
<input type="checkbox"/>	8508	Travel - Parking & Tolls	X
<input type="checkbox"/>	8506	Travel - Travel Insurance	X

New Delete



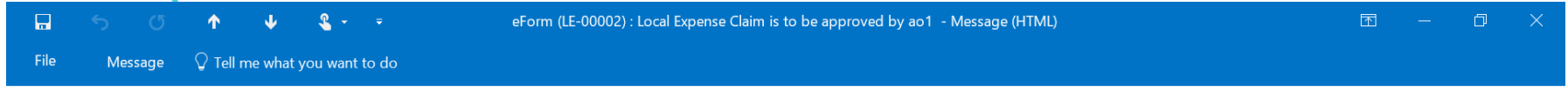
Companies can choose to map the account codes from their Quickbook online's account or create account codes for their individual expenses



Forms Sample Emails Notification



Email to First or Second Tier of Approval




Thu 5/5/2016 4:42 PM

eForm Administrator <eform@justlogin.com>

eForm (LE-00002) : Local Expense Claim is to be approved by ao1

To Jocelyn Ma

 If there are problems with how this message is displayed, click here to view it in a web browser.

LOCAL EXPENSE CLAIM FORM FROM RACHEL WEE

Hi Daphne Suherman,

Rachel Wee has raised a new form [LE-00002](#).

Please view the form to Approve/Reject it.

[VIEW](#)



Email to Applicant once Claim is processed



File Message Tell me what you want to do eForm (LE-00003) : Local Expense Claim is processed - Message (HTML)

Wed 11/5/2016 2:30 PM
eForm Administrator <eform@justlogin.com>
eForm (LE-00003) : Local Expense Claim is processed

To: Jocelyn Ma

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

LOCAL EXPENSE CLAIM FORM FROM BRIAN TAY

Hi Brian Tay,

The form **LE-00003** submitted by Brian Tay has been processed ("Reimburse") by Jocelyn Ma.

Previously...

- Jocelyn Ma - Finance
Reimburse: 11 May 2016
- Brian Tay - Applicant
Submit: 06 May 2016

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Forms Administrator



Pending Actions




Forms | **Pending Actions** | Form History | Action History | Form Administration | Reports | Form Data

Form Status Dashboard Local Expense Claim Form Go

	Local Expense Claim is to be entered	Local Expense Claim is to be approved by ao1	Local Expense Claim is to be reimbursed
Admin Admin	1	1	5

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 Claims administrator manage the claims approval by selecting the pending claims indicated as per above.

Action History



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Forms | Pending Actions | Form History | **Action History**

Approval History | Delegation

Search

SNo	Action	All Forms	Form Preview	All Roles	Submitted By	Date	Remarks
1.	Save as draft	Overseas Expense Claim Form	TE-00002	Applicant	Brian Tay	12 May 2016 00:31:31	
2.	Save as draft	Overseas Expense Claim Form	TE-00001	Applicant	Brian Tay	12 May 2016 00:30:09	
3.	Save as draft	Local Expense Claim Form	LE-00008	Applicant	Brian Tay	12 May 2016 00:25:24	
4.	Submit	Local Expense Claim Form	LE-00005	Applicant	Brian Tay	09 May 2016 17:08:51	
5.	Submit	Local Expense Claim Form	LE-00004	Applicant	Brian Tay	06 May 2016 16:47:41	
6.	Submit	Local Expense Claim Form	LE-00003	Applicant	Brian Tay	06 May 2016 16:44:53	
7.	Approve	Local Expense Claim Form	LE-00002	Approver 2	Rachel Wee	05 May 2016 16:48:07	

Print Preview View Audit History

Action History | Delegation

All action history are captured (saved as draft, submitted and approval expense forms)

Delegation



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Forms | Pending Actions | Form History | **Action History**

Approval History | **Delegation**

Delegation

From: To:

Smart Local Transport Claim Form:	<input type="text" value="NA"/>
Overseas Expense Claim Form:	<input type="text" value="NA"/>
Local Expense Claim Form:	<input type="text" value="NA"/>

Note: Please select the delegation person from the drop-down list to be your delegation officer during your absence. Only those names which appear in the approving officer list for each form will appear in the drop-down list.

Action History | **Delegation**

Approving Managers going on leave can delegate the approval admin



Reports



Reports



eForm eLeave eTimecharge eSurvey eTimeclock eAdmin eStaff ePayroll eBenefit

Forms Pending Actions Form History Action History Form Administration Reports Form Data

Report Form Status Summary Report Expense Type Report

Form Name: All Forms Form Status: All

Workflow Status: All Status

User Name: [User Icon] [X]

Dept: All Depts

Start Date: 04/01/16 End Date: 5/11/16 (mm/dd/yy)

Field Name 1: Default Fields

Field Name 2: Default Fields

Field Name 3: Default Fields

Field Name 4: Default Fields

Form ID: [Input] **Go**

View attachment

Instruction: To generate a report, please select required criteria and click on 'Go' button.

No.	Form Name	Action	Form Ref No.	Workflow Status	Submitted by	Last Action Date	Action
1	Local Expense Claim Form		LE-00003	Local Expense Claim is processed	Brian Tay	11 May 2016	
2	Local Expense Claim Form		LE-00007	Local Expense Claim is processed	Jocelyn Ma	11 May 2016	
3	Local Expense Claim Form		LE-00006	Local Expense Claim is processed	Jocelyn Ma	10 May 2016	
4	Local Expense Claim Form		LE-00005	Local Expense Claim is processed	Brian Tay	9 May 2016	
5	Local Expense Claim Form		LE-00004	Local Expense Claim is processed	Brian Tay	6 May 2016	
6	Local Expense Claim Form		LE-00002	Local Expense Claim is processed	Rachel Wee	5 May 2016	
7	Local Expense Claim Form		LE-00001	Local Expense Claim is to be entered	Terence Khoo	5 May 2016	

Print Preview **Download Report** **Download**

View expense form in PDF format

- Query the type of expense form
- Query the processing status
- Query the user or department
- Click go to generate the forms submitted
- View the attachments individually
- View the forms submitted
- Download the report

Report Form Status Summary Report Expense Type Report

Form Status Summary Report



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Forms | Pending Actions | Form History | Action History | Form Administration | **Reports** | Form Data



Report | **Form Status Summary Report** | Expense Type Report

Form Status Summary Report

Form Name: Form Status:

- Please select a form
- Smart Local Transport Claim Form
- Overseas Expense Claim Form
- Local Expense Claim Form

Report | Form Status Summary Report | Expense Type Report

-  Select the expense form
-  Click go to generate

Form Status Summary Report



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- Forms
- Form Actions
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- Action History
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- Form Data

- Report
- Form Status Summary Report**
- Expense Type Report

Form Status Summary Report

Form Name: Local Expense Claim Form Form Status: Active Go

S/N	Name	Local Expense Claim is to be entered	Local Expense Claim is to be approved by ao1	Local Expense Claim is to be approved by ao2	Local Expense Claim is to be reimbursed	Local Expense Claim is processed
1	AIELLEN GAMBOA CASTILLO	0	0	0	0	0
2	ANICETO ANGELICA LIQUIGAN	0	0	0	0	0
3	AUBREY CHIEW	0	0	0	0	0
4	Brian Tay	1	0	0	0	0
5	CANDY ONG WAN RONG	0	0	0	0	0
6	CANTOS RITCHAN PIDLAOAN	0	0	0	0	0
7	CANTOS RITCHAN PIDLAOAN	0	0	0	0	0
8	Daphne Suherman	0	0	0	0	0
9	DAYNA ONG SHU MIN	0	0	0	0	0
10	DOMINIC SOH JUEN AHN	0	0	0	0	0
11	FAUZIAH BINTE MUSA	0	0	0	0	0
12	FOONG KING YI	0	0	0	0	0
13	GOH WEI WEN	0	0	0	0	0
14	Grace Goh	0	0	0	0	0
15	HEE LING YI	0	0	0	0	0
16	HERBER ALAIN GUY	0	0	0	0	0
17	JEAN NG	0	0	0	0	0
18	Jocelyn Ma	0	0	0	0	6
19	JONATHAN LIM ZHI XUAN	0	0	0	0	0
20	JUSTIN WOO YONG CONG	0	0	0	0	0

1 2 3 4

Print Preview Download

Expense Type Report



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Home

Forms | Pending Actions | Form History | Action History | Form Administration | Reports | Form Data

Report | Form Status Summary Report | Expense Type Report

Expense Type Report

Search Options

From To All Forms Advanced Options

Form Status: Date Based On: Expense Type: Employee: Department:

Report | Form Status Summary Report | Expense Type Report

- ✈ Query the date range
- ✈ Query the expense form
- ✈ Query the status
- ✈ Query the employee or department
- ✈ Click go to generate the report

Expense Type Report



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eForm

eLeave

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eSurvey

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Form Data



Report



Form Status Summary Report



Expense Type Report

Expense Type Report

Search Options

From

01/04/2016

To

11/05/2016

All Forms

GO

Advanced Options

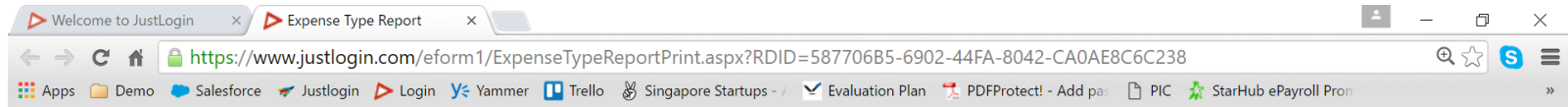
Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

PRINT PREVIEW

DOWNLOAD

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Sample Expense Type Report (Print Preview)



Expense Type	Account Code	Amount (excl. GST)	GST/VAT	Amount (incl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

Expense Type Report



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Form Status Summary Report



Expense Type Report

Expense Type Report

Search Options

From 01/04/2016

To 11/05/2016

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Advanced Options

Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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Sample Expense Type Report (Summary)



ExpenseTypeReport (5) - Excel

File Home Insert Draw Page Layout Formulas Data Review View Foxit PDF Tell me what you want to do Share

Get External Data New Query Show Queries From Table Recent Sources Refresh All Connections Properties Edit Links Sort Filter Clear Reapply Advanced Text to Columns What-If Analysis Forecast Sheet Group Ungroup Subtotal

I10

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Expense Type	Account Code	Amount (excl. GST	GST/VAT	Amount (incl. GST)									
2	Entertainment	8401	66	4.31	61.69									
3	Mobile	8101	2.67	0.17	2.5									
4	Office Expenses - Miscellaneous	8601	11.8	0.77	11.03									
5	Transport	8301	27.9	0.8	27.1									
6	Total		108.37	6.05	102.32									
7														
8														
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17														
18														
19														

ExpenseTypeReport (5) Ready 100%

Expense Type Report



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Form Status Summary Report



Expense Type Report

Expense Type Report

Search Options

From 01/04/2016

To 11/05/2016

All Forms

GO

Advanced Options

Expense Type	Account Code	Amount (incl. GST)	GST/VAT	Amount (excl. GST)
Entertainment	8401	66	4.31	61.69
Mobile	8101	2.67	0.17	2.5
Office Expenses - Miscellaneous	8601	11.8	0.77	11.03
Transport	8301	27.9	0.8	27.1
Total		108.37	6.05	102.32

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Sample Expense Type Report (Detailed)



ExpenseTypeReport (4) - Excel

File Home Insert Draw Page Layout Formulas Data Review View Foxit PDF Tell me what you want to do Share

Get External Data New Query Show Queries From Table Recent Sources Refresh All Connections Properties Edit Links Sort Filter Reapply Advanced Text to Columns What-If Analysis Forecast Sheet Group Ungroup Subtotal

N7

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Expense Type	Account	Employee Name	Amount (excl. GST)	GST/VAT	Amount (incl. GST)									
2	Entertainment	8401	Brian Tay	23.4	1.53	21.87									
3	Entertainment	8401	Jocelyn Ma	42.6	2.78	39.82									
4	Mobile	8101	Brian Tay	2.67	0.17	2.5									
5	Office Expenses	8601	Rachel Wee	11.8	0.77	11.03									
6	Transport	8301	Brian Tay	12.3	0.8	11.5									
7	Transport	8301	Rachel Wee	15.6	0	15.6									
8	Total			108.37	6.05	102.32									
9															
10															
11															
12															
13															
14															
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16															
17															
18															
19															

ExpenseTypeReport (4)

Ready ExpenseTypeReport (4) - Excel 100%

Copy



Forms Usage (User Perspective)



Employees' Functions



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1. Smart Local Transport Claim Form
2. Overseas Expense Claim Form
3. Local Expense Claim Form

* Please go to Form Library to enable the forms you want.

Forms with Workflow

🚀 Applicants have to first select the forms / claims that they are doing.

Types of Forms Available



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Smart Local Transport Claim Form



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 Save As Draft | Submit | Go Back

Smart Local Transport Claim Form

Name **BRIAN TAY**

Employee No.

Vehicle No.

Claim Date

Claim Month

Date (dd/mm)	From	To	Km.	Purpose	Transport Type	Car Park	ERP	Taxi	Bus/MRT	Amount
29/04	20 Kallang Avenue Singapore	120 Robinson Road Singapore	5.99					8.10		8.10
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								
	FROM	TO								

- Complete the necessary fields base on your transport claim
- System is able to compute the distance base on google map
- Attached your receipt at the end of the line item

Click to attach your receipt





Smart Local Transport Claim Form



Role	Name
Applicant	Brian Tay
Verification Officer	Please Select One ▼
Approving Officer	Please Select One ▼
Finance Officer	Please Select One ▼

Smart Local Transport Claim Form

Name: BRIAN TAY Employee No. Claim Date

Date (dd/mm)	From	To	Km.	Purpose	Trans. Typ.
20/04	120 Kallang Avenue Singapore	120 Robinson Road Singapore	5.99		

Please verify that the information that you have entered is correct before submit.
 * Denotes Mandatory fields. (If any).



- Select the approvals for your claim (one-time setup)
- Click re-calculate total before saving as draft or submission
- Click save as draft to return back to the form
- Click submit for approval

Role	Name
Applicant	Brian Tay
Verification Officer	Please Select One ▼
Approving Officer	Please Select One ▼
Finance Officer	Please Select One ▼

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Overseas Expense Claim Form



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Overseas Expense Claim Form

Employee ID		Date Created	11/5/2016
Name	Brian Tay	Local Currency	<input type="text"/>
Department	Marketing		

Date	Type of Expense	Account Code	Item Description	Transacted Amount	Transacted Currency	Exchange Rate	Local Currency	Remarks
25/03/2016	Entertainment	8401	Lunch with ABC Company	60.50	USD	1.3	78.65	

- Entertainment
- Insurance
- Medical
- Mobile
- Office Equipments
- Office Expenses - Miscellaneous
- Parking & Tolls
- Per Diem
- Transport
- Travel - Accomodation
- Travel - Entertainment
- Travel - Flight
- Travel - Laundry
- Travel - Local Transport
- Travel - Parking & Tolls
- Travel - Travel Insurance

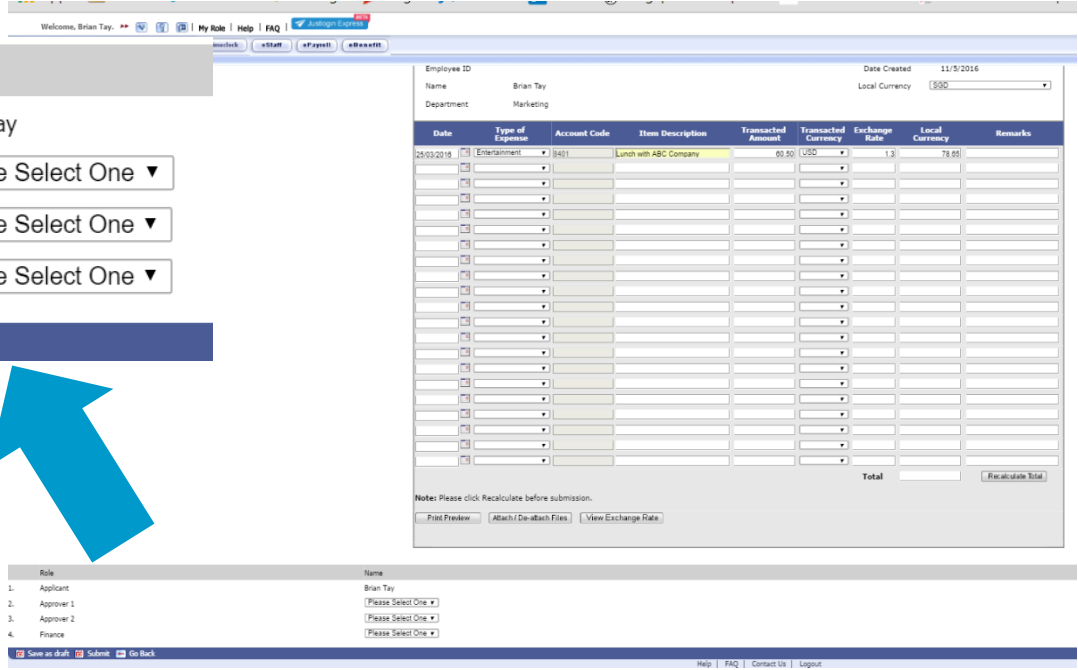
- Key in date of transaction
- Select your type of expense from the dropdown list
- Key in description of the expense
- Key in Transacted amount in the overseas currency
- Select Transacted currency
- Select default exchange rate or key in your preferred rate
- Local currency will be auto computed
- Attached the receipt at the end of the line item

Overseas Expense Claim Form







Role	Name
1. Applicant	Brian Tay
2. Verification Officer	<input type="text" value="Please Select One"/>
3. Approving Officer	<input type="text" value="Please Select One"/>
4. Finance Officer	<input type="text" value="Please Select One"/>

[Save As Draft](#) [Submit](#) [Go Back](#)



The screenshot shows the full application interface. At the top, it says 'Welcome, Brian Tay.' and has navigation links for 'My Role', 'Help', 'FAQ', and 'Justlogin Expenses'. The main form area is divided into two sections. The left section is the approval table, and the right section is the expense table. The expense table has columns for Date, Type of Expense, Account Code, Item Description, Transacted Amount, Transacted Currency, Exchange Rate, Local Currency, and Remarks. The first entry is dated 25/03/2016, with an amount of 60.50 USD at an exchange rate of 1.3, totaling 78.65. A 'Recalculate Total' button is located at the bottom right of the expense table. A note at the bottom of the expense table reads: 'Note: Please click Recalculate before submission.' Below the note are buttons for 'Print Preview', 'Attach/De-attach Files', and 'View Exchange Rate'. At the bottom of the page, there is a footer with 'Help | FAQ | Contact Us | Logout'.

-  Select the approvals for your claim (one-time setup)
-  Click re-calculate total before saving as draft or submission
-  Click save as draft to return back to the form
-  Click submit for approval



Types of Forms Available



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Local Expense Claim Form



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Local Expense Claim Form

Employee ID _____ Date Created 12/5/2016
Name Brian Tay Department Marketing

Date	Type of Expense	Account Code	Item Description	GST	Total Amount	Before GST	GST Amt	Remarks
02/02/2016	Mobile	8101	Overseas Phone Call with ABC	YES	6.70	6.26	0.44	

- Key in date of transaction
- Select Type of Expense from dropdown list
- Account Code would be auto computed
- Key in Item Description
- Select if tax is applicable
- Total Amount transacted
- SG would have GST auto computed
- Attach your receipt at the end of the line item

Local Expense Claim Form



Role	Name
1. Applicant	Brian Tay
2. Verification Officer	Please Select One ▾
3. Approving Officer	Please Select One ▾
4. Finance Officer	Please Select One ▾

Save As Draft
 Submit
 Go Back

Date	Type of Expense	Account Code	Item Description	GST	Total Amount	Before GST	GST Amt	Remarks
02/02/2016	Mobile	8101	Overseas Phone Call with ABC	YES	6.70	6.20	0.44	

Note: Please click Recalculate before submission.



- Select the approvals for your claim (one-time setup)
- Click re-calculate total before saving as draft or submission
- Click save as draft to return back to the form
- Click submit for approval

Role	Name
1. Applicant	Brian Tay
2. Approver 1	None ▾
3. Approver 2	None ▾
4. Finance	Jocelyn Ma ▾

Pending Actions



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Form Status Dashboard

Overseas Expense Claim is to be entered	
Brian Tay	2

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Local Expense Claim Form

Overseas Expense Claim Form

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- Select the type of expense form you had saved as draft from the top right hand corner
- Click on the number to select the form you had saved previously

Form History



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<input type="checkbox"/>	S No	View	All Forms	All Status	Waiting For	Form Reference No	Date Entered	Action
<input type="checkbox"/>	1.		Overseas Expense Claim Form	Overseas Expense Claim is to be e	Brian Tay	TE-00002	12 May 2016	
<input type="checkbox"/>	2.		Overseas Expense Claim Form	Overseas Expense Claim is to be e	Brian Tay	TE-00001	12 May 2016	
<input type="checkbox"/>	3.		Local Expense Claim Form	Local Expense Claim is to be ente	Brian Tay	LE-00008	12 May 2016	
<input type="checkbox"/>	4.		Local Expense Claim Form	Local Expense Claim is processed		LE-00005	9 May 2016	
<input type="checkbox"/>	5.		Local Expense Claim Form	Local Expense Claim is processed		LE-00004	6 May 2016	
<input type="checkbox"/>	6.		Local Expense Claim Form	Local Expense Claim is processed		LE-00003	6 May 2016	

Print Preview | View Audit History | Delete Form

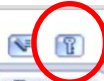
Form History Report

- View the PDF format of the expenses forms
- View the attachments from the expense forms
- View the status of the expense form

Change Password



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Change Password.

[Submit](#) [Go Back](#) [Reset](#)

Old Password:	<input type="password"/>
New Password (no space):	<input type="password"/>
Retype New Password (no space):	<input type="password"/>

You have to type your old password to change it to a new password.
You have to retype your new password to make sure that your new password will be changed correctly.

[Submit](#) [Go Back](#) [Reset](#)

Forget Password



Login to your account.

[I forgot my password.](#)

Support



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