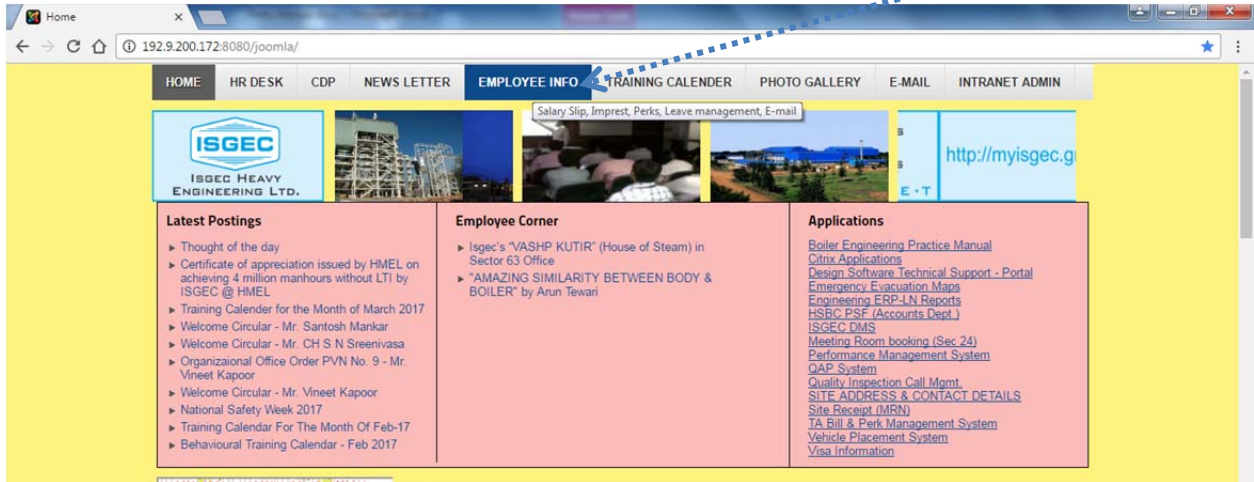
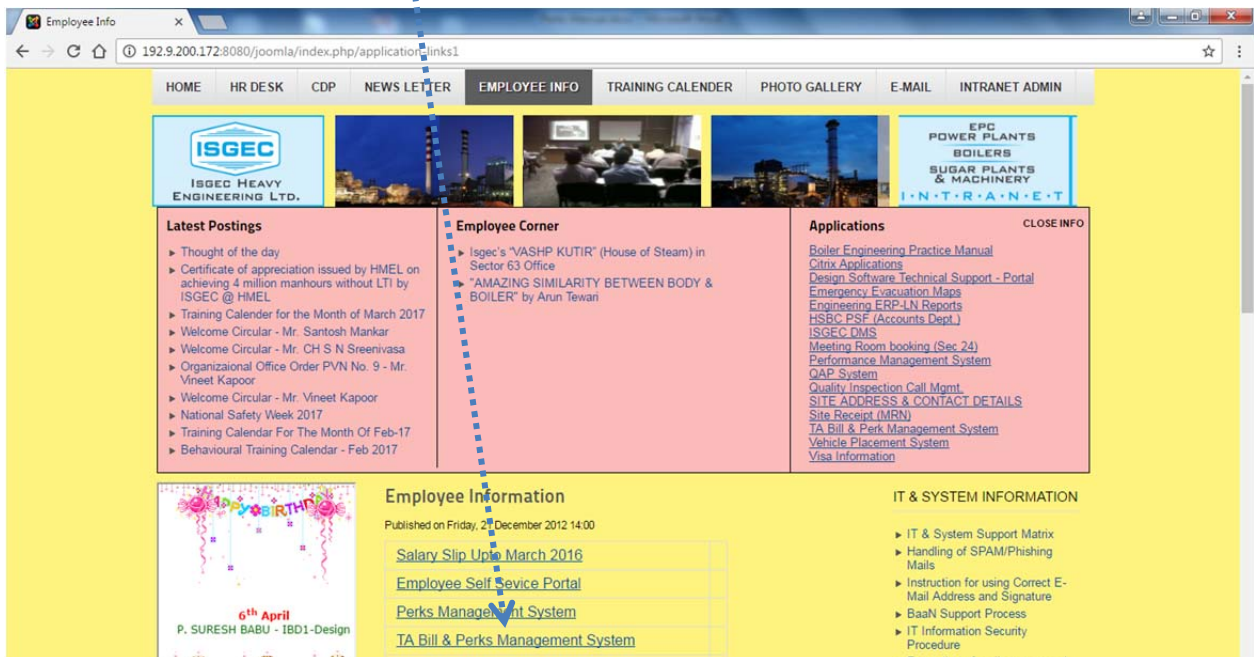


Perks Claim - User Guide

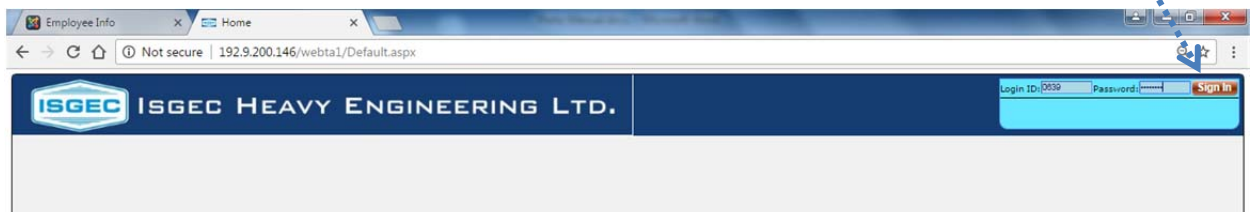
1. Open Isgec Home page, Using url <http://192.9.200.172:8080/joomla/>. Click on **EMPLOYEE INFO** tab.



2. Click on [TA Bill and Perks Management System](#).



3. Enter employee code and password.(same as used in Leave management System). Click on Sign In.



4. Click on **Perks Claim Form** to Apply. And Click on **Entitlement Sheet** to view entitled **PERKS DETAILS**.

The screenshot shows the ISGEC Heavy Engineering Ltd. web portal. The user is logged in as HARISH KUMAR, Designation: Engineer. The portal has a navigation bar with 'Admin', 'Travel Bill-A/c', 'TA Bill-Module', and 'Perk Module'. Below the navigation bar, there are icons for 'TA Bill Entry HELP', 'TA Claim Form', 'Perks Claim HELP', 'Perks Claim Form', and 'Entitlement Sheet'. A green arrow points from the 'Entitlement Sheet' icon to a 'PERKS DETAILS' table.

Type	Date	Particulars
MEDICAL BENEFIT:		
ENT	Apr/2016	
ENT	May/2016	
ENT	Jun/2016	
ENT	Jul/2016	
ENT	Aug/2016	
ENT	Sep/2016	
ENT	Oct/2016	
ENT	Nov/2016	
ENT	Dec/2016	
ENT	Jan/2017	
ENT	Feb/2017	
JNR	30/03/2017	Paid to HARISH KUMAR
ENT	Mar/2017	

5. After clicking Perk Claim Form, Below screen will appear, Here user can able to see all applied claim and there status linewise, To apply for new claim, Click on **Add new record** button..

The screenshot shows the 'List of Claims' screen in the ISGEC Heavy Engineering Ltd. web portal. The user is logged in as HARISH KUMAR. The screen displays a table of claims with columns: 'EDIT', 'PRINT', 'Claim Ref.No', 'Claimed Amount', 'Submitted On', 'Received On', and 'Ret'. There are three claims listed. A blue arrow points from the 'Add new record' button to the 'List of Claims' title.

EDIT	PRINT	Claim Ref.No	Claimed Amount	Submitted On	Received On	Ret
		0639/3	300.00	05/04/2017		
		0639/2	0.00			
		0639/1	0.00			

6. After clicking Add new record button below screen will appear with **Claim Ref No.**, Click on **Add new record** under **Add Perk Detail** section. Against a single Claim you can apply for multiple Perks.

The screenshot shows the 'Perk Claim Form' interface. At the top, there is a header bar with navigation icons. Below it, a 'Claim Ref. No.' field is populated with '0639/5', and a link 'Click here for Claim's Summary & Status' is visible. A blue button labeled 'Add Perk Detail' is present. Below this, there is a table with a toolbar and a pagination bar showing '1' of '0' pages, '10' items per page, and a status message 'No record found !!!'. A blue arrow points from the text in step 6 to the 'Add Perk Detail' button, and a yellow arrow points from the underlined text to the 'Claim Ref. No.' field.

7. On Clicking **Add new record**, you will see the **Perk Entry Form**. Here you can select **Perk Type** from drop down list. Fill user remarks (**not mandatory**) and then Click **Save Button**. You will be asked to **Enter Bill Details**.

The screenshot shows the 'Perk Entry Form' interface. It includes a 'Save' button at the top left. The 'Claim Ref.No.' field is populated with '0639/5'. The 'Perk Type' dropdown menu is open, showing a list of options: Car Insurance, Car Maintenance (highlighted), Club Subscription, Driver Charges, Entertainment Exp., LTC, Medical Benefit, Mediclaim, Mobile, Newspaper & Magazine, Petrol, Telephone, Two Wheeler Maint., and Uniform. The 'User Remark' field contains 'Petrol Claim'. A 'Ledger Balance' field shows '0'. Below the form, there is a section titled 'INSTRUCTIONS: First select the Perk Type then SAVE this Perk Entry Form to enter Bill Details.' At the bottom, there is a blue button labeled 'Enter Bill Details' and a table with a toolbar and a pagination bar showing '1' of '0' pages, '10' items per page, and a status message 'No record found !!!'. A blue arrow points from the text in step 7 to the 'Enter Bill Details' button, and another blue arrow points from the text 'Add new record' to the 'Add new record' button in the table below.

8. You can now enter the bill details by clicking **Add new record** under **Enter Bill Details** section. On Clicking **Add new record**, you will see a **Bill Entry Form**. In case you have a bulk of bills such as that of Petrol, Medical you can also use the Excel Upload facility which is explained in **Excel Upload Facility** in the last page of this manual.

9. After entering the bill detail Click on **save button** to save the data. Repeat Step No 8 and 9 to enter multiple bills.

Bill Entry Form

Petrol

Declaration : I request reimbursement of expense towards running & maintenance of my vehicle, while I was on official duty.

Claim Ref.No :* 0639/5


BILL NO :* 000012 **BILL DATE :** 01/01/2016

Particulars :* Bharat Petrol Pump

Claimed Amount :* 1200.00

Save

10. After saving you will see the below screen. Here you can add more bills for this Perk by following

Step 8 and 9. After completing the Bill Entries click on **back button**  to go back to the **Perk Claim Form** (Refer Step 6) and you can follow the **Steps 6 to 9** to add any other Perk which you want to claim.

ISGEC HEAVY ENGINEERING LTD.

Perk Entry Form

Claims Ref.No :* 0639/5 **Ledger Balance:0**

Perk Type : Petrol

User Remark : Petrol Claim

Click here for this Perk's claim status

Status ID : 7 **7-Free**

Approved Value : 0.00 **Approved Amt :** 1200.00

Approver Remark :

Verified By : **Verified On :**

Approved By : **Approved On :**


Enter Bill Details

EDIT	BILL NO	BILL DATE	PARTICULARS	BILL AMT	CLAIMED AMT
	000012	01/01/2016	Bharat Petrol Pump	0.00	1200.00







To upload BILL Details through MS-Excel. First Download the Template. Then Upload the updated Excel File.

Step 1. **Download** Step 2. **Search** **Upload**

11. Once you have applied for all the different perks which you want to claim, the next step is to 'Forward the Claim Request to accounts and submit the hardcopies of the bills. So to go back to **List**








of Claims click the **back button**  in the below screen and then click on **Forward button** under the **List of Claims** to forward the claim to Account for further processing.



Perk Claim Form








Claim Ref. No :* 3019/1
[Click here for Claim's Summary & Status](#)

Add Perk Detail




       1 #of 1 Pages 10 /Page

EDIT	Perk Type	Applied On	Claimed Amount	Verified On	Approved On
	Petrol	10/04/2017	2567.00		
	Mobile	08/04/2017	499.00		

List of Claims

       #of 1 Pages 10 /Page

Filter Records (Show Filters...)

EDIT	PRINT	Claim Ref.No	Claimed Amount	Submitted On	Received On	Returned On	Passed Amount	Claim Status	Fwd.To Accounts
		3019/1	3066.00				3066.00	Free	

[Entitlement Sheet](#)

Excel Upload Facility

1. In the **Enter Bill Details** (Step no 7) instead of entering bill details on-by-one you can also upload bulk entries from Excel. First **Download** the Excel Template. Fill the data in Excel and then **Upload** after filling necessary details.

Enter Bill Details

1 of 0 Pages 10 / Page

Add new record

No record found !!!

To upload BILL Details through MS-Excel, First Download the Template. Then Upload the updated Excel File.

Step 1. **Download** Step 2. **Search Upload**

Sample Excel template

SYS.ID	Bill No.	Bill Date	Particulars	From Date	To Date	Bill Amount	Claimed Amount
1	1012	1/1/2016	Bharat Petrol Pump			1000.00	1000.00