**Customer Feedback- Expense List (Web Support)**

**(Enhancement)**

# Business Requirement

1. The Expense List (Web) enhancement requirements are:
   1. Currently the ExpenseOnDemand’s web and mobile device support is inconsistent functionality wise, while the Mobile app offers all the feature, functionality and support being the ‘Device of Choice’, the web on the other hand does not support all features which are there on mobile.
   2. The web currently also does not provide flexibility to act upon the expenses in list in bulk.
   3. The requirement originates from the Problem statement faced by customers who have switched from Paper to EOD SMB.
   4. The Generic user behaviour of the claimant were to save all the expense and submit it together at the specific date or at the end of the month. This action is possible on mobile but on web platform the support for bulk action on the Expense list is still not developed.
   5. Hence, Web platform should also support bulk submission of Incomplete expenses and complete expenses together which are in Incomplete expenses section whereas in mobile bulk submission is working.
   6. Web should have Submit and Delete options both when expenses are selected in bulk.

# Current Flow:

1. The current expense list on web does not allow submission of Expense in bulk. The action available is **Delete** on the expense list on web(**Screen 1**).

Screen 1

Graphical user interface, application

Description automatically generated

1. User has to edit and submit expenses ONE by ONE, since there is no bulk action present.

# Expense List: Proposed flow - Web

1. Expense list on the will now options to Submit the Incomplete Expenses in bulk.
2. On Selecting more than one expenses via checkbox on the Incomplete expenses, the panel will now display two options:
   1. Submit
   2. Delete

Screen 2

Graphical user interface, text, application

Description automatically generated

1. Clicking on Submit will submit the expenses will submit the expenses selected.
2. The Incomplete expenses can have following scenarios:
   1. **Mandatory fields (Category, Amount) filled**
   2. **Mandatory fields (Category, Amount) not filled**
   3. **Incomplete expenses which are violating policy**
   4. **Additional mandatory fields (Customer, CC, Additional fields, Business Purpose etc) not filled.**
3. This enhancement will discuss below the above scenarios and there respective handling in detail when submit actions is performed for bulk selection:
   1. **When the incomplete expenses have all the mandatory fields filled**: When Claimant selects to Submit the Incomplete expenses with Mandatory fields (category and amount, and no other additional field’s function has not been subscribed) filled present then the expenses should be SUBMITTED.
   2. **When the incomplete expenses have mandatory fields NOT filled:** When Claimant selects to SUBMIT the incomplete expenses with Mandatory fields not filled under Incomplete Expenses then a panel with message “*The Expense(s) with missing information has/have not been submitted, please take action on them individually and Submit*” with OK button.

Screen 3

Graphical user interface, text, application

Description automatically generated

* 1. **When some of the incomplete expenses has all the mandatory fields filled while some has NOT:** When Claimant selects to Submit some of the Incomplete expenses with all the mandatory fields filled and few Incomplete expenses with mandatory fields not filled under Incomplete Expenses then the incomplete expenses with all the mandatory fields filled will remain selected and Incomplete expenses with mandatory fields not filled will get unselected. Selected expenses should be SUBMITTED and for Incomplete expenses with mandatory fields not filled a panel with message “*The Expenses with missing information has not been submitted, please take action on them individually and Submit*” with OK button.
  2. **When the incomplete expenses are violating policy:** When Claimant selects the Incomplete expenses which are violating policy under Incomplete Expenses, none of them will be selected.   
     When selected individually, then on clicking Submit button then a panel with message “*The Expense(s) with missing information/ Policy violation has/have not been submitted, please take action on them individually and Submit*” with OK button. When clicked on OK button panel will open to enter the Justification note to submit it.
  3. **When some of the incomplete expenses are violating policy while some are NOT:** When Claimant selects to Submit the Incomplete expenses which are violating policy with some of the Incomplete expenses with all the mandatory fields filled under Incomplete Expenses list then the incomplete expenses with all the mandatory fields filled be SUBMITTED and Incomplete expenses with policy violated will remain remain in the list with message “*The Expense(s) with missing information/policy violation has/have not been submitted, please take action on them individually and Submit*”” with OK button.
  4. **When the incomplete expenses have mandatory fields filled but Additional Mandatory fields not filled:** When Claimant selects to Submit some of the Incomplete expenses with mandatory fields filled but Additional Mandatory fields not filled under Incomplete Expenses then selected expenses will not be SUBMITTED and a panel with the message “*The Expenses with missing information/ Policy Violation has not been submitted, please take action on them individually and Submit*” with OK button.
  5. **When Some of the expenses have complete information, some has incomplete information while some has policy violation:** When Claimant selects to Submit some of the Incomplete expenses with all the mandatory fields filled, few Incomplete expenses with mandatory fields not filled and few Incomplete expenses which are violating policy under Incomplete Expenses, then only the incomplete expenses with all the mandatory fields filled will be SUBMITTED. The incomplete and policy violated expenses will be left with the panel message “*The Expenses with missing information/Policy Violation has not been submitted, please take action on them individually and Submit*” with OK button.

1. Please note, the incomplete expense with all required fields filled will be submitted in case of Bulk Submit action.
2. In case of receipt type system will check the expenses, and item which requires Receipt will be treated as incomplete.
3. In case of policy violation expenses, claimant must submit them individually.

# Impact(s):

1. There is no impact for this enhancement.
2. The web expense list will remain as it for now, if received good feedback on mobile then we will plan the same to implement on Web as well.