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Create Expense Type

Here in this screen, we can create a type of Expense or can edit the approval flow for an expense type.

1. Data Table

Add Expense Types												
Expense	Workflow Approvals						Expense Type Levels			Attachment	Is Active	Action
	Supervisor	PM	IT	HR	L&D	Finance	Project	BU	Org			
Air Travel	X	Yes	X	Yes	X	Yes	Yes	Yes	Yes	Yes	True	✎
Books	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	✎
Bus / Train / Ferry	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	✎
Car	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	✎
Certification Reimbursements	X	Yes	X	X	Yes	Yes	Yes	X	X	X	True	✎
Certifications	X	Yes	X	X	Yes	Yes	X	Yes	Yes	Yes	True	✎
Client / Team Entertainment	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	✎
Client/Team meetings	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	✎
Event / Conference Fees	Yes	X	X	X	X	Yes	Yes	Yes	Yes	Yes	True	✎
Fuel	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	✎

Expense: This column displays the name of the Expense type.

Work Flow Approval: In these entire columns we can select the work flow to be processed for any expense that is created by a resource.

Expenses Type Levels: Here based on the selection in this expense Type levels those expenses type will be available for selection in that level.












Attachments: Here if we select this column for any expense type, then when any resource is creating any expense in that particular expense type then the resource is required to submit the attachment with that expense.



In Active: After creating an expense we can have that expense active in Usage or can in activate the expense type.

Action: After clicking on the edit button available in that column we can edit the already created expenses.

2. Create Expense Type









Here we can create a new expense type by clicking on the Icon highlighted in the image a new row populates and here all the required details can be added.



Expense	Workflow Approvals						Expense Type Levels			Attachment	Is Active	Action
	Supervisor	PM	IT	HR	L&D	Finance	Project	BU	Org			
Air Travel	X	Yes	X	Yes	X	Yes	Yes	Yes	Yes	Yes	True	
Books	X	Yes	Yes	X	Yes	Yes	Yes	X	Yes	Yes	True	
Bus / Train / Ferry	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Car	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Certification Reimbursements	X	Yes	X	X	Yes	Yes	Yes	X	X	X	True	
Certifications	X	Yes	X	X	Yes	Yes	X	Yes	Yes	Yes	True	
Client / Team Entertainment	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	
Client/Team meetings	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Event / Conference Fees	Yes	X	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Fuel	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	
testing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False ▾	



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3. Edit Expense Type

Here by clicking on the edit button for already available expense type the complete details of that particular expense can be edited and by clicking save option below all those changes made will be reflected.

Add Expense Types												
Expenses												
Expense	Workflow Approvals						Expense Type Levels			Attachment	Is Active	Action
	Supervisor	PM	IT	HR	L&D	Finance	Project	BU	Org			
Air Travel	X	Yes	X	Yes	X	Yes	Yes	Yes	Yes	Yes	True	
Books	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	False ▾	
Bus / Train / Ferry	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Car	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Certification Reimbursements	X	Yes	X	X	Yes	Yes	Yes	X	X	X	True	
Certifications	X	Yes	X	X	Yes	Yes	X	Yes	Yes	Yes	True	
Client / Team Entertainment	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	
Client/Team meetings	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Event / Conference Fees	Yes	X	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Fuel	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	



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Expense	Workflow Approvals						Expense Type Levels			Attachment	Is Active	Action
	Supervisor	PM	IT	HR	L&D	Finance	Project	BU	Org			
Air Travel	X	Yes	X	Yes	X	Yes	Yes	Yes	Yes	Yes	True	
Books	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	True	
Bus / Train / Ferry	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Car	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Certification Reimbursements	X	Yes	X	X	Yes	Yes	Yes	X	X	X	True	
Certifications	X	Yes	X	X	Yes	Yes	X	Yes	Yes	Yes	True	
Client / Team Entertainment	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	
Client/Team meetings	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Event / Conference Fees	Yes	X	X	X	X	Yes	Yes	Yes	Yes	Yes	True	
Fuel	X	Yes	X	X	X	Yes	Yes	Yes	Yes	Yes	False	

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