

User Manual for Travel Requests, Employee Advances, and Expense Claims



Introduction

This manual serves as a comprehensive guide for employees on how to navigate the travel request, employee advance, and expense claim processes using the ERPNext platform. Following these guidelines will facilitate efficient handling of travel-related requests and ensure compliance with company policies.

The tour program can be efficiently managed through the Travel Request module in ERPNext.

1. Travel Request Process

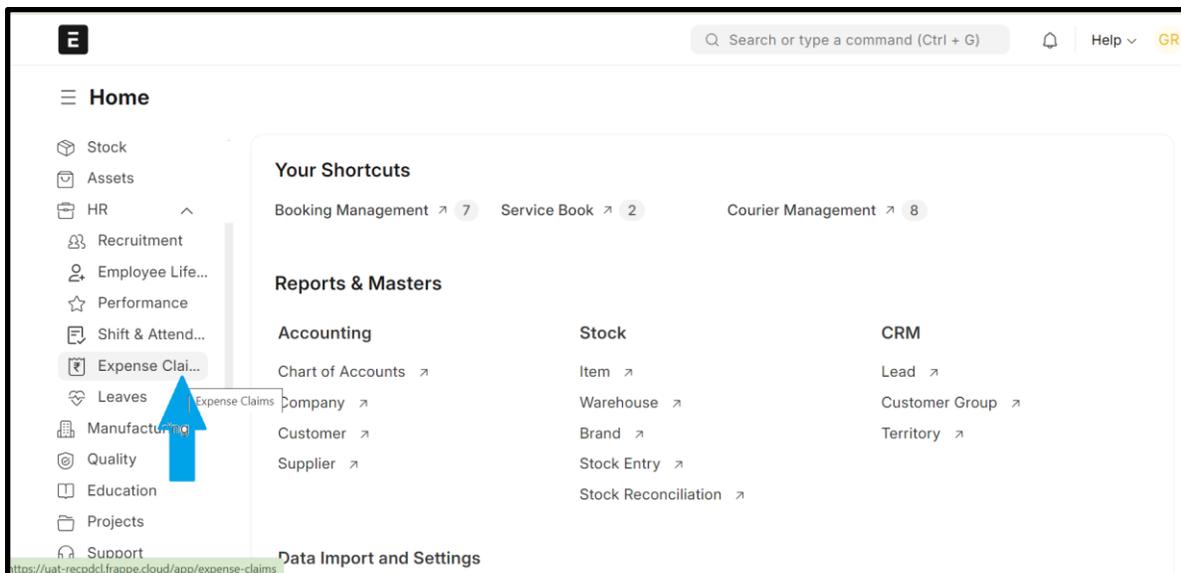
Overview

The travel request process enables employees to submit requests for business travel, ensuring adherence to company policies and budgetary constraints.

Steps to Submit a Travel Request

1. Access the Travel Request Form:

- Log in to your ERPNext account.
- Navigate to the **Travel Request** section
- Human Resource > Expense Claim > Travel Request > New Travel Request.



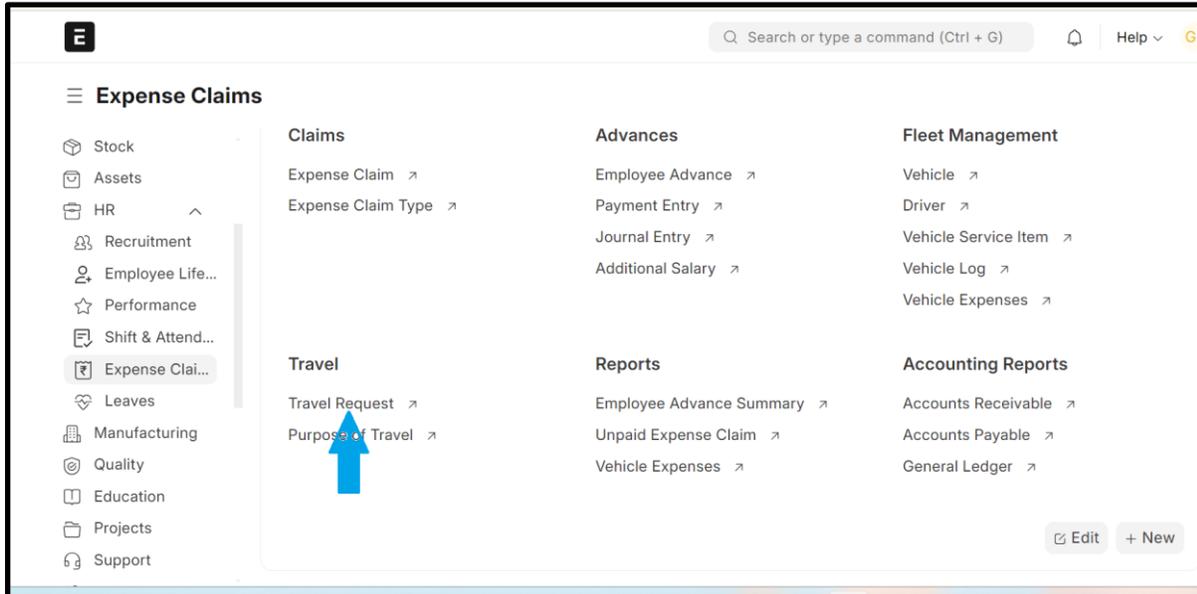
Alternative Way to Access the Travel Request Form:

1. Navigate to the **Awesome Bar**
2. Type "**Travel Request**" in the search bar
3. Select **Travel Request** from the results

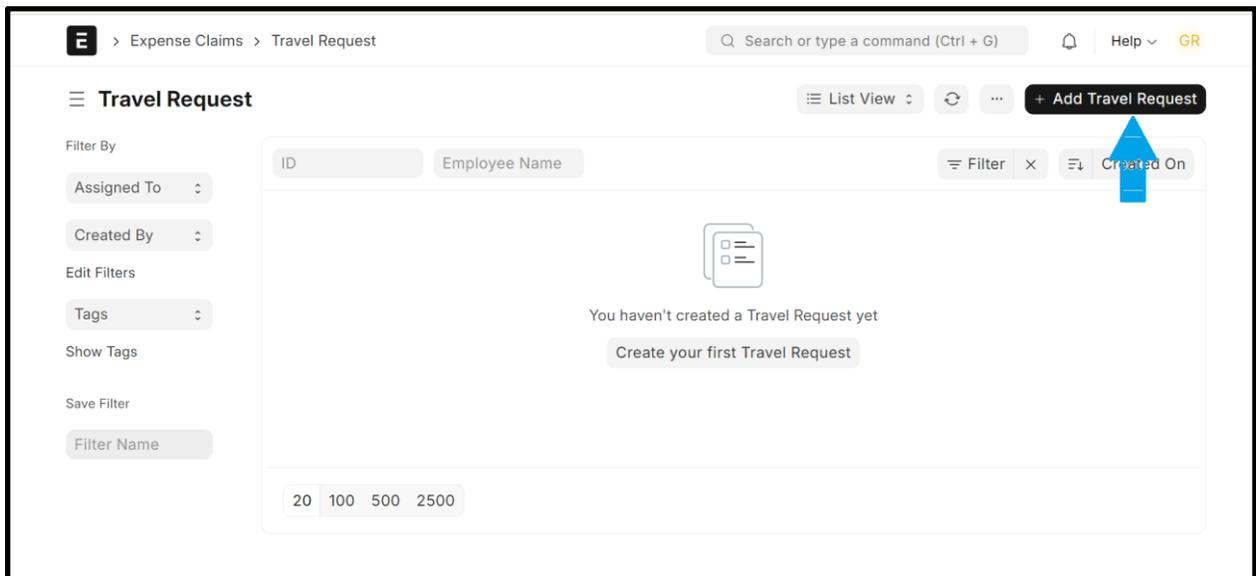
The screenshot shows the REC Power Development system interface. At the top left, the logo 'REC Power Development' is visible. A search bar is highlighted in yellow, containing the text 'Travel Request List'. Below the search bar, a dropdown menu is open, showing the search results: 'Travel Request List', 'Search for Travel Request List', and 'Help on Search'. The main content area is divided into sections: 'Your Shortcuts' (Booking Management, Material Request, Courier Management), 'Employee' (Employee, Leave Application), and 'Data Import and Settings' (Import Data, Opening Invoice Creation Tool, Chart of Accounts Importer, Letter Head, Email Account). At the bottom, the 'Travel Request' page is shown, featuring a table of requests with columns for ID, Employee Name, Status, Employee, Travel Type, ID, and Created On. The table contains five rows of data, including entries for Yatendra Meena and Dhivyadharshini R.

ID	Employee Name	Status	Employee	Travel Type	ID	Created On
<input type="checkbox"/>	Employee Name		Employee			20 of 146
<input type="checkbox"/>	Yatendra Meena	Pending at Ge...	10227	• Domestic	HR-TRQ-2025-...	1M 0 0
<input type="checkbox"/>	Yatendra Meena	Pending at Ge...	10227	• Domestic	HR-TRQ-2025-...	1M 0 0
<input type="checkbox"/>	Yatendra Meena	Pending at Ge...	10227	• Domestic	HR-TRQ-2025-...	1M 0 0
<input type="checkbox"/>	Yatendra Meena	Pending at Ge...	10227	• Domestic	HR-TRQ-2025-...	1M 0 0
<input type="checkbox"/>	Dhivyadharshini R	Pending at Rep...	REC451	• Domestic	HR-TRQ-2025-...	1M 0 0

1.1 Go to Travel Request



1.2. Add Travel Request



2. Complete the Travel Request Form:

Fill out all required fields, including:

- Travel Type
- Purpose of Travel
- Employee details, Travel details etc

The screenshot shows a web application interface for creating a new travel request. The breadcrumb navigation at the top indicates the path: HR > Travel Request > New Travel Request. The page title is 'New Travel Request' with a 'Not Saved' indicator. A search bar and 'Help' link are visible in the top right. The form is divided into several sections:

- Travel Type ***: A dropdown menu.
- Purpose of Travel ***: A text input field.
- Travel Funding**: A dropdown menu.
- Details of Sponsor (Name, Location)**: A text input field.
- Copy of Invitation/Announcement**: A section with an 'Attach' button.
- Employee Details**: A section with a dropdown arrow, containing:
 - Employee ***: A text input field.
 - Contact Number**: A text input field.
 - Contact Email**: A text input field.
 - Company**: A text input field.
 - Identification Document Type**: A text input field.
 - Identification Document Number**: A text input field.
 - Passport Number**: A text input field.

A 'Save' button is located in the top right corner of the form area.

3. Submit the Form:

- Review all information for accuracy.
- Click the **Submit** button to send the request for approval

4. Approval Process:

- The travel request will be routed to your immediate supervisor for approval.
- Expect a response within 3 business days.

5. Notification of Approval/Denial:

- You will receive an email notification regarding the status of your travel request.

2. Employee Advance Process

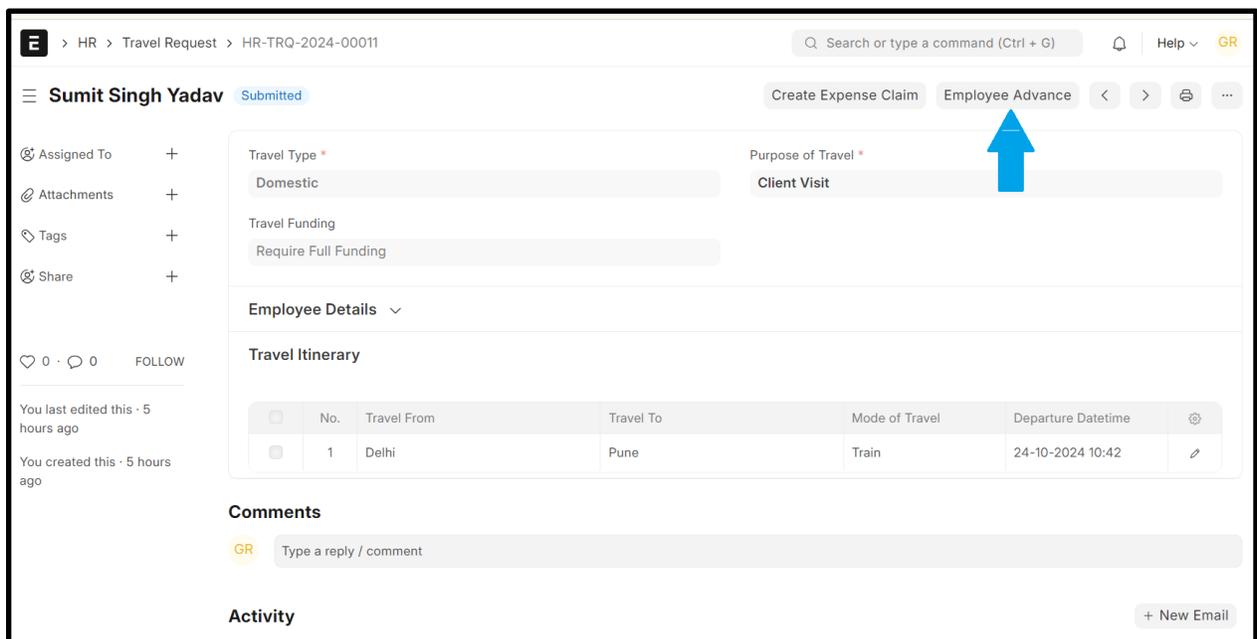
Overview

Employee advances allow employees to request funds in advance to cover anticipated travel expenses, ensuring smooth travel experiences.

Steps to Request an Employee Advance

1. Create an Employee Advance Request:

- After receiving approval for your travel request, navigate to the **Employee Advance** section in ERPNext.



The screenshot shows the ERPNext interface for creating an Employee Advance. The user is Sumit Singh Yadav, and the request is submitted. The form includes the following fields:

- Travel Type: Domestic
- Purpose of Travel: Client Visit
- Travel Funding: Require Full Funding
- Employee Details: (Expanded)
- Travel Itinerary: (Table with 1 row: No. 1, Travel From: Delhi, Travel To: Pune, Mode of Travel: Train, Departure Datetime: 24-10-2024 10:42)
- Comments: (Input field: Type a reply / comment)
- Activity: (Input field: + New Email)

2. Fill out all required fields,

- Purpose
- Amount requested
- Travel Request ID: This will be auto fetched from the approved travel request for easy tracking.

HR > Employee Advance > New Employee Advance

Search or type a command (Ctrl + G) Help GR

New Employee Advance Not Saved Save

Series HR-EAD-.YYYY.-	Posting Date * 24-10-2024
Employee * Testsumit	Department Smart Metering Division - RPDCL
Employee Name Sumit Singh Yadav	Travel Request ID HR-TRQ-2024-00011

Currency ▾

Purpose & Amount

Purpose * Advance is Needed	Advance Amount * 10,000.00 Amount of expense
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3. Submission and Approval:

- Submit the completed form for approval.
- Your request will be routed to the appropriate approver (e.g., manager or finance department).

4. Receiving the Advance:

- Once approved, the advance amount will be disbursed to your designated payment method.

3. Expense Claim Process

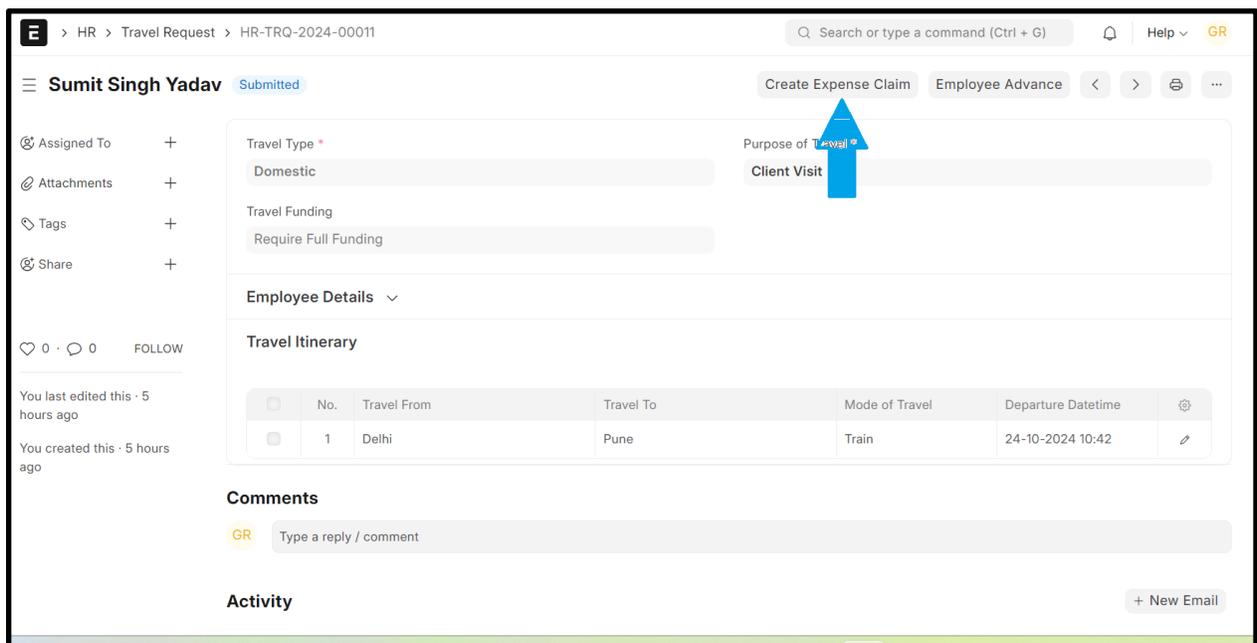
Overview

Expense claims allow employees to seek reimbursement for expenses incurred during business travel.

Steps to Submit an Expense Claim

1. Create an Expense Claim:

- After completing your travel and incurring expenses, navigate to the **Expense Claim** section in ERPNext



The screenshot displays the ERPNext interface for creating an expense claim. The user is Sumit Singh Yadav, and the travel request is HR-TRQ-2024-00011. The form includes the following sections:

- Travel Type:** Domestic
- Travel Funding:** Require Full Funding
- Employee Details:** (Collapsed)
- Travel Itinerary:** A table with one entry: No. 1, Travel From Delhi, Travel To Pune, Mode of Travel Train, Departure Datetime 24-10-2024 10:42.
- Comments:** A text input field with a placeholder "Type a reply / comment".
- Activity:** A button labeled "+ New Email".

A blue arrow points to the "Purpose of Travel" field, which is set to "Client Visit".

2. Complete the Expense Claim Form:

- Fill in necessary details, including:
 - Date of expense
 - Type of expense (e.g., Travel, Food, Fuel, Others, etc)
 - Description
 - Amount.
 - Travel Request ID: This will be auto-fetched from the approved travel request for easy tracking.

HR > Expense Claim > New Expense Claim

Search or type a command (Ctrl + G) Help GR

New Expense Claim Not Saved Save

Expenses & Advances Accounting More Info

Series *
HR-EXP-.YYYY.-

Expense Approver *
sumit.y@indictranstech.com

From Employee *
Testsumit

Approval Status
Draft

Employee Name
Sumit Singh Yadav

Travel Request ID
HR-TRQ-2024-00011

Department
Smart Metering Division - RPDCL

Company *
REC Power Development And Consultancy Limited

Company GSTIN
06AADCR7399K1ZP

Expenses

<input type="checkbox"/>	No.	Expense Date	Expense Claim Type *	Description	Amount *	Sanctioned Amount	
<input type="checkbox"/>	1	24-10-2024	Travel	Visit	10,000.00	10,000.00	

Add Row

3. Submit the Claim:

- Review all details for accuracy and completeness.
- Click the **Submit** button to send your claim for approval.

4. Approval Process:

- The expense claim will be routed for review and approval by the designated approver & finance department.

5. Reimbursement:

- Approved claims will be processed for reimbursement, with funds disbursed via your designated payment method.

Key Points

- An employee can directly raise an expense claim for any incurred expenses without the mandatory need for a prior travel request.
- There are no strict rules requiring employees to go through the travel request and employee advance processes before submitting an expense claim.
- Employees have the option to first raise an employee advance and subsequently submit an expense claim for reimbursement.
- This flexible approach allows employees to manage their expenses according to their needs and circumstances.

END