**Professional Resourcing Team**

**WebExpenses**

Locum User Manual

**(Well Professional Resourcing Database)**

**NOT FOR DISTRIBUTION**

This Manual contains information of a sensitive nature. Strictly for PRT reference purpose ONLY.

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**Introduction**

Welcome to WebExpenses: Well Professional Resourcing locum expenses system.

This user’s manual will guide you through all aspects of WebExpenses that are specific to you as a Locum.

The User Manual contains all essential information for you to make full use of the WebExpenses system. It includes a description of the system functions, capabilities, and step-by-step procedures for system access and use. Screenshots have been provided to ensure ease of understanding.

Users may contact the Webexpenses support team for any queries or visit their support hub for FAQs and feature videos.

<https://hub.webexpenses.com/>

support@webexpenses.com

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In order for you to be able to use WebExpenses you will have to be set up as a WebExpenses user by a Professional Resourcing Administrator. Your email address will have to be submitted and before any access to WebExpenses is allowed.

1. **Access**

To access WebExpenses, use the following link in your internet browser (Chrome)

[**https://gb.webexpenses.com/we/**](https://gb.webexpenses.com/we/)

(Save this link to your favourites on your internet browser for easy future access)

When you click on this link, the following home page should appear on your screen.

Once your profile has been completed you can also download the WebExpenses app for IOS or Android phones and build/submit your expenses claims from there.



1. **Completing Your Profile**

It’s important for you to complete your user profile as soon as you receive your WebExpenses welcome email, to do so please follow the steps below.

1. Go to your **Account Details** in the top, right corner
2. Click **My Settings**
3. Complete the fields in the **General**, **Vehicle**, **Email Alerts** and **Additional Information** tabs



1. Click **Save** to keep the changes.

**3. Creating a claim header**

**Web Interface**

1. Log in to your Webexpenses account on the web user interface
2. Now click **Add** to create a new claim header
3. Add a **Title** for the claim
4. Enter any relevant **Notes** (these will be visible to yourself and your Approvers)
5. You will see your **Cost Centre**, your default **Approver** and your default **Accounts Approver**
6. Click on **Click here to define default settings** to pre-populate claim item fields
7. Click **Save** to create the **claim header**
8. You are now ready to start building your claim.

**IOS/Android**

1. Tap **My Claims**
2. Now tap **Add** to create a new claim header
3. Add a **Title** for the claim
4. Enter any relevant **notes** (these will be visible to yourself and your Approvers)
5. Below, you will see your **Cost Centre**, your default **Approver** and your default **Accounts Approver**
6. Click **Save** to create the **claim header**
7. You are now ready to start building your claim.

Click on this link for a video tutorial - <https://hub.webexpenses.com/resource/how-to-create-a-claim-header/>

**4. How to add a claim item to a claim**

**Web Interface**

1. Click on the claim **Title** to open the claim
2. Now click on the **Add Item** **to the Claim** button
3. Select the expense **Category** for the item
4. You can search here and then click to pick
5. Now select the **Date** of the expense
6. Enter the **Amount** of the expense
7. Add a full **Description** of the spend
8. The receipt has been located and attached, this is based on the date and the amount matching
9. Click **Save** to keep the changes.

**iOS/Android**

1. Tap **My Claims**

2. Tap the **claim** that you want to add the claim item to

3. Tap **Add Item** at the bottom of the screen

4. Add the **Date** the expense took place

5. Add the **Amount** of the expense

6. Type in a **Description** for the expense

7. Select the expense **Category**

8. Tap **Save** to add the item

9. Tap **Back** to return to the **My Claims** screen

10. Tap **Back** again to return to the main menu

Click on this link for a video tutorial - <https://hub.webexpenses.com/resource/how-to-add-a-claim-item-to-a-claim/>

**5. How to add a claim item to a claim**

**Web Interface**

1. From the**My Claims** screen, click on the **Title** of the claim you want to submit
2. Ensure that all your claim items have a **receipt** attached to them where required
3. Go to **Actions** and click on **Submit** in the menu
4. Enter any relevant notes for your **Approver** and your **Accounts Approver**
5. Now click **Submit** button to send your claim
6. Your claim has now been **Submitted** to your **Approver**.

**iOS/Android**

1. Tap **My Claims**
2. Tap on the **Title** of the claim you want to submit
3. Ensure that all your claim items have a **receipt** attached to them where required
4. Now tap **Submit** at the bottom of the screen
5. Enter any relevant **notes** for your **Approver** and your **Accounts Approver**
6. And then tap **Done**
7. Tap **Submit** to send your claim
8. Your claim has now been **Submitted** to your **Approver**.

Click on this link for a video tutorial - <https://hub.webexpenses.com/resource/how-to-submit-a-claim-for-approval/>