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# Expense Claim Procedure in **SalesMantra**

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# Step 1 :

- Login to Sales Mantra by using the below link  
<http://72.249.20.137/snslssm/LoginNewCRM.jsp>
- Enter the User ID and password provided to you.




Sales Mantra  
ON DEMAND CRM SOLUTION

User name  Password

I Agree to the terms [Forgot Your Password](#)


## Sales Mantra Channel



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Put your workplace in your palm and stay connected to your business wherever you go...

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# Step 2 : Click On SalesCall & Quotation

The screenshot shows the Sales Mantra CRM dashboard. At the top, there is a search bar with the text "Search for Sales Call, Contact and more ...". The navigation bar includes links for Home, New Issue, Support, Help, and Setting. The user is logged in as "Welcome, Samaresh Singh I". The dashboard features several modules: "Contacts & Campgains", "Planner", "SalesCall & Quotation", "MIS", and "Alerts & Reminders". The "SalesCall & Quotation" module is highlighted with a red circle and a red arrow pointing to it. On the right side, there are sections for "UpComing Birthday...", "UpComing Marriage Anniversary...", "Call Required Attention", "Last 60 Days you neglected SREE TECHNO SYSTEMS.", and "Last 3 Proposal".

Search for Sales Call, Contact and more ...

Home New Issue Support Help Setting

Welcome, Samaresh Singh I

**Contacts & Campgains**  
This modules assists in lead generation, manage & read on ...

**Planner**  
This module enables the sales team to manage read on ...

**SalesCall & Quotation**  
The Sales Call capture all relevant details about read on ...

**MIS**  
The system has most powerful MIS system giving read on ...

**Alerts & Reminders**  
The system gives regular alerts /reminders read on ...

UpComing Birthday...

UpComing Marriage Anniversary ...

Call Required Attention

Last 60 Days you neglected SREE TECHNO SYSTEMS. more ...

Last 3 Proposal

You send a Quotation to C-Net Technologies Pvt. Ltd on 19-07-2016 more ...

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# Step 3 : From Modules List Select / Click on Expense Entry Option

The screenshot shows a software interface for 'SalesCall & Quotation'. It features two main columns: 'Modules' and 'Reports'. The 'Modules' column lists various functions such as 'Enter Enquiry', 'Update SalesCall', 'Generate Quotation', 'Import SalesCall', 'Sales Call List', 'Sales Call Contacts', 'Web Enquiry', 'Customer Master', 'Expenses Approval', 'Move To Sales Order', 'Library Management', 'Add Competitor Detail(s)', 'VIP Prospect / Key Customer', and 'Expense Entry'. The 'Expense Entry' option is highlighted with a red circle and a red arrow. The 'Reports' column lists 'SalesCall Management Report', 'SalesCall FollowUp Report', 'Quotation Report', 'Sales Funnel Report', and 'Expense Report'. The background shows a sidebar with 'Contacts & Campaigns' and 'MIS' sections, and a main content area with a 'Sales Mantra' logo and various notifications.

# Step 4 : Enter your expenses as per the fields in Expense Details and click save

[View Pending Expense](#)

EXPENSE DETAILS					Add <input type="text" value="1"/> Entries				
Date	Expense Type*	Nature of Expense*	Description 1	Description 2	Units			Total	Sales Call/ Appointments
					Unit Rate	Unit Type	Units/Expenses*		
18-10-2016	<input type="text" value="select"/>	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value=""/>
18-10-2016	<input type="text" value="select"/>	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value=""/>
<b>mandatory fields</b>								<b>Grand Total</b>	<input type="text" value="0.00"/>



# How to fill expense details :

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- a) Select Date of actual expense. (will not accept claims prior to previous month)
- b) Select Expense Type from Drop Down.
  - -Travel – for Travelling outstation.
  - -Local Conveyance – for Travel & Food Expenses incurred within Location.
  - -Branch – to Submit Branch Expenses.
  - -Personal – to submit any personal expenses (if allowed)
  - -Lodging – to Claim Expenses incurred on Outstation Stay.
  - -Special Allow – To claim any special amount on approval.
  - -Mobile Conveyance – To claim telephone / Mobile expenses incurred.
  - -Boarding – to claim Food expenses incurred during outstation travel.

# How to fill expense details : (contd..)

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- c) Select Nature of Expense from Drop Down.
  - d) Provide Customer Name & Other details in Description 1 & 2 to justify your claims
  - e) In case of Local Travel, insert only no. of kilometres in Unit/Expenses filed, system will automatically calculate amount to pay.
  - f) Sales Call/ Appointments filed can be used if you have predefined your Customer Names in list. If it is defined then can be selected by clicking S symbol provided next to it.
  - g) Separate line should be used as per the change in date & nature of claims.
  - h) Save your claims once all things entered properly.
  - i) System will pop up a message on successfully submission of your claims.
- **Note : Maximum Limit for each claim amount has been set according to the lowest Grade as mentioned in Company policy. Hence system may pop up an message that you are not eligible, but no need to worry, just press Esc Button from your keyboard & enter the amount as per your need. Final approver will take a call whether it is to be paid or reject.**

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- **Step 5** : Reporting Supervisor /HOD has to approve the submitted claims Online through Sales Mantra.

(You can view your submitted claims by clicking on the link [View Pending Expense](#) provided on right side of same page )

- **Step 6** : Take the print out of Pending Expenses Page using (Ctrl + P) option and attach all the supporting bills , receipts and required documents as per claim and courier it to Mr. Vikesh Prabhu in Goa office.

**Address :**

Mr. Vikesh Prabhu,

C/o Smartlink Network Systems Ltd,

L-7, Verna Electronic City,

Verna – Salcete – Goa – 403722.

Ph. No. 0832-2885400 M: 7507771057



# How to repair earlier submitted claims

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- While approving claims, if our Auditor / Approver noticed that claims are not proper, or as per company policy then they have an option to either reject it or sent it for Repair.
- In such cases employee has to follow the below steps to repair their claims:

# Step 1 : From Modules List Select / Click on Expense Entry Option

The screenshot displays the 'SalesCall & Quotation' application window. The interface is divided into two main sections: 'Modules' and 'Reports'. The 'Modules' section contains a list of options, with 'Expense Entry' at the bottom, circled in red and pointed to by a red arrow. The 'Reports' section lists various reports, including 'Expense Report'.

Modules	Reports
Enter Enquiry	SalesCall Management Report
Update SalesCall	SalesCall FollowUp Report
Generate Quotation	Quotation Report
Import SalesCall	Sales Funnel Report
Sales Call List	Expense Report
Sales Call Contacts	
Web Enquiry	
Customer Master	
Expenses Approval	
Move To Sales Order	
Library Management	
Add Competitor Detail(s)	
VIP Prospect / Key Customer	
<b>Expense Entry</b>	

# Step 2 : Click on the link View Pending Expense provided on right side of same page



[View Pending Expense](#)

EXPENSE DETAILS					Add 1 Entries				
Date	Expense Type*	Nature of Expense*	Description 1	Description 2	Units			Total	Sales Call/ Appointments
					Unit Rate	Unit Type	Units/Expenses*		
01-11-2016	select	select					0	0	S
01-11-2016	select	select					0	0	S
* mandatory fields								Grand Total	0.0

Save

# Step 3 : Select Your Name, Approval Status as **Repair** from dropdown, Select period (from –to) & Click on GO.



[Hide Search Header](#)

As on  Period From    To:

Service Engineer	Approval Status	
Vikesh Ram Prz ▼	Repair ▼	<input type="button" value="Go"/>

No Results Available.

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- **Step 4** : Click on [Repair](#) link available at the end of each line.
  - **Step 5** : Edit the voucher as per your requirement / Suggested to you & click on submit/ Save button. The same will be resubmitted again.
  - **Step 6** : Ask your Reporting Supervisor /HOD to Approve your submitted claims again through Sales Mantra.
  - In case you have any query, please contact Mr. Samaresh Singh for SalesMantra related queries & Mr. Vikesh Prabhu for expense related queries.

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Thank You !!!