Expense Claim Procedure
in **SalesMantra**

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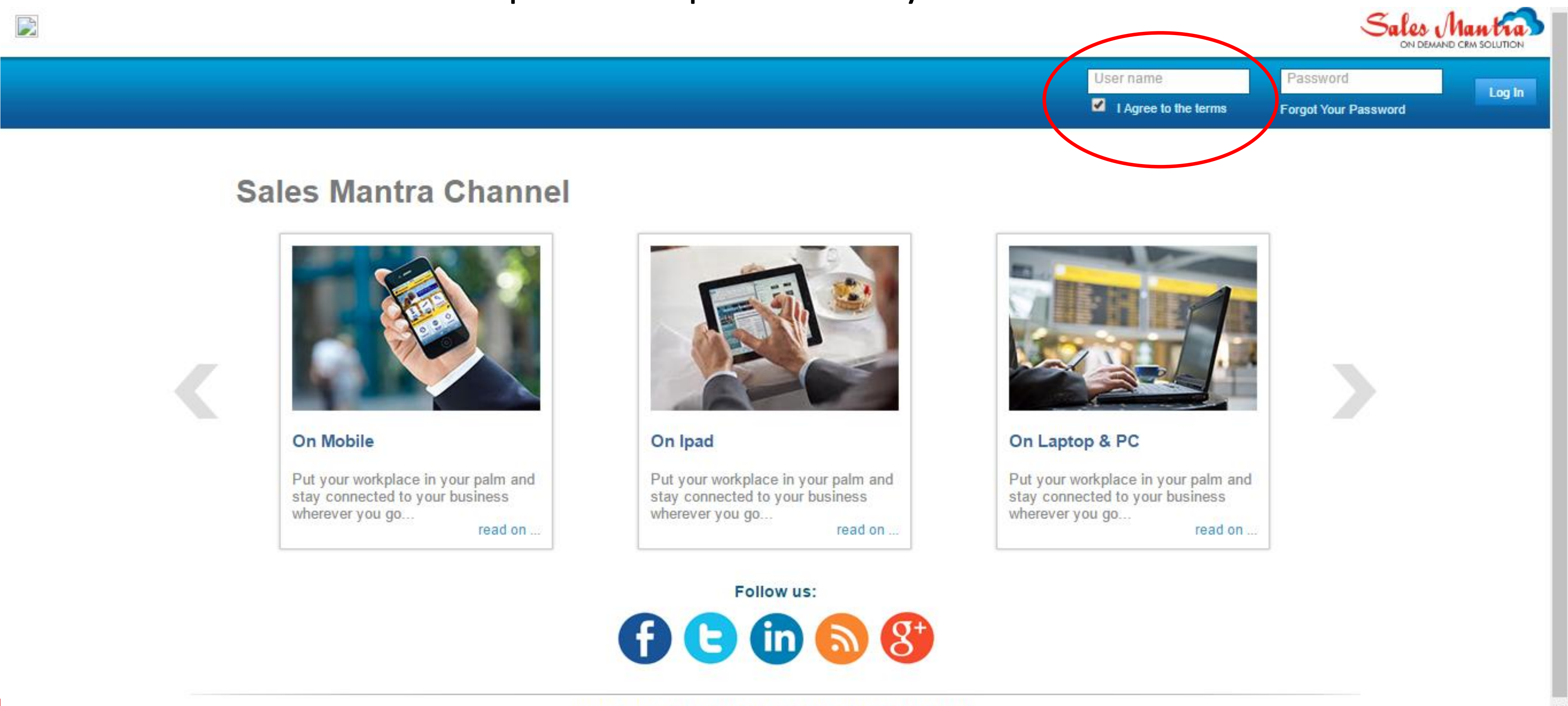
Step 1 :

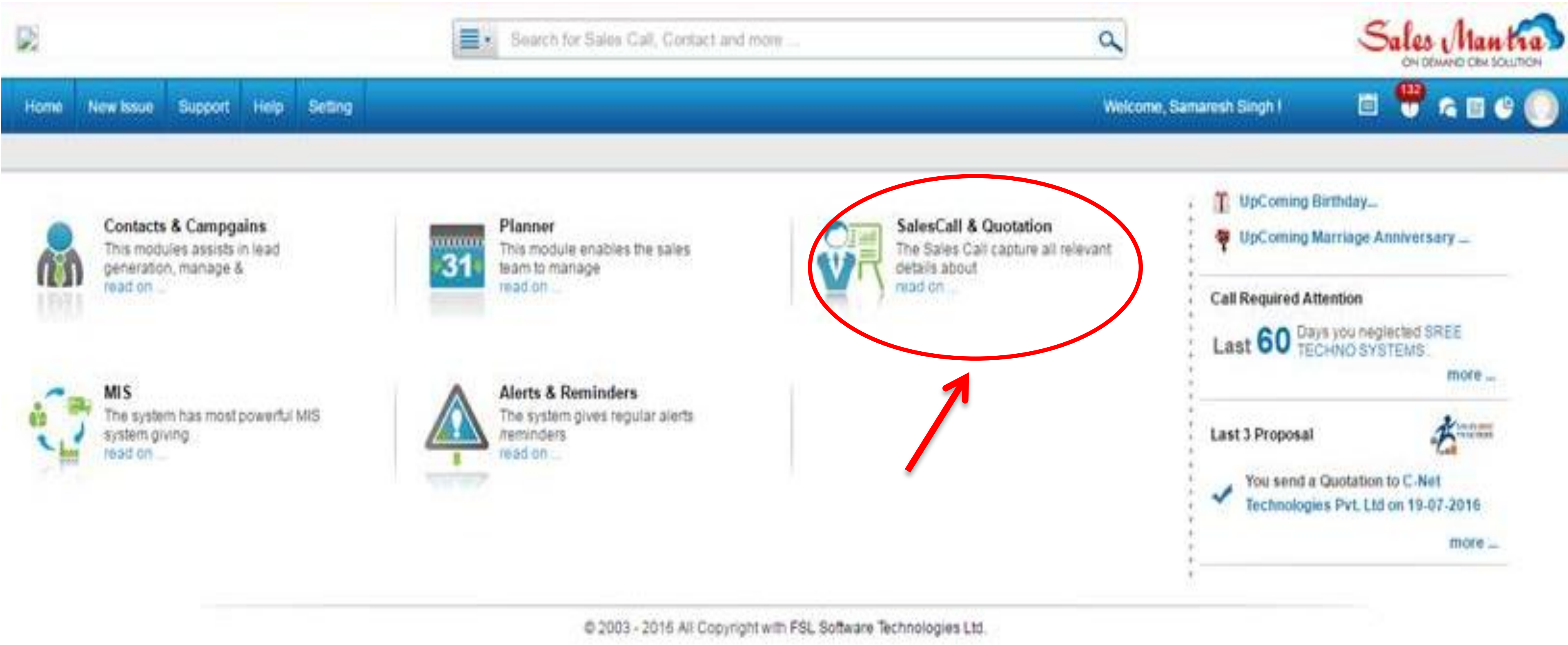
- Login to Sales Mantra by using the below link

http://72.249.20.137/snslssm/LoginNewCRM.jsp

- Enter the User ID and password provided to you.



Step 2 : Click On SalesCall & Quotation



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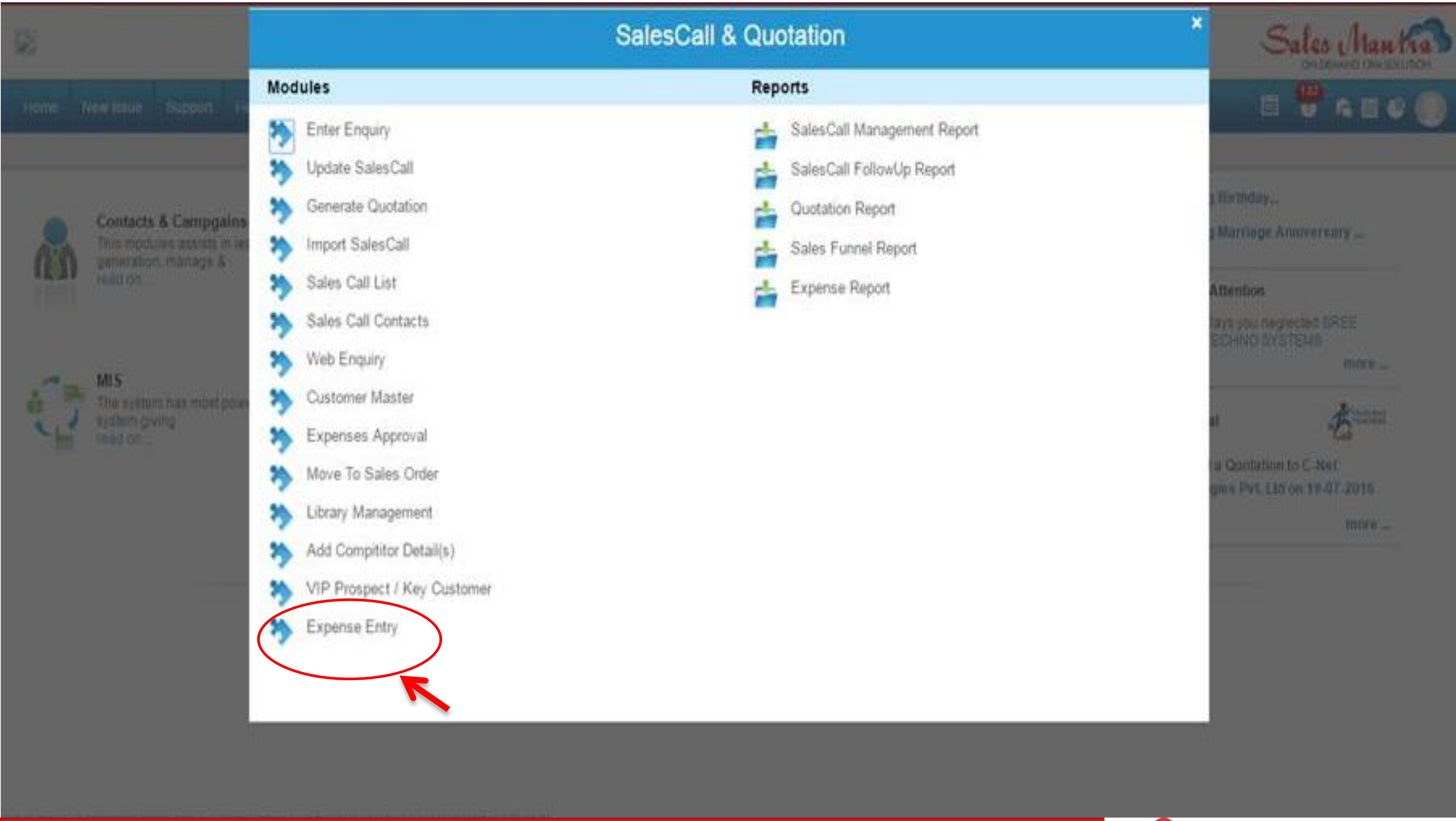
Step 3 : From Modules List Select / Click on Expense Entry Option



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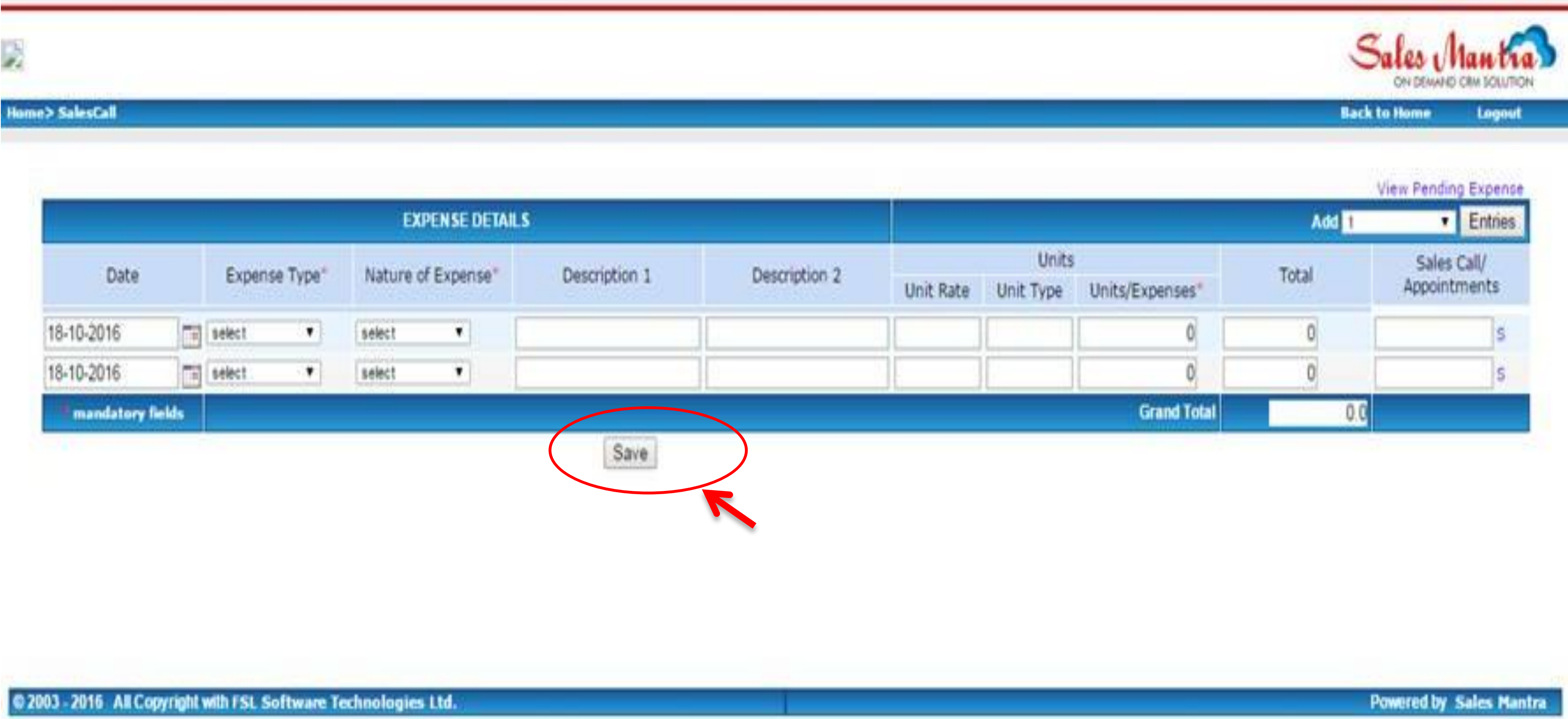
Step 4 : Enter your expenses as per the fields

in Expense Details and click save



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How to fill expense details :

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..)

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 <u>Unit/Expenses</u> 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 <u>S</u> 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 massage 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.

- **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,

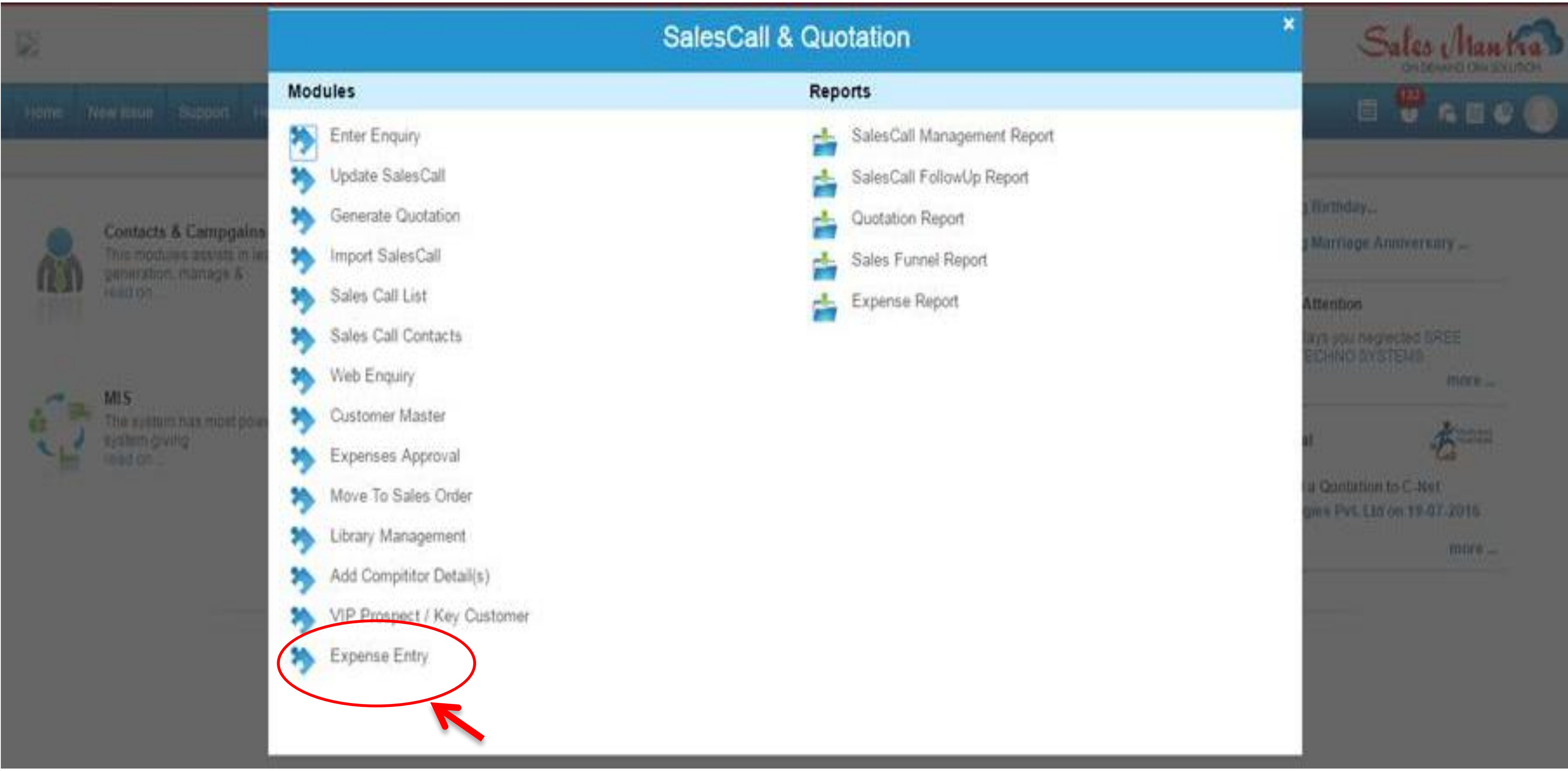
  Verna – Salcete – Goa – 403722.

  Ph. No. 0832-2885400 M: 7507771057

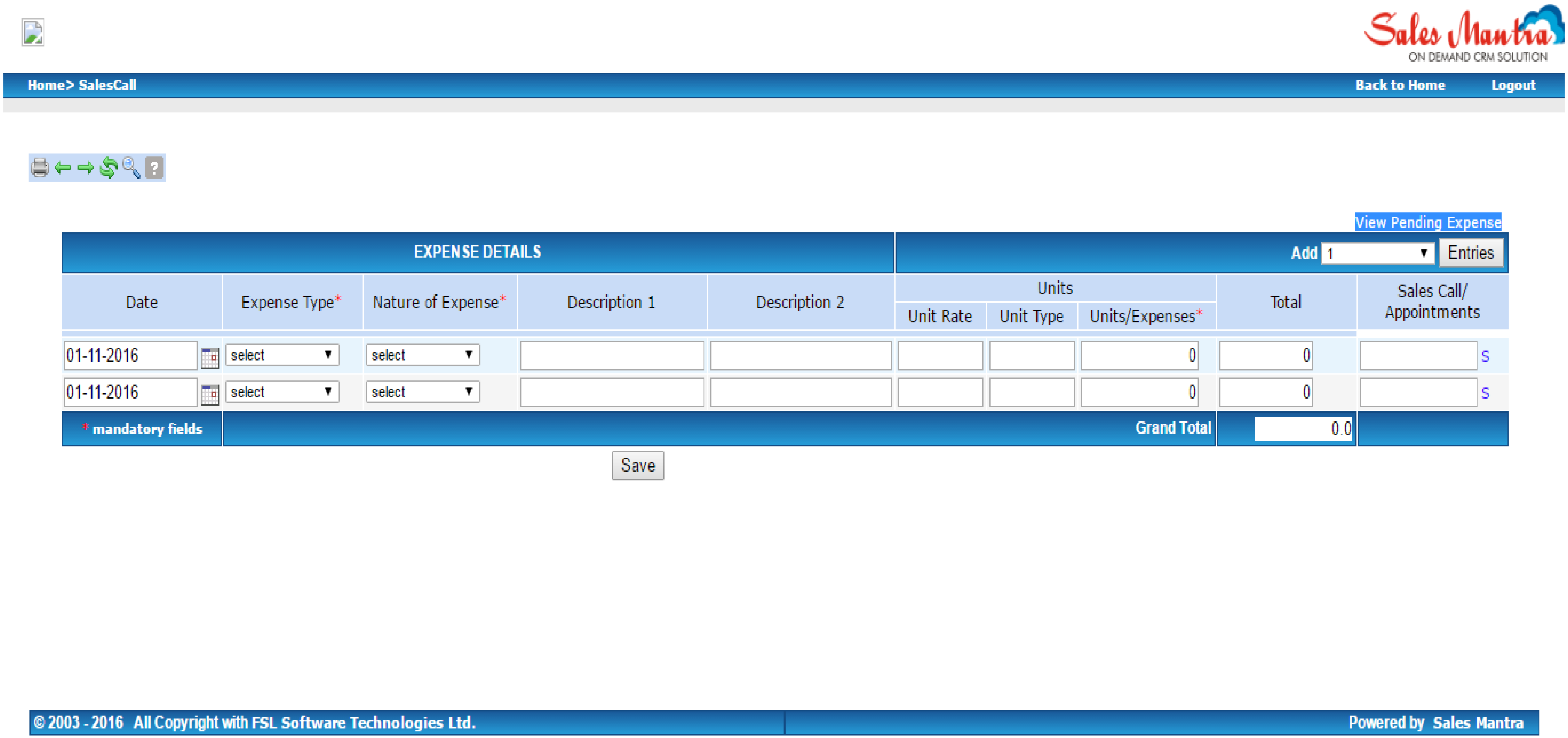
How to repair earlier submitted claims

- 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



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



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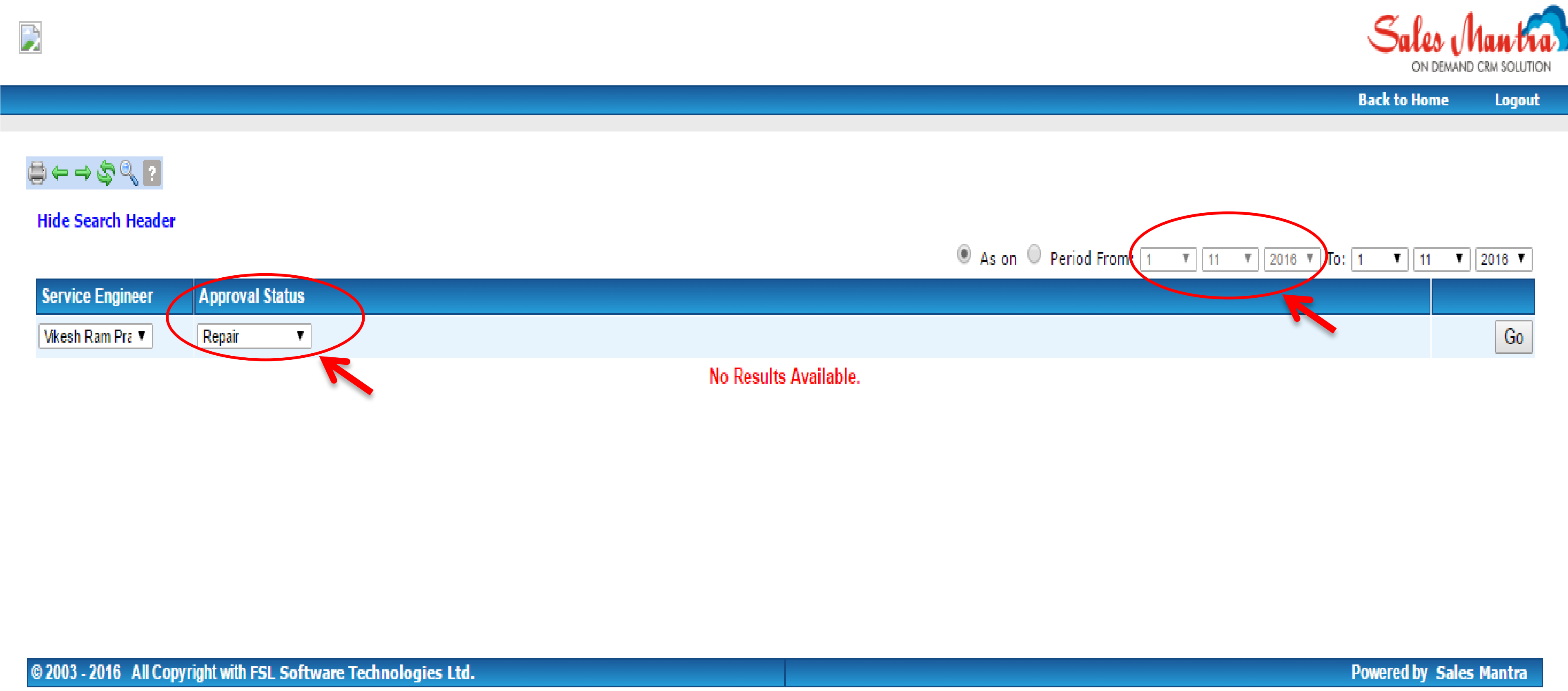
Step 3 : Select Your Name, Approval Status as Repair from dropdown, Select period (from –to) & Click on GO.



- **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.

Thank You !!!