

Openbooks - How to Enter a Mileage Claim

1. On the top of your screen, click on "My Money" then "Expenses"




2. At the top right hand corner, you will find a bright green button "Add New Mileage" click on this.

Add New Mileage


3. Enter the details of the Mileage claim. The Date of the Business Travel, the miles travelled for the single or return trip, the description and Vehicle Type.

Details

Dated * 
(dd mmm yy)

Mileage * miles

Description *

Vehicle Type 

4. If you are not Vat registered or are on the Flat rate scheme for Vat. 'Un-tick' the box as you cannot reclaim the vat.

Reclaim VAT on Mileage?

Yes, and I have a VAT receipt

Car Engine Type and Size

Tips:

The receipt still needs to be retained to support your mileage claim even if the vat will not be claimed back.

5. You can link mileage expenses to a Project to allow tracking of expenditure on the project. Select the Project you would like to link the mileage expense to.

Is this Project Mileage?

Link to Project

Tips:

Please refer to the ' How to create a project' guide if you have no projects created.

5. For recurring mileage expense claims , you can set the expense to recur by selecting the relevant option on the drop down menu.

Recurring?

This Mileage recurs

IRIS OpenBooks will create a duplicate of this. Leave the end date blank to recur forever.

Tips:

If you attach all your expense receipts to the relevant expense claims then you do not need to keep the paper copies.



6. Once you have recorded all the information and attached the receipt. Click on "Create New Expense"

Tips:

If you are adding more than one expense, click on "Create and Add another"

Create New Expense

Create and Add Another

