

Webinar:

How to get your employee expenses right in the modern age

Cathy Bell, Nicole Pointon

Introductions & Housekeeping



- All attendees are on mute
- Please submit all your questions in the chat box on the control panel
- Recording of the webinar and slides will be provided post webinar
- We'll have some polls running throughout so please do engage in those
- Handouts provided

Agenda

- Starting with your expense policy; what does good look like?
- Boosting business growth and resilience with Assure Expenses – A snapshot
- How to manage your money, people and processes – Lincoln University
- Live demo on Assure Expenses software



Poll 1:



How are you currently managing your company expenses?



Starting off with a good policy | Our top tips



- 1) Be fair with your expenses policy
- 2) Ditch the jargon!
- 3) Consider the rules and locations
- 4) Ensure the policy is easy to find for employees
- 5) Keep it up-to-date





Take control through reduced expenses spend and improved compliance.

COMPLIANCE

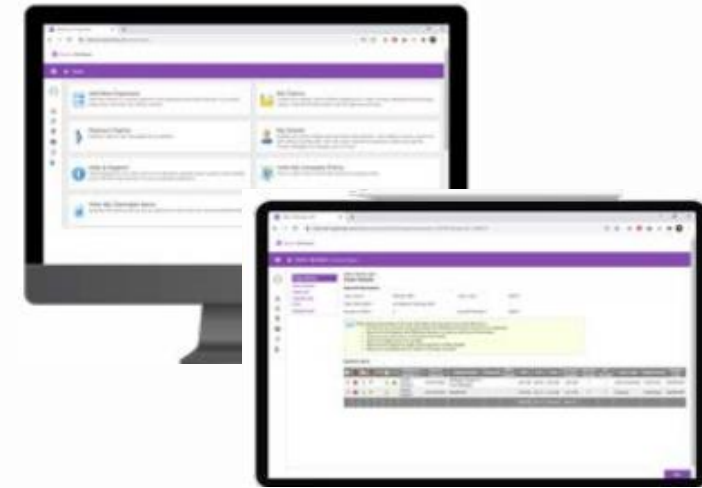
Ensures organisational expenses are processed in line with both expenses policy and HMRC, preventing fraudulent and out of policy claims.

VISIBILITY

See the process of a claim at anytime on any device. Understand what expenses are being claimed and how much is spent, enabling further cost savings based on spend analysis.

EFFICIENCY

Processing times for claimants, approvers and finance is dramatically reduced, whilst increasing the accuracy and reporting of expense claims and spend.



Poll 2:



What are the biggest challenges for you when managing employee expenses?



In the eyes of.... University of Lincoln



Biggest Challenge:

One of the biggest concerns for a large business or university like this is keeping a closer eye on spending and understanding where and when purchases have been made within the University.

Biggest Benefits using Assure Expenses:

- significant savings in procurement
- Asset management
- Duty of care -notifications of document expiry and reminders
- Increased efficiency in becoming 'paperless'
- Increased traceability and auditability




We have benefited from significant savings in procurement and the cloud based software has helped the University track its assets more effectively."

Ian Hodson, Head of Reward and Deputy Director of HR, University of Lincoln

Features: Assure Expenses




OCR and GPS
mobile app



Journey
validation



Corporate card
management



Receipt
validation



Vehicle tax and
MOT checks



Highly
configurable



Reporting
suite



Payment
services



Flags and
limits



HMRC
compliance



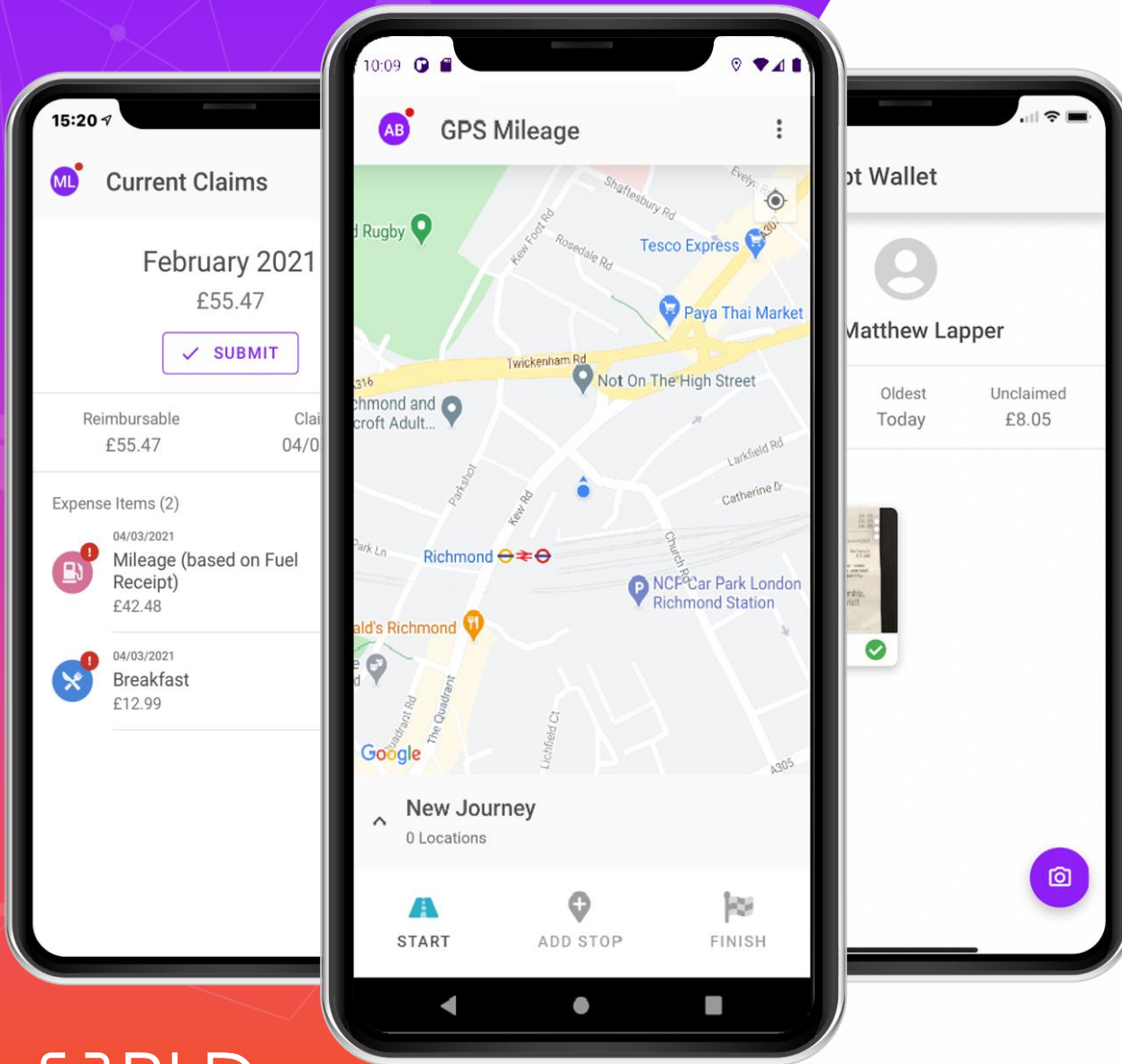
Insurance and
licence checks




System
integration

Expenses Mobile – Key features

- **Digital receipts:** Upload receipts via the camera or select from your phone gallery.
- **OCR Receipt Scan:** OCR technology scans receipts and automatically populates expense claims.
- **Accurate mileage:** Record mileage with GPS technology that pinpoints your exact start and finish locations.





Thank you for listening, Any questions?

- Please submit these in the chatbox and we'll get back to you
- Slide Deck and Recording will be provided within 5 working days via email
- Please let us know what you thought by filling out our survey 😊
- If you have any questions or would like to get in touch with us, please email G-C@rldatix.com

