



HR Expense

CA CloudDesk



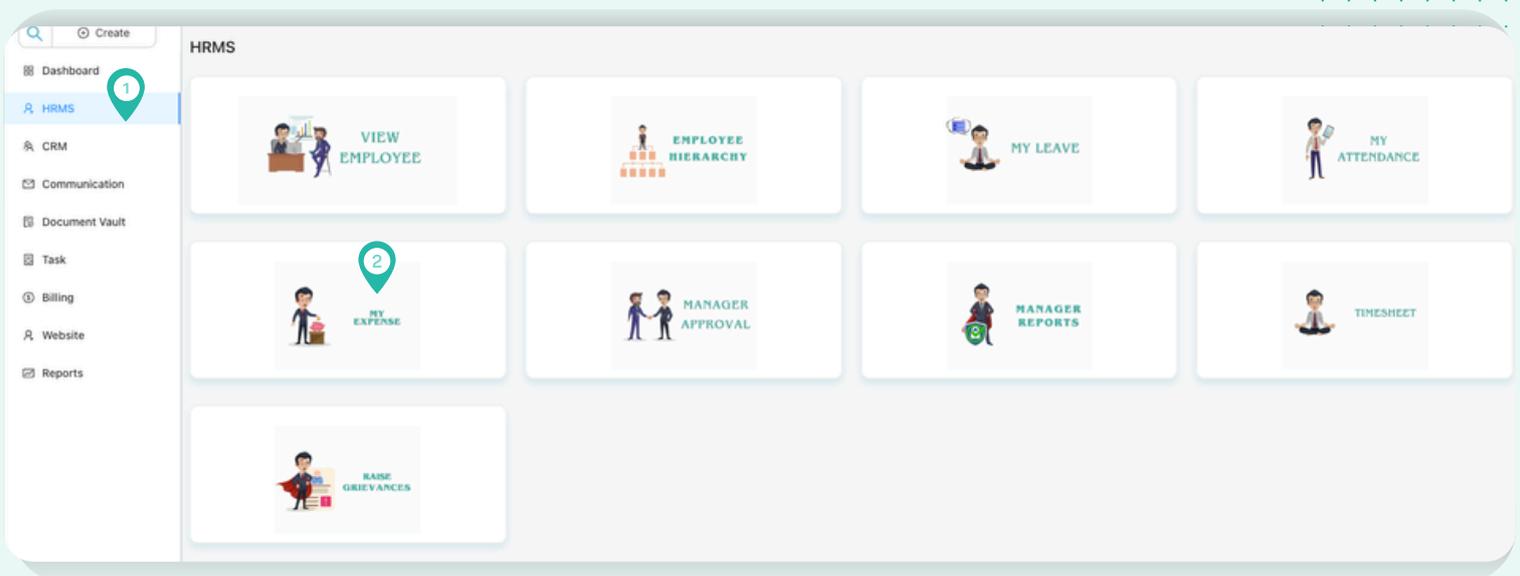
Step 1: Open HRMS Module



Click on HRMS.



Click on My Expense.



STEP 2: GO TO THE MY EXPENSE SECTION

Select My Expense. This opens the dashboard where you can view Previous Pending, Approved and Rejected Expense.

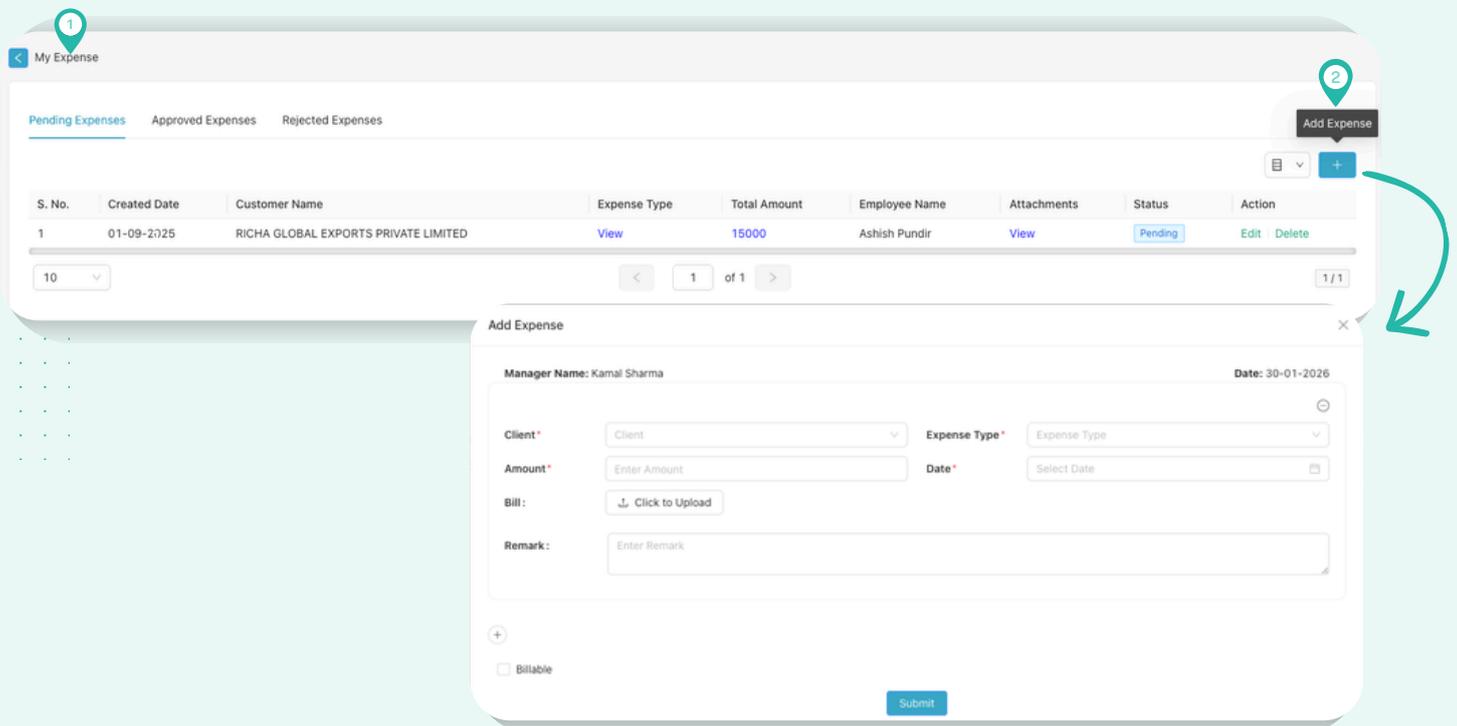


STEP 3: CLICK ON "ADD EXPENSE "

Click the Add Expense icon to add a new expense.



- 1 Click on My Expense.
- 2 Click on Add Expense (+).



The screenshot shows the 'My Expense' dashboard with a table of expenses and an 'Add Expense' modal form. The table has columns for S. No., Created Date, Customer Name, Expense Type, Total Amount, Employee Name, Attachments, Status, and Action. A single expense is listed with S. No. 1, Created Date 01-09-2025, Customer Name RICHA GLOBAL EXPORTS PRIVATE LIMITED, Total Amount 15000, Employee Name Ashish Pundir, and Status Pending. The 'Add Expense' modal form includes fields for Client, Amount, Bill, Remark, Expense Type, and Date, along with a 'Submit' button.

S. No.	Created Date	Customer Name	Expense Type	Total Amount	Employee Name	Attachments	Status	Action
1	01-09-2025	RICHA GLOBAL EXPORTS PRIVATE LIMITED	View	15000	Ashish Pundir	View	Pending	Edit Delete

Add Expense

Manager Name: Kamal Sharma Date: 30-01-2026

Client* Expense Type*

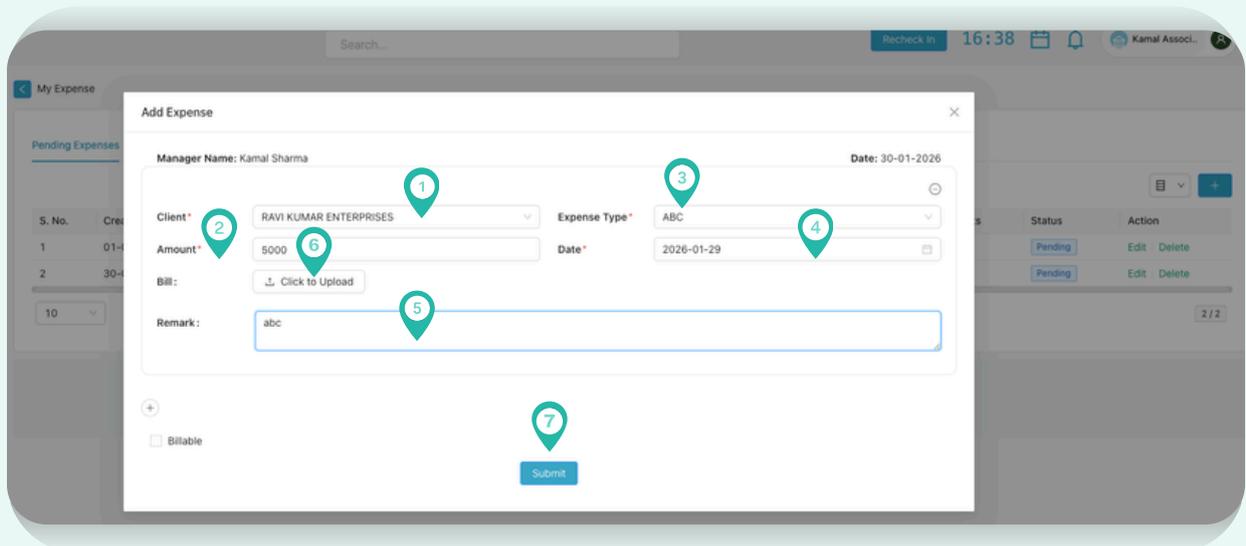
Amount* Date*

Bill:

Remark:

Billable

- 1 Enter Client Name
- 2 Enter Amount
- 3 Enter Expense Type
- 4 Enter Date
- 5 Enter Remark
- 6 Upload Bill
- 7 Enter Submit



STEP 4: ENTER EXPENSE DETAILS

Enter the expense type, date, amount, and remarks accurately to ensure faster approval.

STEP 5: UPLOAD EXPENSE PROOF

Upload bills, receipts, or invoices as expense proof for quick verification and approval.

STEP 6: SUBMIT EXPENSE

Review the details and click Submit to send the expense for approval.

Enable the Billable option if the expense needs to be billed

STEP 7: TRACK EXPENSE STATUS

After clicking Submit, a confirmation popup appears with the message

“Expense Added successfully.”

After submission, you can view the status of your Expense

(Pending, Approved, Rejected) .

