DIANO

DIANO ACADEMY · MODULE COURSE M09

Expenses and expense claims

Capture business spending, and pay staff back for what they bought

For: Company Admin and Finance User; every staff member for My expenses · **Length:** 25 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Expenses and expense claims

WHO IT IS FOR
Company Admin and Finance User; every staff member for My expenses

LENGTH
25 minutes

BEFORE THIS COURSE
None for My expenses. For business expenses: a bank account set up (M11).

YOU WILL BE ABLE TO
Record and approve a business expense, submit a staff claim with its receipt, and approve and pay it back.

There are two kinds: a **business expense** paid at once with no purchase order (bank charges, a courier), and a **staff claim** for something an employee paid with their own money. This course follows **Capture a business expense, or claim one back** (diano.co.za/help/app/expenses.html).

Who does what

Screen	Who
Expenses	A Company Admin or Finance User records and approves; an Accountant or Auditor can view
My expenses	Every role except Accountant and Auditor: your own claims
Expense claims	A Company Admin or Finance User approves; an Accountant or Auditor can view

Record a business expense

1. Open **Accounting**, then **Expenses**.
2. Under **Record an expense**, fill in the **Date**, **Paid to**, **Description**, the **Account** (what was bought), the **Method** (EFT, Card or Cash) and the **Reference**.
3. Type the **Amount excl. tax** and the **Tax amount**, then press **Record expense**. It waits as **Pending approval**.
4. Someone other than the person who recorded it presses **Approve** (or **Decline**, with a reason).

> A bank line with no document has a **Record expense** link on the Bank accounts page (M11). An approved expense can be voided by a Company Admin, with a reason.

Submit a staff claim

1. Open **Accounting**, then **My expenses**.
2. Under **New claim**, fill in the **Date** on the receipt, the **Amount** you paid, the **Tax** on the receipt (if any), **What was it for?** and the **Type of expense**. Press **Save**.
3. Press **Open** on the claim, then **Take photo** or **Attach files** to add the receipt.
4. Press **Submit for approval**.

Approve and pay it back

1. The approver opens **Accounting**, then **Expense claims**, checks the receipt and presses **Approve** (then **Approve and post**) or **Reject** with a reason.
2. When the money is paid back, they press **Mark paid**.

> Nobody can approve their own expense claim, unless the company has only one user. If DIANO says "This needs a second person", ask a colleague.

Common mistakes

- **Typing the amount including VAT in Amount excl. tax.** Split it: amount excl. tax and tax amount.
- **Approving your own expense.** Someone else must approve it.
- **Submitting a claim without the receipt.** Attach it first.
- **Capturing a supplier bill as an expense.** If there was a purchase order, capture the supplier invoice instead (M13).

Exercise (practice company)

1. As **Ayesha Patel (Finance User)**, record the 12 November courier expense: Paid to **Quick Couriers (example)**, R 300.00 excl. tax, tax R 45.00, Card. (Invented figures.)
2. As **Pieter van Wyk (Company Admin)**, approve it.
3. As **Sipho Dlamini (Sales)**, submit a claim for R 230.00 parking and tolls, with a photo of any slip (use a blank page in training). Submit for approval.
4. As Ayesha, approve and post the claim, then press **Mark paid**.
5. As Sipho, try to approve your own claim. What happens?

Where to read more

- Help Centre: Capture a business expense, or claim one back · "This needs a second person" · Import a bank statement and match it
- Next course: M10 Journals and recurring, M11 Banking