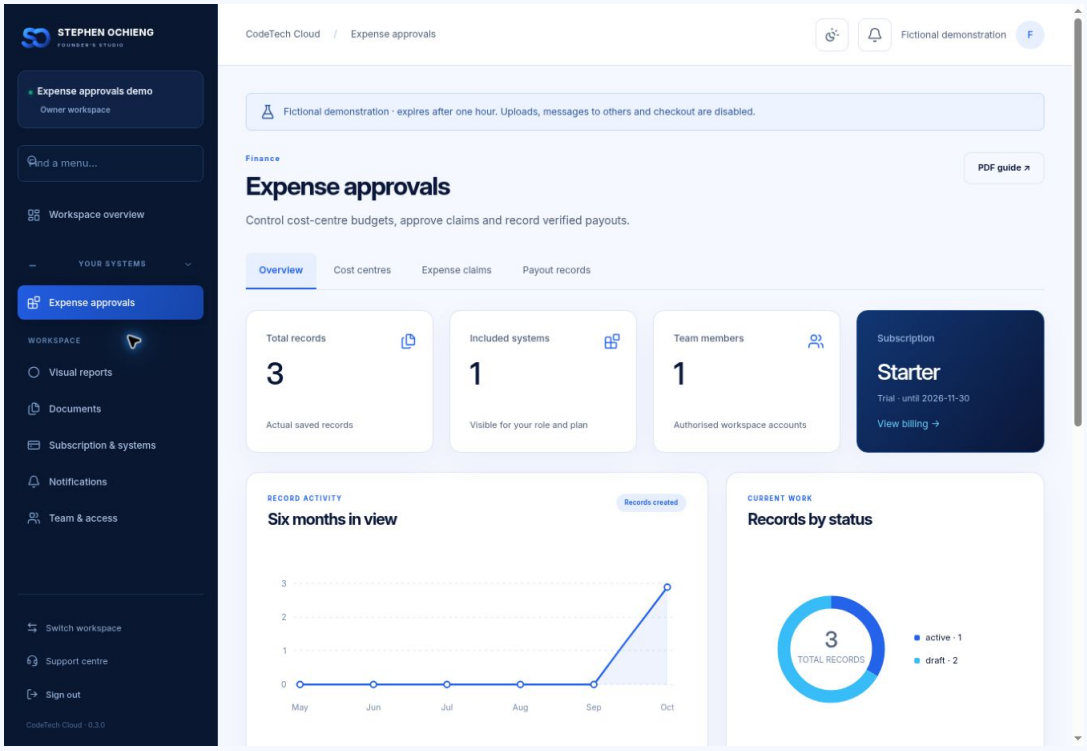
# Expense approvals

Finance / Orientation and scope

Control cost-centre budgets, approve claims and record verified payouts.

### THE CORE WORKFLOW

Set a cost-centre budget, submit a claim, approve within budget and post one verified payout.




Fictional-data interface capture supplied by the training project. Screen content is illustrative, not live customer activity.

## Start with the right workspace

Use a role that permits the intended action. Viewers cannot write. Select the correct organisation, confirm this system is included in its subscription and use test records for your first run. The guide describes the listed core records; advanced sector requirements are evaluated separately.

# Prepare the records

Data workbook / Exact fields and input meaning

## Cost centres

| Field | Type | Entry guidance |
| --- | --- | --- |
| Cost-centre name | Text | Plain text, up to 200 characters. |
| Cost-centre code | Text | Unique within the workspace; up to 200 characters. |
| Approved budget | Money | Non-negative; up to two decimal places. |

## Expense claims

| Field | Type | Entry guidance |
| --- | --- | --- |
| Cost centre | Reference | Choose from centres in this workspace. |
| Expense description | Long text | Plain text; up to 12,000 characters. |
| Claim amount | Money | Non-negative; up to two decimal places. |
| Expense date | Date | Calendar date. End follows start when paired. |
| Claimant name | Text | Plain text, up to 200 characters. |

# Prepare the records

Data workbook / Continued

## Payout records

| Field | Type | Entry guidance |
| --- | --- | --- |
| Approved claim | Reference | Choose from claims in this workspace. |
| Verified transfer / payment reference | Text | Plain text, up to 200 characters. |
| Payment date | Date | Calendar date. End follows start when paired. |
| Verified claim amount | Computed amount | Calculated by the server; not an entry field. |

Each record also carries a workspace, stored state, version and timestamps. Those controls are separate from the business fields above.

# Apply a valid action

Actions and safeguards / Run the core process

| Record | Possible states | Action and result |
| --- | --- | --- |
| Cost centres | active | No configured state action. |
| Expense claims | draft, submitted, approved, paid, rejected, cancelled | Submit: draft -> submitted<br>Approve: submitted -> approved (manager)<br>Reject: submitted -> rejected (manager)<br>Cancel: draft, submitted -> cancelled |
| Payout records | draft, posted | Post: draft -> posted (manager) |

## Core checks to review

- The configured claim sequence is draft, submitted, then manager approval within a cost-centre budget.
- A payout references an approved claim and a genuine verified transfer reference. Post is a manager action; the amount is server-calculated.

## Use the saved state

The first configured state for payout records is "draft". Use the permitted action for the current state and version. A repeated or stale action is rejected. Processed records cannot be edited as if they were still drafts.

> **APPROVAL IS A ROLE CHECK**
>
> Actions marked "manager" require an owner or manager. The module also declares manager checks for approve, post, reject. An action label is not proof of external payment or approval outside the application.

# Check the result

Validation and interpretation / Your first controlled run

1 **Prepare the context**

Create or choose Expense claims. Confirm that every reference belongs to the selected workspace.

2 **Save payout records**

Enter the required fields from the workbook. Inspect the stored record and any server-calculated values before proceeding.

3 **Apply and inspect**

Use post only from an allowed state. Reload the record and verify its new state and any related stock, capacity or budget effect described in this guide.

4 **Try the protective check**

Try exceeding the remaining budget or posting a second payout for the same claim; verify both guards in the accepted build.

## Read the records in context

- Read claim approval, cost centre, payout reference and date before treating an expense as paid.
- A payout record records verified external settlement; this guide does not establish an automated bank transfer or a payment mandate.

> **EVALUATE THE ADVANCED REQUIREMENTS**
>
> Bank payout initiation, statutory reimbursement rules and complete financial accounting need separate evaluation.

For a support request, include the workspace, system, record reference, action, expected result and observed result. Remove passwords, payment secrets and unnecessary personal data.