questico.site

Expense Claims & Reimbursements

User manual

Inside your tool it is called “Bhatta”.

An expense claim and travel reimbursement tool for field teams, where reps log travel, allowances and bills from their phones with a photo of the receipt.

1. Your tool at a glance

Bhatta replaces paper expense sheets for businesses with staff on the road. Reps add each day's travel, allowance or bill against the owner's written policy; managers approve fully, partly or reject, see spend by person and category, and mark claims paid with the bank reference. The policy limits are checked on every claim, and the owner sees how much the policy saved.

Made for: Businesses with field teams who travel and claim expenses against a written policy. The sample business is a pharma distributor in Indore with 8 medical reps.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The proprietor or partner	• Do everything a manager can • Approve claims even when approval is set to owner only • File their own claims	• Approve their own claims
Manager	An area manager, accountant or accounts desk	• File their own claims • Open Approvals, Team spend, To pay and anyone's claim sheet • Approve, part-approve, reject and undo decisions on other people's claims, unless the owner has kept approval for themselves • Mark claims paid with the reference	• Approve their own claims
Rep	Field staff such as medical or sales reps	• Add claims with bill photos • Edit or delete their own claims while pending • See their own decisions and payments • Read the policy • Print their own claim sheet	• Approve claims or mark them paid • See anyone else's claims

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Every list in this tool is either for managers only or each person's own, and the database keeps it that way: a staff member only ever sees their own records.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.

- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool's address and presses Sign in, then signs in with the email you added for them, in one of two ways.
- With Google: press "Continue with Google". For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company's own mail): under "No Google account? Use any email", type the address and press "Email me a code". Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees "You're signed in, but not invited yet" until you add their address.

Adding your team

1. One person at a time: in your Questico console, open the tool's Team section, type their email address and choose "Can use it" (Rep) or "Can manage it" (Manager).
2. Everyone at once: in the same Team section → Add many from Excel. Download the template, fill one row per person (name, email and access), and upload it. You see every row checked before anything is added.
3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool's own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool's overview has an Owners card. Type a partner's email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.
- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool's address and how to sign in, with Google or with a code.
- In the console's Team section, "Remind the N not signed in" emails everyone who has not joined yet. Under "Send the invitation" you can also copy the ready message for your team's WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone's access or remove them, use the tool's Team screen or the console's Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- Owners and managers: “[name] added expense claims for [month].”
- The person who asked: “Your expense claims for [month] have been reviewed.”

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business’s notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool’s admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.
- Anything printable opens your browser’s print window, where you can also choose “Save as PDF”.
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Try the demo first, switching View as between owner, manager and rep
2. Open the admin panel from Edit website in the Questico console
3. Set the business name, address and logo
4. Set up claim categories with km rates and limits
5. Set up city classes with daily allowance and hotel limits
6. Choose who approves, the bill threshold, the late-claim window, and the submit-by and pay-by days
7. Enter the towns the team travels to
8. List the ways you pay, such as NEFT or UPI
9. Set the claim sheet title and declaration
10. Write the policy note
11. In the console's Team section, add each rep's email address with 'Can use it' and each manager's with 'Can manage it'
12. Ask each person to sign in with that email address (with Google, or a code Questico emails them)

4. Everything it does

Home (rep)

- Greet the rep with this month's claimed and approved amounts
- Show one Add a claim tile per category, with its rate or limit

- Show claimed this month, waiting for approval, approved and to be paid (with the pay-by day), and the last payment received (date and reference)
- List recent claims and chart this month's spend by category
- Show dates to remember: submit-by day, pay-by day and the amount above which a bill is needed
- Ask the accounts desk on WhatsApp (when the owner has entered a WhatsApp number) and open the policy

Home (owner and manager)

- Show claimed this month and claims waiting, with buttons to review claims or see team spend
- Show claimed (with a trend line), waiting (and how many are flagged), approved but not paid, and paid this month
- Chart claimed against approved for 6 months
- Approve, part-approve, reject or open the bill from a 'Waiting for you' queue
- Show who spent what, by person and by category

Add a claim (everyone)

- Pick a category tile; the form changes to suit it
- Kilometre claims: date, from, to, km one way, and 'came back the same way' to double the km; amount = km × rate
- Daily allowance: date, city class and place; amount = that class's allowance
- Hotel: date, city class, place, nights and bill amount
- Bill claims: optional from and to, and the amount
- Add a note and a bill photo from the phone camera (shrunk automatically)
- See the amount and a policy check as you type: over-limit warning (per day, month or claim, counting earlier claims) and a no-bill warning
- Stop a zero amount, a future date (unless allowed), an over-limit claim without a note (if the owner requires one), and a claim older than the claim window without a note
- Save the claim, or save and add another; see what was added today
- Pick towns from the owner's list of places

My claims (everyone; managers can open anyone's sheet)

- Move between months
- Show claimed, waiting, approved (and rejected count), and paid (date and reference)
- Filter by All, Waiting, Approved, Paid or Rejected
- List claims with details and flags, a by-category summary and the payments received
- Open a claim to see the route, km, city class, nights, policy limit, decision and note, payment and the bill photo
- Edit or delete your own claim while it is still pending
- Print the month's claim sheet and download it as a spreadsheet

Approvals (owner and manager)

- List claims from the last 3 months waiting for a decision, grouped by person, with a badge count
- Show waiting, within policy, flagged (and amount over limits) and number of people
- Filter by All, Within policy or Flagged
- Approve a claim, or approve up to the limit when it is over
- Part-approve by entering the amount and a required note
- Reject with a required reason

- Open the bill or details
- Approve all claims within policy at once, for everyone or one person; flagged claims are left out
- Undo a decision from the claim detail
- Show which claims are left out because they are the approver's own or need the owner

Team spend (owner and manager)

- Move between months
- Show claimed, approved, 'Saved by the policy' (amount cut or rejected) and total kilometres
- Chart approved against claimed for 6 months, and spend by category
- List each person's claimed, waiting, approved, paid and to-pay amounts, and open their sheet
- Download the month's claims for accounts as a spreadsheet

To pay (owner and manager)

- List approved but unpaid claims per person per month, for the last 6 months
- Show amount to pay, number of people, the oldest unpaid (with its pay-by date) and amount still being approved
- Tick and mark several paid, mark all paid, or mark one row paid
- Record the date paid, how it was paid and the UTR or reference (required unless the mode is cash)
- Download the payment list as a spreadsheet, with the narration 'Expenses Mon YYYY'
- See what was paid recently

Policy (everyone)

- Show the owner's policy note
- Show what can be claimed: how each category is paid, its limit and whether a bill is needed
- Show city classes with daily allowance and hotel limit
- Show dates to remember and the rules on late claims, over-limit claims and who approves

5. Reports, prints and downloads

Prints

- Monthly claim sheet: letterhead with logo and address, title, person, email, period, claims (claimed, approved, status), category summary, totals, payments, approved amount in words, declaration, and signature blocks for claimed by, approved by and accounts

Downloads

- One person's claims for the month
- Whole team's claims for the month, for accounts
- Payment list of reimbursements to pay

WhatsApp

- Rep's 'Ask the accounts desk' button opens WhatsApp to the business with 'Hello, I have a question about my expense claims.'

Worked out for you

- Works out kilometre amount = km × rate, doubled for a return trip

- Pays the daily allowance set for the city class
- Limits hotel claims to the class limit × nights
- Checks each category's limit per day, month or claim, counting earlier claims
- Flags claims that are over the limit, have no bill above the threshold, or were added late (shows how many days late)
- Works out 'Saved by the policy' = claimed − approved on decided claims

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the business name, short name and city
- Enter the address printed on claim sheets
- Name who the team asks about reimbursements
- Upload the logo
- Choose the main colour, sidebar style, typeface and corner style

What can be claimed

- Set up 1 to 12 claim categories, each with a tile name, code, how it is worked out (km × rate, bill amount, daily allowance by city class, or hotel bill limited by class), rate per km, limit in ₹ (0 means none), whether the limit is per day, month or claim, whether a bill photo is needed, whether to ask from and to, a tile icon (12 choices) and a colour
- Start from the defaults: Two-wheeler ₹3.5/km, Car ₹9/km, Bus/train/auto, Daily allowance, Hotel stay, Phone and data, Doctor or chemist meeting, Other

City classes

- Set up to 8 city classes, each with a daily allowance and a hotel limit per night
- Start from the defaults: A ₹600 / ₹3,000, B ₹450 / ₹2,200, C ₹300 / ₹1,500

Rules & approvals

- Choose who approves: manager or owner, or owner only
- Require a note when a claim is over the limit
- Set the amount above which a bill photo is needed
- Set how many days old a claim can be before it needs a note
- Allow or block future-dated claims
- Set the submit-by day and pay-by day

Places & payment

- List the towns and areas the team travels to (offered as suggestions)
- List the ways you pay; the first is the default

Claim sheet

- Change the sheet title
- Write the declaration above the signatures

Words & pictures

- Write the manager line, rep line and policy text
- Write the sign-in heading, text and quote
- Change the three pictures

Contact

- Enter the email and WhatsApp number

Checks the panel makes

- Refuse two categories with the same code
- Require a rate for km categories and city classes for allowance and hotel categories
- Keep the pay-by day on or after the submit-by day

7. Good to know

- There is no team or user screen inside the tool; people are added only from the Questico console
- Kilometres are typed by the rep; there is no GPS or automatic distance
- It does not read bills automatically
- It does not pay reps through a bank or UPI; payments are only recorded with a reference
- It does not handle advances or petty cash
- There is one level of approval only
- It connects to payroll or accounting software only through downloaded spreadsheets
- The 'From' town on claim forms starts filled with 'Indore' (from the sample) whatever the business's city, so reps must change it
- The contact email set in the admin panel is not shown anywhere in the tool at present

Need help?

Write to contact@questico.site with your tool’s address and what you need.