	Title: Cliqit Manual - Eskom	**Number:** BS147	**Revision:** 1	**Effective Date:** 2021-04-14

Utilise the online booking platform:

TABLE OF CONTENTS

	Title: Cliqit Manual - Eskom	**Number:** BS147	**Revision:** 1	**Effective Date:** 2021-04-14

1. Home Page

The Cliqit home page provides the following icons to navigate you through the booking process:
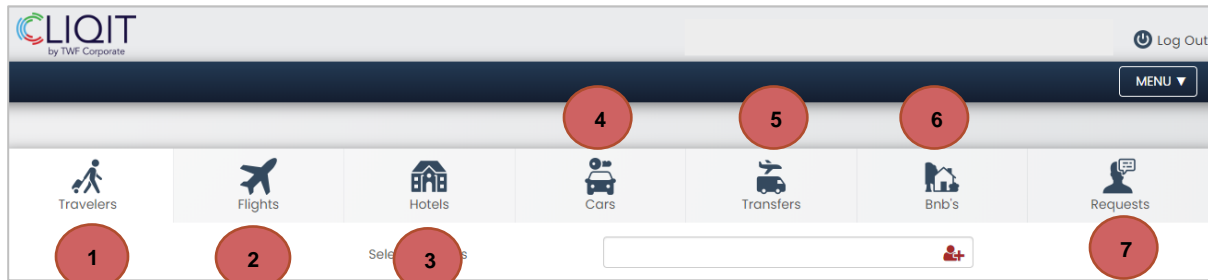
1. **Travellers**: The home page defaults to the *"travellers"* icon for you to select the traveller/s.
2. **Flights**: Live inventory to book flights.
3. **Hotels**: Live inventory to book hotel accommodation.
4. **Cars:** Live inventory to make car bookings.
5. **Transfers:** EZ shuttles, live inventory to make transfer bookings. If you require another supplier, request the consultants' assistance via the *"Requests"* tab.
6. **BnB's:** Live guesthouse inventory from Nightsbridge. If you require a guesthouse not listed in the live inventory, request the consultants' assistance via the *"Requests"* tab.
7. **Requests:** Request the consultants' assistance for any service or load any services yourself, where you made the booking direct with the supplier and require TWF to make payment on your company's behalf.
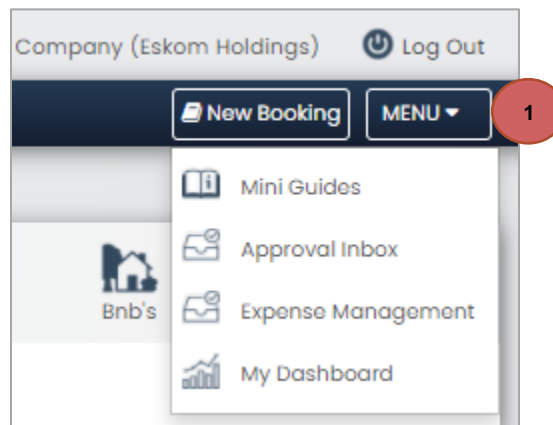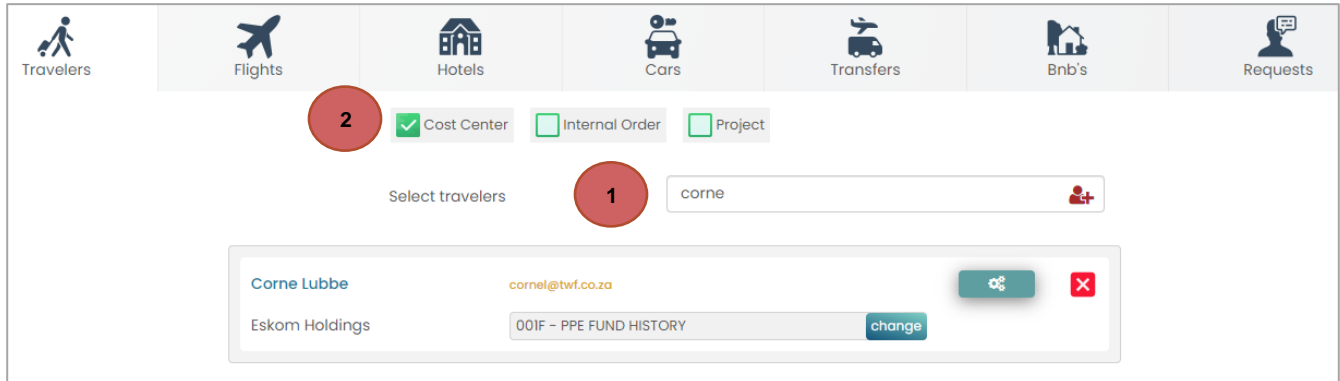

1. On the righthand top corner of the page, you will find a *"Menu"* icon
    From the dropdown you can select:
    *   **Mini Guides:** Here you will find guides to assist you through different bookings processes available on Cliqit.
    *   **Approval inbox:** Only applicable if you have approver rights within your company.
    *   **Expense Management:** This will navigate you to where you can submit your expense claim.
    *   **My Dashboard:** Find the list of bookings you have booked with their statuses.
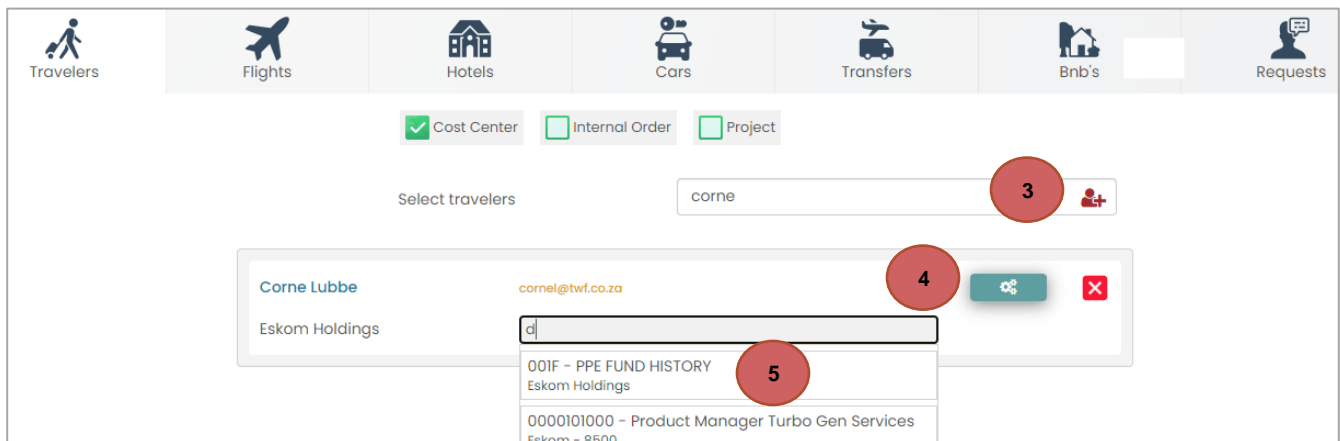
2. <u>Select the Travellers and Cost Elements</u>

1. Start typing the name of the traveller and make your selection from the dropdown list.
(This function is only available, if you are allowed to make bookings on behalf of other travellers)
2. The system will by default bill costs to your master **"Cost Centre",** but you can change the billing requirements to **"Internal order"** or **"Project"** by selecting the relevant box.
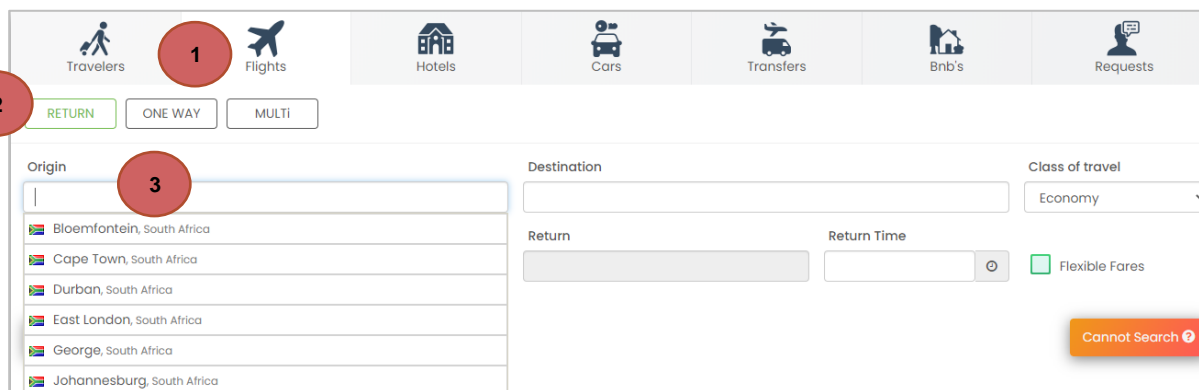

3. The selected traveller will be added below, if you require to add another traveller you repeat step1.
4. The ⚙ icon will display the travellers basic profile information.
5. To change the default cost centre, select the **"change"** button & start typing the cost centre name or number and make a selection from the dropdown list.
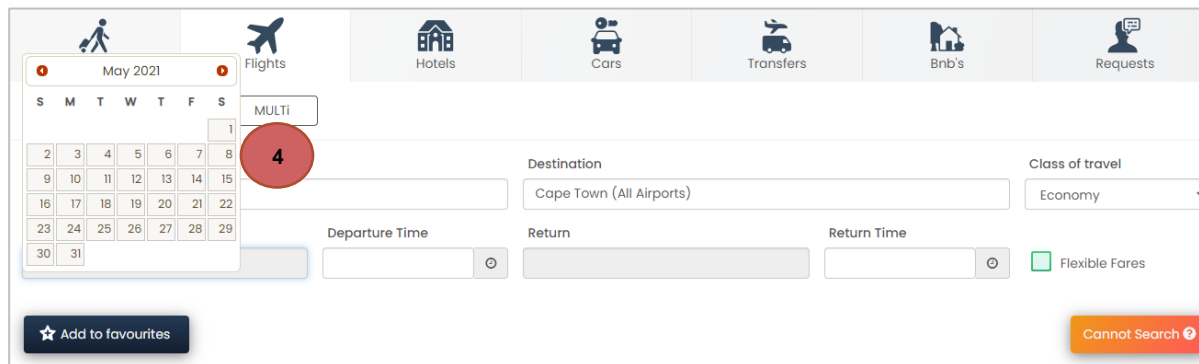
3. <u>Flight Bookings</u>

3.1.   The Flight Search Form

1. Start your trip by selecting the *"Flights"* icon at the top of the page.
2. The system will default to the *"Return"* flight option. You can select *"one way or multi-leg"*. Refer to the **MULTI-LEG TRIP** section in the guide to assist with this booking process.
3. Start typing the the origin and destination cities or make a selection from the dropdown list.
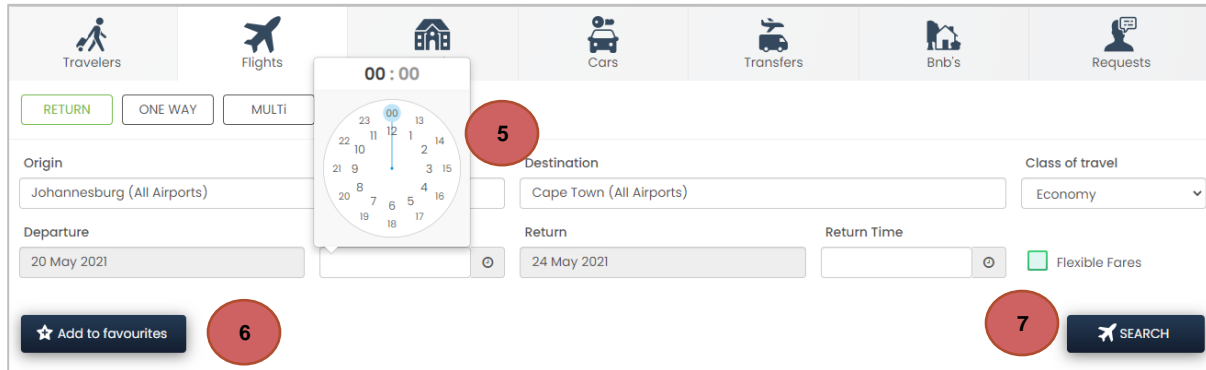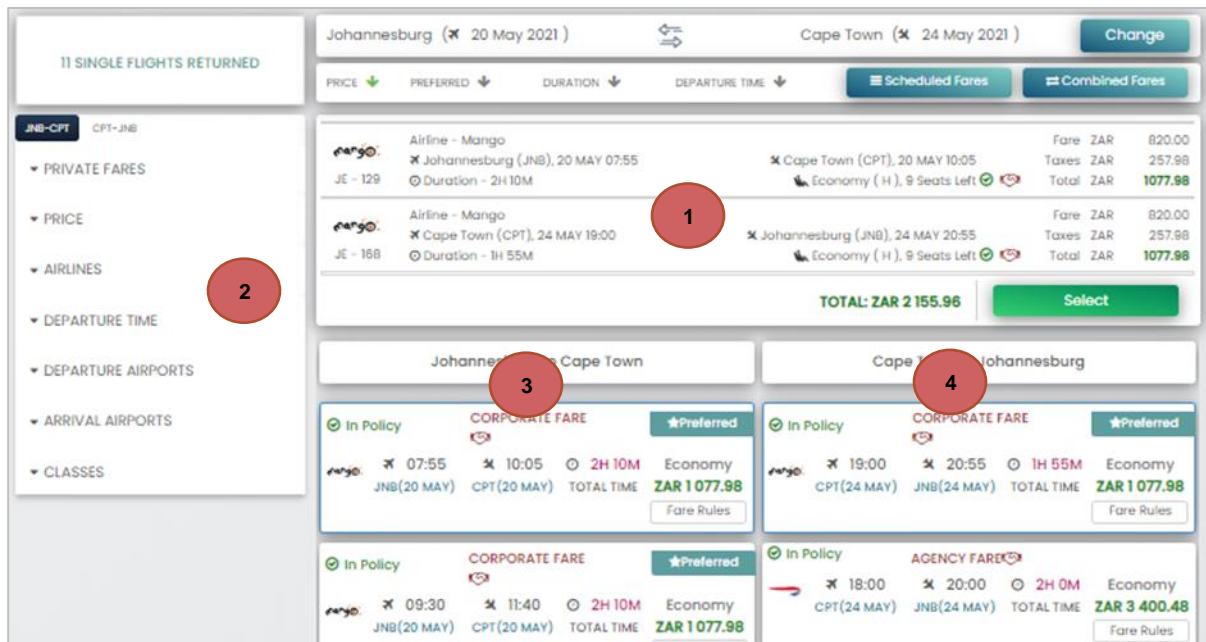

4. Select your dates from the pop up calender.

5. Select the departure- and return times from the pop up clock. Inner circle is AM hours and outer circle is PM hours.
6. Utilise the *"Favourites"* tab to save frequently travelled routes. Select the favourites tab to give your template a name. To utilise the template: type fav- in the origin block. A dropdown will generate, select the template required & the fields will be auto popluated without the dates.
7. Select the *"Search"* button to start the search.

TWF TRAVEL — Travel with Flair (Pty) Ltd	**Title:** Cliqit Manual - Eskom	**Number:** BS147	**Revision:** 1	**Effective Date:** 2021-04-14

3.2. Flight Results Page

1. The cheapest flight option for the selected times will be auto selected by the system and displayed at the top of the page.
2. The left-hand sidebar provides you with filter options, to refine your search.
3. Below the cheapest flight grid, are two columns. The left-hand column will display alternate flight results for the departure flights, starting with the cheapest options.
4. The right-hand column will display the return flight options, for your request starting with the cheapest options.

5. Refine your search result by first selecting the applicable route at the top of the filter column. Once you have selected the route, you can filter according to the following categories:
   - Private fares – either by Agency or corporate deals,

- Price,
- Airlines to display,
- Depature times,
- Departure airports,
- Arrival airports,
- Classes.

6. The system will indicate if the fare is a Corporate or an Agency deal.
7. Select your flight by clicking on the preferred flight option. This will update the flights on the top grid to indicate your selection. Remember to select the **flight to** and **from** your destination.
8. Click on **"Fare Rules"** to verify change and refund rules of the applicable flight.
9. You can change your request at any time by selecting the **"Change"** icon to update your request.
10. Add your flight selection to your **"Shopping Basket"** by clicking on the **"Select"** icon.

11. On the result page, the system will indicate if bookings comply with the Company's Travel policy.

4. **Hotel Bookings**

4.1. Hotel Search Form

1. Select the *"Hotels"* icon at the top of the page.
2. Start the request, by typing the location name. Make a selection from the drop down list.
3. Increase the search radius if you are searching for a hotel more than 15KM from the specified location.
4. Select the *"Search hotels"* icon, to start the search.

4.2. Hotel Results Page

1. The results page will start with the cheapest option as per your request.
2. Refine your search by using the filter categories on the left-hand sidebar.
   - Negotiated rates – either Corporate or Agency rates
   - Price
   - Hotel chains – property groups
   - Policy
   - Hotel names
3. Select the *"Mapview"* icon to make your hotel selection from a google map.
4. **Important:** the "from" amount displayed on the results page is the total amount for the stay, for all travellers. The amount below the total amount is the average nightly rate per person.
5. The system will indicate when a Negotiated rate is displayed.
6. Click on the *"View Details"* icon to select room types/ meal options.

7. The page will default to the *"Rooms"* tab from where you can make your room type selection.
8. You can view images of the property, the map location & amenities by selecting any of these tabs on the left hand side of the page.
9. By selecting the *"Show rules"* icon you will find the cancellation policy and other rules linked to the specific room rate.
10. Details of the meals included in the rate & room description will be displayed.
11. You can find the reason for a service displaying out of policy by clicking on the ⛔ icon.
12. Click on the *"Select"* icon to add the room to your shopping basket.

13. The items in the *"Shopping Basket"* will be updated and available at the top righthand corner of the page.

5. Car Bookings

5.1. Car Search Forms

1. Select the *"Cars"* icon at the top of the page.
2. If you have booked flights, the form will automatically populate your dates and times based on your selected flights.
3. Alternatively complete the form to meet your travel requirements. Start typing your pick-up & drop off location (city) and make a selection from dropdown list.
4. Select the *"Search Cars"* tab to start the search.

5.2. Car Results Page:

1. The results will display the cheapest option compliant with your company' travel policy.
2. Filter the results by means of the left-hand sidebar filter categories:
   - Deals – Corporate or Agency deals
   - Price
   - Rental Agents – suppliers
   - Policy
   - Transmission type
3. The system will specify when a Negotiated deal is selected.
4. Click on the *"Details"* icon to make your selection.

5. The system will default to the airport location, but you can click on the arrrow to generate a list of town offices available for the specific supplier, which you can select from the dropdown list.
6. If you require a delivery or collection on the vehicle, you can specify this by selecting the relevant box and indicating the delivery- and collection address.
   Important: If a delivery or collection is requested, the agent will first have to confirm this arrangement before the voucher will be issued.
7. Select the tick box, if one of the other travellers that is a part of the booking needs to be listed as an additional driver.
8. Select your *"Rental Reason"* from the dropdown list. This is a mandatory field.
9. Select the *"Add to basket"* button to add the vehicle to your *"Shopping basket".*

10. If you selected <u>projects</u> from the dropdown list under the *"Rental Reason"* another block will display where you need to indicate if the rental is for a bussiness trip or not.

11. The system will default back to the car results page after you have added the vehicle to your basket.

12. The shopping basket will update to include the added vehicle.

6. <u>Transfer / Shuttle Bookings</u>

Important: The only shuttle supplier that has live inventory and is bookable on the online tool is EZ Shuttles

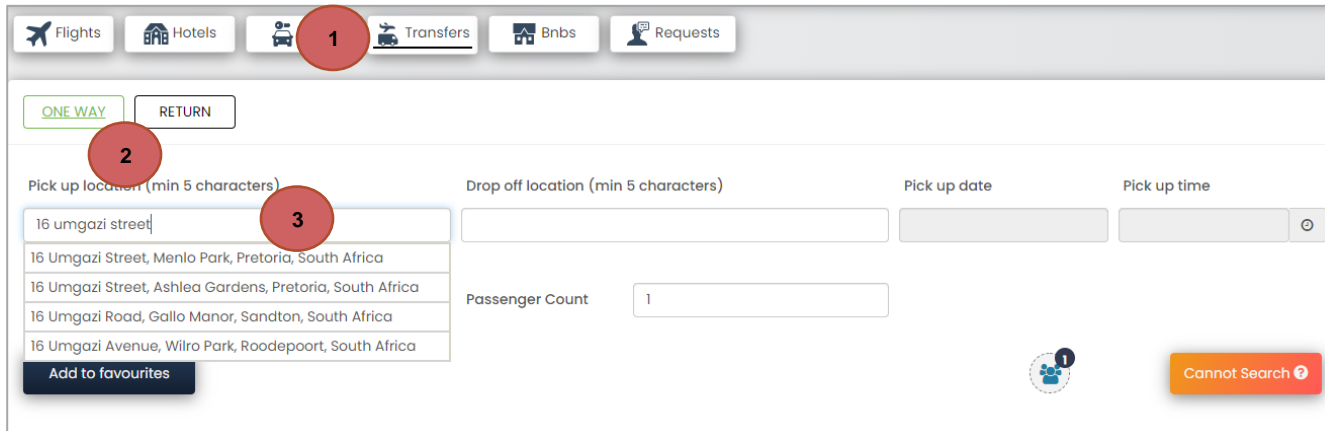If you require services of another shuttle company, you can either

- request assistance from a consultant via the ***"Request"*** tab under <u>transfers</u> or,
- book the shuttle directly with the supplier and add the booking details under the ***"Request"*** tab and selecting the ***"Booked my Me"*** option.

Please refer to section 8 for more information regarding the <u>Request Tab</u>.

6.1. Transfer Search Form

1. Select the ***"Transfers"*** icon at the top of the page.
2. You have the option to select a one way or return transfer.
   Important – A return transfer is from the same pick up and drop off address otherwise you need to book 2 one-way transfers.
3. Start typing the physical pick-up location address and select from the dropdown list.

NB-free text will result in an error message, you must make your selection from the dropdown list.
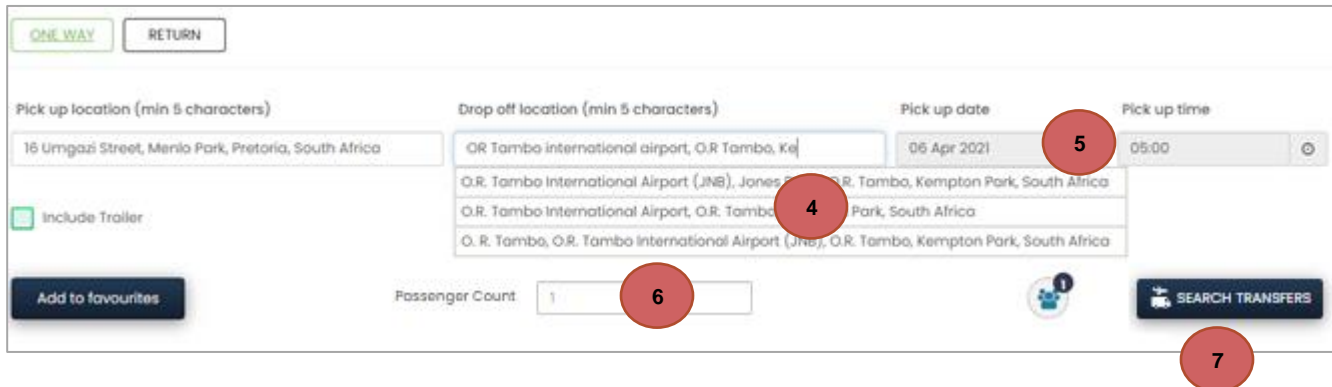

4. The same applies for the drop off location address. Start typing the address and select from dropdown list.
5. Add dates and times. Keep in mind that travellers requiring a shuttle to the airport needs to check in 1 hour before departure for domestic flights.
6. The size of vehicle offered on the results page will depend on the passanger count inserted in the ***"Passanger Count"*** field – for example a count for 5 and more pax will provide a Mini-bus vehicle option.
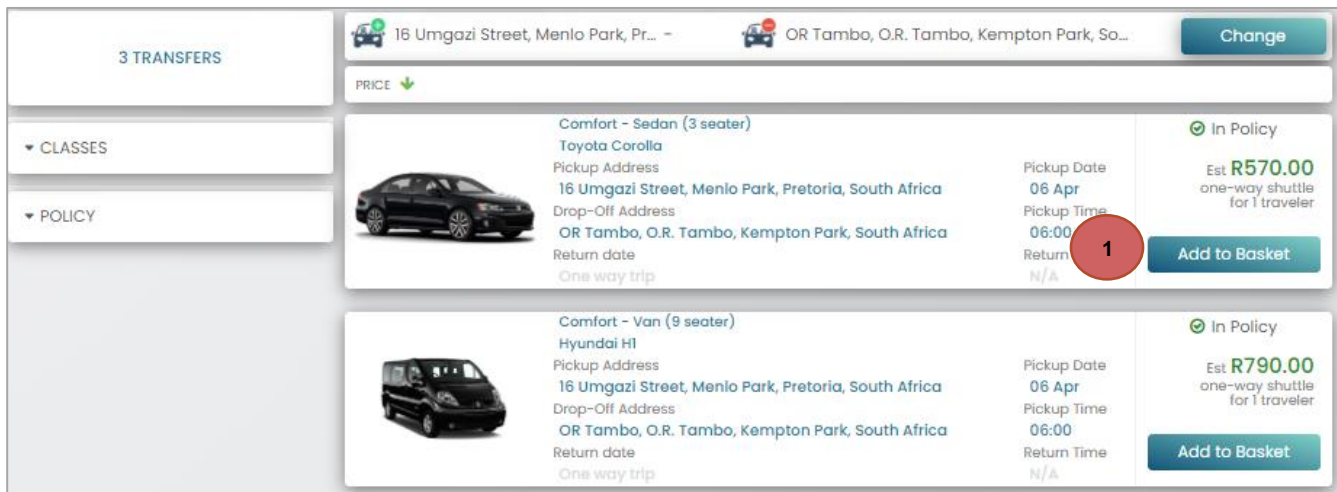
7. Select the **"Search Transfers"** button to search for options.

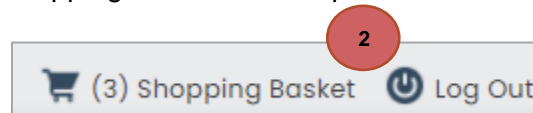## 6.2. Transfer Results Page

1. Select the **"Add to basket"** icon to add the shuttle to your **"Shopping Basket".**

2. The total items in your shopping basket will be updated.

7. **Bed and Breakfast Bookings**

Properties that are loaded on Nightsbridge will display in the B&B icon.
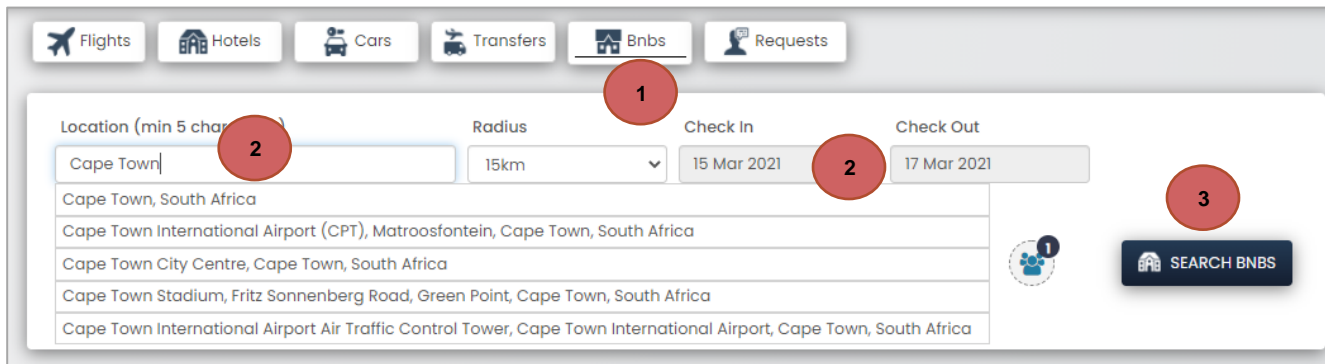
If you cannot find your specific supplier in the Hotels or B&B icons:

- you can add a *"Request"* to make use of consultant assistance or,
- make the booking directly with the supplier and utilise the *"Booked by me"* function under the *"Request"* tab.

Please refer to section 8 for more information regarding the Request Tab.

7.1. BnB's Search Form

1. Select the *"BnBs"* icon at the top of the page to start your search.
2. Search by location, by start typing the location and making a selection from dropdown list. Submit the required dates.
3. Select the *"Search BNBS"* tab to start the process.

7.2. BnBs Results Page

1. A list of B&B's starting from the cheapest will display on the results page.
   Note – the amount stipulated here is the total amount for the stay.
2. Select the *"View Details"* tab to be diverted to the room type availability of the selected property.

3. The page will default to the *"Info"* tab, select the *"Rooms"* tab to open the room types.
   Note – the property will indicate how many adults are allowed per room.
4. Select the *"Assign Pax"* icon to book the required room type to add the traveller.

5. On the below pop up, select the applicable traveller to have the traveller moved to the *"Selected Travellers"* box.

6. If the property offers different meal plans, you can make a selection from the drop down and the rate including the applicable meal plan in the costing.

7. Select the *"Add Room"* tab to select your room.

8. Your room selection will show at the top of the page. Click on the *"Add rooms"* icon to add the accommodation to the *"Shopping basket".*

8. <u>Request Tab</u>

In the request tab you can request services that is not bookable online. These services include:

- Accommodation,
- Car rental,
- Transfers,
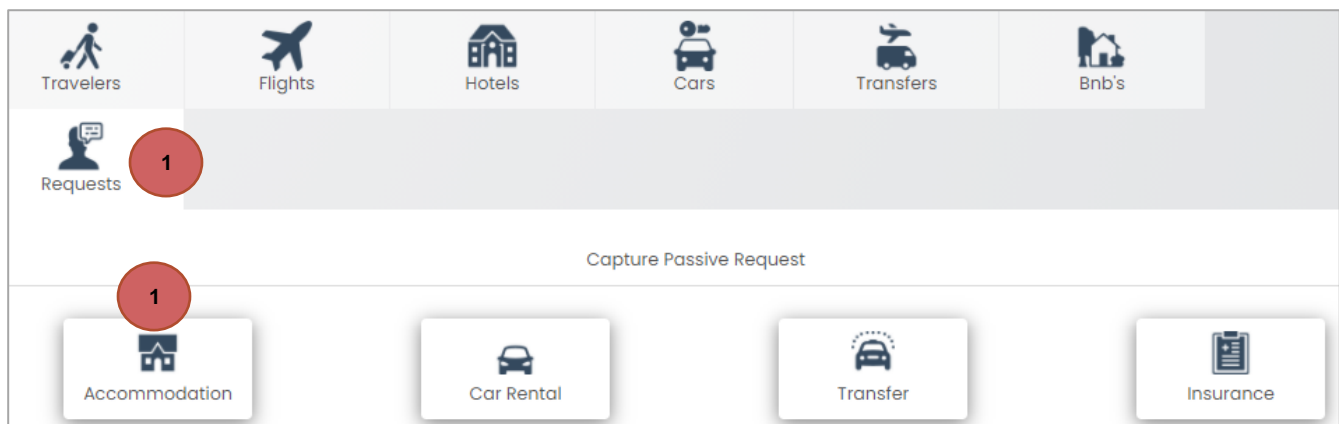- Insurance,
- Coach rentals,
- Parking,
- Forex,
- Visas,
- Flights,
- Conferences, and
- Bus tickets.

The system will allow you to capture services where the service has not been booked, where consultant intervention is require. Alternatively, with the correct documentation, the system will allow you to capture services where you, as the booker, has made a booking directly with the supplier and requires assistance from TWF to make payment for the service. In this instance, we refer to the services as a *"booked by me"* service.

8.1.   Accommodation

8.1.1. Consultant Intervention with Accommodation

1. Select the accommodation tab to request any establishment that was not found in the *"Hotels"* or *"BnB"* tabs.

2. Complete the fields as requested.
3. Select the *"Search Accommodation"* button.

4. Make your selection from the preferred list of properties displayed by clicking on the *"Select"* button.

5. Check the details of the property (address, etc) at the top of the page to ensure that it is the correct property.
6. Select the **"Add room"** button.

7. Select the **"Room Type"** from the dropdown list.
8. Select the **"Add"** button to add the traveller to the request.

9. The traveller name will be added to the <u>assigned travellers</u> field.
10. Any notes to the consultant can be added under the *"Notes"* box, if applicable.
11. Select the *"Add to basket"* button to have the request added to your <u>shopping basket.</u>

Request/Capture Accommodation ❌

The Winston Hotel
6 Tottenham Ave, Melrose Estate, Johannesburg, 2146
Rosebank
Telephone 011 268 3140   Email reservations@thewi... Contact 011 268 3140

Check-in 17 May
Check-out 19 May
Duration 2 nights

Notes

Please include lunchpack   **10**

Rooms   **Add Room**   ☐ Booked by me

Room Type ❌
Room only ⌄

Travelers
⌄

9   Assigned Travelers   🔴 Out of Policy ℹ️
NONHLANHLA CHRISTOBEL MKHIZE   ✖

11
Add To Basket

8.1.2. Booking Accommodation Directly with the supplier

If you have made the booking directly with any supplier; generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

12. Select the **"Booked by me"** tickbox. Additional fields for the cost & confirmation number details will open on screen.
13. Complete the confirmation number and costing details.
14. You have the ability to add notes to the voucher under the **"Voucher remarks"** box, for example if you require diabetic meals.
15. Select the **"Add to basket"** button to have the service added to your shopping basket.
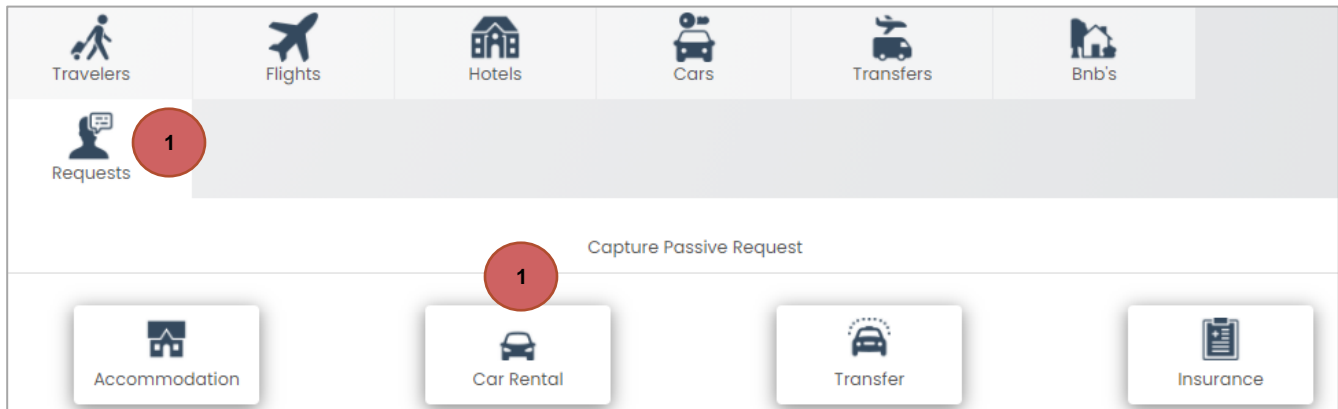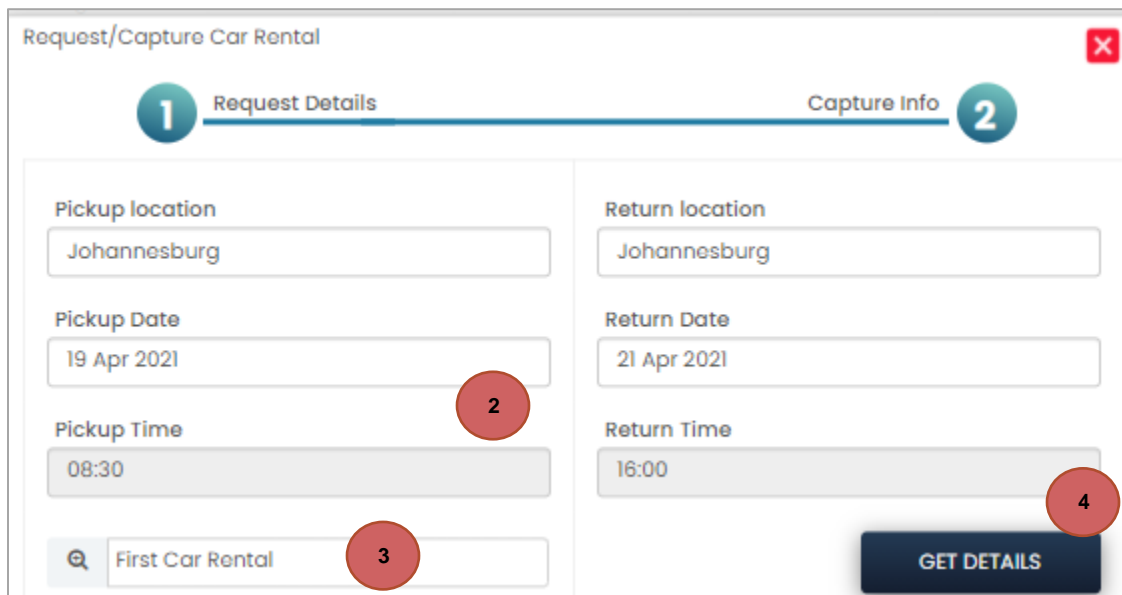
8.2. Car Rental

8.2.1. Consultant Intervention with Car Rental Bookings

1. Select the Car rental tab to request a vehicle if no live availability of car rental inventory was available in the **"Cars"** tab, in the online section of Cliqit.

2. Complete the fields as requested.
3. Select your supplier from the dropdown list.
4. Select the **"Get details"** button.

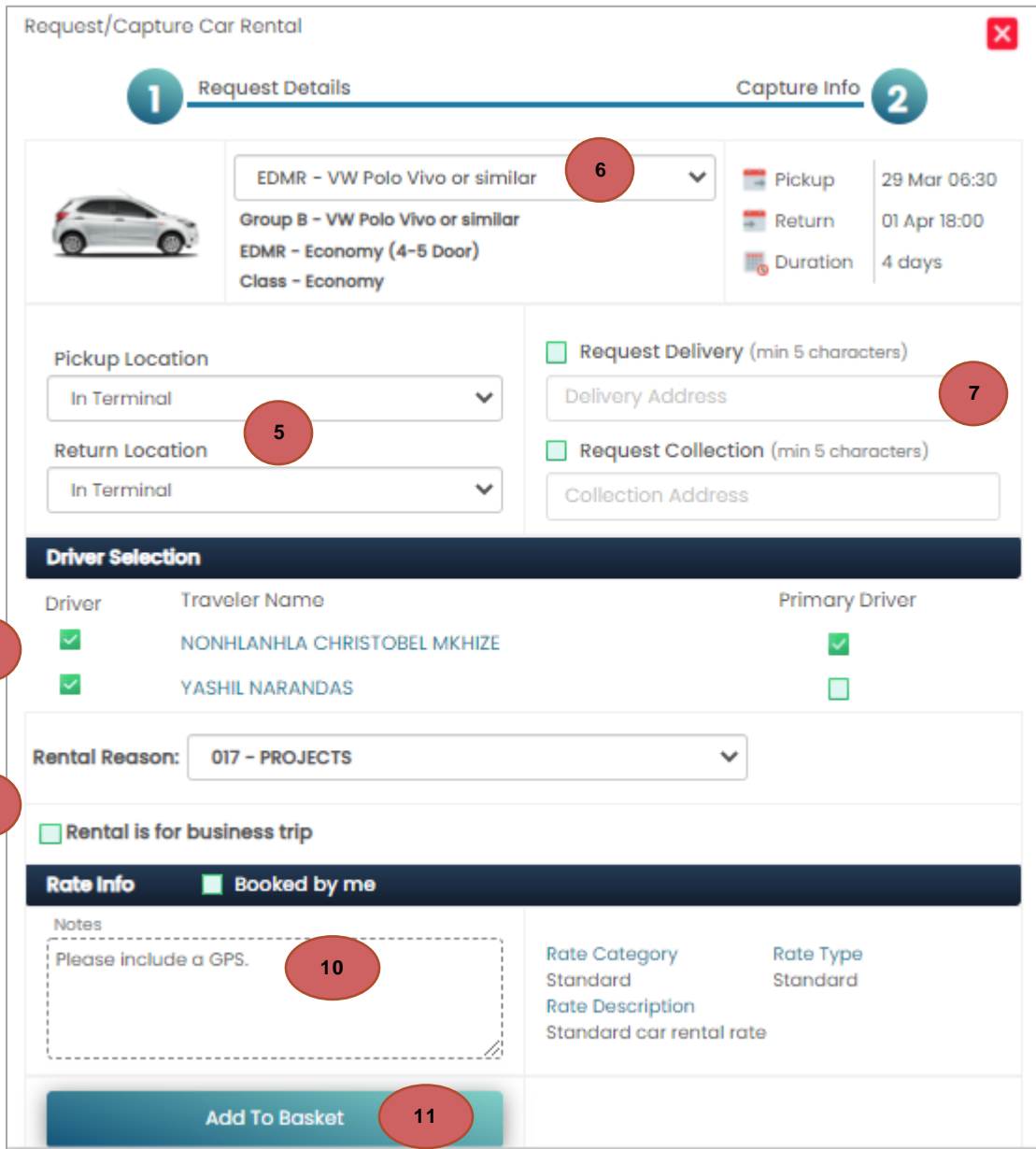**5.** The system will default to the airport location, click on the arrrow to generate a list of alternate town offices available for the specific supplier and make a selection from the dropdown list.

6. The system will default to a group B vehicle, however, you can update the vehicle type by making a selection from the dropdown list.

7. If you require a delivery or collection on the vehicle, you can specify this by selecting the relevant box and indicating the address where the vehicle needs to be delivered to or collected from.
Important: If a delivery or collection is requested, the agent will first have to confirm the arrangement before the voucher will be issued.
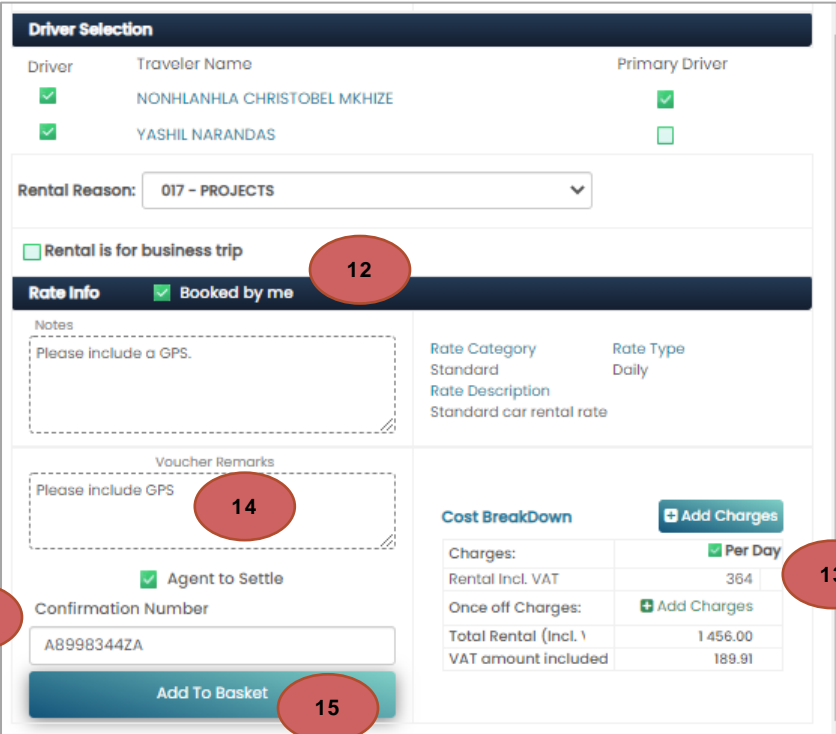
8. Select the tick box, if one of the other travellers that's part of the booking needs to be listed as an additional driver.
9. Select your *"Rental Reason"* from the dropdown list. If your selection was projects, another box will open for you to advise if it's a business trip or not.
10. Any message to the consultant can be added under the notes box.
11. Select the *"Add to basket"* button to add the vehicle to your *"Shopping basket."*

8.2.2. Booking Car Hire Directly with a supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

12. Select the *"Booked by me"* button. A block with cost & confirmation number details will open.
13. Complete the confirmation number and costing details.
14. You have the ability to add notes to the voucher under the *"Voucher remarks"* box for example if you requested a GPS as an example.
15. Select the *"Add to basket"* button to have the service added to your shopping basket.

8.3. Transfers

8.3.1. Consultant Intervention with a Transfer Booking

1. Only EZ shuttles provides live inventory availablility. If you require another preferred shuttle company, you can request this under the *"Request"* tab under the transfers tab
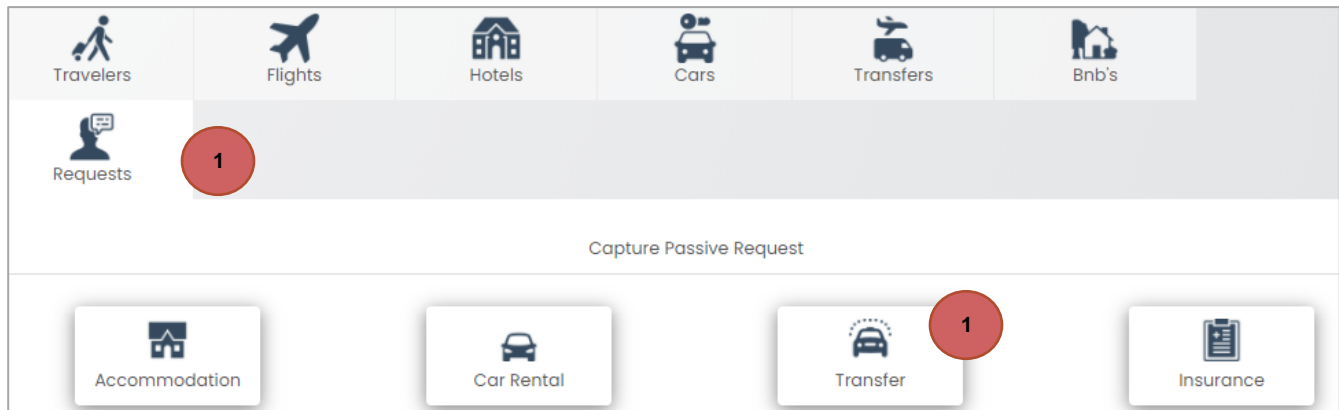
2. Complete all the required details on the pop-up box. Ensure that you submit the full address for pick up and delivery.
3. Click on the *"Select Vendor"* tab to select the preferred supplier from the dropdown list.
4. You can select the *"return"* box to submit the return transfer information.
   Important: a return transfer is from the same pick up and drop off address otherwise you need to request 2 one way transfers
5. Select the *"Get details"* tab.

6. Select the **"Add to basket"** button to have the request added to your <u>shopping basket.</u>

8.3.2. Booking Transfers Directly with a supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

7. Select the *"Booked by me"* button. A block with cost & confirmation number details will open.
8. Complete the confirmation number and costing details.
9. Select the *"Add to basket"* button to have the service added to your shopping basket.

8.4. Insurance

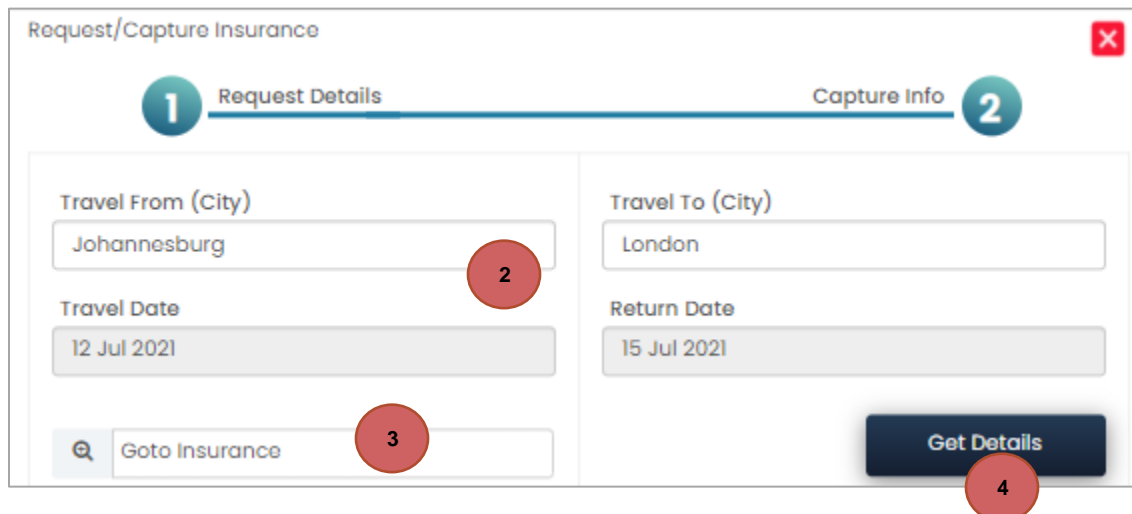#### 8.4.1. Consultant Intervention with Insurance Bookings.

1. If you require insurance for a trip, you can request the service under the *"Request"* tab. Select the <u>insurance</u> tab.
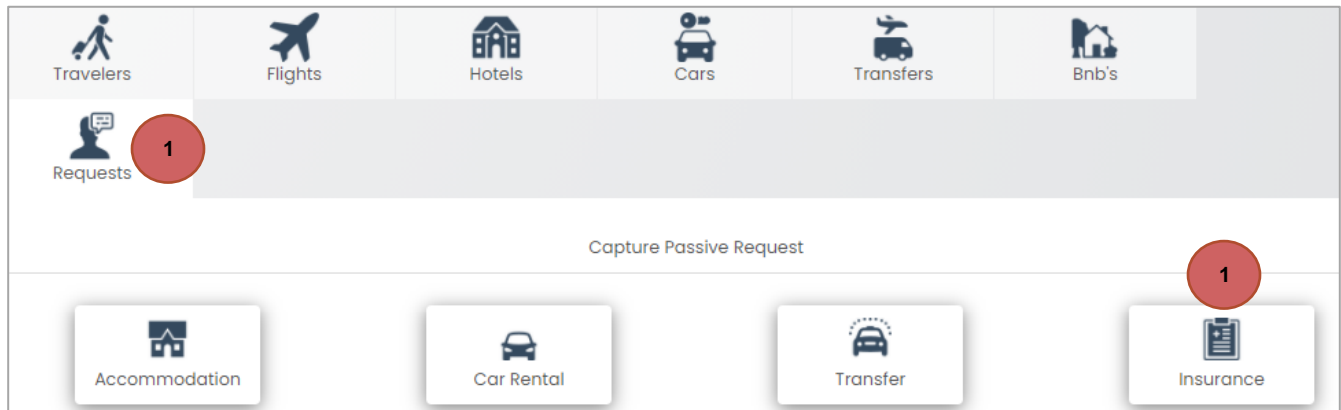
2. Complete the fields as requested.
3. Click on the *"Select Vendor"* tab and select the supplier from dropdown list.
4. Select the *"Get details"* button.

5. Select the *"Add request"* button.
6. Select the *" Add"* button.

7. The traveller name moved to the <u>assigned traveller</u> section.
8. Select the **"Add to basket"** button to add the requested service to your <u>shopping basket.</u>

8.5. Coach Rental

8.5.1. Consultant Intervention with Coach Bookings

1. To rent a coach, you can submit the request in the *"Request"* tab under the <u>Coach rental </u>icon.
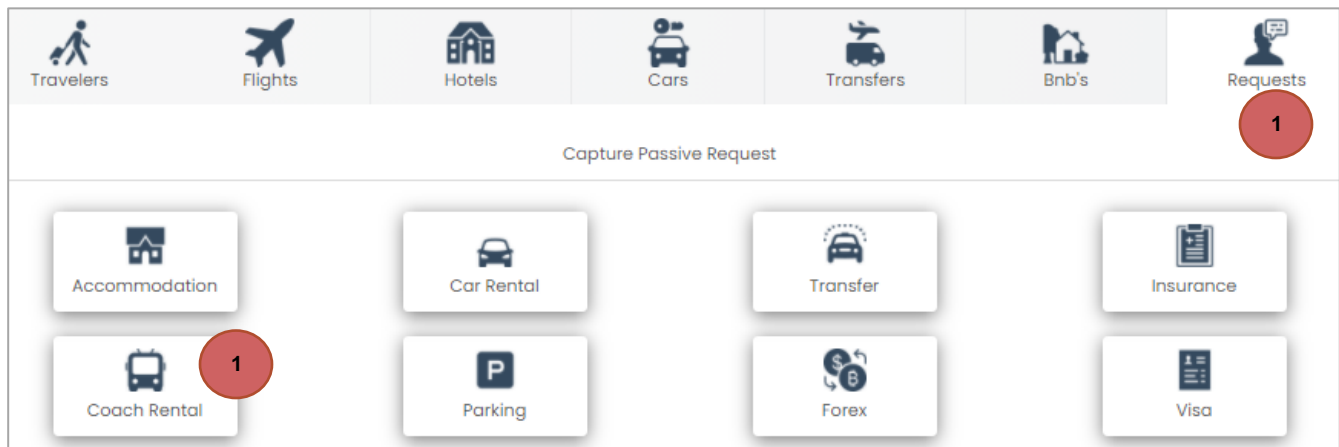
2. Complete all the required details on the pop box. Ensure that you submit the full address for pick up and delivery.
3. Click on *"Select Vendor"* to select your required choice of supplier from the preferred supplier dropdown list.
4. You can select the *"return"* box to submit the return details.
Important: a return details is from the same pick up and drop off address otherwise you need to request 2 one way addresses.
5. Select the *"Get details"* tab.

6. Check the details of the selected supplier to ensure it's the correct supplier.
7. Remember although it's a coach rental, one primary traveller for the booking will apply.
8. Select the *"Add to basket"* to have the request added to your shopping basket.

8.5.2. Booking Coach Hire Directly with a Supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

9. Select the **"Booked by me"** button. A block with cost & confirmation number details will open.
10. Complete the <u>confirmation number</u> and <u>costing details.</u>
11. Select the **"Add to basket"** button to have the service added to your shopping basket.

Request/Capture BusRental

1 Request Details   Capture Info **2**

Mega Bus & Coach
Alsation Road,Off Allanda, Midrand, Gt, 2157
Rosebank
Telephone 010 223 1026   Email yvonne.anthony@m...Contact 010 223 1026

Pickup   18 Feb
10:00

Notes
Information of relevant importance.

Voucher Remarks
Remarks to print on voucher.

✅ Agent to Settle

9 ✅ Booked by me

Details

Primary Traveler   ⊘ In Policy ⓘ
Corne Lubbe   ⌄

Passenger count
1

Class
Economy   ⌄

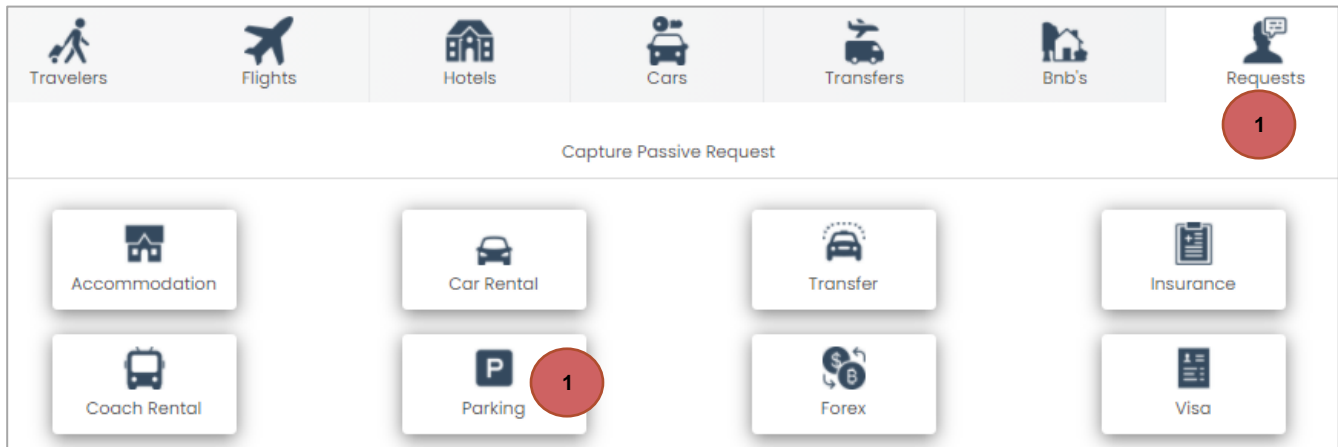Confirmation Number
E989898   **10**

Cost BreakDown   ➕ Add Charges

Charges:
Amount Incl. VAT   23000.00
10 Total (Incl. VAT)   23 000.00
VAT amount included   3 000.00
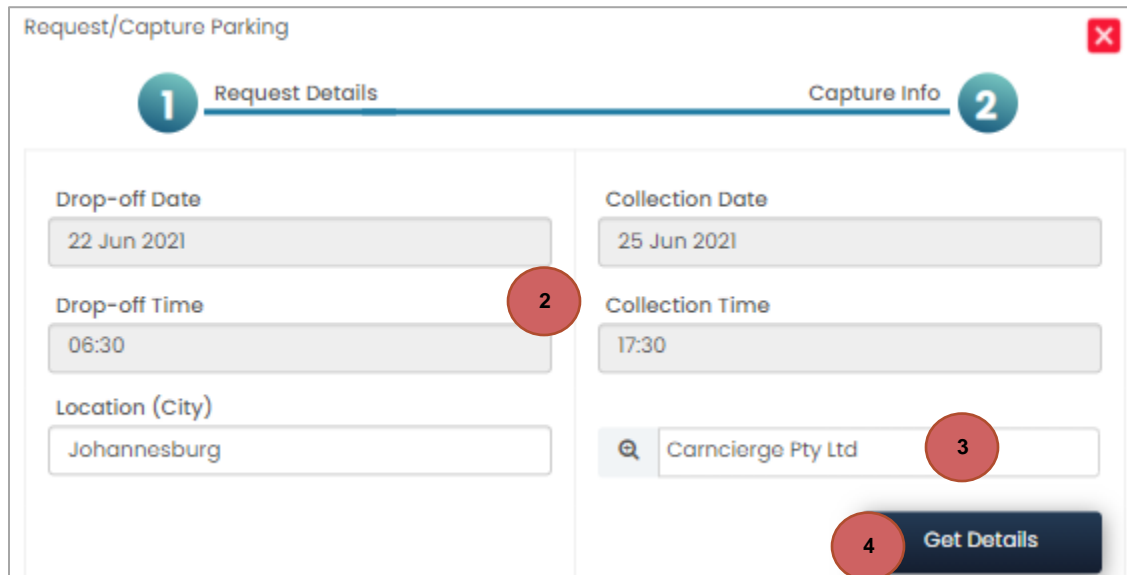
11

Add To Basket

8.6.   Parking

8.6.1. Consultant Intervention with Parking

1. If you require parking for a trip, you can request the service under the *"Request"* tab. Select the parking tab.
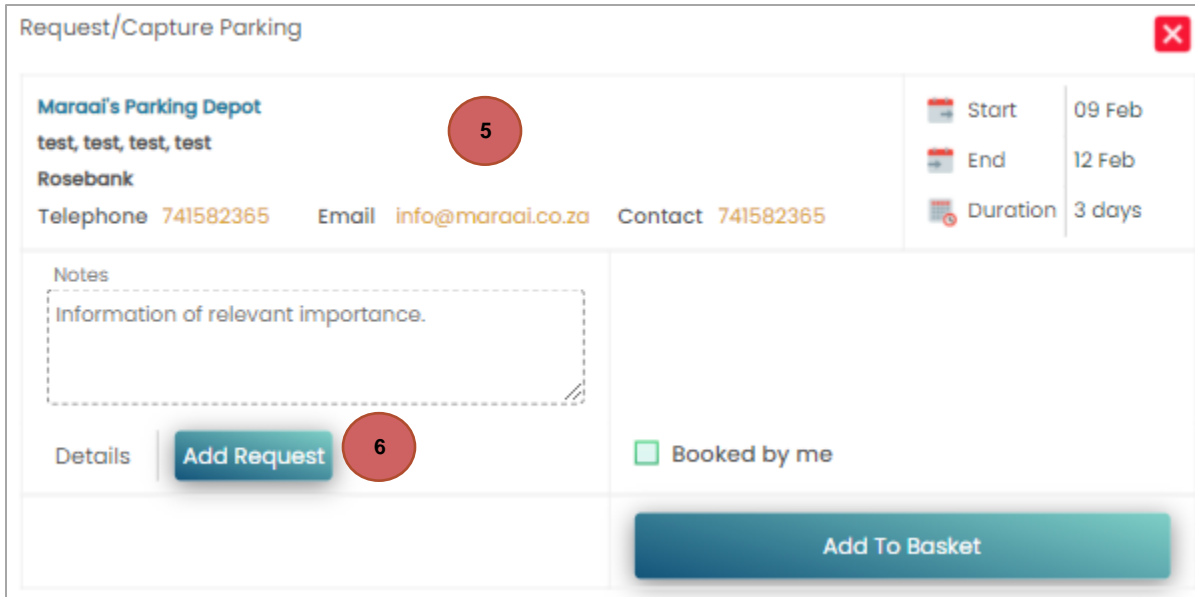

2. Complete the fields as requested.
3. Click on *"Select Vendor"* to select your required choice of supplier from the preferred supplier dropdown list.
4. Select the *"Get details"* button.

5. Check the details of the selected supplier to ensure you have selected the correct supplier.
6. Select the **"Add request"** tab.

7. Select the **"Add"** button to have the traveller moved to the <u>assigned traveller</u> section.
8. Complete the vehicle details.
9. Select the **"Add to basket"** button to have the required request added to your <u>shopping basket</u>

8.6.2. Booking Parking Directly with a Supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

10. Select the **"Booked by me"** button. A block with cost & confirmation number details will open.
11. Complete the <u>confirmation number</u> and <u>costing details.</u>
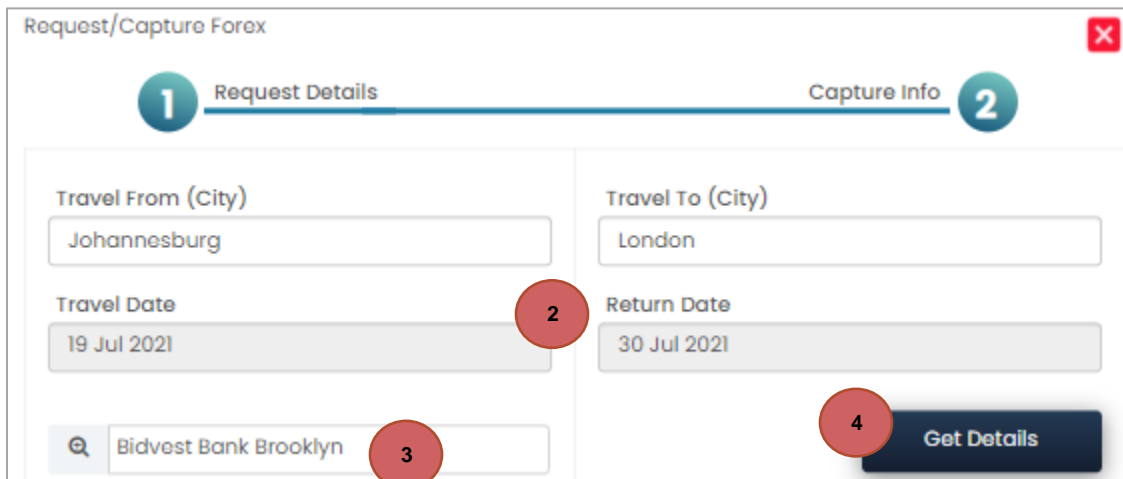12. Select the **"Add to basket"** button to have the service added to your shopping basket.

8.7. Forex

8.7.1. Consultant Intervention with Forex

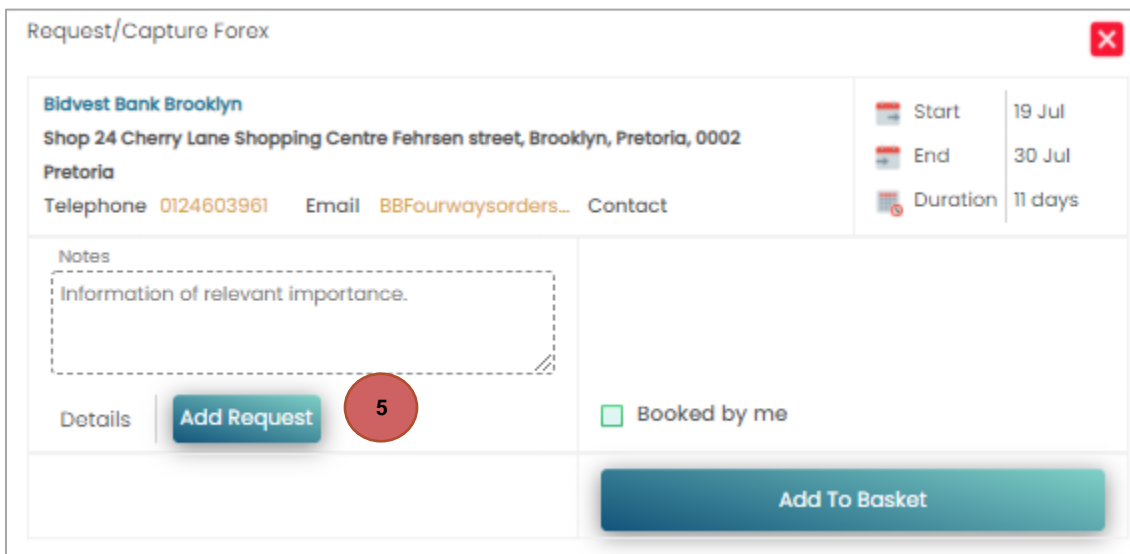1. To request forex for an international trip, select the *"Request"* tab and forex icon.

2. Complete the required fields in the pop up box.
3. Click on *"Select Vendor"* to select your required choice of supplier from the preferred supplier dropdown list.
4. Click on *"Get details".*

5. Select the *"Add request"* button.

6. Complete all the fields from a dropdown list:
- Currency required,
- Denom,
- Equiv base values,
- The equiv amount will be auto generated according to the current exchange rate.

7. You can request more than one currency by selecting the *"Add currency line"*.

8. Select the *"Add"* button to move the traveller to <u>assigned traveller.</u>

Request/Capture Forex

ForexTest
test, test, test, test
Rosebank
Telephone 123   Email 123   Contact 123

Start 16 Feb
End 26 Feb
Duration 10 days

Notes
Information of relevant importance.

Details | Add Request   ☐ Booked by me

Exchange rat...cted are indicative. Actual rate su...quote/confirmation.

Currency Required		Denom.	Equiv. Base Values		Exch. Rate	Equivalent Amount	
Currency	Type		Amount	Currency	1 Unit = ROE	Currency	Value
USD ▼	Foreign Notes ✓	Small ✓	600	USD ✓	16.33237	ZAR	9799.42

👍 Required information provided.   Add Currency Line ➕

Assign Traveler
Corne Lubbe ✓   Add ➕
Assigned Traveler   ⛔ Out of Policy ℹ️

Add To Basket

9. The traveller will now display under the underline assigned traveller section
10. Select the **"Add to basket"** button to have the request added to your underline shopping basket

Assign Traveler
✓
Assigned Traveler   ⊘ In Policy ℹ️
Corne Lubbe   ✗

Add To Basket

8.7.2. Booking Forex Directly with a Supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

11. Select the *"Booked by me"* button. A block with cost & confirmation number details will open.
12. Complete the confirmation number and costing details as per the supplier invoice.
13. The below fields will stay as per your submittel:
   - Currency required,
   - Denom,
   - Equiv base values,
   - Except for the **exchange rate** block which you need to insert manually as per your invoice from the supplier.
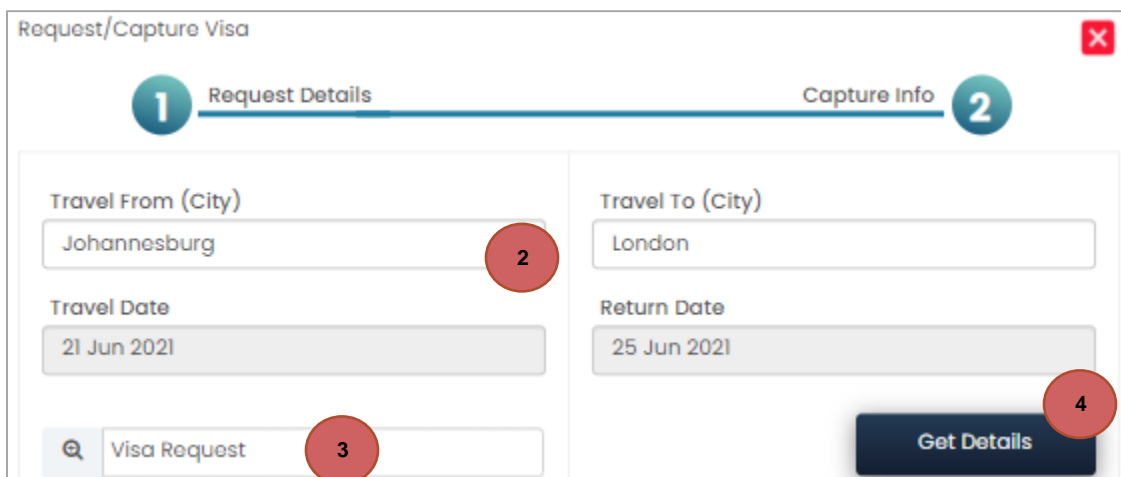**14.** Select the *"Add to basket"* button to have the service added to your shopping basket.

8.8. Visa

8.8.1. Consultant Intervention with Visas

1. If you require a visa, the request can be submitted under the **"Request"** tab under the visa icon.

2. Complete the required fields in the pop up box.
3. Click on **"Select Vendor"** to select your required choice of supplier from the preferred supplier dropdown list.
4. Click on **"Get details".**

5. Select the **"Add request"** button.

6. Select the *"Add"* button to move the traveller to the <u>assigned traveller</u> section.

7. The traveller will now display under the <u>assigned traveller</u> section.
8. Select the *"Add to basket"* button to have the request added to your <u>shopping basket.</u>

8.8.2. Booking Visas Directly with a Visa Service Supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued
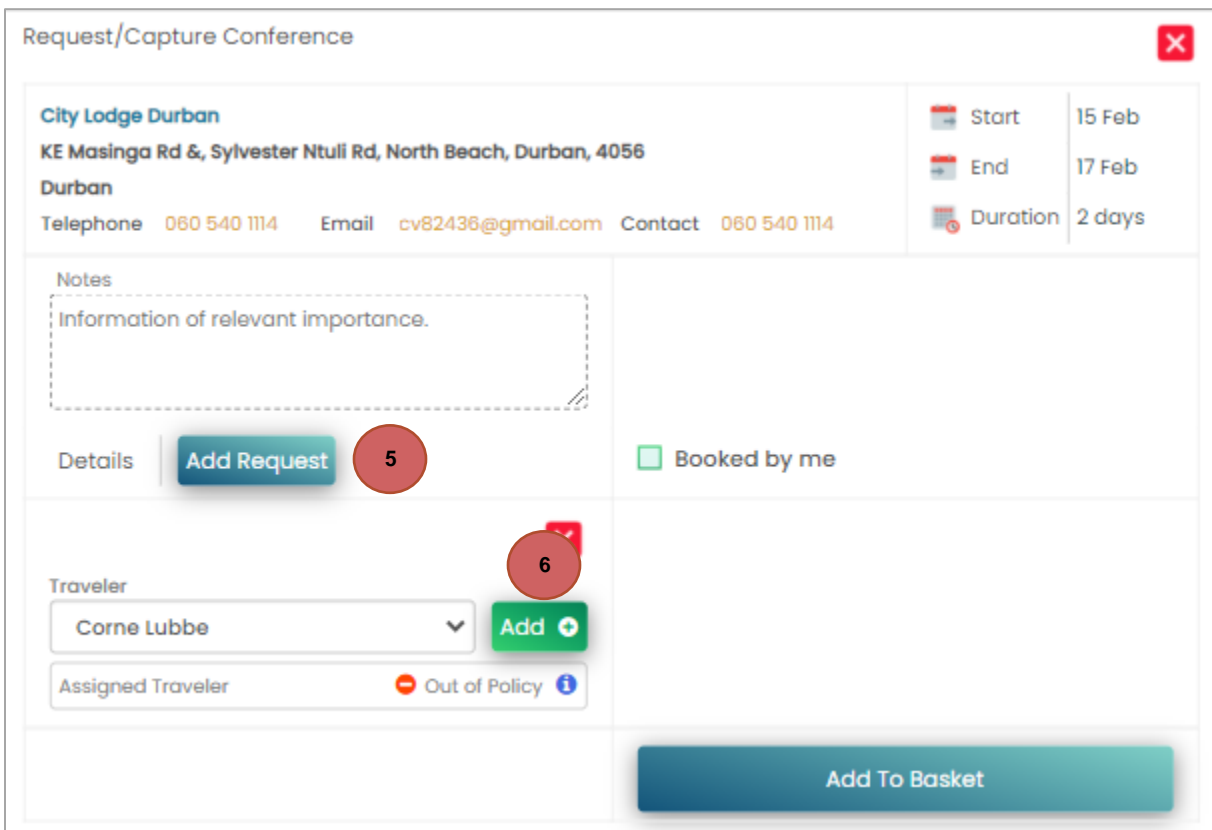
9. Select the *"Booked by me"* button. A block with cost & confirmation number details will open.
10. Complete the <u>confirmation number</u> and <u>costing details.</u>
11. Select the *"Add to basket"* button to have the service added to your <u>shopping basket.</u>

Request/Capture Visa ❌

Twf Visa Company
test, test, test, test
Rosebank
Telephone 123   Email test   Contact 123

📆 Start   08 Mar
📆 End   26 Mar
🕑 Duration 18 days

Notes
Information of relevant importance.

Voucher Remarks
Remarks to print on voucher.

✅ Agent to Settle

Details **Add Request**   **9**   ✅ Booked by me

❌

Traveler
⌄

Assigned Traveler   ⊘ In Policy ⓘ
Corne Lubbe   ✖

Confirmation Number
B38999   **10**

Cost BreakDown   **➕ Add Charges**

Charges:	
Visa Charges Incl. VAT	1250.00
Courier Fee Incl. VAT	90.00
Total (Incl. VAT) **10**	**1 340.00**
VAT amount included	**174.78**

11

Add To Basket
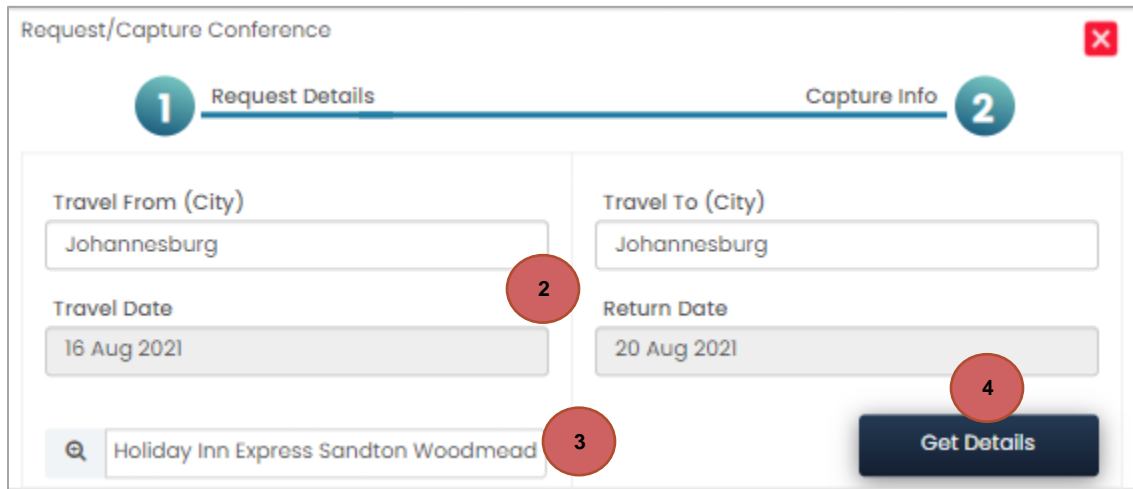
8.9. Conference

8.9.1. Conferencing Coordinator's Intervention with Conferences.

1. If you are required to book a conference you can select the **"Request"** tab and the <u>conference</u> icon.

2. Complete the required fields in the pop up box.
3. Click on **"Select Vendor"** to select your required choice of supplier from the preferred supplier dropdown list.
4. Click on **"Get details".**

5. Select the *"Add request"* button.
6. Select the *"Add"* button to have the traveller moved to the <u>assigned traveller</u> section.

7. The traveller name will now display in the <u>assigned traveller</u> section.
   Important: Although a conference is for a group of people, you need to specify one traveller name or if you are the booker of the conference then your name
8. Specify the requirements for the conference to the consultant in the <u>notes</u> box.

9. Select the **"Add to basket"** button to have the request added to your <u>shopping basket.</u>

8.9.2. Booking a Conference Directly with a Supplier

If you have made the booking direct with any supplier & generated an approved SAP order and you require TWF to settle the bill, you can add the cost and confirmation number to have the voucher issued.

10. Select the **"Booked by me"** button. A block with cost & confirmation number details will open.
11. Complete the <u>confirmation number</u> and <u>costing details.</u>
12. Ensure to add all the requirements discussed with supplier under the <u>voucher remarks</u> box.
13. Select the **"Add to basket"** button to have the service added to your <u>shopping basket.</u>

Request/Capture Conference

City Lodge Durban
KE Masinga Rd &, Sylvester Ntuli Rd, North Beach, Durban, 4056
Durban
Telephone   060 540 1114   Email   cv82436@gmail.com   Contact   060 540 1114

Start — 15 Feb
End — 17 Feb
Duration — 2 days

Notes
Information of relevant importance.

Voucher Remarks
2 Day conference. U style with breakfast and lunch. Accommodation with dinner

12

Details   **Add Request**

✅ Agent to Settle

10   ✅ Booked by me

Traveler

Assigned Traveler   ⊘ In Policy ⓘ
Corne Lubbe   ✖

Number In Party
1

Confirmation Number
Tamsin   **11**

Cost BreakDown   ➕ **Add Charges**
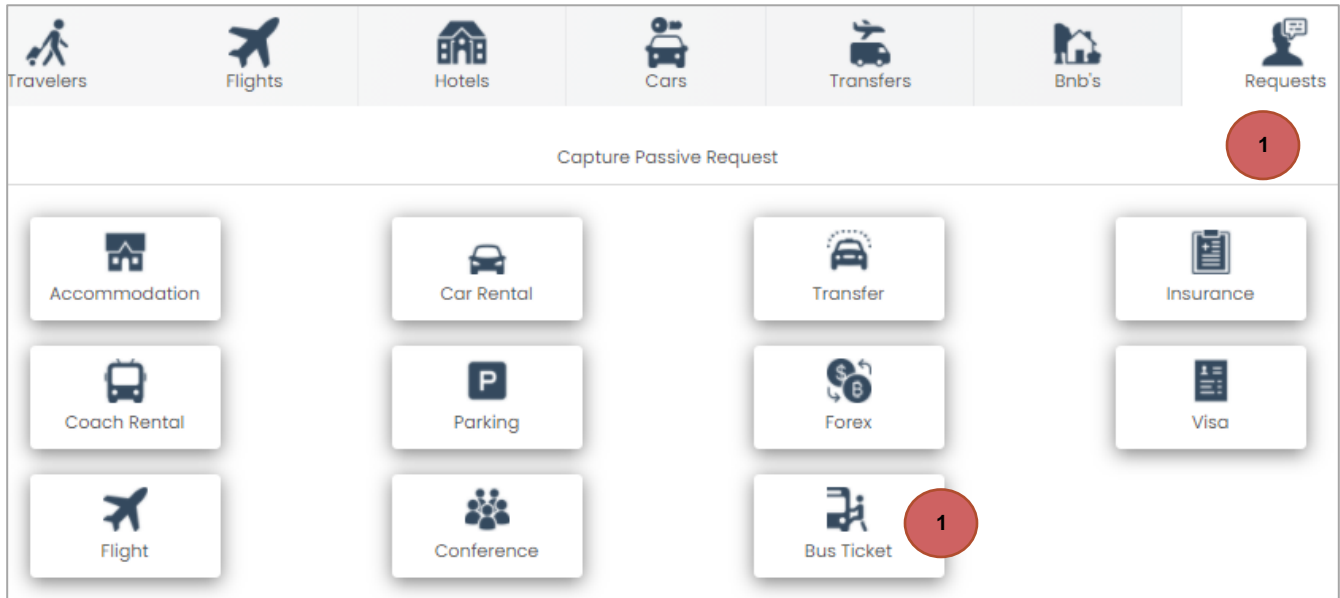
Charges:	
Conf. Charges Incl. VAT	120000.00
Total (Incl. VAT)	**11** 120 000.00
VAT amount included	15 652.17

13

Add To Basket
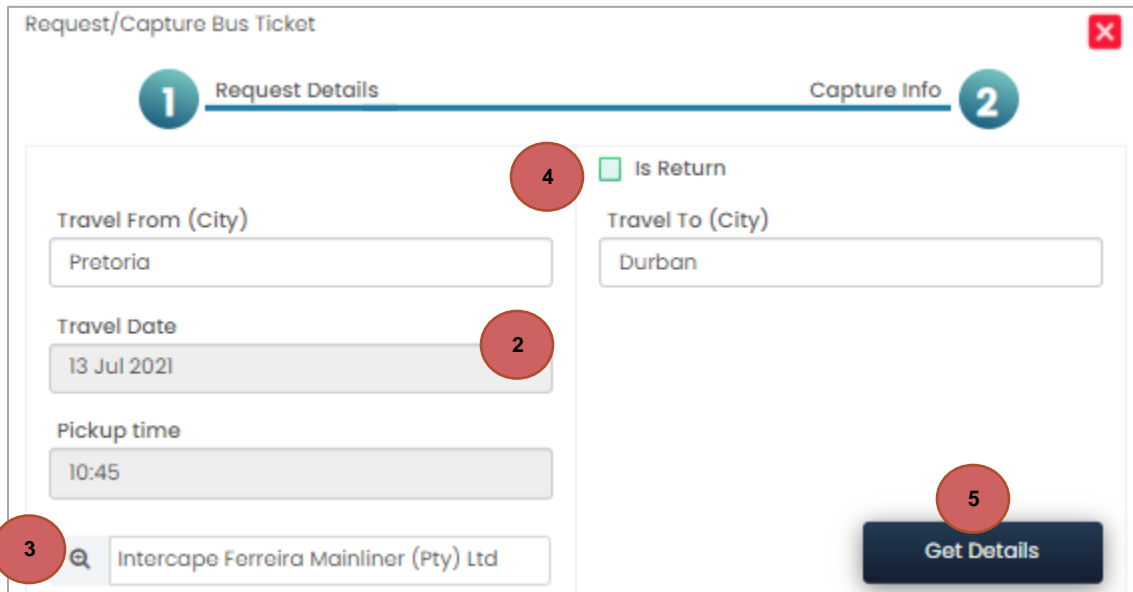
8.10. Bus Tickets

1. If you require a bus ticket with Intercape, Greyhound etc. you can submit your request via the *"Request"* tab under the <u>bus ticket </u>icon.

2. Complete all the required details on the pop box.
3. Click on *"Select Vendor"* to select your required choice of supplier from the preferred supplier dropdown list.
4. You can select the *"return"* box to submit the return bus details.
   Important: a return bus ticket is from the same pick up and drop off address otherwise you need to request 2 one way bus tickets.
5. Select the *"Get details"* tab.

6. Select the *"Add request"* tab.
7. Select the *"Add"* button to move the traveller to assigned traveller section.
8. You can add any comments or notes to the consultant under the notes box.

9. The traveller will display under the <u>assigned traveller</u> section
10. Select the *"Add to basket"* tab to have the requested service add to your <u>shopping basket</u>
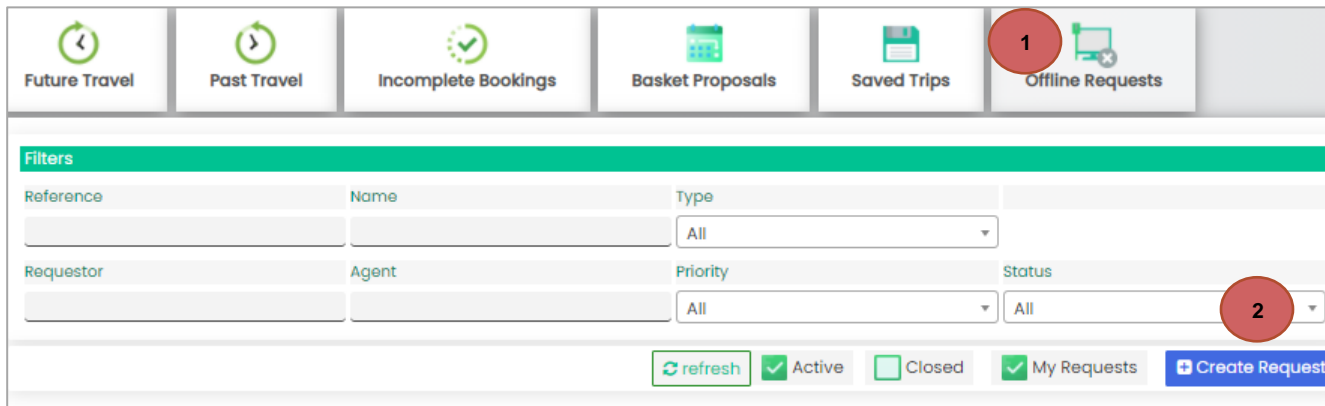
9. International Travel - Offline Request
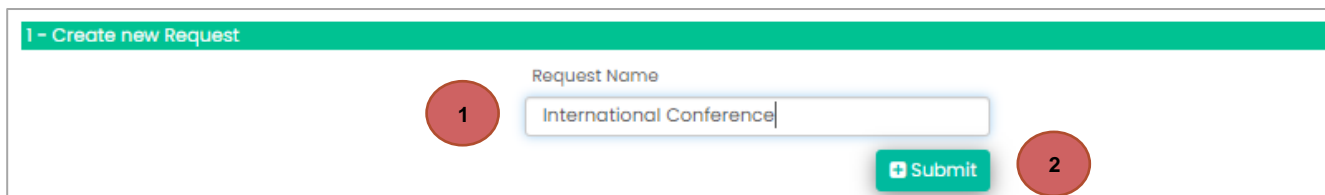
The offline-request tab will be utilized for international travel, complex conference bookings and group bookings.

1. Select the off-line requests tab on the Dashboard to open the section.
2. Select the create request button to start the process.

9.1. Create A Request

1. Give your request a name.
2. Select the submit button.

3. Select the traveller.
4. You can change the default cost centre by selecting the change icon. Make your new selection from the dropdown list.
5. Select the submit button.

6. Submit the details of the requirements for the request to the agent under the free text box. Ensure that all relevant information is added to enable the consultant to do the quote, booking.
7. **NB NB** – you need to tick the <u>request international trip</u> box if you are requesting international travel. No need to tick this box if you are requesting a conference or group booking.
8. Complete under the <u>trip information</u> the <u>trip name</u> & <u>reason for travel</u> & <u>payment option.</u>
9. The Eskom <u>International Trip information</u> form needs to be completed before you will be able to submit your request to the agent, if applicable
10. You can attach documents under the <u>attachments</u> tab if required.
11. Select the <u>submit request</u> tab to send the request off to the agent.

Trip Information   ⑧

Trip Name	International Conference
Trip Reason	Business
Payment Option	EFT

Booking Notes

Additional notes regarding the booking. Useful to provied info for approvers to see.

International Trip Information

Details of Visit

	Country	City	Organisation	Person Visited	Purpose	From Date	To Date	Days
✕	United Kingdom	London(United...	ABC Company	Conference	Conference	2021-08-10	2021-08-14	4
✕	United States	Washington(U...	BDD Company	Conference	Conference	2021-08-14	2021-08-21	7

First overseas visit on Eskom Business	✅	If not, attach details of previous overseas visits on Eskom Business
Is the trip for training purposes	✅	If yes, attach retention contract
Eskom – Signed Travel Policy Document.pdf 📎		Details of training here
Leave taken while overseas	☐	If yes, attach approved leave form
Travel with spouse overseas	☐	If yes, attach motivation letter with details of dependants

		General Manager	
Travel Class	Economy ✅	Complied with Policy/National Treasury/Travel Procedure	CALIB CASSIM

Travel Reason
Conference

⑨

Other employees travelling with

➕ search by staff number/full name

Staff Number	Full Name	Division	Tel Number	Email Address	Role of Individual

⑨

Subsistance Allowance

Country	Currency	Daily Rate	Days	Total Allowance
[GB] United Kingdom	[GBP] British Pounds	102	0	0
[US] USA	[USD] US $	146	0	0

11 day(s) unallocated

12. The below pop-up box will generate with your off-line request number.

✓

Request Created
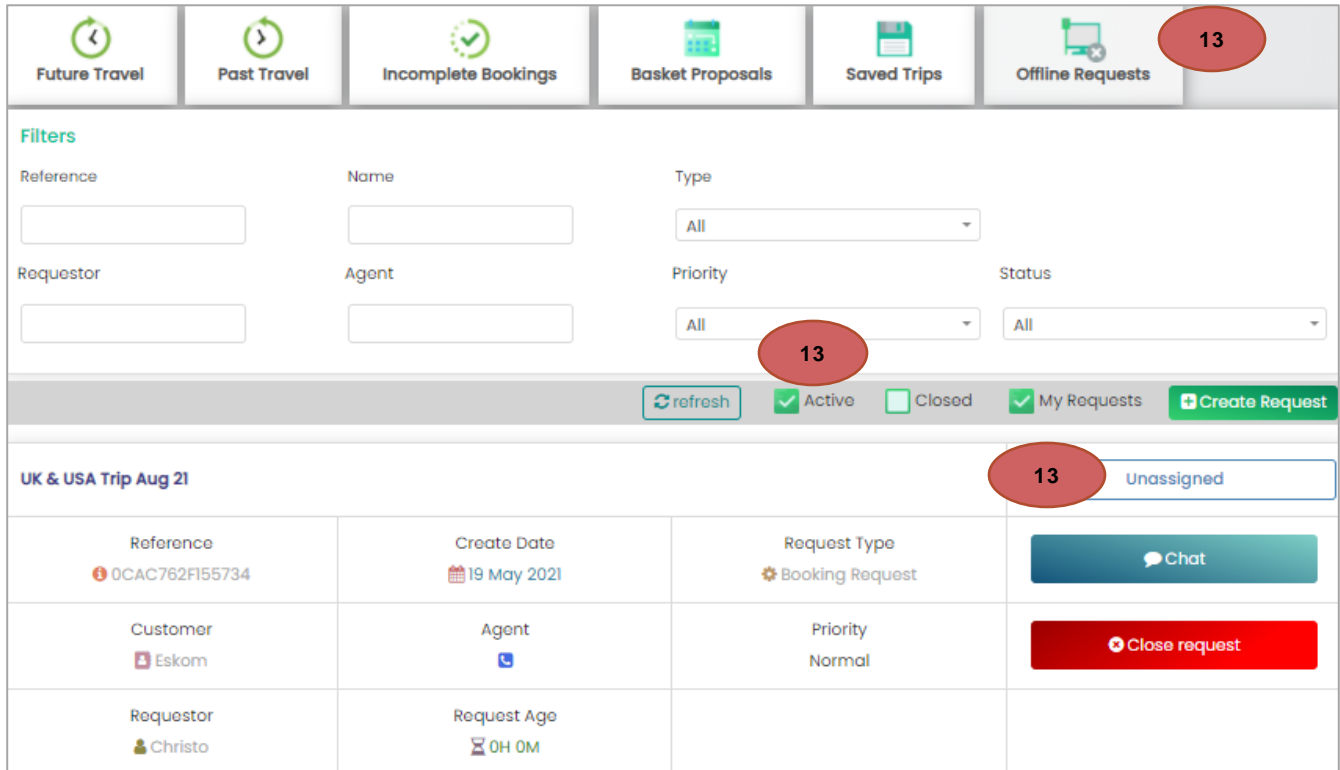
Offline Request created. Reference DB2C15AC111121

OK ⑫

13. The request will be listed under the <u>off-line request</u> tab as <u>active</u> with status <u>unassigned.</u>

14. Upon the agent responding to the request, the status will update to <u>pending user feedback</u> (you the requestor now need to respond to the agent's feedback). You will also receive an email to advise you that the consultant has responded.

15. Select the 🗨 Chat icon to open the request.

16. Once opened you will find the feedback and comments from the agent.
17. You can open an attachment by selecting the icon if any document was attached.
18. Add your response message to the agent under the new message tab.
19. You can add a document if required by selecting the click to upload files tab.
20. Select the submit button.

Request Details

Requestor Details

Requestor Created	Requestor	Requestor Email
19 May 2021	Christo ADMIN	cv82436@gmail.com

Request Traveler(s)

Traveler #	Traveler	Traveler Email
47560	NONHLANHLA CHRISTOBEL MKHIZE	MoatshTM@eskom.co.za

Request Chat

Christo — 19 May 15:58

Good day,

Please assist in quotes for flights for:

JNBLON – DEP 10 AUG
LONWAS – DEP 14 AUG
WASJNB – DEP 21 AUG

I also require accommodation in the city centre of London and Washington.

Kind Regards,

🔗 0 Attachment(s)

Corne Lubbe — 19 May 16:00

Corne Lubbe has assigned request to themself

🔗 0 Attachment(s)

Corne Lubbe — 19 May 16:01

Good day,

Please find the quotes attached.

16

🔗 1 Attachment(s)

17

📄 Quote 1.pdf

New Message

[Formatting toolbar: Font, Formatting, Font size, B, I, U, A, alignment options, lists, etc.]

Hi,

Thank you for the quotes. Please can you book option 2 for the flights and option 1 for the accommodation.

Many Thanks,

18

Characters : 121 Words : 23

Attachments
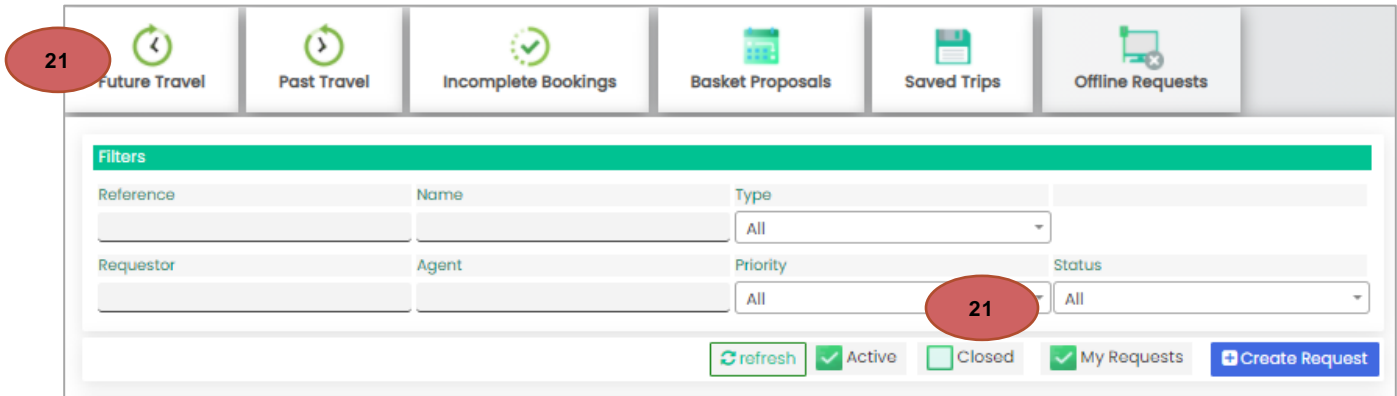
☁ Click to upload files.

19

20 ➕ Submit

21. Upon the consultant confirming & importing the booking, you will find the booking on your dashboard under the <u>future travel</u> tab with status <u>awaiting approval</u>. The offline request will now move from the active list to the closed icon under your <u>offline request</u> tab. An email will generate to you to advise when the booking was imported by the agent.
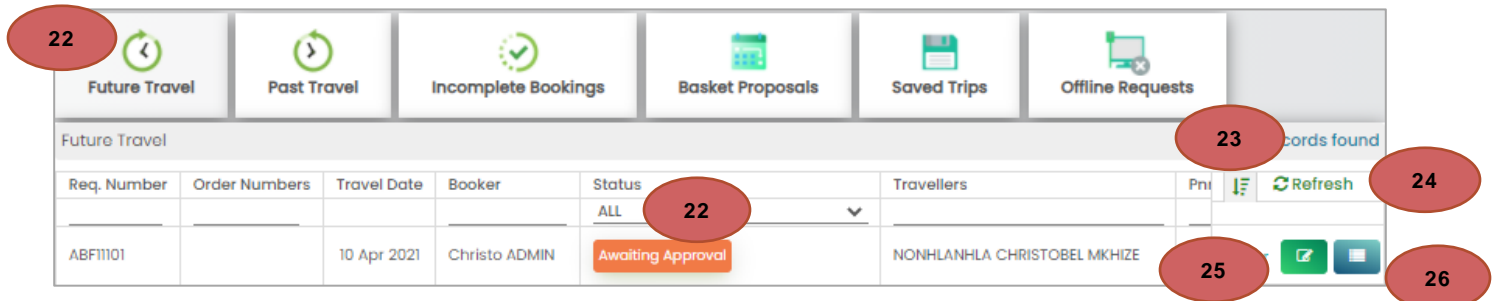
22. Find the booking under the <u>future travel</u> tab with status <u>awaiting approval.</u>

23. You can select the ![icon] icon to filter all trips by booking date, starting with today's bookings.

24. The ![Refresh] icon will refresh the page to check if a booking status was updated.

25. Select the ![icon] icon to open the trip details.

26. The ![icon] icon will open the history of the booking.

9.2. Opening a trip

1. The system will default to the <u>main details</u> tab upon opening the trip.
2. Info like the trip name, travel reason, bookers name etc will be included.
3. The details of each booked segment will be displayed.

4. If your status of your booking is approved, by selecting the ℹ️ icon, you will find:

5. Issued invoices under the billing documents tab,

6. Vouchers & e-tickets where applicable.

7. The reasons for missed savings & policy breaches (if applicable) will also display here.

8. The travel orders tab will open the req. number, cost centre & traveller details.

9. You will also find the Eskom <u>International trip</u> form that you completed before submitting your offline request under the <u>travel orders</u> tab, if applicable.

International Trip Information

Details of Visit

Country	City	Organisation	Person Visited	Purpose	From Date	To Date	Days
Kenya	Nairobi	testing	tesiting	testing	2021-12-21	2021-12-22	1

First overseas visit on Eskom Business ☐ — If not, attach details of previous overseas visits on Eskom Business

Select a file... 🔍

Is the trip for training purposes ☐ — If yes, attach retention contract

Leave taken while overseas ☐ — If yes, attach approved leave form

Travel with spouse overseas ☐ — If yes, attach motivation letter with details of dependants

		General Manager
Travel Class: Economy ✓	Complied with Policy/National Treasury/Travel Procedure	SELBY SIBONGAKONKE MAKHOSONKE MGAGA

Travel Reason	
Quality related	

Other employees travelling with

Staff Number	Full Name	Division	Tel Number	Email Address	Role of Individual

Subsistance Allowance

Country	Currency	Daily Rate	Days	Total Allowance
[KE] Kenya	[USD] US $	138	1	138

10. After you have returned from your international trip, the <u>report feedback</u> form needs to be completed and submitted for approval.

ABF3990101	ZJD2ZL	3216119335	TSALELI GRACE NDOU-MNISI	0000124021-Application Test Management	

Trip Information   **Report Feedback**   (10)

Feedback Report

⚠ Report feedback has not been submitted

No alerts have been sent	**View Document** Q
Approval	**CLOSED**

Level	Approver	Action	Comments

Background

Provide information here to further detail the trip

Key Points

Provide information here for any key points identified during the trip

Implications

Provide information here related to any implications discovered

Way Forward

Provide information here regarding the way forward

(10)

Submit Feedback ✔

11. The <u>client fields</u> tab will display to which company (Eskom/ERI) the trip belongs.

Main Details	Traveler Orders	(11) Client Fields	Approval Transactions	Booking Attachments

Client Specific Fields

Business Unit	Field Name	Field Value
Eskom – 1100		

12. The approval transactions tab will display the view approval details and view approval logs

13. By selecting the view approval details the below page will open. The levels of approval will display with the details of the relevant approvers. Click on the ❌ icon to close the page.

14. If you select the view approval logs tab the below page will open. Here you will find the logs of the approval workflow with time and date stamp. Select the ❌ icon to close the page.

15. Select the <u>booking attachments</u> tab to find a copy of any documents that was attached to the booking before approval. You can also attach any other documents afterwards by selecting the
icon.

16. Select the ☁ icon to open the attachment.
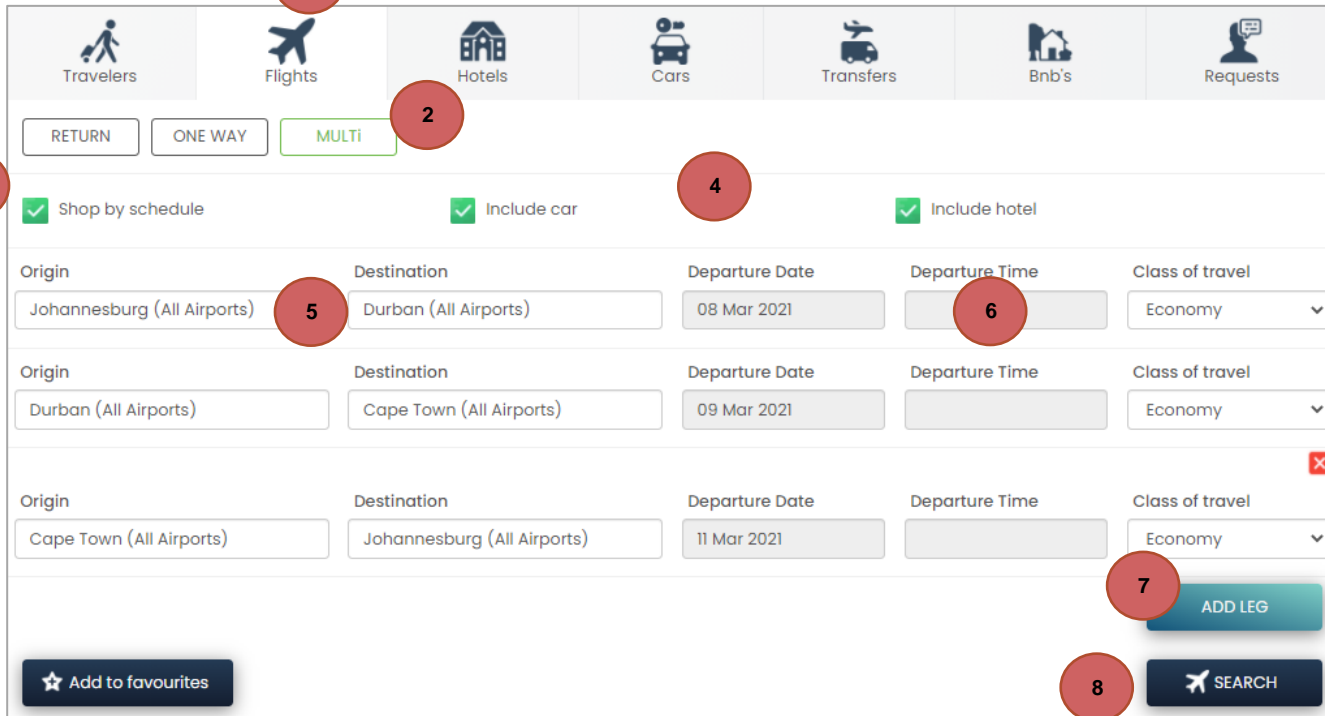
10. Multi-Leg Flight bookings:

10.1. Multi-Leg Flight bookings:

10.1.1. The Flight Search Form:

1. Start your trip by selecting the **"Flights"** icon at the top of the page.
2. Select the **"Multi"** icon for the Multi-leg trip.
3. **NB NB** – you need to tick the box **"Shop by Schedule"** .
4. Tick the **"Include Car"** and **"Include Hotel"** boxes if you are also going to require these services. The system will then auto fill the times and dates for each destination.
5. Type the origin and destination details and make your selection from the dropdown list.
6. The **"Departure Time"** boxes are not mandatory fields for domestic travel.
7. Select the **"Add leg"** icon to build your route.
8. After completion of the whole route, select the **"Search"** tab.

10.1.2. Flights Results Page:

1. Flights will display per schedule for the day without prices starting with the 1st flight of the day till the last flight for the day.
2. Select your routing on the left hand sidebar to find the results per route.
3. Select the *"Get Fares"* tab to open all prices linked to this flight.

4. Click on the *"Select"* icon to make your selection from the list of prices.

5. Upon selecting the flight, it will move to the grid at the top of the page.

6. Select the next route on the left-hand sidebar to make your selection for the next flight.

7. Repeat the process by selecting the **"Get Fares"** button to open the **8.** price listing to make your selection.

9. The selection will be added to the top grid.

10. Only when the whole routing has been completed the top grid's **11.*"Select"*** tab will open for you to add the routing to your shopping basket at the top of the page.

12. By selecting the *"Shopping Basket"* link at the top of the page the trip details will open. If you only require flights, you can check out.
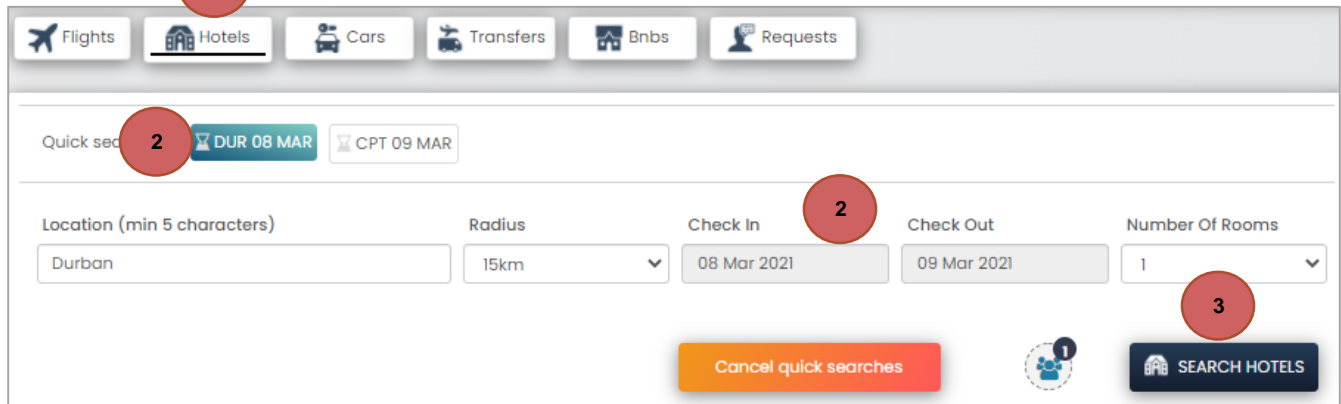
To add accommodation and car rental select the ⊖ button.

10.2. Booking Accommodation in a Multi-Leg Booking

10.2.1 Hotel search page

1. Select the *"Hotels"* tab to start your accommodation search.
2. The system will auto fill all details for the hotel search for the blue selected location.
3. Select the *"Search Hotels"* tab to find your results.
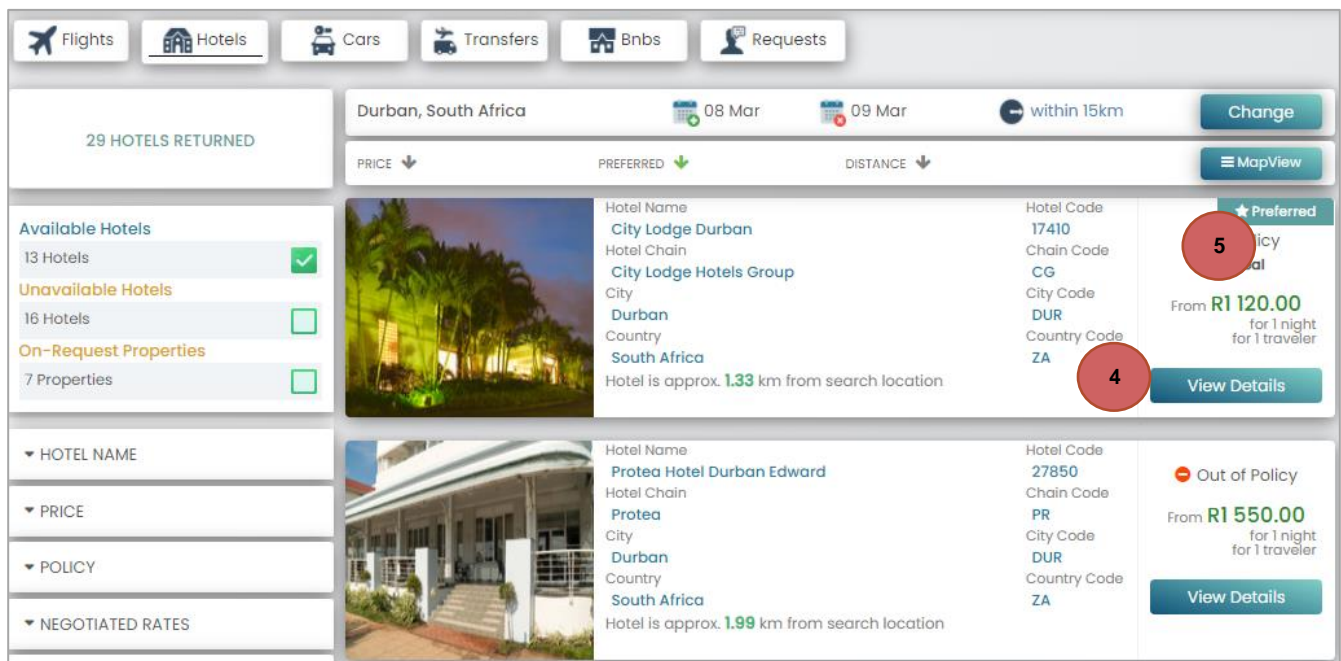
10.2.2 Hotel results page

4. Make your selection from the results page by selecting the *"View Details"* button to be taken into the hotel's room type availability.
5. **Note:** The "from" rate is the total amount for the whole stay and the amount below that is the rate per night if the traveller is staying more than one night.

6. Choose your room type under the *"Rooms"* tab by clicking on the *"Select"* icon to have the room added to your *"Shopping Basket".*
   After your room is added to the shopping basket the system will default back to the results page.

7. Select the *"Back"* icon to go back to the hotel result page.

8. Select the *"Change"* icon to go back to the hotel search page for the next destination.

9. On the search page the location already booked will now display green in colour.
10. The system will auto fill the fields for the next location to search for the hotel.
11. Select the *"Search Hotels"* button to be navigated to the results page.

12. Repeat the previous process by selecting your hotel by clicking on the **"View details"** button be navigated to the hotel's room types.

13. Select the room type under the **"Rooms"** icon to add to your **"Shopping Basket".**

14. On the hotel search page all the location tab's will be green to indicate that selections were made for all locations.

10.3. Car Rental when Booking a Multi-Leg Trip

10.3.1. *Car search page*

1. Select the Car Tab to be navigated to the car search page.
2. The system will auto fill the details for the car search for the blue highlighted location.
3. Select the *"Search Cars"* tab.

10.3.2 Car results page

4. On the results page make your selection by clicking on the **"Details"** tab.

5. Details of the vehicle and rate will be displayed.
6. You can select an additional driver for the rental here.
7. Select your **"Travel Reason"** from the dropdown list.
8. If you select projets as a travel reason, another block will open to indicate if this is a business trip or not.
9. Select the **"Add to basket"** icon to add the vehicle to your shopping basket.

Car Details

Thrifty Car Rental (ZT)
Group B – VW Polo Vivo or similar
EDMR – Car (4-5 Door)
Class – Economy
Agc. Deal

Pickup	08 Apr 10:00
Return	09 Apr 10:00
Length	1 day
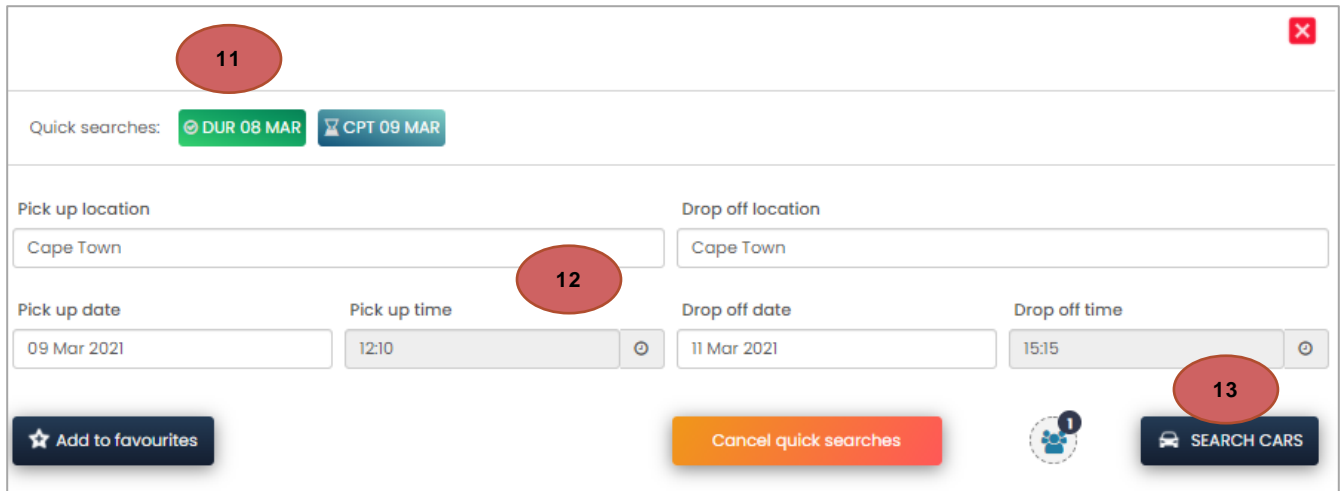
★ Preferred

※ Aircon ♦ Petrol 🔑 Manual ⚙ Airbags ◎ Abs ◎ P. Steering

(5)

Pickup Location
In Terminal

Return Location
In Terminal

☐ **Request Delivery** (min 5 characters)
Delivery Address

☐ **Request Collection** (min 5 characters)
Collection Address

Driver Selection

Driver	Traveler Name	Primary Driver
☑	NONHLANHLA CHRISTOBEL MKHIZE	☑
☑ **(6)**	YASHIL NARANDAS	☐

Rental Reason: 017 – PROJECTS **(7)**

(8) ☐ Rental is for business trip

Rate Options: 1-3 Days

Rate Description	Account	Rate Code
1-3 Days	3068334	ESK01
Mileage Allowance	Rate Category	Rate Type
100 km	Standard	Daily
Cost per km	Insurance Waiver	
R2.00	Super Waivers	

⊘ In Policy

Add To Basket (9)

Cost BreakDown	
Daily Rate	R364.00
Additional driver	R350.00
Total	Est. **R714.00**

10. The below page will open, select the *"Change"* button to be diverted back to the car search page.

11. On the search page the location already booked will be green in colour.
12. The system will auto fill the fields for the next location to search for a vehicle.
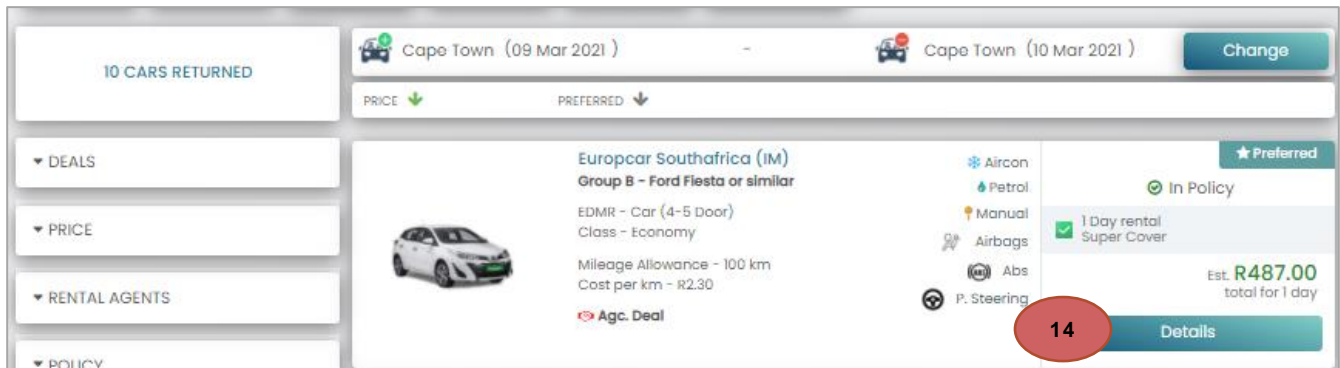**13.** Select the **"Search Cars"** button to have the results page open.

14. Repeat the previous steps to make your vehicle selection and add it to your shopping basket.

15. On the car search page all the location tab's will be green in colour to indicate that selections were made for all locations.
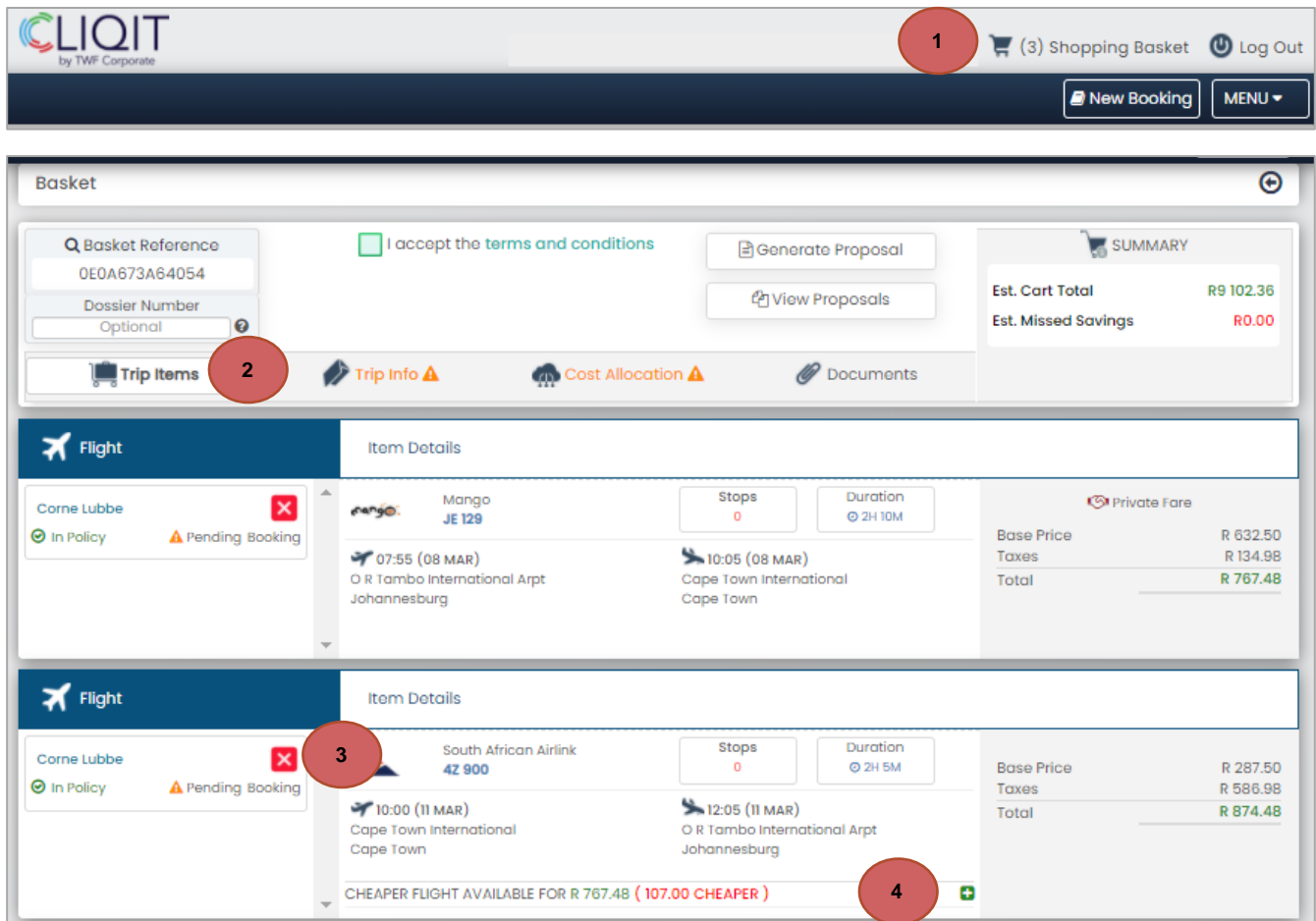
11.   Shopping Basket

Once you have selected all your required services you can select your shopping basket to submit the booking.

11.1. Generate a Booking with Only Active Segments

1. After you have selected all your required services, click on the **"Shopping basket"** at top right of the page.
2. Inside your **"Shopping basket"** the system will default to the **"Trip items"** tab.
3. Click on the [X] button, if a service is no longer required to remove from your itinerary.
4. If a cheaper option on any service was offered and not selected this will be noted under the **"Trip items".** You can view and swop the cheaper option by selecting the + sign, to expand the information.

5. Complete fields under the *"Trip info"* tab. At the top the system will give you a warning about services that was not selected that could be part of your booking like a vehicle or accommodation. This is to ensure that you have selected all your relevant services before submitting your booking. Complete these warning fields accordingly which is mandatory.

6. Complete the *"Trip name"* and *"Reason for travel "* fields which are mandatory fields to complete.

7. Select your form of payment from the dropdown list: EFT or Floatcard.

8. The *"Additional comments"* box is optional where you can generate a message/instruction (without any monetary value) to the consultant.
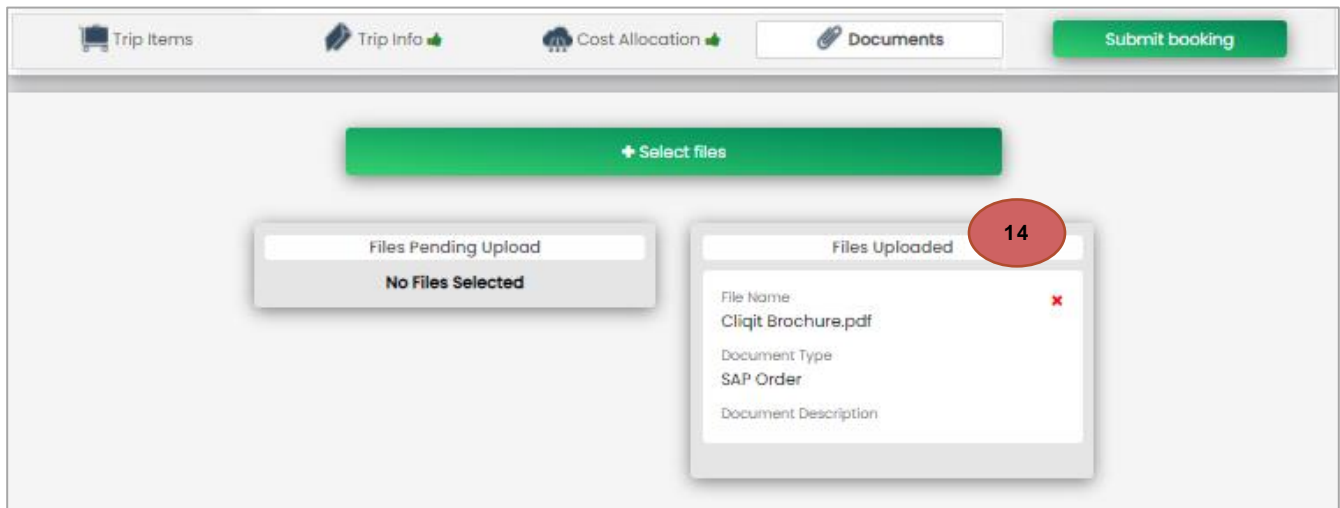
9. Click on the *"Cost allocation"* tab.

10. You can attach any document to the trip under the **"Documents"** tab.
11. If you have any <u>out of policy</u> services in your shopping basket, you will be required to attach a motivational letter before submitting your booking – **mandatory field.**
12. Click on the **"Select files"** tab. Search for the document on you PC & add.
13. Select your document type under the **"Document type"** dropdown list.
14. Select the **"Upload attachments"** tab.
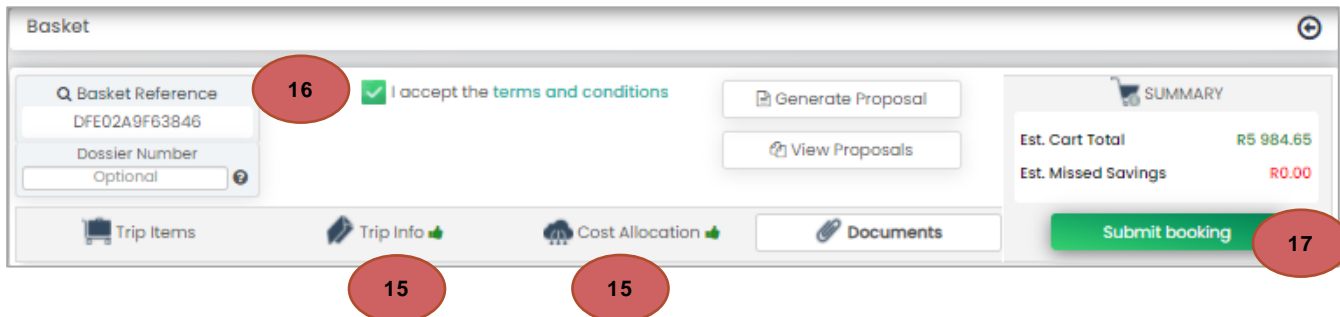
15. The system will display your uploaded document under the **"Files uploaded"** section.

16. The tabs, **Trip Info** & **Cost allocation** must be completed because it's mandatory fields. If any of these tabs still have an orange colour, there is info outstanding.
17. The **"Accept T&C"** box must be ticked.
18. Select the **"Submit booking"** icon to complete the booking.

If your trip includes accommodation:

1. The below pop up will generate. The meals and advance capturing displayed in this pop up is linked to what services you selected in the booking. If your trip includes accommodation, you have the option to select what meals is required.
   You can select **"Full Board"** that will include breakfast, lunch and dinner.
2. If you tick the **"Full Board"** block another block will open to give you the option to indicate if you require a lunchpack for your stay.
3. Select your required subsistance allowance.
4. You can add your advance if required. Select the expense type from the dropdown list. Add the amount required.
5. **Important:** you need to click on the **"Add"** button to add the expense type to the trip.

6. Select the payment option from the dropdown list.
7. Click on the *"Proceed With Booking"* button to submit the booking for approval.
8. You can go back to the previous page by selecting the *"Back to Basket"* button.

If your trip does not include accommodation:

1. The below pop up will generate. Select your required *"Subsistance allowance"* option.
2. You can add your advance if required. Select the expense type from the dropdown list. Add the amount required.
3. **Important:** you need to click on the *"Add"* button to add the expense type to the trip.
4. Select the payment option from the dropdown list.
5. Click on the *"Proceed With Booking"* button to submit the booking for approval.
6. You can go back to the previous page by selecting the *"Back to Basket"* button.

7. The below *"Travel confirmation"* with your booking details will generate on screen.

8. You will find this booking on your *"Dashboard"* with status <u>awaiting approval.</u> You can navigate from this page to your *"Dashboard"* by selecting the *"Menu"* tab & selecting *"My dashboard"* from the dropdown list.

11.2. Generate a Booking with "On Request to Agent" Segments

1. Inside your **"Shopping basket"** the system will default to the **"Trip items"** tab.
2. **Important**: If the booking that you want to generate includes an agent assistance segment, because one of the suppliers in the booking is not available online & the consultant needs to confirm the cost, follow the below steps.
3. Click on the ⊠ button, if a service is no longer required to remove from your itinerary.
4. If a cheaper option on any service was offered and not selected this will be noted under the **"Item details".** You can view and swop the cheaper option by selecting the + sign, to expand the information.

5. Complete fields under the **"Trip info"** tab. The **"Trip name"** and **"Reason for travel "** fields are mandatory fields to complete.
6. Select your form of payment from the dropdown list: EFT or Floatcard.
7. The **"Additional comments"** box is optional where you can generate a message/instruction (without any monetary value) to the consultant.

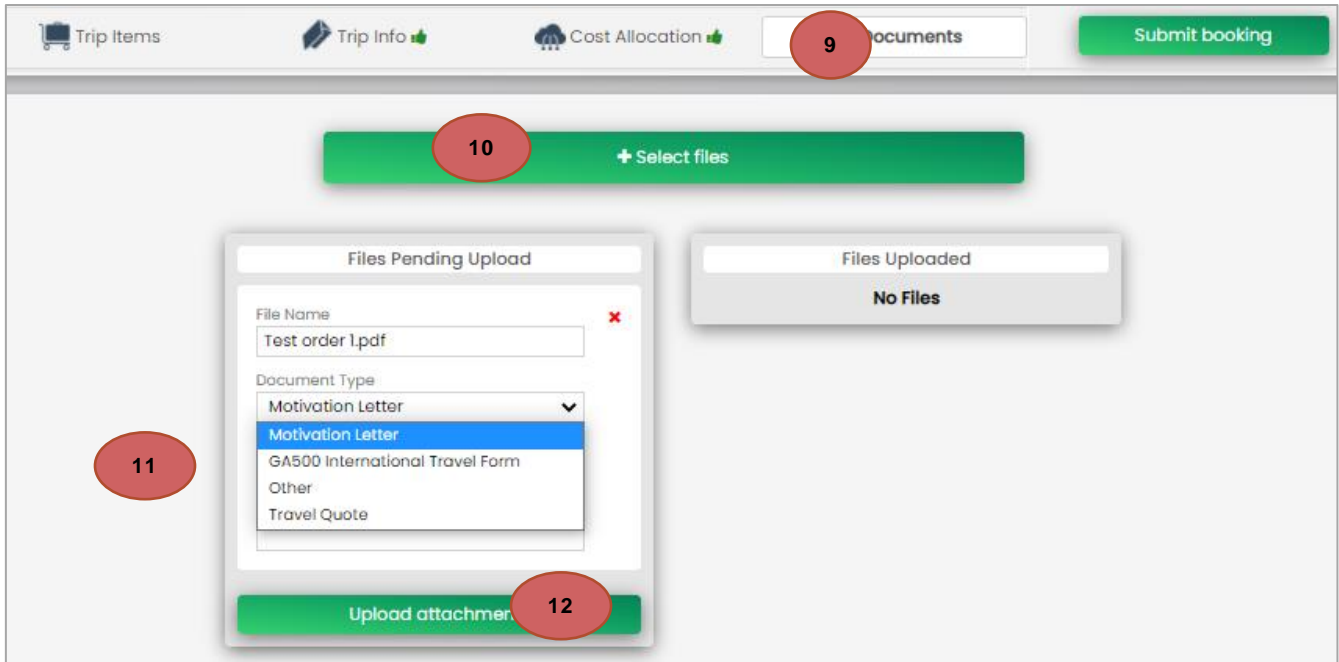8. Click on the **"Cost allocation"** tab.

9. You can attach any document to the trip by under the **"Documents"** tab.
10. If you have any <u>out of policy</u> services in your shopping basket, you will be required to attach a motivational letter before submitting your booking – **mandatory field.**
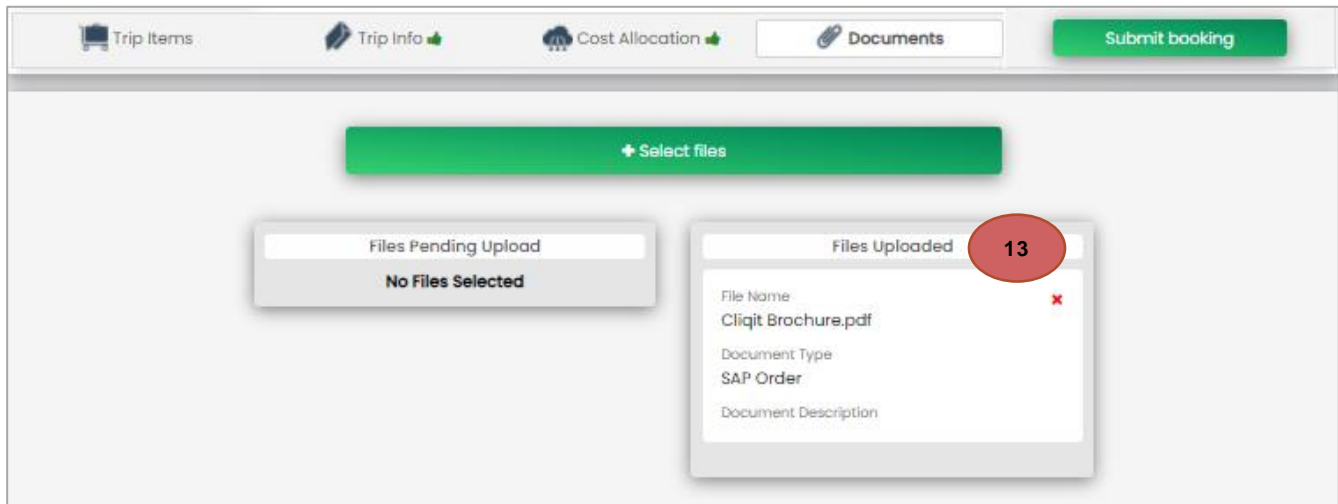11. Click on the **"Select files"** tab. Search for the document on you PC & add.

12. Select your document type under the *"Document type"* dropdown list.
13. Select the *"Upload attachments"* tab.
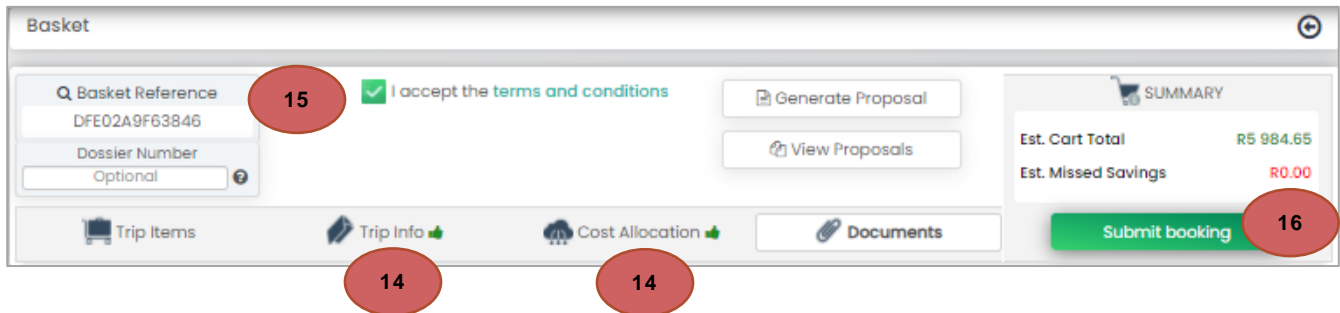
14. The system will display your uploaded document under the *"Files uploaded"* tab.

15. All tabs: Trip Info and Cost allocation must be completed. If any of these tabs still have an orange colour, some of the info is outstanding.
16. The *"Accept T&C"* box must be ticked.
17. Select the *"Submit booking"* icon to send the request off to the agent to assist with confirming the ON REQUEST segments.

If your trip includes accommodation:

1. The below pop up will generate. The meals and advance capturing displayed in this pop up is linked to what services you selected for the booking. If your trip includes accommodation, you have the option to select what meals is required.
    You can select *"Full Board"* that will include breakfast, lunch and dinner.
2. If you tick the *"Full Board"* block another block will open to give you the option to indicate if you require a lunchpack for your stay.
3. Select your required subsistance allowance.
4. You can add your advance if required. Select the expense type from the dropdown list. Add the amount required.
5. **Important:** you need to click on the *"Add"* button to add the expense type to the trip.
6. Select the payment option from the dropdown list.
7. Click on the *"Proceed With Booking"* button to submit the booking for approval.
8. You can go back to the previous page by selecting the *"Back to Basket"* button.

If your trip does not include accommodation:

9. The below pop up will generate. Select your required FDA option.
10. You can add your advance if required. Select the expense type from the dropdown list. Add the amount required.
11. **Important:** you need to click on the *"Add"* button to add the expense type to the trip.
12. Select the payment option from the dropdown list.
13. Click on the *"Proceed With Booking"* button to submit the booking for approval.
14. You can go back to the previous page by selecting the *"Back to Basket"* button.

15. The below **"Travel confirmation"** with your booking details will generate including the ON REQUEST segments.

    Important: The booking is not yet confirmed. Only upon the consultant confirming the ON REQUEST segments will the booking be confirmed and sent for approval.

16. The PENDING BOOKING will be found on the **"Dashboard".** You can navigate to the **"Dashboard"** from this page by selecting the **"Menu"** tab from where you can select the **"My dashboard."**

17. On the **"Dashboard"** you can find the booking under the **"Future Travel"** tab with status pending agent action.

18. Upon the agent confirming the <u>On request</u> segments the booking will automatically be updated to status <u>Awaitiong Approval</u> .

12. <u>Dashboard</u>

The Dashboard consists out of:

- **Future travel** – Any travel you have booked that is still going to happen.
- **Past travel** – Any past travel you have booked is saved here.
- **Incomplete bookings** – Any booking where an error occurred at time of submitting the booking you can pick up here to re-submit.
- **Basket proposals** – All proposals created will be saved here until departure date.
- **Saved trips** – When you started a trip and were interrupted during the booking, you can pick up the trip from here to finish off and submit it for approval.
- **Offline-requests** – Any international bookings & services not found on the system can be requested via the off-line requests tab.

12.1. Future Travel

1. The system will default to the *"Future travel"* tab when opening the Dashboard.
2. Bookings can have the following statuses:
   - **Agent to action** – the agent has to confirm the *"on request"* segment in the booking, before the booking will go for approval.
   - **Awaiting approval** – the booking was submitted for approval.
   - **Escalated to alternate approver** - no action from 1ˢᵗ approver, escalated to alternate approver.
   - **Approved** – booking is approved and documents issued.
   - **Rejected** – booking was rejected and cancelled.
   - **Eskom error** – Eskom's financial system is down/no response received.

3. You can filter trips by various items such as: Req number, order number, travel status, Travellers etc.
4. You can select the $\downarrow_{\overline{\overline{z}}}$ icon to filter all trips by booking date, starting with today's bookings.
5. The $\circlearrowright$ Refresh icon will refresh the page to check if a booking status was updated.
6. You can open the booking by selecting the ☑ icon.
7. The 🖥 icon will open the history of the booking.

12.1.1.   Opening a trip

1. The system will default to the **_"Main details"_** tab upon opening the trip.
2. Info like the trip name, travel reason, bookers name etc will be included.
3. The details of each booked segment will be displayed.

Main Details		Traveler Orders	Client Fields	Approval Transactions		Booking Attachments		
Main Requisition		ES0000111K		Booker		Corne Lubbe		
Travel Date		20 Aug 0002		Missed Savings		R 1 017.19		
Basket Ref.		DFE02A9F63846		Approval Total		R 5 984.65		
Trip Name		Voucher Test						
Travel Reason		Meeting						
Booking Notes		none						
Agent Comments		none						
Cost Allocation								
Allocation Percentage		Allocation						
100 percent		001F – PPE FUND HISTORY						

Flight

Corne Lubbe	South African Airlink 4Z 891	Stops 0	Duration 2H 10M	Base Price	R 287.50
In Policy — Approved				Taxes	R 584.98
Missed Saving R 105.00	07:10 (08 FEB) O R Tambo International Arpt Johannesburg	09:20 (08 FEB) Cape Town International Cape Town		Total	R 872.48

Flight

Corne Lubbe	Safair (Proprietary) Ltd. FA 316	Stops 0	Duration 2H 10M	Base Price	R 1 173.00
In Policy — Approved				Taxes	R 244.98
Missed Saving R 340.00	17:30 (11 FEB) Cape Town International Cape Town	19:40 (11 FEB) Lanseria International Arpt Johannesburg		Total	R 1 417.98

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4. By selecting the ℹ️ icon, you will find:
5. Issued invoices under the *"Billing documents"* tab,
6. Vouchers & e-tickets where applicable,
7. The reasons for missed savings & policy breaches (if applicable) will also display here.

Accommodation

Corne Lubbe		Corne Lubbe		✕
In Policy — Approved		Room Info Single		
Voucher		Missed Savings	Policy Breaches None	
V22275		Billing Documents	Voucher Documents	
Change — Cancel		Z11352	V22275	

8. The *"Travel orders"* tab will open the req. number, cost centre & traveller details.

9. The *"Client fields"* tab will display to which company (Eskom/ERI) the trip belongs.

10. The *"Approval transactions"* tab will display the <u>view approval details</u> and <u>view approval logs</u>.

11. By selecting the <u>view approval details</u> the below page will open. The levels of approval will display with the details of the relevant approvers. Click on the ❌ icon to close the page.

12. If you select the <u>view approval logs</u> tab the below page will open. Here you will find the logs of the approval workflow with time and date stamp. Select the ❌ icon to close the page.

13. Select the **"Booking attachments"** tab to find the a copy of any documents that was attached to the booking before approval. You can also attach any other documents afterwards by selecting the ➕ icon.

14. Select the ☁ icon to open the attachment.
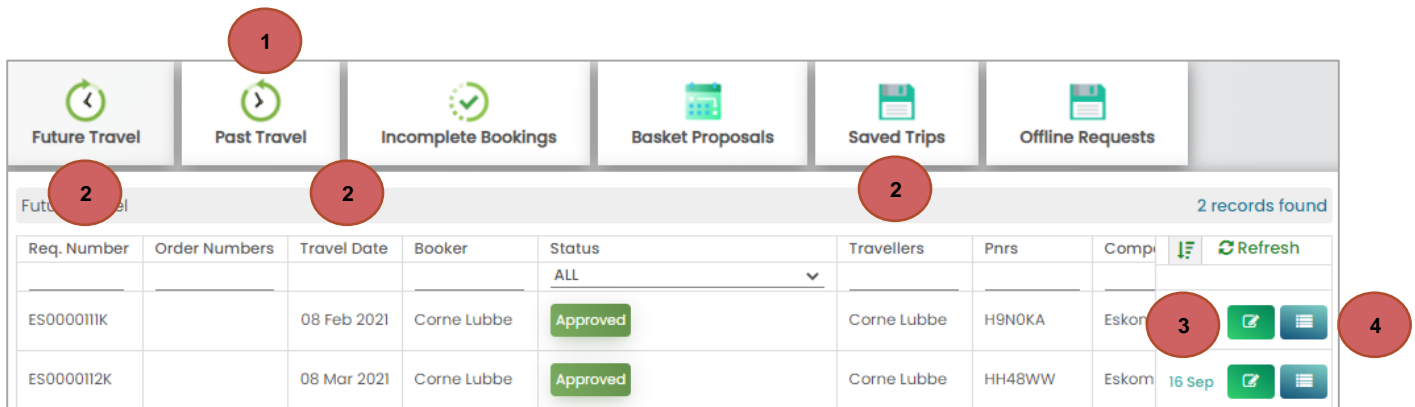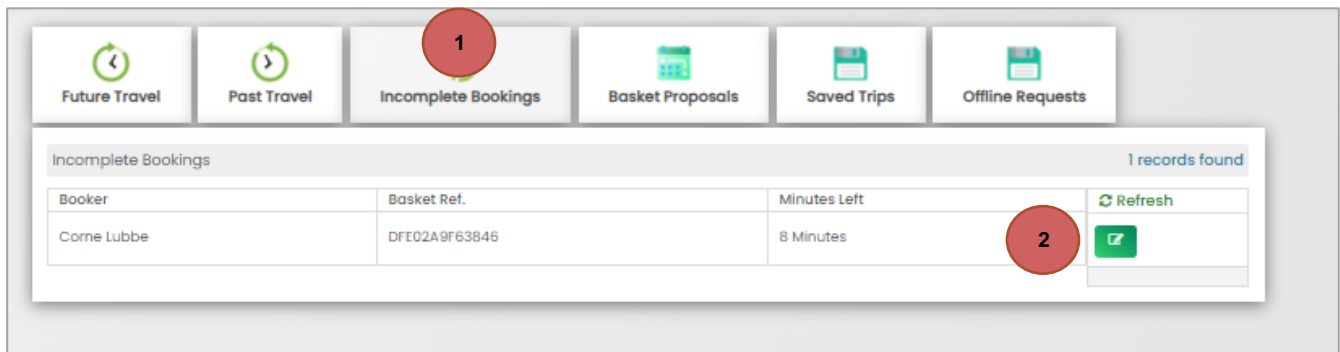
a. Past Travel

1. Select the *"Past travel"* tab to open the list of bookings you have made that's passed.
2. You can filter trips by various items such as: Req number, travel date, status, Travellers etc.
3. You can open the booking by selecting the [icon] icon.
4. The [icon] icon will open the history of the booking.

b. Incomplete Bookings

1. If any error occurred, or you were logged out while submitting your booking, you can pick up the booking under the *"Dashboard"* under the *"Incomplete bookings"* tab.
   Note: The booking will only be available for 15 minutes under this tab to try and re-submit the booking.
2. Select the [icon] icon to open the incomplete booking.
   The shopping basket will open.
   Follow the steps as previously to resubmit the booking.

c. Basket Proposals

1. You will find your list of proposals under the *"Dashboard"* under the <u>basket proposal.</u>
2. Select the ☑ icon to open the proposal. Follow the **CONVERT PROPOSAL INTO BOOKING** section in this manual if required.

d. Saved Trips

1. A saved trip is when you were busy selecting your services required but was interrupted before submitting the booking or proposal. You can pick up the pending booking/proposal under your *"Dashboard"* under the <u>saved trips.</u>
2. Select the ☑ icon to open the trip in your shopping basket to proceed with the process.

e. Offline Requests

An off-line request is utilised to request international travel & any other services that was not bookable on-line. Please refer to the Offline request section in this guide to assist with the process.

15.   Expense Management

1. On the righthand top corner of the page, you will find a *"Menu"* icon.

    From the dropdown you can select:
    - **Mini Guides:** Here you will find guides to assist you through different bookings processes available on Cliqit.
    - **Approval Inbox:** Will only display in dropdown list if you have approver rights. This icon will navigate you to your approval inbox where pending approvals will be listed for approval.
    - **Expense Management:** This will navigate you to where you can submit your expense claim.
    - **My Dashboard:** Find the list of bookings you have booked with their statuses.

2. Select the *"Expense Management"* icon to be directed to the expense module.
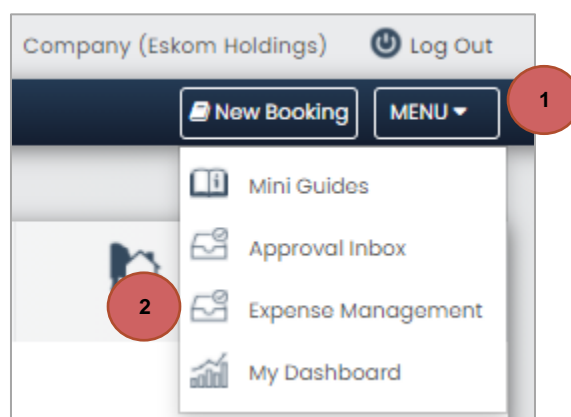
16.   Expense Dashboard

1. The page will default to the *"Expense Dashboard"* which will list all your expense claims submitted.

2. You can filter the list on the page by selecting the ⍦ icon.

3. The *"Report Status"* will indicate the status of your claim in the workflow process:
    - *Open*, this is when you claim is still in a draft status.
    - *Awaiting approval.*
    - *Approved*, and or, *Rejected.*
    - *Submitted*, awaiting feedback from Eskom with a SAP number on the approved expense.
    - *Posted*, received the SAP number from Eskom, the claim was processed.
    - *Eskom error*, if no response was received from Eskom's financial system. (i.e.when the system is down.)

4. Select the ✎ icon on the left-hand side of the page to open the expense.

5. Under the **"Quick Receipts"** tab you can save any receipts which you can add to your claim once ready.

6. You can submit a claim that is linked to a trip booked on Cliqit via the **"Trip Expense"** tab.

7. A company paid expense must be submitted under the **"Comp Paid Expense"** tab.

8. Submit your stand alone (not linked to a trip booked on Cliqit) travel expense under the **"Travel Expense"** tab.

9. Submit your EMX weekly report under the **"EMX Expense"** tab. This is linked to a booked trip.

All Expenses

Action	Report Type	Reference	Trip Date	Report Status	Report Traveler	Last Edited
✎	Trip Expense #13	Twf Ref: AAA01401TA SAP Trip: 0003400309	10 Apr - 13 Apr 2021	Posted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	Company Paid Expense #12	Twf Ref: AAA01301CP SAP Trip: 0003400301	01 Apr - 02 Apr 2021	Submitted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	EMX Expense #11	Twf Ref: AAA01201TW SAP Trip: Pending	15 Mar - 21 Mar 2021	Submitted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	Trip Expense #10	Twf Ref: AAA01101TA SAP Trip: 0003400302	03 Apr - 04 Apr 2021	Posted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	Trip Expense #9	Twf Ref: AAA01001TA SAP Trip: 0003400301	01 Apr - 02 Apr 2021	Posted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	Travel Expense #8	Twf Ref: AAA00901TE SAP Trip: 0003400300TE	08 Mar - 09 Mar 2021	Submitted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN
✎	Travel Expense #7	Twf Ref: AAA00801TE SAP Trip:	06 Mar - 07 Mar 2021	Submitted	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN

17.   Trip Expense

a. Create a Trip Expense

A **Trip Expense** is an expense claim that is linked to a booked trip on Cliqit.
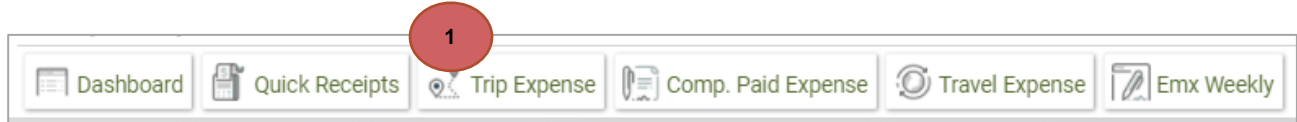
1. Select the **"Trip Expense"** tab in the dashboard.
2. The below template will open. Click in the **"Trip Number"** block and start typing the last few digits of the trip number that you have booked. Make a selection from the dropdown list.

3. The system will auto complete all trip expense & traveller details blocks.
4. Insert the destination in the **"Destination"** field by selecting the block and typing in the block.

b. Claim for KM/Milage

1. To submit a claim for KM/Milage, click in the *"Date"* box. A pop up calender will display the trip dates that was specified when the user started creating the trip expense.
    Select the required date.
2. Select the the *"Vehicle Type"* from the dropdown list.

3. Start typing the address of your start location under the *"Start Loc"* tab. Make your selection from the dropdown list.
4. Repeat the step for the *"End Loc"* tab.
    Important: The system will not accept any free text for the addresses, you need to select from the dropdown list.

5. The system will automatically generate the total amount of KM driven and costing per KM as per Eskom's agreement.

6. The system will automatically save a copy of the route driven on Google maps which can be found by clicking on the **"Receipt"** ✓ icon.

Distance: 46 km, avg. Duration: 33 mins

7. Select the ⊕ Add icon to add additional KM/Milage claims for the same trip. A second line will become available for completion. Repeat the above steps (step 1-7) to add the additional claim.

KM/Mileage

	Date	Vehicle Type	Start Loc.	End Loc.	Km's	Rate	Amount	Receipt
🗑	📅 23 Mar 2021	Eskom E&M Scheme	16 Umgazi Street, Menlo Park,	O.R. Tambo International Airpo	46	3.05	140.30	📎 ✅
🗑	📅	Eskom E&M Scheme			0	3.05	0.00	📎 ⚠

8. Select the *"Save"* button to have the Trip Expense with KM/Milage saved as a draft.

Travel Expense Report   ⊕ Create New Report

Trip Number		End Country		ZA-South Africa
Trip Start DateTime	05 Apr 2021 08:30	Trip Reason		Power station maintenance
Trip End DateTime	07 Apr 2021 20:00			
Destination	Cape town			
		Cost Assignment		Cost Center 100%
Report Status	Report is Open			

Traveller Details

Traveller	NONHLANHLA CHRISTOBEL MKHIZE	Cost Center	0000124015-SAP CoE HCM Team
Personnel Number	1146886	Company Code	E1 (1100)
Payment Option	EFT		Submit Save

KM/Mileage

	Date	Vehicle Type	Start Loc.	End Loc.	Km's	Rate	Amount	Receipt
🗑	📅 05 Apr 2021	Eskom E&M Scheme	16 Umgazi Street, Menlo Park, I	O.R. Tambo International Airpor	46	3.05	140.30	📎 ✅

9. The claim will display in the *"Dashboard"* with an <u>open</u> status. You can return to this claim to add any other service before submitting it.
To submit the Trip Expense refer to **Submitting your Trip Expense for approval** in this manual.

📋 Dashboard	📄 Quick Receipts	🚗 Trip Expense	📑 Comp. Paid Expense	⊙ Travel Expense	📝 Emx Weekly

All Expenses   🔽

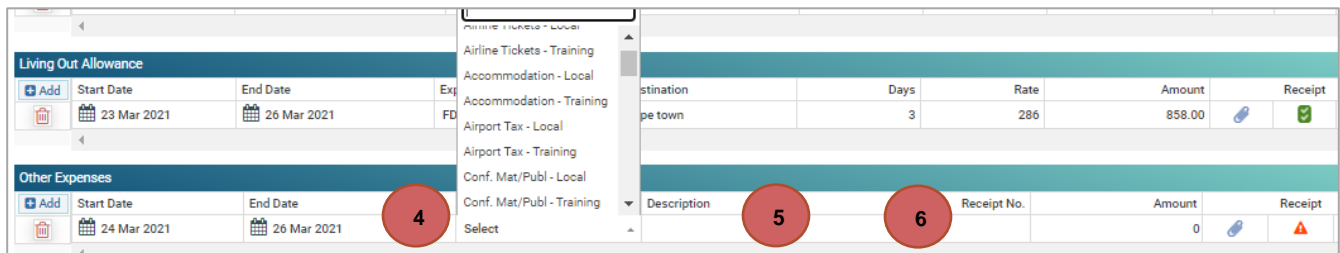| Action	Report Type	Reference	Trip Date	Report Status	Report Traveler	Last Edited
✎	Trip Expense #13	Twf Ref: Pending SAP Trip: 0003400309	10 Apr - 13 Apr 2021	Open	NONHLANLHA CHRISTOBEL MKHIZE 1146886/E1 (1100)	Christo ADMIN

    c. Claim Living Expenses

1. To submit a claim for Living Expenses, click in the *"Start Date"* box. A pop up calender will display on screen, presenting only the trip dates that was specified at the beginning of the creation of the trip expense. Select the required start date.
2. Select the *"End Date"*.

3. Make a selection from the dropdown list for the **"Expense Type"**.
4. The system will auto-complete the rate and total amount based on your selection in the expense type.
5. Select the ✐ icon at the right hand side to upload a copy of your receipt.

6. The receipt icon will update to green ✅ to indicate that a receipt was saved.
7. Another living out allowance can be claimed for the same trip by selecting the ⊕ Add icon. A new line item will be added for every expense. Repeat the above steps to submit the claim.

8. Select the **"Save"** button to have the Trip expense with living out allowance saved as a draft.

9. The claim will display in the **"Dashboard"** with an <u>open status</u>. You can return to this claim to add any other service before submitting your expense.
   To submit the Trip Expense refer to **<u>Submitting your Trip Expense for approval</u>** in this manual

d. Claim Other Expenses

1. To submit a claim for other expenses, select the **⊕ Add** icon in the **"Other Expenses"** tab to open the template line.
2. Click in the **"Start Date"** block. A pop up calender will display, presenting only the trip dates that was specified at the beginning of creation of the trip expense. Select the required start date.
3. Repeat the above step for the **"End Date"** field.

4. Make a selection from the dropdown list within the **"Expense Type"** field.

5. Submit a description of the expense type in the **"Description"** field by adding free text.
6. Add the receipt number of the claim in the **"Receipt No"** tab.
7. Add the amount of this expense in the **"Amount"** tab.
8. Select the 🔗 icon to add a copy of the receipt to the claim. Once added, the receipt icon will update to a green ✅ icon.

Other Expenses
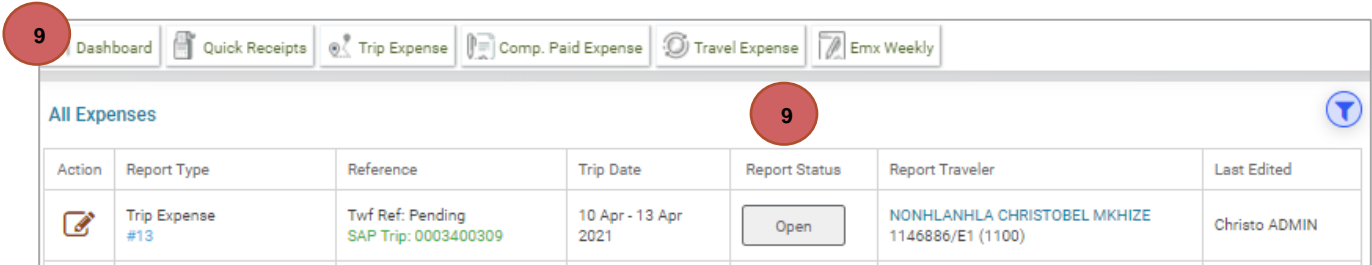
	Start Date	End Date	Expense Type	Description	Receipt No.		Amount	Receipt
🗑	📅 24 Mar 2021	📅 26 Mar 2021	Accommodation - Training ▾	Bed and breakfast close to the power station	8989898	**7**	3200	📎 ✅ **8**

9. Select the **"Save"** button to have the Trip expense with other expenses saved as a draft.

10. The claim will display in the **"Dashboard"** with a status reading <u>open</u>. You can return to this claim to add any other service before submitting it.
To submit the Trip Expense refer to **Submitting your Trip Expense for approval** in this manual

e. Submitting your Trip Expense for approval

1. Open your claim in the **"Dashboard"** by selecting the ✏ icon.

2. Select the **"Submit"** button once you have added all the different claim types related to the trip to have the claim sent for approval.

3. The below pop up will generate to advise that the claim was successfully submitted. Select the **"OK"** button to continue.

4. The claim will display in the **"Dashboard"** with status <u>awaiting approval.</u>

5. The status will update to <u>approved</u> once the approver approves the claim.

6. Cliqit will update the status to <u>submitted</u> to confirm that this claim was sent to Eskom's financial system.

7. The system will update the status to <u>posted</u> upon Eskom's financial system confirming that the claim was processed.

8. Cliqit will update the status to <u>Eskom Error</u> if no response (i.e. Eskom system down) was received from Eskom's financial system.

18.   Travel Expense

A **Travel Expense** is a stand alone claim which is not linked to a trip booked on Cliqit.

a. Creating a Travel Expense

1. Select the *"Travel Expense"* tab.
2. The below pop up will generate. Complete all the fields:
    *   Traveller name,
    *   Trip end country,
    *   Trip start and end date,
    *   Trip start and end time,
    *   Cost assignment type – make a selection from dropdown list,
    *   Trip purpose – Business or Training.
3. Select the *"Submit"* button.

4. The below template will open. Submit your destination details in the *"Destination"* block by clicking in the block and typing in it.
5. Submit your trip reason in the *"Trip Reason"* section by selecting the block and starting to type.

6. Select the **0%** icon, next to the cost centre block to select your specific cost centre & allocation.
7. The pop up will open. Search for the cost centre by starting to type the number or description of the cost centre. Make a selection from the dropdown list.

8. The cost centre will be moved under the **"Selected Cost Centre"** . Advise the % of cost allocation to this cost centre for example 100%. If cost is splitted between 2 different cost centres you need to advise the cost centre and % split.
9. Select the icon to close the pop up.
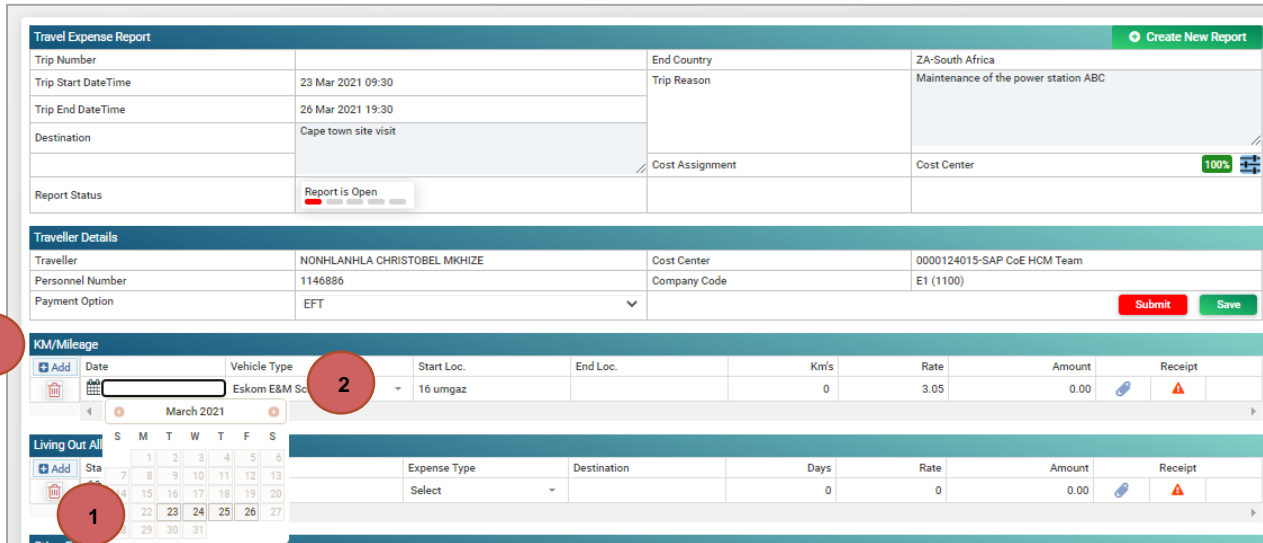
10. Next to the cost centre details a green indicator with % will display.

b. Claim for KM/Milage

1. To submit a claim for KM/Milage, click in the **"Date"** box. A pop up calender, providing only the trip dates that was specified at the start of the creation of the trip expense.
Select the required date.

2. Select the the **"Vehicle Type"** from the dropdown list.

3. Start typing the address of your start location under the **"Start Loc"** tab. Make your selection from the dropdown list.
4. Repeat the step for the **"End Loc"** tab.

5. The system will automatically generate the total amount of KM driven and cost per KM as per Eskom's agreement.

Travel Expense Report				⊕ Create New Report
Trip Number		End Country	ZA-South Africa	
Trip Start DateTime	23 Mar 2021 09:30	Trip Reason	Maintenance of the power station ABC	
Trip End DateTime	26 Mar 2021 19:30			
Destination	Cape town site visit			
		Cost Assignment	Cost Center	100%
Report Status	Report is Open			

Traveller Details			
Traveller	NONHLANHLA CHRISTOBEL MKHIZE	Cost Center	0000124015-SAP CoE HCM Team
Personnel Number	1146886	Company Code	E1 (1100)
Payment Option	EFT		Submit Save

KM/Mileage									
⊕ Add	Date	Vehicle Type	Start Loc.	End Loc.	Km's	Rate	Amount	Receipt	**5**
🗑	📅 23 Mar 2021	Eskom E&M Scheme	16 Umgazi Street, Menlo Park,	O.R. Tambo International Airpo	46	3.05	140.30	📎 ✅	**6**

6. The system will automatically save a copy of the route driven on Google maps which can be found under the *"Receipt"* ✅ icon.

Distance: 46 km, avg. Duration: 33 mins

7. Select the **+ Add** icon to add additional KM/Milage claims for the same trip. A new line will be opened on screen to complete. Repeat the above steps to add the claim.

8. Select the *"Save"* button to have the Trip expense with KM/Milage Expenses saved as a draft. To submit the Travel Expense refer to **Submitting Your Travel Expense For Approval** in this manual.

c. Claim Living Expenses

1. To submit a claim for Living Expenses, click in the *"Start Date"* box. A pop up calender will display presenting only the trip dates that were specified at the start of creating the trip expense. Select the required start date.
2. Repeat the above step for the *"End Date"* box.

3. Make your selection from the dropdown list under the *"Expense Type"*.
4. The system will auto complete the rate and total amount according to your selection in the expense type field.
5. Select the ✐ icon at the right hand side of the screen to add a copy of your receipt.

6. The receipt icon will update to green ✅ to indicate that the receipt was saved.
7. Another living out allowance can be claimed for the same trip by selecting the ➕ Add icon. A new line will be added. Repeat the above steps to submit the claim.

8. Select the **"Save"** button to have the Travel expense with living out allowance saved. To submit the Travel Expense refer to **Submitting Your Travel Expense For Approval** in this manual.

d. Claim Other Expenses

1. To submit a claim for other expenses, select the ➕ Add icon in the **"Other Expenses"** section to open the template line.
2. Click in the **"Start Date"** block. A pop up calender will display, presenting only the trip dates that were specified at the start when creating the trip expense. Select the required start date.
3. Repeat the above step for the **"End Date"** box.
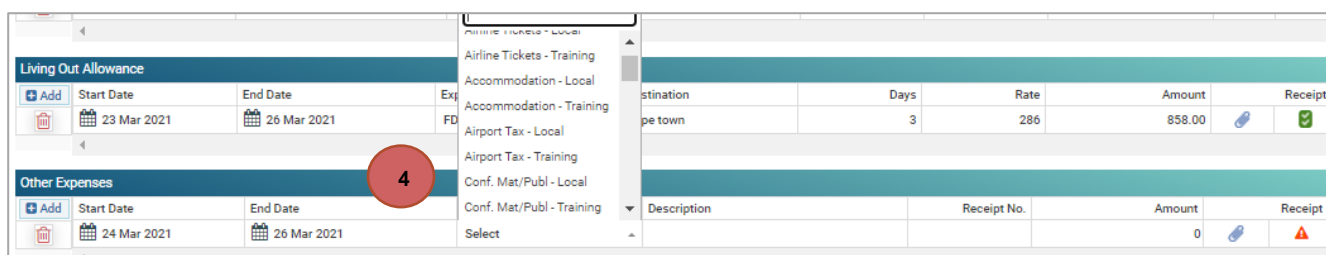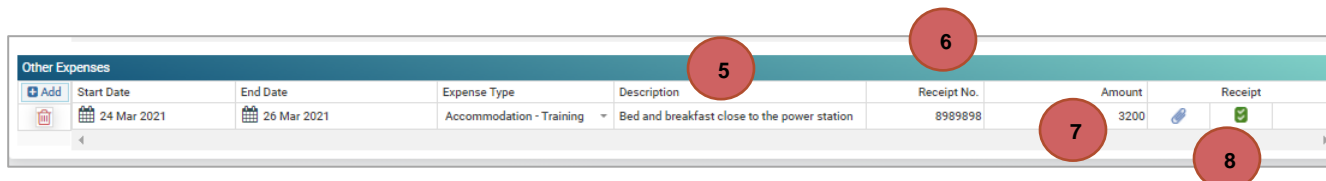
4. Make your selection from the dropdown list for the *"Expense Type"*.

5. Submit a description of the expense type under the *"Description"* field by adding free text.
6. Add the receipt number of the claim in the *"Receipt No"* tab.
7. Add the amount of this other expense in the *"Amount"* tab.
8. Select the ✐ icon to add a copy of the receipt to the claim. Once added the receipt icon will update to green ✅.

9. Select the *"Save"* button to have the Travel expense with other expenses saved.
   To submit the Travel Expense refer to **Submitting Your Travel Expense For Approval** in this manual.

e. Submitting Your Travel Expense For Approval

1. You can open your claim on the *"Dashboard"* by selecting the ✏ icon.

2. Select the *"Submit"* button once you have added all the different claim types to have the claim sent for approval.

3. The below pop up will generate to advise that the claim was successfully submitted. Select the **"OK"** button.

4. The claim will display in the **"Dashboard"** with status <u>awaiting approval.</u>

5. The status will update to <u>approved</u> once the approver approves the claim.

6. Cliqit will update the status to <u>submitted</u> to confirm that this claim was sent to Eskom's financial system.

7. The system will update the status to <u>posted</u> when Eskom's financial system confirms that the claim was processed.

8. Cliqit will update the status to <u>Eskom Error</u> if no response (Eskom system is down) was received from Eskom's financial system.

19.   Company Paid Expense

A Company Paid Expense is also linked to a trip booked in Cliqit.

   a. Create a Company Paid Expense Claim

1. Select **"Comp. Paid Expense"** at the top of the dashboard to create your claim.
2. Start typing the trip number and make your selection from the dropdown list. The system will auto complete some of the boxes according to your trip details.
3. Complete the **"Destination"** field.

4. Select the **Add** icon to add a line in **"Other Expenses"**.

5. Complete the dates as per the pop-up menu presented.
    Note: Only the dates as per your booked trip will display on screen.
6. Select your **"Service Provider"** from the dropdown list.
7. Select your **"Expense Type"** from the dropdown list.
8. Give a **"Description"** to the claim.
9. Add the **"Receipt No"** to the claim.
10. Add the **"Amount"** to the claim.

11. Select the ✎ icon to add a copy of the receipt to the claim. Once added the receipt icon will update to green ✅ .

	Start Date	End Date	Service Provider	Expense Type	Description	Receipt No.	Amount	Receipt
Other Expenses								(s): R 56.36 [details]
	📅 01 Apr 2021	📅 01 Apr 2021	EUROPCAR (1100317... ▾	CP Remot Branch Su... ▾	Test Expense	654123	322.14	🔗 ✅

12. Select the *"Save"* button to have the Company Paid expense saved as a draft.

Traveller Details			
Traveller	NONHLANHLA CHRISTOBEL MKHIZE	Cost Center	0000124015-SAP CoE HCM Team
Personnel Number	1146886	Company Code	E1 (1100)
Payment Option	EFT		Submit Save

Other Expenses							Advance(s): R 500.00 [details]
➕ Add	Start Date	End Date	Service Provider	Expense Type	Description	Receipt No.	Amount	Receipt

b. **Submitting your Company Paid Expense for approval**

1. Open your claim in the *"Dashboard"* by selecting the ✎ icon.

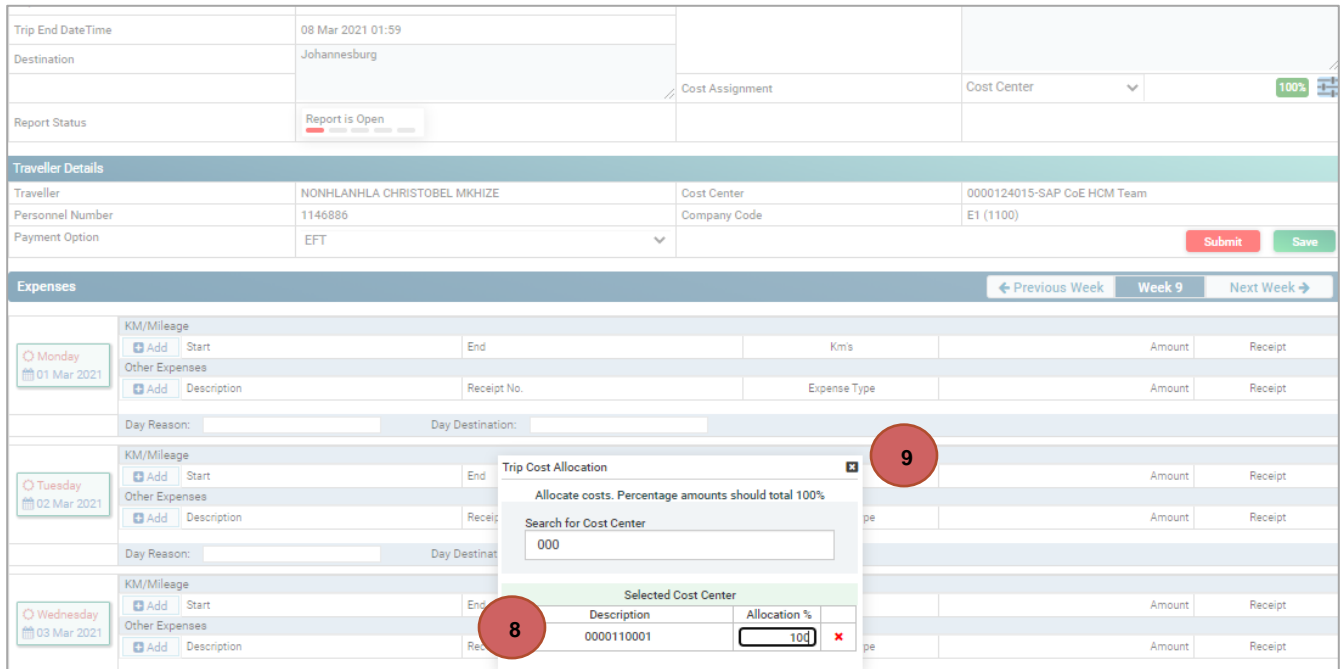| Dashboard	Quick Receipts	Trip Expense	Comp. Paid Expense	Travel Expense	Emx Weekly

All Expenses

Action	Report Type	Reference	Trip Date	Report Status	Report Traveler	Last Edited
✎	Sys. Company Paid Expense #18	Twf Ref: AAA01903AP SAP Trip: 0003400301	01 Apr - 02 Apr 2021	Open	NONHLANHLA CHRISTOBEL MKHIZE 1146886/E1 (1100)	System NA

2. Select the *"Submit"* button once you have added all the different claim types to have the claim sent for approval.

3. The below pop up will generate to advise that the claim was successfully submitted. Select the **"OK"** button.

4. The claim will display in the **"Dashboard"** with status <u>awaiting approval.</u>

5. The status will update to <u>approved</u> once the approver approves the claim

6. Cliqit will update the status to <u>submitted</u> to confirm that this claim was sent to Eskom's financial system.

7. The system will update the status to <u>posted</u> upon Eskom's financial system confirming that the claim was processed.

8. Cliqit will update the status to <u>Eskom Error</u> if no response (Eskom system is down) was received from Eskom's financial system.

20.   **EMX Expense**

a. Creating an EMX Expense

1. Select the traveller by typing the name of the traveller and selecting from the dropdown list.
2. Select the *"Week Start date"* from the pop up calendar.

3. The week calendar template will generate the below screen.
4. Complete the *"Trip Reason"* box.
5. Complete the *"Destination"* box.
6. Click on the 🟥 icon to select your cost centre and the percentage allocation.

7. A pop up will generate. Start typing the cost centre number or -description and select from the dropdown list.

8. The cost centre will be moved to the *"Selected Cost Centre"* tab. Advise the percentage of cost allocation to this cost centre, for example 100%. If cost is splitted between 2 different cost centres you need to advise the cost centres and % split.
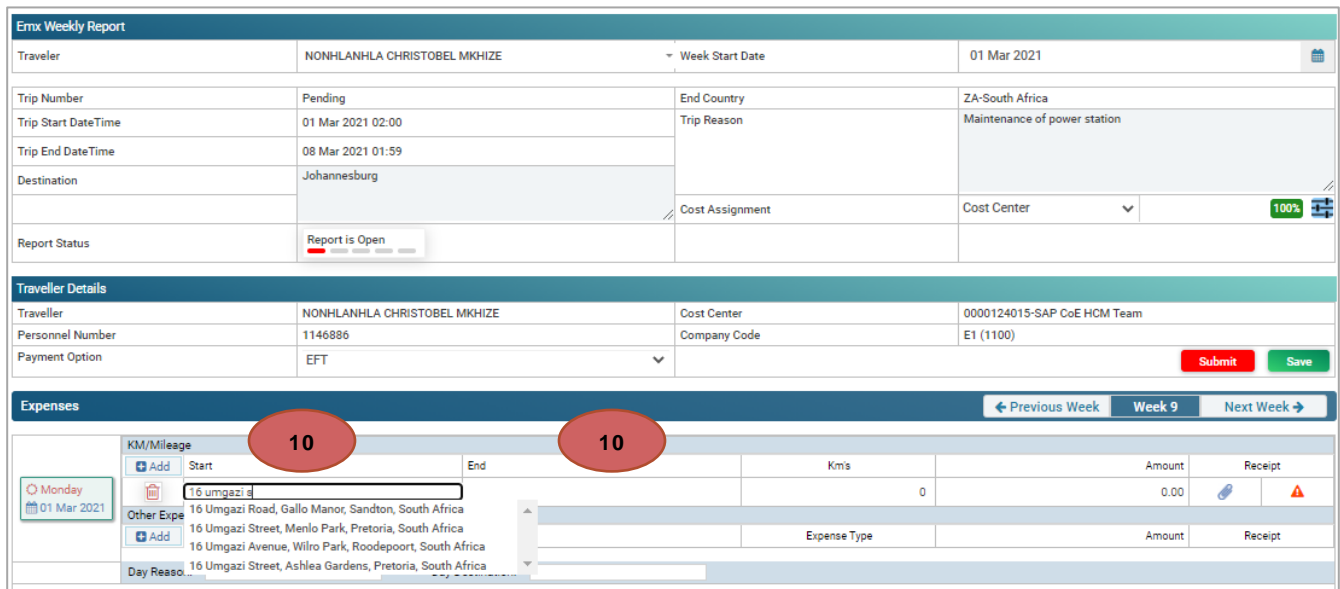
9. Select the ⊠ icon to close the pop up.

10. Start typing the address of your start location in the *"Start"* tab. Make your selection from the dropdown list. Repeat the step for the *"End"* tab.
Important: The system will not accept any free text for the addresses, you need to select from the dropdown list.

11. The system will automatically generate the total amount of KM driven and cost per KM as per Eskom's agreement.

12. The system will automatically save a copy of the route in Google maps which can be found by clicking on the **"Receipt"** ☑ icon.
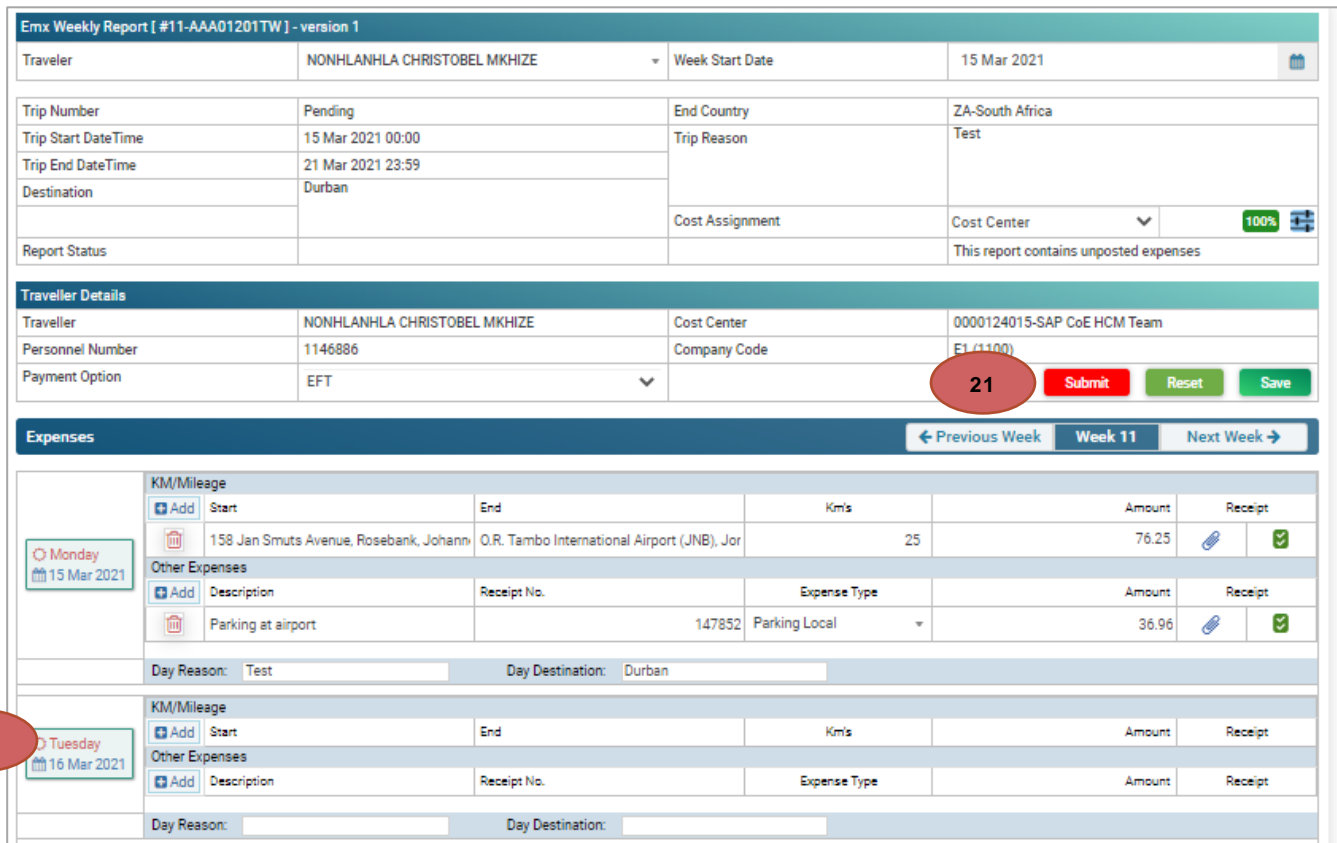
Distance: 46 km, avg. Duration: 33 mins

13. Select the **Add** icon to add *"Other Expenses"* to the Milage claim.
14. Complete the *"Description"* of the other expense.
15. Provide the receipt number in the *"Receipt Number"* field.
16. Select the *"Expense Type"* from the dropdown list.
17. Add the amount of the claim.
18. Select the ✏ icon to add a copy of the receipt to the claim. Once added the receipt icon will update to green ☑ .
19. Complete the *"Day Reason"* and *"Day Destination"* boxes.

20. Repeat the above steps for each day of the week.
21. Select the *"Save"* button to have the EMX expense with other expenses saved as a draft.

22. The claim will display in the **"Dashboard"** with an <u>open status</u>. You can return to this claim to add additional claims for the rest of the week and or other expenses before submitting it for approval.

To submit the EMX Expense refer to **Submitting your EMX Expense for approval** in this manual.

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  b. Submitting an EXM Expense for approval

1. Select the **"Submit"** button once you have added all the claims and related expenses for the week to have the claim sent for approval.

2. The below pop up will generate to advise that the claim was successfully submitted. Select the **"OK"** button.

Claim processed

Claim has been processed and will now submit for approval

OK

3. The claim will display in the *"Dashboard"* with status <u>awaiting approval.</u>

4. The status will update to <u>approved</u> once the approver approves the claim.

5. Cliqit will update the status to <u>submitted</u> to confirm that this claim was sent to Eskom's financial system.

6. The system will update the status to <u>posted</u> once Eskom's financial system confirms that the claim was processed.

7. Cliqit will update the status to <u>Eskom Error</u> if no response (Eskom system is down) was received from Eskom's financial system.

21.   Quick Receipts

Save your receipts on the system in the *"Quick Receipts"* section while you are on a trip. From where you can simply attach copies of these receipts when creating the claim.

1. Select the *"Quick Receipts"* tab in the dashboard.
2. Select the *"Add Receipt"* icon to add the receipt to the quick receipts tab.

22.   Change a Claim.

Follow the below steps to change a claim across all types of expense claim.

1. In the <u>dashboard</u> select the ✏️ icon to open the expense.

2. Once opened, select the *"Change report"* button to open the claim for amendments.

3. The claim form will open for amendments. Click on the 🚫 icon to delete a claim line.
4. Click in the box that needs to be updated: Dates, Expense type, Destination etc.

5. A <u>deleted</u> line will change its colour to grey.
6. An <u>updated</u> line will change its colour to orange.
7. Select the ➕ Add icon to have a new line added to the claim. The line colour will be added in green.

8. The <u>reset</u> button will clear any changes made to the claim and revert to the original claim.
9. The <u>save</u> button will save the changes as a draft.
10. The <u>submit</u> button will submit the change for approval.

Refer to section **Submitting an EXM Expense for approval** in this manual on the different <u>statuses</u> of the claim after submittal for approval.