



# **Webpos User Manual**

# Login Page Webpos



## Volunteers' Portal

(Expenses and Purchase Orders)

Email:

Password:

Login

Remember me

[Forgot your Password?](#)

<http://sageportal.cyclingireland.ie/>

Link access webpos

# Sign Up Page Webpos



Purchase orders

Expenses

Users

## Register

Username:

Password:

Full Name:

Email Address:

Club:

Approver:

Save

Clear

If you don't have a webpos account, you can use the link below to create your own account. Fill all the information to create the account

<http://sageportal.cyclingireland.ie/SignUp.aspx>

# 1° Step add car and bank details



Purchase orders

Expenses

Users



Expenses



Car Details

Add your car details, so the system can calculate your rate when you claim mileage



Bank Details

Add your bank details, if you haven't sent it already.

## 2° Step Submit Expenses

 

 Purchase orders Expenses Users



Submit Expenses



View Expenses



Authorise Expenses

 

 Purchase orders Expenses Users

### Personal Expenses Claim Form

Name:  Month:  **Use the last day of the month**

Status:  Club:

Approver 1:  Purpose of Claim:  **Fill the purpose of the claim**

#### Personal Claim Lines

Type	Date	Receipt	Details of expense	Amount	Rate	Project	Category	Total
Please Sele	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	1.00	Please €	<input type="text"/>	
Please Sele	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	.00	Please €	<input type="text"/>	
Please Sele	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	.00	Please €	<input type="text"/>	
Please Sele	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	.00	Please €	<input type="text"/>	
Please Sele	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	.00	Please €	<input type="text"/>	

**1 - Select the type of expense**  
**2 - Fill the date**  
**3 - Fill the details of the expense**  
**4 - Fill the amount**  
**5 - Select the project (event)**  
**6 - Select the category of the expense**

**You can add more rows if you need it**

*I hereby claim to be reimbursed for the above expenses, which were wholly, necessity & exclusively incurred in carrying out my duties on behalf of Cycling Ireland.*  **Mark that option**

**Click here to save**

# Submit Expenses



- Purchase orders
- Expenses
- Users

## Personal Expenses Claim Form

Name:  Month: 28-Feb-2021  
Status: Volunteer Club:   
Approver 1:  Purpose of Claim: Monthly Debit Card Use

Type	Date	Receipt	Details of expense	Amount	Rate	Project	Category	Total
Sundry	08/02/2021	1	Office 365	53.48	1			53.48
Sundry	10/03/2021	2	Individual Hand Sanitizers x 40	19.2	1			19.20

[More rows](#) Total £

*I hereby claim to be reimbursed for the above expenses, which were wholly, necessarily & exclusively incurred in carrying out my duties on behalf of Cycling Ireland.*

**File Uploader**  
You have 2 Receipts left to upload.  
 No file chosen

Choose the file in your laptop or cell phone

After choose the file, Upload it

Submit and Finish

After you Save in the last menu, you have to follow the steps in the following order:  
1 - Choose the file in your laptop or cell phone (you can open webpos using your mobile phone and upload photos of the receipts)  
2 - After Choose, Upload it  
3 - Submit & Finish, then the claim will be send to the approver review it and authorize it.

**Note:**  
When you have too many rows to fill, rename the receipts following the same order you filled in the rows, that way the visual keeps clean

# View Expenses

The screenshot shows the top navigation bar with the 'cyclingireland' logo on the left and 'acorn IT solutions sage Business Partner' on the right. Below the logo is a hamburger menu icon. In the center, there are three tabs: 'Purchase orders', 'Expenses', and 'Users'. Below the tabs are three large icons: 'Submit Expenses' (a document with an upward arrow), 'View Expenses' (a folder with a magnifying glass), and 'Authorise Expenses' (a person icon with a checkmark). The 'View Expenses' icon is highlighted with a red rectangular border.

# View Expenses

The screenshot shows the 'View Expenses Forms' table. The table has columns for 'Open', 'Reference', 'Date', 'OrderValue', 'Description', and 'Status'. The first row has Reference 103, Date 30-Jun-2020, OrderValue 0.50, Description test, and Status Approved. The second row has Reference 191, Date 30/11/2020, OrderValue 10.00, Description Test 2, and Status Draft. The 'Draft' status is highlighted with a red box. Below the table, there are two text boxes with arrows pointing to the 'Open' column and the 'Draft' status.

Open	Reference	Date	OrderValue	Description	Status
	103	30-Jun-2020	0.50	test	Approved
	191	30/11/2020	10.00	Test 2	Draft

Click in the folder to see the expenses

When the status is Draft, you can open it and amend it