LEEP Crew Smart Discretion Calculator

LEEP Crew Smart Discretion Quick Start Guide

Record Identifier: ICONIC-LEEP-KNW-002

System: LEEP Crew Smart Discretion

Organization: Iconic Productions

Access Classification: Internal — Authorized Iconic Productions Personnel

Version: 1.0

Effective Date: September 10, 2026

Record Status: Active

> **Quick Purpose:** Use this guide when you already understand the Smart Discretion system and only need the essential steps for entering and processing a LEEP reimbursement claim.

1. Sign In

Sign in using your own authorized Smart Discretion account.

Do not share passwords or use another staff member's account.

2. Create the Claim

Complete the **New reimbursement claim** section.

LEEP Project ID

The Project ID is generated automatically. Do not attempt to enter or change it.

LEEP Project Name

Enter the correct LEEP project name and refer to Slack.

Receipt Date and Receipt Time

Enter the actual transaction date and time shown on the receipt where available.

Venue / Supplier

Enter the name of the venue, business, retailer, restaurant, hotel, or supplier.

Slack Project Link

Paste the relevant Slack project link where available.

Receipt Number

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Enter the receipt, invoice, order, or transaction number where available.

Receipt Image / PDF

Upload the supporting receipt as:

- JPG
- JPEG
- PNG
- PDF

Maximum file size: **10 MB**.

Select **Create claim**.

3. Enter Each Receipt Line

Enter each relevant receipt item separately.

For every line complete:

- Line Item
- Amount Including Tax
- Category
- Ordered / Consumed By
- Shared Dessert?
- Notes where required

4. Choose the Correct Category

Category	Allocation Rule
Product / Item Shared Eligibility	SSP 72% / DJP 28%
Drink	100% to the person who ordered or consumed it
Dessert	50/50 if shared; otherwise 100% to the person who ordered it
Surcharge	50% SSP / 50% DJP
Credit Card Fee	Excluded / Iconic

5. Ordered / Consumed By

Select:

- **Shared** — shared eligible crew item
- **SSP** — item attributable to SSP
- **DJP** — item attributable to DJP

6. Shared Dessert?

Select **Yes** only when SSP and DJP genuinely shared the dessert.

Select **No** when the dessert belongs to only one person.

7. Check the Calculation

Review:

- Receipt Total

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- SSP
- DJP
- Excluded / Iconic

> **Required Check:** The claim should display **Reconciliation: $0.00 OK** before it is progressed.

8. Progress the Claim

The status options available to you depend upon your permission level.

Level	Authority
Level 1	Draft → Submitted
Level 2	Draft → Submitted → Approved
Level 3	Draft → Submitted → Paid
Level 4	Draft → Submitted → Approved → Paid
Level 5	Draft → Submitted → Approved → Paid + VOID
Level 6	System Administrator

9. Complete PAID Details

When marking a claim **Paid**, complete:

- **Paid By**
- **Paid Date**
- **Paid Time**
- **Payment Receipt / Reference Number**

If **Other** is selected under Paid By, complete the **Paid By Other** field.

10. View the Supporting Receipt

Where a receipt has been uploaded, select **View Receipt** to securely open the supporting JPG, PNG, or PDF.

11. Quick Daily Workflow

1. Sign in.
2. Create the claim.
3. Upload the receipt.
4. Enter every receipt line.
5. Select the correct Category.
6. Select Shared, SSP, or DJP correctly.
7. Identify shared desserts correctly.
8. Check all allocation totals.
9. Confirm Reconciliation is $0.00 OK.
10. Submit the claim.
11. Approve or pay the claim where permitted.
12. Record all PAID Details.

> **Remember:** Correct classification is more important than simply obtaining a calculation. Verify the receipt, the category of every item, and the final **$0.00 OK** reconciliation before progressing the claim.

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Attached files:

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