

## Concur Expense QuickStart Guide



SAP Concur  
Technologies  
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- Invoice
- Expense
- Travel
- Request
- Risk Messaging
- SAP Concur for Mobile

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# Signing in to SAP Concur

## To sign in to SAP Concur

1. In the **User Name** field, enter your user name.
2. In the **Password** field, enter your password.
3. Click **Sign In**.

### NOTES:

- Sign in to SAP Concur following your company's logon instructions.
- Your password is case sensitive.
- If you are not sure how to log on, check with your company's administrator.

SAP Concur

### Sign In

User Name

Password

☐ Remember user name on this computer

[Sign In](#)

[Forgot your user name?](#)

[Forgot your password?](#)

Change language  
English (US)

SAP

SAP Concur

[Service Status \(North America\)](#)

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## Exploring the SAP Concur Home Page

The SAP Concur home page contains the following sections.

**NOTE:** To return to the SAP Concur home page from any other page, click the SAP Concur logo on the top left of the screen.

### Expense only

If your company uses Expense only, you will see these sections.

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none"><li>Start a new report, request, cash advance, payment request, etc.</li><li>Open reports and requests</li><li>Manage available expenses</li></ul>
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.

**SAP Concur** | Requests | Travel | Expense | Invoice | Approvals | App Center | Administration | Help

**SAP Concur** | Hello, William

**Quick Task Bar**

- + New
- 13 Authorization Requests
- 01 Purchase Requests
- 02 Payment Requests
- 09 Available Expenses
- 09 Open Reports

**TRIP SEARCH**

**Flight Search**

Round Trip | One Way | Multi City

From: Departure city, airport or train station

To: Arrival city, airport or train station

**Search**

**COMPANY NOTES**

Welcome to Concur

Welcome to Concur !

**Quick Task Bar**

Thank you for your participation

A new way of filing travel expenses is coming. This automated travel and expense system from Concur Technologies will simplify current procedures and ultimately eliminate the current paper-based system.

**MY TASKS**

- 00 Required Approvals →  
Great! You currently have no approvals.
- 09 Available Expenses →  
04/11 Delta \$434.40  
04/05 American Airlines \$502.70
- 09 Open Reports →  
04/05 November Expenses (11/01/20...  
04/05 client visit \$314.60

## Expense and Travel

If your company uses Expense and Travel, you will see these sections.

Section	Description
Trip Search	This section provides the tools you need to book a trip with any or all of the following: <b>Flight:</b> Use to book a flight. You can also book hotel and reserve a car at the same time. <b>Car, Hotel, Limo, or Rail:</b> Use to book hotels, reserve rental cars, etc. if not including them while booking a flight ( <b>Flight</b> tab).
Alerts	This section displays informational alerts about Travel features.
Company Notes	Content is provided by your company administrator.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists <b>Required Approvals</b> , <b>Available Expenses</b> , and <b>Open Reports</b> .

The screenshot displays the SAP Concur web application interface. At the top, there is a navigation bar with links for Requests, Travel, Expense, Invoice, Approvals, and App Center. A user profile dropdown is visible on the right. Below the navigation bar, a dashboard shows a welcome message 'Hello, William' and several key metrics: 13 Authorization Requests, 01 Purchase Requests, 02 Payment Requests, 09 Available Expenses, and 09 Open Reports. The main content area is divided into several sections, each highlighted with a red box in the original image:

- TRIP SEARCH:** Contains a 'Flight Search' form with tabs for Round Trip, One Way, and Multi City. It includes fields for 'From' (Departure city, airport or train station) and 'To' (Arrival city, airport or train station), both with 'Find an airport' and 'Select multiple airports' links. A 'Search' button and a 'Show More' link are at the bottom.
- COMPANY NOTES:** Displays a welcome message 'Welcome to Concur' and a blue announcement: 'Thank you for your participation. A new way of filing travel expenses is coming. This automated travel and expense system from Concur Technologies will simplify current procedures and ultimately eliminate the current paper-based system.' A 'Read more' link is provided.
- MY TASKS:** A central section with three main task cards:
  - Required Approvals:** Shows '00' and 'Great! You currently have no approvals.' with a checkmark icon.
  - Available Expenses:** Shows '09' and a list of expenses:
 

Date	Expense	Amount
04/11	Delta	\$434.40
04/05	American Airlines	\$502.70
02/23	Courtyard	\$605.41
02/23	Avis	\$527.82
01/12	Courtyard	\$1,389.93
  - Open Reports:** Shows '09' and a list of reports:
 

Date	Report	Amount
04/05	November Expenses (11/01/20...)	
04/05	client visit	\$314.60
02/19	Business Meeting	
02/19	client visit	
01/30	Trip to Seattle	
- MY TRIPS (2):** Shows a list of upcoming trips, with one example: 'APR 23-27 Trip from Seattle to Memphis'. A 'More' link and an upward arrow icon are present.

## Updating Your Expense Profile

Use the **Profile Options** page to set or change your personal preferences. To avoid re-entering personal and permanent information about yourself (phone number, contacts, credit card information etc.), complete your profile after logging onto SAP Concur for the first time and update it whenever your information changes. Your profile options include:

- Approvers
- Attendees
- Bank Information
- Cars:
  - Company
  - Personal
- E-Receipts
- Expense Delegates
- Expense Preferences:
  - Email notifications
  - Prompts

**NOTE:** Depending on your company's configuration, some of these options might not be available to you. Contact your SAP Concur administrator for more information.

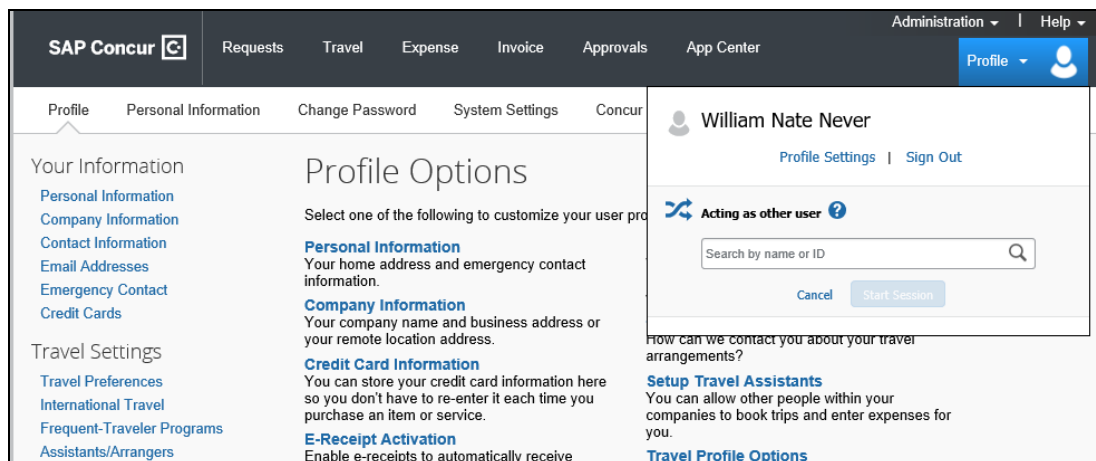
## Delegates

If you are acting as an Expense *delegate* for another employee (*delegator*):

- Any changes you make on this page affect only the delegator and do not change your personal information.
- You cannot access all profile options for your delegator, such as bank information.

### To access your profile information

1. Click **Profile > Profile Settings**.  
The **Profile Options** page appears.
2. Click the appropriate option from the left-side menu.





## Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

### To work as a delegate

1. Click **Profile > Act on behalf of another user**.
2. Select the appropriate delegator's name.
3. Click **Start Session**.

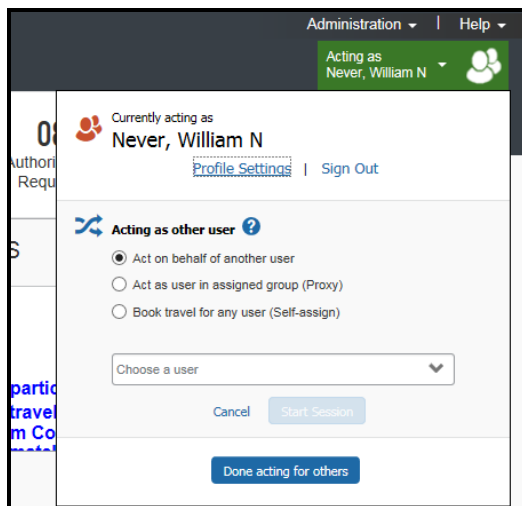
**NOTE:** Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.

4. You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.

To select a different user, follow the same steps but click a different name.

5. To return to your own tasks, click **Acting as**, and then select **Done acting for others**.

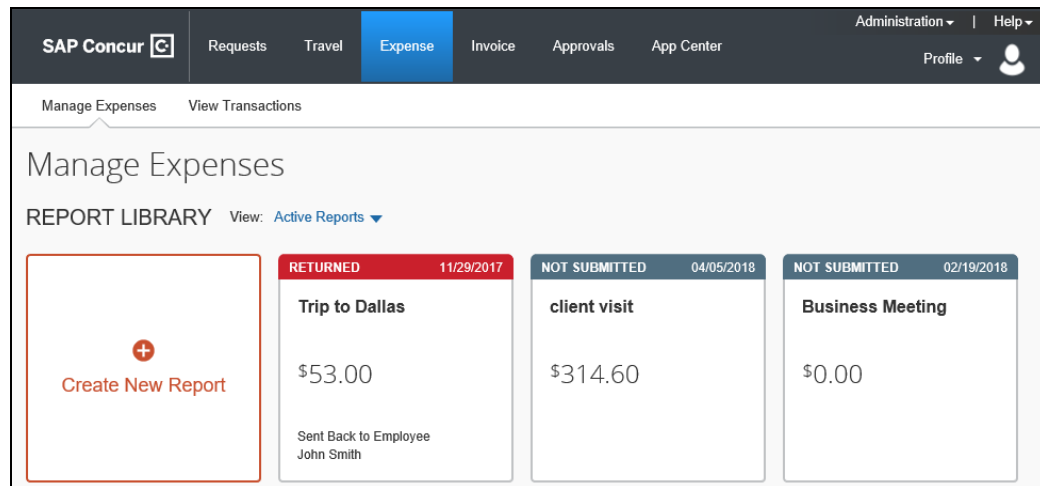
**NOTE:** Notice that the **Profile** menu now appears.



# Creating a New Expense Report

To create a new expense report

1. Either:
  - On the SAP Concur home page, on the Quick Task Bar, place your mouse pointer over **New**, and then click **Start a Report**.
  - or -
  - From the **Expense** menu, click **Manage Expenses** (on the **Expense** sub-menu), and then click the **Create New Report** tile.



2. Complete all required fields (marked with red asterisks) and the optional fields customized by your company, as needed.

The screenshot shows the 'Create New Report' form. It includes the following fields and options:

- Report Name \***: A text input field.
- Report Date**: A date picker showing 08/13/2018.
- Policy \***: A dropdown menu showing 'Travel & Expense Policy - US Content Dev'.
- Business Purpose \***: A text input field.
- Comment**: A text input field.
- Claim Travel Allowance**: A section with the text 'Select if your report includes travel and you require allowances for lodging, meals or incidentals.' and two radio buttons: 'Yes, I want to claim Travel Allowance' and 'No, I do not want to claim Travel Allowance' (selected).
- Buttons**: 'Cancel' and 'Create Report' buttons at the bottom right.

3. Click **Create Report**.  
Available cash advances are displayed in an information prompt (click **View** to assign advances).
4. At this point, you will likely either:

- Add an out-of-pocket expense to your expense report
- Add company card transactions to your expense report

## Copying an Expense

You can copy an expense and then update the expense details to quickly enter a new expense. This is especially useful for recurring business expenses.

### To copy an expense

1. With the expense report open, select the expense you want to copy.
2. Click **Copy**.

The screenshot shows the SAP Concur interface for an expense report titled "Trip to San Francisco \$171.40". The status is "Not Submitted". At the top right are "More Actions" and "Submit Report" buttons. Below the title are links for "Report Details", "Print/Share", and "Manage Receipts". A row of action buttons includes "Add", "Edit", "Delete", "Copy" (highlighted with a red box), "Allocate", "Combine Expenses", and "Move to". Below this is a table with columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains one entry for "Company Paid" (Airfare) from "Alaska Airlines" for "San Francisco, California" on "12/11/2017" with a "Requested" amount of "\$171.40 Allocated". A total of "\$171.40" is shown at the bottom right.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>		Company Paid	Airfare	Alaska Airlines San Francisco, California	12/11/2017	\$171.40 Allocated

The new expense is added to the **Expenses** list. Note the following:

- The original expense date is advanced by a day.
- All allocations, attendees, expense-level comments, and value added tax (VAT) details from the original expense are copied to the new expense.
- Credit card information, e-receipts, mobile entry information, and travel segments (associated with travel itineraries) from the original expense are *not* copied to the new expense.

**NOTE:** This type of information is generally associated with only one expense so it is not copied to the new expense.

- If the **Payment Type** of the original expense is a credit card, then the **Payment Type** of the new expense is editable using the dropdown list.

## Adding Card Transactions to an Expense Report

On the SAP Concur home page, you can view a list of any unassigned credit card transactions in the **Available Expenses** section.

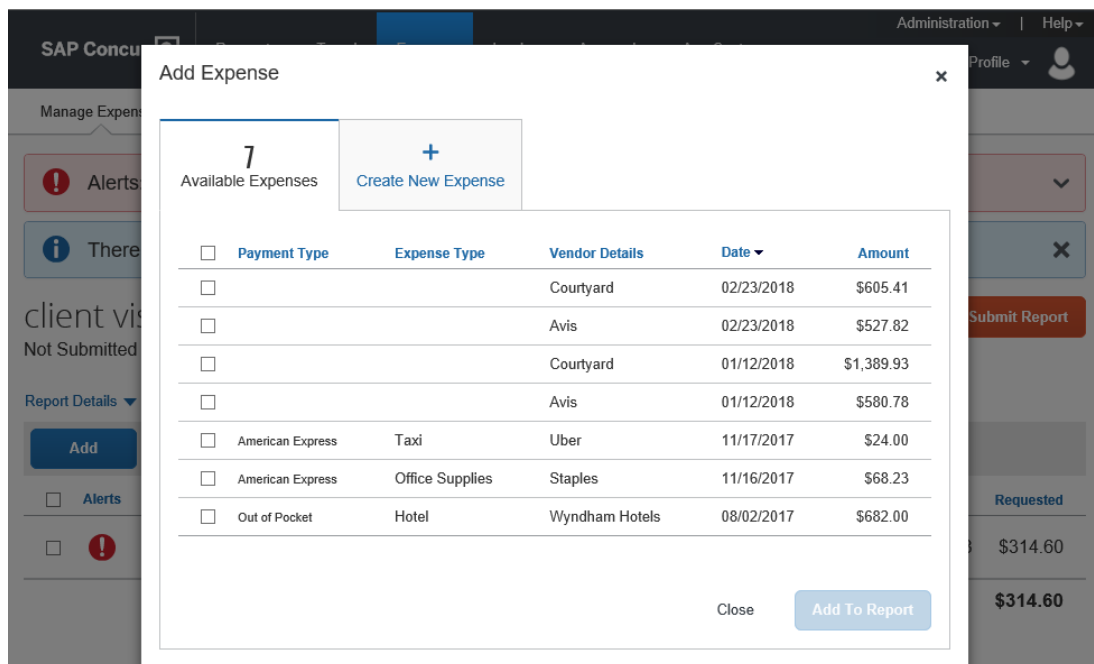
You can add card transactions to an expense report in the following ways:

- From the open expense report
- From the **Available Expenses** section (you might need to scroll down) (**Expense > Manage Expenses** on the sub-menu)

### From the open expense report

To add card transactions within the open report

1. Click **Add**.
2. From the **Available Expenses** tab, select the check box(es) for the appropriate expenses.



3. Select each transaction that you want to assign to the current expense report.
4. Click **Add To Report**.

### From the Available Expenses section

To assign transactions to a report from the Available Expenses section

1. From the **Available Expenses** section (you might need to scroll down) select a check box next to each appropriate transaction.

**TIP:** Select the uppermost check box to select all transactions.

2. Click **Move to**.
3. Select the name of the appropriate report or select **New Report**.

- If you select an existing report, the report opens and the selected transactions are attached to the report.
- If you select **New Report**, the **Create New Report** page appears. Enter the report information as usual.




AVAILABLE EXPENSES

View: All Expenses

Delete

Combine Expenses

Move to

<input type="checkbox"/>	Receipt	Payment Type	Vendor Details	Date	Amount	
<input type="checkbox"/>			Courtyard	01/12/2018	\$1,389.93	
<input checked="" type="checkbox"/>		Company Paid	Alaska Airlines	12/11/2017	\$171.40	
<input type="checkbox"/>		American Express	Staples	11/16/2017	\$68.23	
<input type="checkbox"/>			Fairfield Inns	09/29/2017	\$374.03	
<input type="checkbox"/>		Company Paid	American Airlines	09/07/2017	\$1,026.10	
<input type="checkbox"/>		Company Paid	Airfare	American Airlines	08/21/2017	\$521.10
<input type="checkbox"/>		Company Paid	Airfare	American Airlines	08/21/2017	\$467.10
<input type="checkbox"/>		Out of Pocket	Hotel	Wyndham Hotels	08/02/2017	\$682.00

Trip to Dallas

Office Supplies

Trip to Seattle

Business Trip

Conference in Miami

Monthly Office Supplies

Trip to Miami

Client Visit

New Report

## Adding an Out-of-Pocket Expense to an Expense Report

### To add an out-of-pocket expense to a report

1. From the open report, click **Add**, and then click the **Create New Expense** tab.
2. Search for or select the appropriate expense type from the list.

The page refreshes, displaying the required and optional fields for the selected expense type.

**NOTE:** Your company defines the fields that are available on this screen.

3. Complete the required and optional fields as directed by your company.

Click one of the following:

- **Attach Receipt Image** - To upload and attach receipt images
- **Itemizations tab** - To itemize the expense
- **Save Expense** – To save the out-of-pocket expense
- **Cancel** - To exit without saving this expense

## Itemizing Expenses

Use the **Itemizations** tab to account for receipts that include both business and personal expenses or to ensure that each of your expenses is accounted for correctly.

### To itemize an expense

1. Create the expense as usual, and then click the **Itemizations** tab (instead of **Save Expense**).
  - The total **Amount**, the amount **Itemized**, and the **Remaining** amount displays.
  - A red exclamation point icon next to the **Remaining** amount, indicating that you need to itemize this expense.

The screenshot shows the 'Itemizations' tab for an expense titled 'Computer Hardware' with an amount of '\$349.00' and a date of '04/18/2018'. Below the title, there are two tabs: 'Details' and 'Itemizations'. The 'Itemizations' tab is active, displaying a table with three columns: 'Amount', 'Itemized', and 'Remaining'. The 'Amount' column shows '\$349.00', the 'Itemized' column shows '\$0.00', and the 'Remaining' column shows '\$349.00' with a red exclamation point icon next to it. Below the table, there are two buttons: 'Create Itemization' and 'More Actions'. Below the buttons, there is a message that says 'No Itemizations. Create itemizations for the items on your receipt.'

Amount	Itemized	Remaining
\$349.00	\$0.00	\$349.00

Create Itemization   More Actions ▼

No Itemizations.  
Create itemizations for the items on your receipt.

2. On the **Itemizations** tab, click **Create Itemization**.
  3. Select the **Expense Type** that applies to the first itemization from the dropdown list.  
The page refreshes, displaying the required and optional fields for the selected expense type.
  4. Complete the fields as directed by your company.
  5. Click **Save Itemization**.  
The newly created itemization appears.
  6. For each additional itemization, on the **Itemizations** tab, click **Create Itemization**, select the appropriate expense type and complete the appropriate fields.
- NOTE:** You can also **Copy** itemizations to save time with similar entries.



Once you have itemized the **Remaining** amount of the charge, an alert displays a green **Success** checkmark.

The screenshot shows the SAP Concur 'Expense' page. At the top, a navigation bar includes 'Requests', 'Travel', 'Expense' (active), 'Invoice', 'Approvals', and 'App Center'. A secondary bar shows 'Manage Expenses' and 'View Transactions'. A green alert banner at the top states: 'Success! You have cleared all alerts on this expense.' Below this, the expense title 'Computer Hardware \$349.00' is displayed with a trash icon, a date '04/18/2018', and buttons for 'Cancel' and 'Save Expense'. The 'Itemizations' tab is selected, showing a summary table and a list of itemizations.

Amount	Itemized	Remaining
\$349.00	\$349.00	\$0.00

<input type="checkbox"/> Date ▲	Expense Type	Amount
<input type="checkbox"/> 04/18/2018	Trade Shows	\$300.00
<input type="checkbox"/> 04/18/2018	Meetings	\$49.00

7. Click **Save Expense**.

## Itemizing Nightly Lodging Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Lodging Itemization allows you to quickly itemize recurring room rates and taxes. You can then itemize the remaining charges on your hotel bill, and adjust for any rate changes during your stay

### To create a lodging expense


1. With the expense report open, click **Add**, and then select the lodging expense type. The page refreshes, displaying the required and optional fields for the selected expense type.


**NOTE:** Your company determines the name of the expense type. It might be called Lodging, Hotel, or something similar.


2. Complete the fields as directed by your company.

The screenshot shows the 'Manage Expenses' form in SAP Concur. At the top, there are tabs for 'Manage Expenses' and 'View Transactions'. Below the tabs is a red alert bar that says 'Alerts: 2'. The main header displays 'Hotel \$845.00' with a calendar icon, and below it, '12/22/2017 | Marriott Hotels'. There are 'Cancel' and 'Save Expense' buttons. The form is divided into two tabs: 'Details' (selected) and 'Itemizations'. The 'Details' tab contains several fields: 'Expense Type' (dropdown menu with 'Hotel' selected), 'Check-in Date' (calendar icon, '12/18/2017'), 'Check-out Date' (calendar icon, '12/22/2017'), 'Nights' (text field with '4'), 'Transaction Date' (calendar icon, '12/22/2017'), 'Business Purpose' (text field), 'Vendor' (dropdown menu with 'Marriott Hotels' selected), 'City' (dropdown menu with 'Seattle, Washington' selected), 'Payment Type' (dropdown menu with 'Company Paid' selected), 'Transaction Amount' (text field with '845.00'), 'Currency' (dropdown menu with 'US, Dollar' selected), 'Has VAT' (checkbox), 'Receipt Status' (dropdown menu with 'Receipt' selected), and a 'Comment' text field. A 'Show Receipt' button is located in the top right corner of the form.

3. On the **Itemizations** tab, click **Create Itemization**.
4. Select the appropriate lodging expense type. You can then select if this **Entry Type** is a **Recurring** or **Single Itemization**.

Hotel \$845.00  12/22/2017 | Marriott Hotels Cancel Save Itemization

**Details** **Itemizations** Show Receipt 

Amount \$845.00	Itemized \$0.00	 Remaining \$845.00
--------------------	--------------------	---

*New Itemization*

Expense Type \*

Entry Type: Recurring Itemization ▼

12/18/2017 - 12/22/2017 (Nights: 4)

Your hotel room rate was:


The Same Every Night
Not the Same


Room Rate (per night) \*  Room Tax (per night)  [+ Additional Taxes](#)


(Amounts in USD)


5. Select whether your hotel room rate was **The Same Every Night**, or **Not the Same**.
6. Enter the **Room Rate (per night)** and **Room Tax (per night)**, as applicable.  
**Note:** You can use the **Additional Taxes** link to enter additional taxes from your hotel bill.
7. Click **Save Itemization**.
8. If there is a remaining amount that needs to be itemized (other charges, for example, for incidentals or room service), the remaining amount is displayed in the **Remaining** field. Continue to itemize the amounts until the balance is \$0.00.

Manage Expenses View Transactions

 Alerts: 2 ▼

Hotel \$845.00  12/22/2017 | Marriott Hotels Cancel Save Expense

**Details** **Itemizations** Show Receipt 

Amount \$845.00	Itemized \$824.00	 Remaining \$21.00
--------------------	----------------------	--

Create Itemization Edit Delete Copy Allocate

<input type="checkbox"/> Date ▲	Expense Type	Amount
<input type="checkbox"/> 12/18/2017	Hotel	\$198.00
<input type="checkbox"/> 12/18/2017	Hotel Tax	\$8.00
<input type="checkbox"/> 12/19/2017	Hotel	\$198.00
<input type="checkbox"/> 12/19/2017	Hotel Tax	\$8.00
<input type="checkbox"/> 12/20/2017	Hotel Tax	\$8.00
<input type="checkbox"/> 12/20/2017	Hotel	\$198.00
<input type="checkbox"/> 12/21/2017	Hotel Tax	\$8.00
<input type="checkbox"/> 12/21/2017	Hotel	\$198.00

9. Click **Save Expense**.

## Adding Attendees to a Business Meal

Some expenses, such as business meal expenses, require you to add attendees to the expense.

### To add attendees to a business meal

1. From the expense type screen, click **Attendees**.

The screenshot shows the SAP Concur Expense screen for a Business Meal expense. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense' (highlighted), 'Invoice', 'Approvals', and 'App Center'. The right side has 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, there are tabs for 'Manage Expenses' and 'View Transactions'. The main header displays 'Business Meal (attendees) \$45.76' with the date '04/08/2015', location 'Cafe Monte', and payment method 'Corporate Card'. A 'Close Expense' button is in the top right. Below the header, there are tabs for 'Details' and 'Itemizations'. The 'Attendees (1)' tab is selected and highlighted with a red box. Below this, there are sections for 'Expense Type' (Business Meal (attendees)), 'Transaction Date' (04/08/2015), 'Business Purpose' (Dinner with customer.), 'Vendor Name' (Cafe Monte), 'City' (Seattle, Washington), 'Attendees' (empty), 'Payment Type' (American Express), 'Personal Expense (do not reimburse)' (checkbox), 'Has VAT' (checkbox), 'Approved Amount' (45.76), and 'Receipt Status' (No Receipt). A 'Close Expense' button is at the bottom left. A legend indicates that '\*' indicates required fields.

2. In the **Attendees** window, click **Add**.

The **Add Attendees** window appears.

The screenshot shows the 'Add Attendees' window. It has a title bar with 'Add Attendees' and a close button. Below the title bar, there are four tabs: 'Recent Attendees', 'New Attendee' (highlighted with a blue plus icon), 'Attendee Groups' (highlighted with a blue plus icon), and 'No Shows' (highlighted with a blue plus icon). Below the tabs, there is a table with columns: 'Attendee Name', 'Attendee Title', 'Company', and 'Attendee Type'. The table contains five rows of data, each with a checkbox in the first column. Below the table, there is a link 'Search All Attendee History' and an 'Add To List' button.

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	Tina, Markus	Account Manager	ABC Company	Business Guest
<input type="checkbox"/>	Jones, Sam	Account Manager	ABC Company	Business Guest
<input type="checkbox"/>	Jones, Edward	Marketing Rep	XYZ, Inc	Business Guest
<input type="checkbox"/>	Smith, John	Sales Manager	ABC Company	Business Guest

You can add attendees in several ways:

- **Recent Attendees** – Select the check box next to the appropriate attendee.
- **New Attendee** – Search for the **Business Guest** or **Employee**. If you need to create a new attendee, click **Create New Attendee**, complete the required fields, and then click **Create Attendee**.
- **Attendee Groups** – Select from your **Favorites** or **My Team** (these are configured in your **Profile** settings).
- **No Shows** – Enter the **Number of Attendees** that did not show.

3. Click **Save**.

## Allocating Expenses

You can allocate expenses to projects or departments, which will be charged for those expenses. You can allocate a single expense or multiple expenses.

**NOTE:** To find out if your company uses this feature, contact your SAP Concur administrator for more information.

### To allocate your expenses

1. With the expense open, to create or edit a *single* expense, click **Allocate**.

Business Meal (attendees) \$45.76 Cancel **Save Expense**

06/12/2018 | Cafe Monte

Details **Itemizations** Show Receipt

Attendees (1) | **Allocate**

\* Indicates required field

Expense Type \*  Transaction Date \*  Business Purpose \*

Vendor Name \*  City \*  Payment Type \*

Transaction Amount \*  Currency \*  ☐ Personal Expense (do not reimburse) ☐ Has VAT

Receipt Status \*

Comment

**Save Expense** Cancel

2. With the report open, to allocate *multiple* expenses, select the appropriate expenses on the left side of the page, and then click **Allocate**.

Copy: Business Conference \$359.51 **More Actions** **Submit Report**

Not Submitted

Report Details Print/Share Manage Receipts

**Add** **Edit** **Delete** **Copy** **Allocate** **Combine Expenses** **Move to**

<input checked="" type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input checked="" type="checkbox"/>			Out of Pocket	Office Supplies	Staples Memphis, Tennessee	06/15/2018	\$68.23
<input checked="" type="checkbox"/>			Out of Pocket	Hotel	Vista Inn Memphis, Tennessee	06/13/2018	\$162.60
<input checked="" type="checkbox"/>			Out of Pocket	Car Rental	Thrifty Memphis, Tennessee	06/13/2018	\$82.92
<input checked="" type="checkbox"/>			Out of Pocket	Business Meal (attendees)	Cafe Monte Seattle, Washington	06/12/2018	\$45.76
							<b>\$359.51</b>

The **Allocate** window appears. The total expense **Amount**, the amount **Allocated**, and the amount **Remaining** are listed.

Allocate

Expenses: 2 | \$191.23

---

Amount \$191.23	Allocated \$191.23 100%	Remaining \$0.00 0%
--------------------	----------------------------	------------------------

Edit

Percent

Company	Department	Cost Center	Project	Code	Percent %
United States	Sales	Mid Market		10-300-3030	<input type="text" value="100"/>

3. From the **Edit** dropdown list, select **Percent** or **Amount**.

4. Click **Add**.

Your company determines if the allocation fields are text fields or lists. Select from the lists or type the appropriate information in the fields.

**NOTE:** Your company might provide default information in some of the fields, such as your company name. If you change the default information, a red triangle appears in the upper left corner of the field.

5. Add as many allocations as necessary, from the **New Allocation** or **Favorite Allocations** tabs

You can adjust the amounts and percentages. The total amount must be allocated 100%, otherwise an audit rule is flagged and you will not be able to submit the report.

Allocate

Expenses: 2 | \$191.23

---

Amount \$191.23	Allocated \$191.23 100%	Remaining \$0.00 0%
--------------------	----------------------------	------------------------

Edit

Percent

<input type="checkbox"/>	Company	Department	Cost Center	Project	Code	Percent %
<input type="checkbox"/>	United States	Sales	Mid Market		10-300-3030	<input type="text" value="0"/>
<input type="checkbox"/>	1390	Sales	Mid Market		-300-3030	<input type="text" value="50"/>
<input type="checkbox"/>	1390	Sales	Mid Market	12th Ave Village Gathering Place Acquisition	-300-3030-44-1-206-1125	<input type="text" value="50"/>

6. Click **Save**.

## Converting Foreign Currency Transactions

When your travel takes you to different countries, you will need to convert foreign currency transactions to your standard reimbursement currency.

### To account for an expense incurred in another currency

1. With the report open, click **Add**, and then **Create New Expense**.
2. Search for or enter an expense type.
3. Enter the appropriate information in the required and optional fields (required fields are indicated with an asterisk).

Note the following:

- Select the "spend" **Currency** from the list to the right of the **Transaction Amount** field. The **Conversion Rate** field appears.
- The **Conversion Rate** is automatically populated according to the **Transaction Date** and **Currency** entries.  
Expense calculates the **Amount** in your reimbursement currency.
- Currency can be converted by multiplying by a particular rate or dividing by a different rate. To switch between multiplication of the rate to division of the rate, click **Reverse** next to the **Conversion Rate** field.

4. Complete the remaining fields as appropriate, and then click **Save Expense**.

The screenshot shows the 'New Expense' form in SAP Concur. The form has two tabs: 'Details' (selected) and 'Itemizations'. At the top right, there are 'Cancel' and 'Save Expense' buttons. Below the tabs, there is a 'Show Receipt' link with a document icon. The form is divided into several sections. The 'Allocate' section at the top left has a red asterisk indicating required fields. It includes 'Expense Type' (a dropdown menu with 'Lunch' selected), 'Transaction Date' (a date picker showing '01/01/2018'), 'Business Purpose' (a text input field), 'Vendor Name' (a text input field), 'City' (a location picker), and 'Payment Type' (a dropdown menu with 'Out of Pocket' selected). Below these, there are checkboxes for 'Personal Expense (do not reimburse)' and 'Has VAT'. The 'Transaction Amount' is '98.00' and the 'Currency' is 'Euro'. The 'Conversion Rate' is '1.19806' and the 'Amount in USD' is '117.41'. There is a 'Reverse' button next to the conversion rate. The 'Receipt Status' is 'Receipt'. At the bottom, there is a 'Comment' text input field. A red asterisk indicates required fields.

*New Expense* Cancel Save Expense

Details Itemizations Show Receipt

**Allocate** \* Indicates required field

Expense Type \* Lunch Transaction Date \* 01/01/2018

Business Purpose Vendor Name

City Payment Type \* Out of Pocket

Transaction Amount \* 98.00 Currency \* Euro

Conversion Rate \* Reverse 1 EUR = 1.19806 USD Amount in USD \* 117.41

☐ Personal Expense (do not reimburse)

☐ Has VAT

Receipt Status \* Receipt

Comment



## Entering Personal Car Mileage

Depending on your company policy, you might have to track your car mileage in order to be reimbursed. You might be using your personal car for business purposes or you might be using a company car. Your company determines the information you are required to provide such as mileage and odometer readings, as well as the reimbursement rates.

### To create a car mileage expense

1. With the expense report open, click **Add**, and then select the mileage expense type.

#### NOTES:

- Your company determines the name of the expense type. It might be called Car, Company Car, Personal Car Mileage, or something similar.
  - You must register a vehicle in your profile before you can create a mileage expense.
2. Complete all required and optional fields as directed by your company. For a personal car, you might enter the total business miles traveled. For a company car, you might be required to enter the beginning and ending odometer readings.

When done, Expense calculates the reimbursement amount based on the miles and the reimbursement rate set by your company.

3. Click **Save Expense**.

The screenshot shows the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has a 'Details' tab selected. At the top right, there are 'Cancel' and 'Save Expense' buttons. Below the title, there are links for 'Mileage Calculator' and 'Allocate'. The form contains several fields, some of which are marked as required with a red asterisk (\*). The fields are organized into a grid-like structure. The 'Expense Type' field is set to 'Company Car Mileage'. The 'Transaction Date' field is set to 'MM/DD/YYYY'. The 'City' field is empty. The 'Purpose of the Trip' field is set to 'Business Meeting'. The 'From Location' field is set to 'Seattle'. The 'To Location' field is set to 'Portland'. The 'Payment Type' field is set to 'Out of Pocket'. The 'Vehicle ID' field is set to 'ADH234'. The 'Distance to Date' field is empty. The 'Odometer Start' field is set to '45876'. The 'Odometer End' field is set to '46276'. The 'Business Distance' field is set to '417000'. The 'Personal Distance' field is empty. The 'Total Distance' field is set to '417000'. The 'Number of Passengers' field is empty. The 'Transaction Amount' field is set to '126,100.00'. The 'Currency' field is set to 'US, Dollar'. At the bottom left, there is a 'Save Expense' button. At the bottom right, there is a 'Cancel' button. A legend at the top right indicates that a red asterisk (\*) indicates a required field.

Expense Type *		Transaction Date *		City	
Company Car Mileage		MM/DD/YYYY			

Purpose of the Trip *		From Location *		To Location *		Payment Type *	
Business Meeting		Seattle		Portland		Out of Pocket	

Vehicle ID		Distance to Date		Odometer Start		Odometer End	
ADH234				45876		46276	

Business Distance		Personal Distance		Total Distance		Number of Passengers	
417000				417000			

Transaction Amount *		Currency *	
126,100.00		US, Dollar	

## Activating E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to SAP Concur to replace imaged paper receipts. The availability and content of e-receipts vary depending on the vendor.

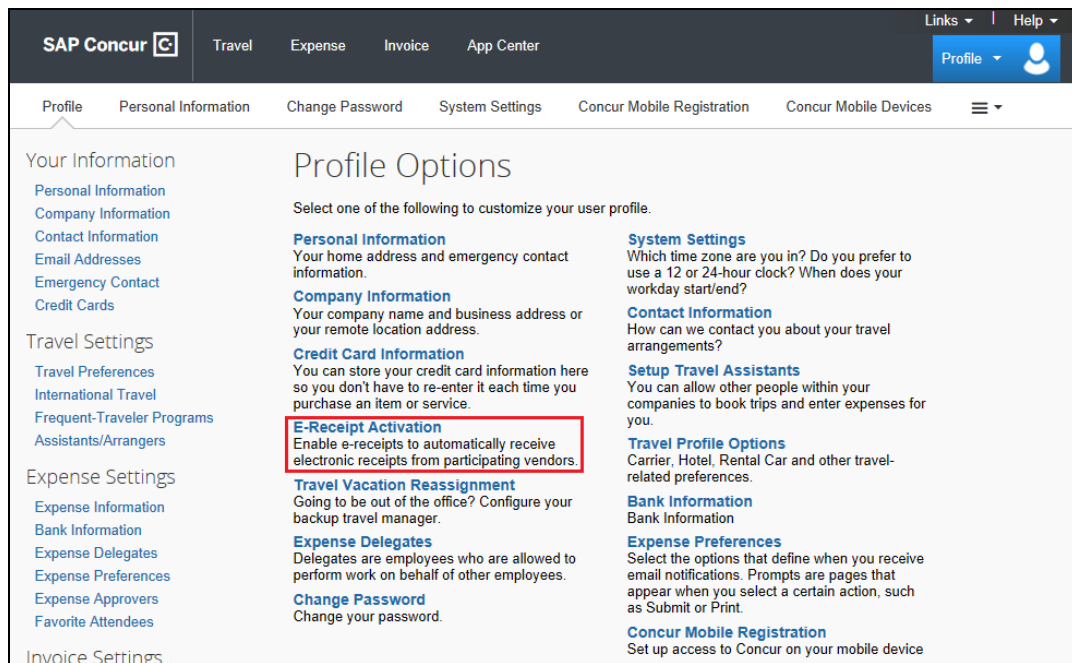
Your company must be enabled to accept e-receipts, and you must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data. Contact your SAP Concur administrator for more information.

Once your company has e-receipts enabled, a message will appear on the SAP Concur home page, prompting you to sign up. You can also active e-receipts from your **Profile Options** page.

**NOTE:** Depending on your company's configuration, this option might not be available to you. Contact your SAP Concur administrator for more information.

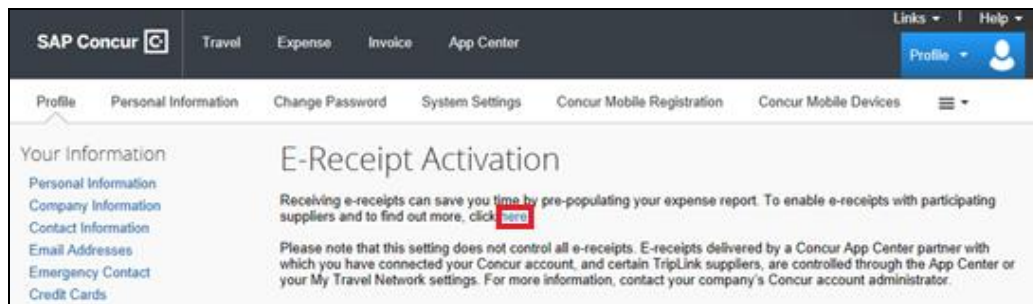
### To activate e-receipts

1. Click **Profile**, and then click **Profile Settings**.
2. On the **Profile Options** page, click **E-Receipt Activation**.

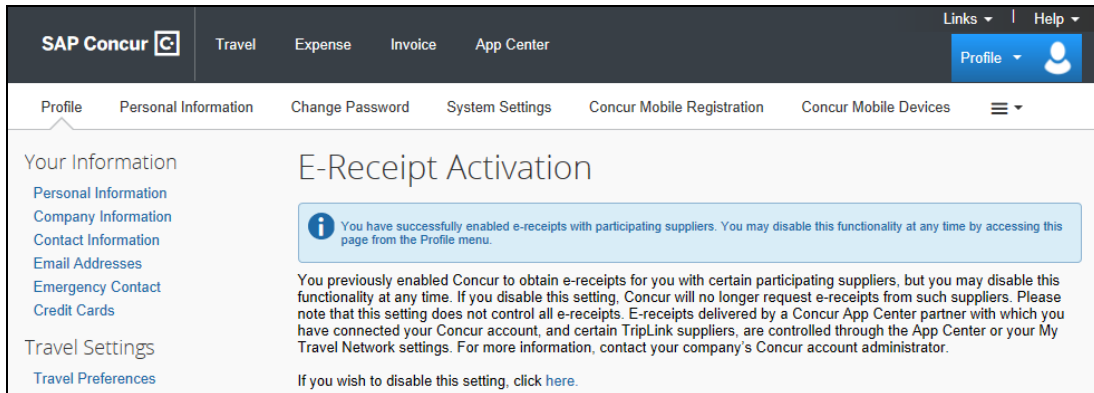


The **E-Receipt Activation and User Agreement** appears.

3. On the **E-Receipt Activation** page, click the **here** link.



4. Read through the **E-Receipt Activation** agreement, and then click **I Agree**. Receipts are successfully enabled.
5. If you want to disable the E-Receipt Activation setting, on the **E-Receipt Activation** page, click the **here** link.



## Uploading Receipts using Available Receipts

Available Receipts work with the SAP Concur Imaging Service to provide receipt images that the user can either email or upload images to, and then use to attach images at the line item expense entry level (only). Images in supported format are uploaded using a SAP Concur-verified email address provided by the user during signup, and these images are then available to that user (only) for the purpose of attaching to report expense entries.

### To attach a receipt image to an expense entry using Available Receipts

1. Select an entry to open it on the **Details** tab.

The screenshot shows the 'Details' tab of an SAP Concur expense entry. The form is divided into two main sections. The left section contains various input fields for the expense entry, including 'Expense Type' (set to 'Car Rental'), 'Transaction Date' (05/17/2018), 'Number of days the vehicle was rented' (3), 'Business Purpose', 'Vendor' (Avis), 'City' (Memphis, Tennessee), 'Payment Type' (Company Paid), 'Transaction Amount' (0.00), 'Currency' (US, Dollar), 'Personal Expense (do not reimburse)' checkbox, 'Has VAT' checkbox, 'Receipt Status' (Receipt), and a 'Comment' field. The right section is a large red-bordered box containing a red plus icon and the text 'Attach Receipt Image'. At the bottom left of the form are 'Save Expense' and 'Cancel' buttons. At the top right is a 'Hide Receipt' link.

2. Click **Attach Receipt Image**.
3. Select the receipt image you want to attach, and then click **Attach**.
4. The receipt image is attached to the expense entry and displays on the right side of the screen.

**Note:** You can **Detach** or **Append** the image from the receipt pane.

## Printing and Submitting an Expense Report

When you complete your expense report, you can print it to save a hard copy for your records or to review required receipts.

### To preview and print the expense report

1. On the expense report page, click **Print/Share**, and then select one of the options from the dropdown list. Your company determines the options that are available. Available options include:
  - **Fax Receipt Cover Page:** Prints a PDF file with a unique barcode a report summary and a checklist for the required expense receipts.
  - **Detailed Report:** Prints a report that includes all report-level information as well as a summary of the report.
  - **Receipt Report:** Prints a list of expenses that require receipts along with the unique receipt bar code and the report-level and summary information.

The screenshot shows the SAP Concur expense report interface. At the top, it displays 'Office chair \$149.98' and 'Not Submitted'. There are buttons for 'More Actions' and 'Submit Report'. Below this, there are tabs for 'Report Details', 'Print/Share', and 'Manage Receipts'. The 'Print/Share' tab is active, and a dropdown menu is open showing options: 'Add Expense', 'Fax Receipt Cover Page', 'Detailed Report', and 'Receipt Report'. Below the dropdown, there is a table with columns: 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. The table contains one row for 'Office Supplies' from 'STAPLES Kalispell, Montana' dated '01/16/2019' for '\$149.98'. The total amount '\$149.98' is shown at the bottom right of the table.

Expense Type	Vendor Details	Date	Requested
Office Supplies	STAPLES Kalispell, Montana	01/16/2019	\$149.98

**\$149.98**

2. On the **Detailed Report** screen, review the details, and then click **Print**.

### To submit your expense report

1. On the expense report page, click **Submit Report**. The **Report Totals** window appears.
2. Review the information for accuracy, and then click **Submit Report**.  
The **Report Status** window appears.
3. Click **Close**.

If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

## Reviewing and Approving an Expense Report

As an approver, you will need to review submitted expense reports and approve them for reimbursement. On the SAP Concur home page, in the **My Tasks** section, you can view a list of any report waiting your approval.

### To review and approve an expense report

1. On the SAP Concur home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**.

The screenshot shows the SAP Concur 'Approvals' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals' (selected), and 'App Center'. A secondary bar shows 'Approvals Home', 'Requests', 'Reports', 'Cash Advances', 'Purchase Requests', and 'Payment Requests'. The main area displays a grid of tiles for different report types: Trips (00), Requests (00), Expense Reports (01, highlighted), Statement Reports (00), Cash Advances (06), Purchase Requests (01), and Payment Requests (97). Below the grid is a table titled 'Expense Reports'.

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Office Supplies	Never, William	11/02/2016	USD 0.00	USD 68.23

The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.

2. Review the report details, and then click **Approve**.

## Adding an Additional Review Step

As an approver, if your company allows it you can add additional review steps for an expense report. For example, you might need to forward the report to additional approvers if the expense report amount exceeds your approval limit, or if the report contains allocations to a cost center that is not within your approval authorization.

### To approve and forward a report

1. On the SAP Concur home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Review the report, and then click **Approve & Forward**. Enter the **User-Added Approver**, and add a comment, as needed.
3. Click **Approve & Forward** to approve the expense report and send it to the next approver.

The screenshot displays the SAP Concur interface for reviewing an expense report titled "Global Tech Sales Training" by user "Never, William". At the top right, there are buttons for "Send Back to Employee", "Approve", and "Approve & Forward". Below these are tabs for "Summary", "Details", "Receipts", and "Print / Email".

The "Exceptions" section is expanded, showing a table with columns: Expense, Date, Amount, and Exception. It lists three items: "N/A", "Hotel" for 2015-02-20 with an amount of \$247.94, and another "Hotel" for 2015-02-20 with an amount of \$57.00. Each item has a yellow warning icon and a message in Spanish or English regarding audit review or sub-entries.

The "Expenses" section shows a table with columns: Transaction D..., Expense Type, Vendor Name, Business Purp..., City, Payment Type, Amount, and Adjusted Clai... It lists four transactions: "Airfare" (2015-04-09, \$518.78), "Hotel" (2015-04-03, \$899.00), "Hotel" (2015-02-20, \$247.94), and "Business Meal (attendees)" (2015-02-17, \$40.00). There is also a "Parking" entry for 2015-02-17 for \$15.00.

On the right side, there is a "Report Summary" section with a "Report Totals" table. This table has three columns: "Amount Due Com...", "Amount Due Com...", and "Amount Due Emp...". The values shown are \$0.00, \$766.72, and \$55.00 respectively.

## Sending Back an Expense Report

As an approver, you will review submitted expense reports and approve them for reimbursement. All of the report's expenses appear in the Expenses list. If the report contains any exceptions, they will display in the Exceptions section of the report.

### To return the entire expense report to the employee for correction

1. On the SAP Concur home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**.

The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.

The screenshot displays the SAP Concur interface for an expense report titled "Office Supplies" by Sue Peterson. The page has tabs for "Approvals Home" and "Reports". At the top right, there are three buttons: "Send Back to Employee" (highlighted), "Approve", and "Approve & Forward". Below the title, there are links for "Summary", "Details", "Receipts", and "Print / Email". The main section is titled "Expenses" and contains a table with the following data:

	Transaction D...	Expense Type	Enter Vendor ...	Business Pur...	City	Payment Type
	08/05/2014	Office Supplies	Staples			Cash
	08/05/2014	Office Supplies	STAPLES			Cash
	07/25/2014	Postage	US Postal Service	Postage for mar...	Seattle, Washin...	Cash
	07/24/2014	Materials	Office Depot	Reference Mate...	Seattle, Washin...	Cash
	07/23/2014	Office Supplies	Staples	Office Chairs	Seattle, Washin...	Cash
	07/23/2014	Miscellaneous	07/14 Misc. Pro...			Cash
	07/23/2014	Office Supplies	07/14 Office Su...			Cash
	07/21/2014	Miscellaneous	MARRIOTT			Cash
	08/07/2010	Bank Fees	Finance Charge ...			Cash

At the bottom right, there is a "Report Summary" section with "Report Totals":

Amount Due Co...	Amount Due E...
\$0.00	\$1,026.23

At the bottom of the page, there are two totals: "TOTAL AMOUNT \$1,126.23" and "TOTAL REQUESTED \$1,026.23".

2. Click **Send Back to Employee**.

The **Send Back Report** window appears.

3. Enter a **Comment** for the employee, explaining why you are returning the report, and then click **OK**.

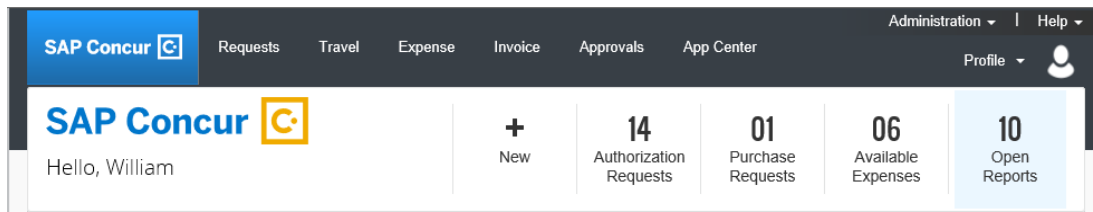


## Correcting and Resubmitting an Expense Report

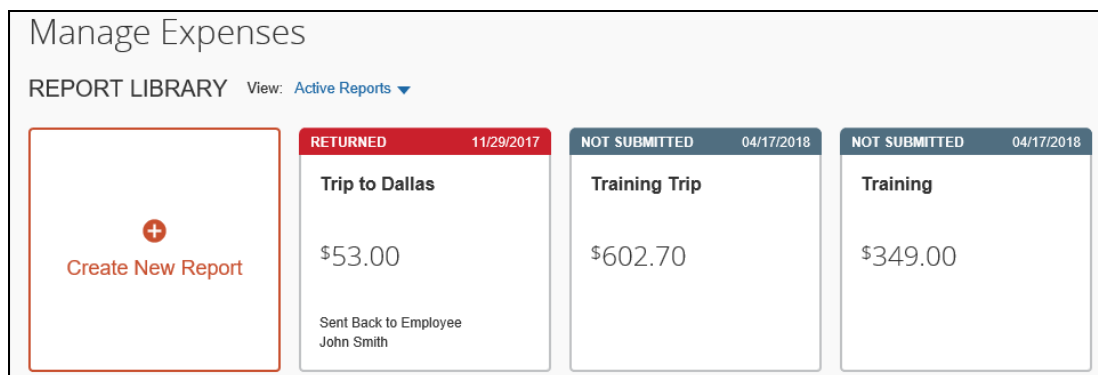
Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

### To correct and resubmit an expense report

1. To open the report, on the SAP Concur home page, on the Quick Task Bar, click the **Open Reports** task.



In the **Active Reports** section of the page, the report appears with **Returned** on the report tile. The approver's comment appears below the amount.



2. Click the returned report tile to open the report.
3. Make the requested changes, and then click **Submit Report**.