

## Concur Expense QuickStart Guide



SAP Concur  
Technologies  
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- Concur Invoice
- Concur Expense
- Concur Travel
- Concur Request
- Concur Locate
- SAP Concur for Mobile

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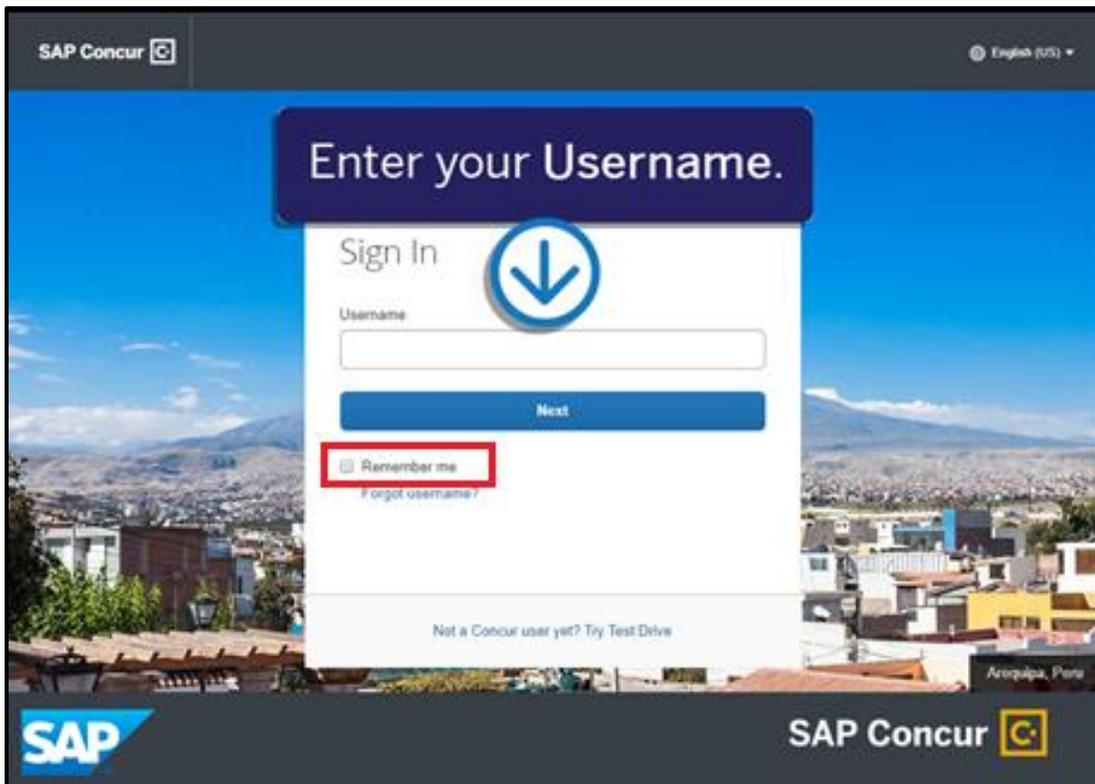
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## Signing in to SAP Concur

### To sign in to SAP Concur

1. To sign in to SAP Concur, on the **Sign In** screen, enter your **Username**, and then click **Next**.

You can select the **Remember me** check box to store your password, so that you don't have to enter it the next time you sign in to SAP Concur from this device.



2. Enter your **Password**.

If this is your initial log in to SAP Concur, you enter the temporary password that was provided to you.

#### 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.

## Exploring the SAP Concur Home Page

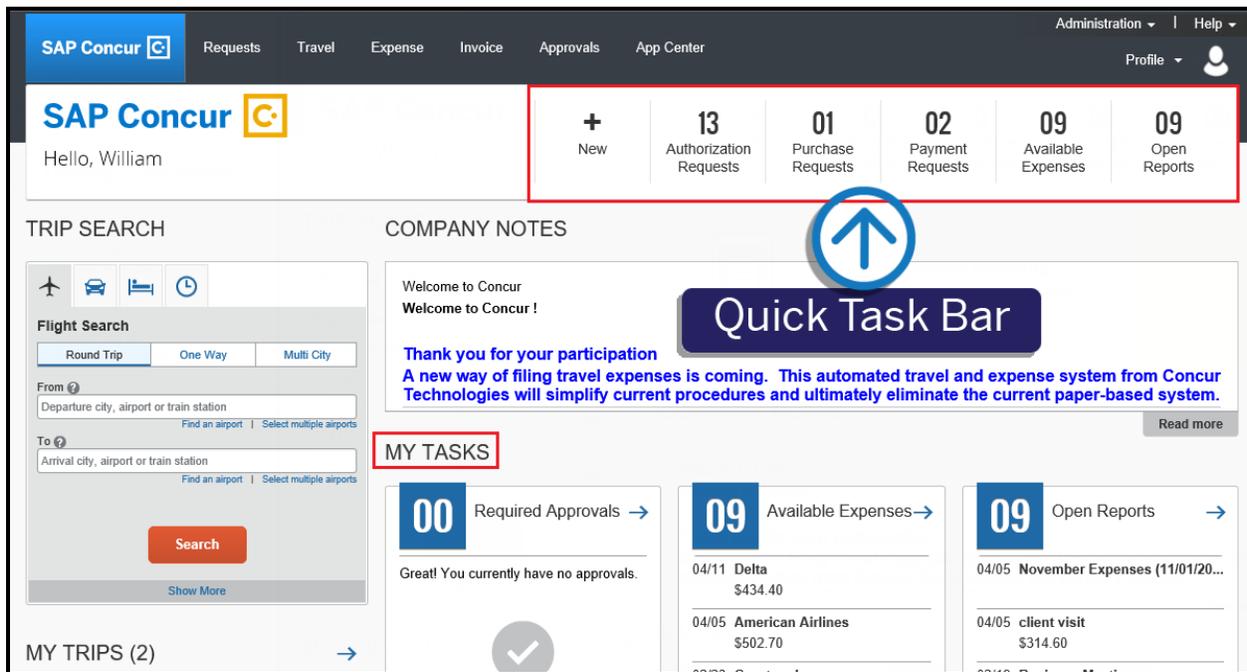
The SAP Concur home page contains the following sections.

**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.

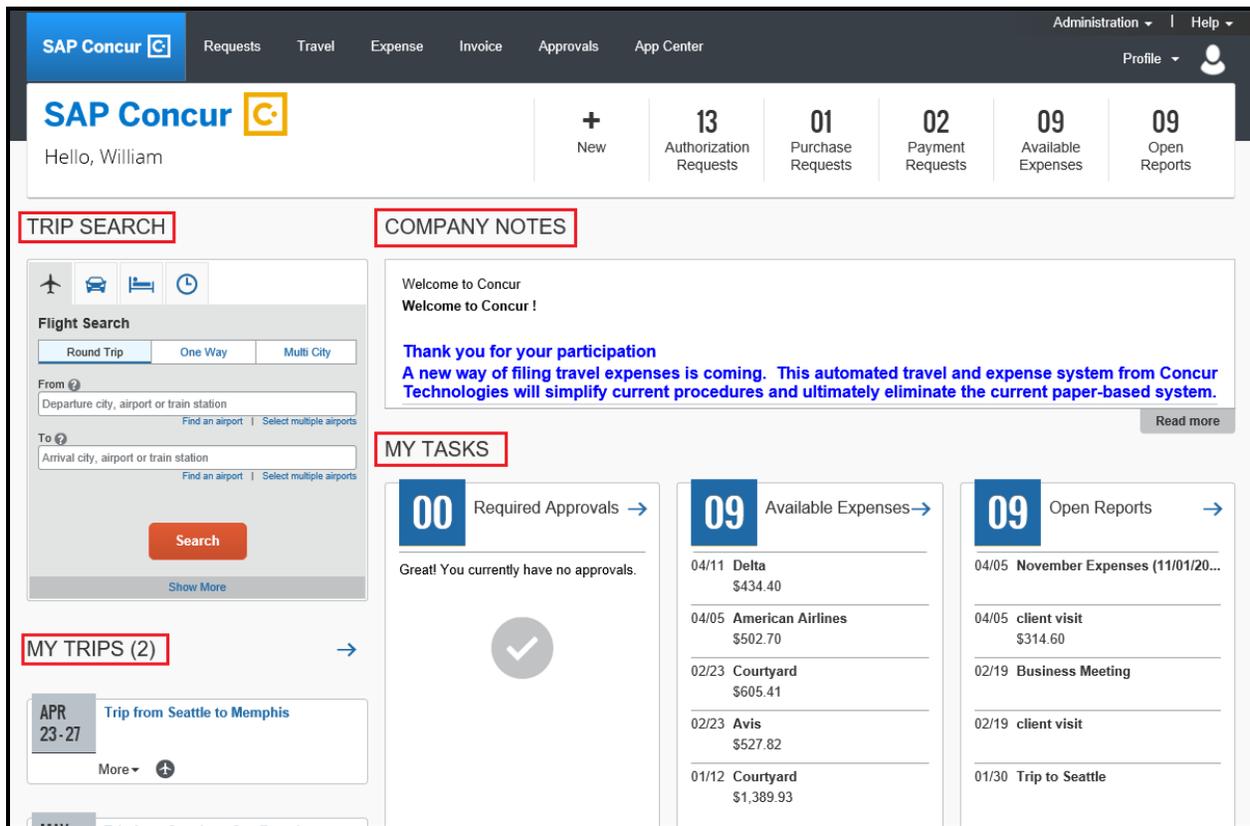


The screenshot shows the SAP Concur home page for a user named William. At the top, there is a navigation bar with links for Requests, Travel, Expense, Invoice, Approvals, and App Center. Below the navigation bar, the SAP Concur logo and the user's name 'Hello, William' are displayed. A summary bar shows various counts: + New, 13 Authorization Requests, 01 Purchase Requests, 02 Payment Requests, 09 Available Expenses, and 09 Open Reports. A 'Quick Task Bar' is highlighted with a red box and an arrow. Below it, a 'MY TASKS' section is also highlighted with a red box, showing '00 Required Approvals', '09 Available Expenses', and '09 Open Reports'. A 'Flight Search' widget is on the left, and a 'COMPANY NOTES' section with a welcome message is in the center.

## 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, Available Expenses, and Open Reports.</b>



## 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.

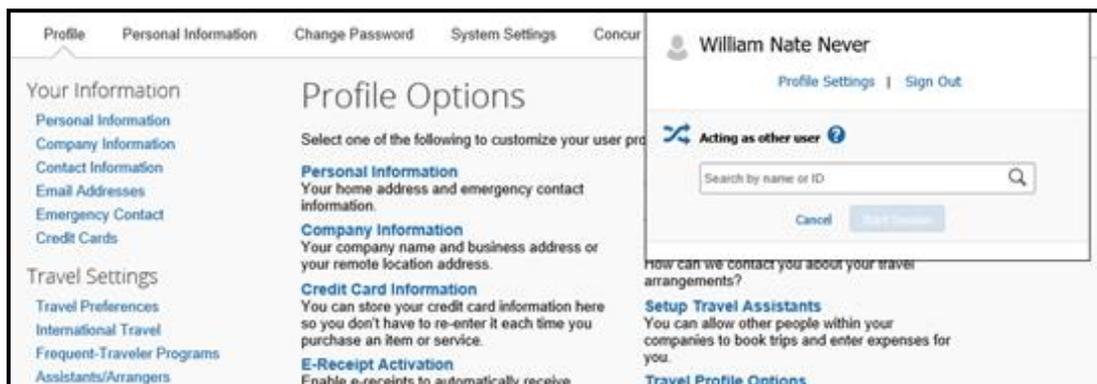
## Delegates

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**.

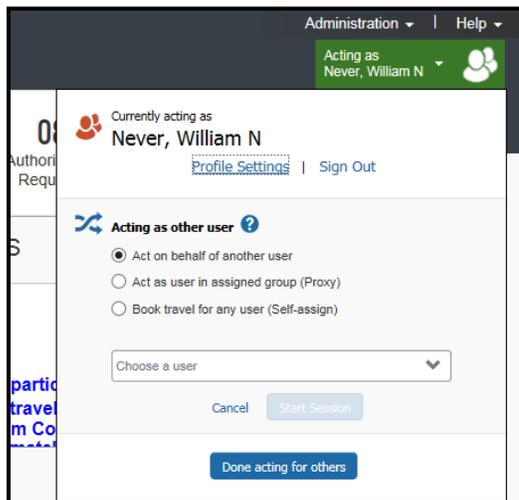
**NOTE:** Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.

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**.

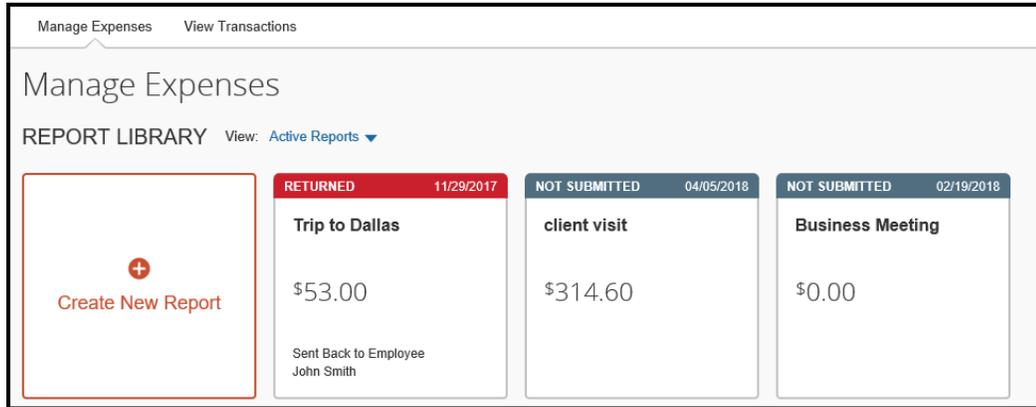
**NOTE:** Notice that the **Profile** menu now appears.



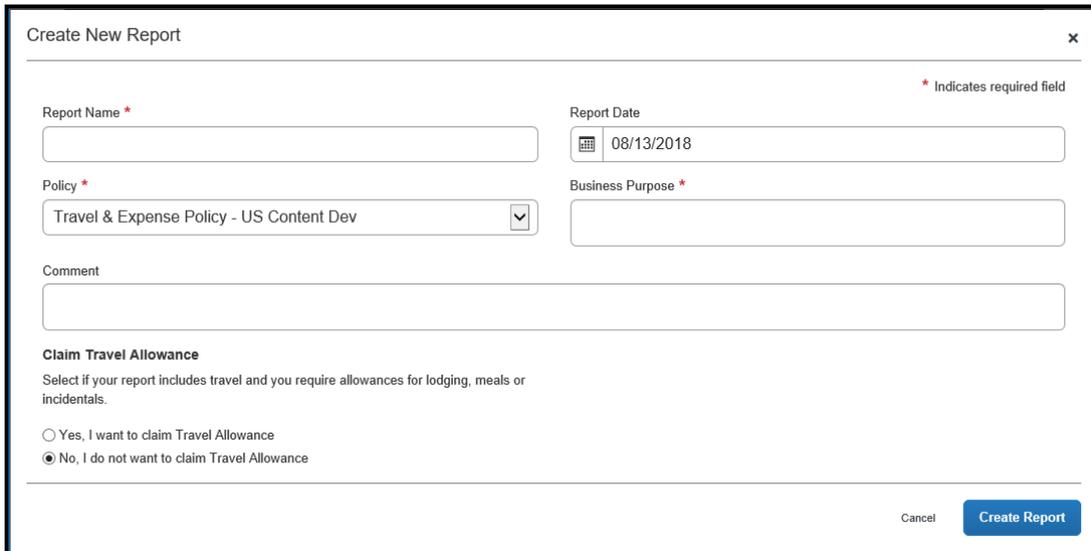
## Creating a New Expense Report

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.



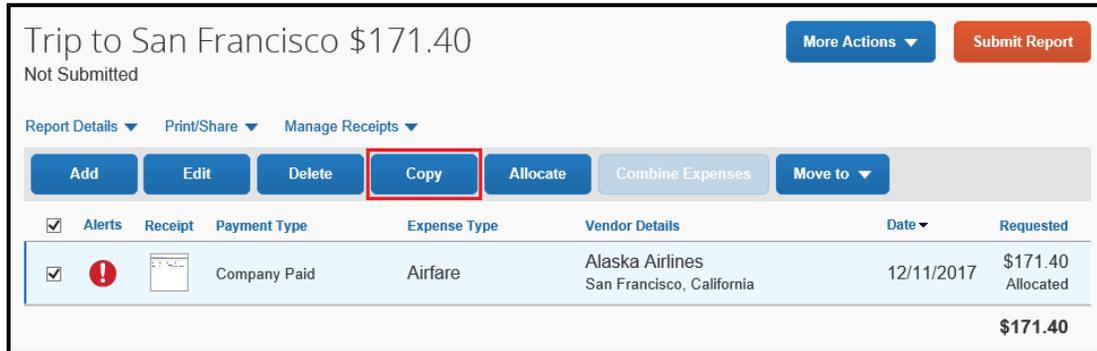
3. Click **Create Report**.  
Available cash advances are displayed in an information prompt (click **View** to assign advances).
4. At this point, you will likely either:
  - Add an out-of-pocket expense to your expense report
  - Add company card transactions to your expense report

## 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 an expense report titled "Trip to San Francisco \$171.40" with a status of "Not Submitted". It features a "More Actions" dropdown and a "Submit Report" button. Below the title are options 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". A table below lists expense items with columns for Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains one entry for "Airfare" on "12/11/2017" for "\$171.40 Allocated".

<input checked="" type="checkbox"/>	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
							<b>\$171.40</b>

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.

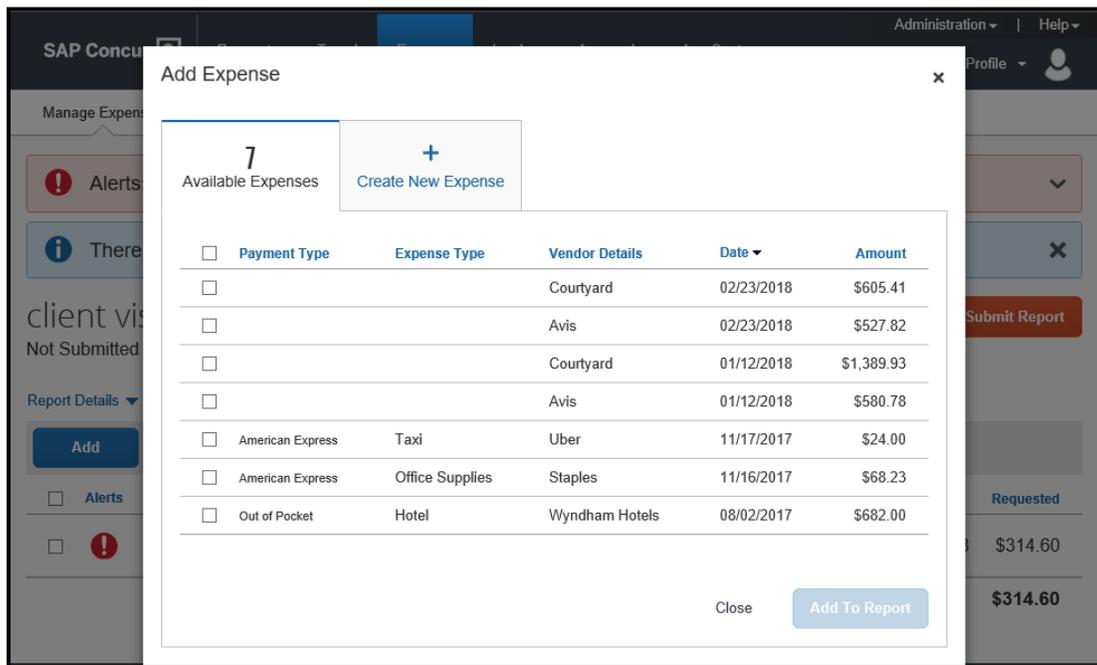
You can add card transactions to an expense report in the following ways:

- 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.



<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>			Courtyard	02/23/2018	\$605.41
<input type="checkbox"/>			Avis	02/23/2018	\$527.82
<input type="checkbox"/>			Courtyard	01/12/2018	\$1,389.93
<input type="checkbox"/>			Avis	01/12/2018	\$580.78
<input type="checkbox"/>	American Express	Taxi	Uber	11/17/2017	\$24.00
<input type="checkbox"/>	American Express	Office Supplies	Staples	11/16/2017	\$68.23
<input type="checkbox"/>	Out of Pocket	Hotel	Wyndham Hotels	08/02/2017	\$682.00

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 ▾

<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.

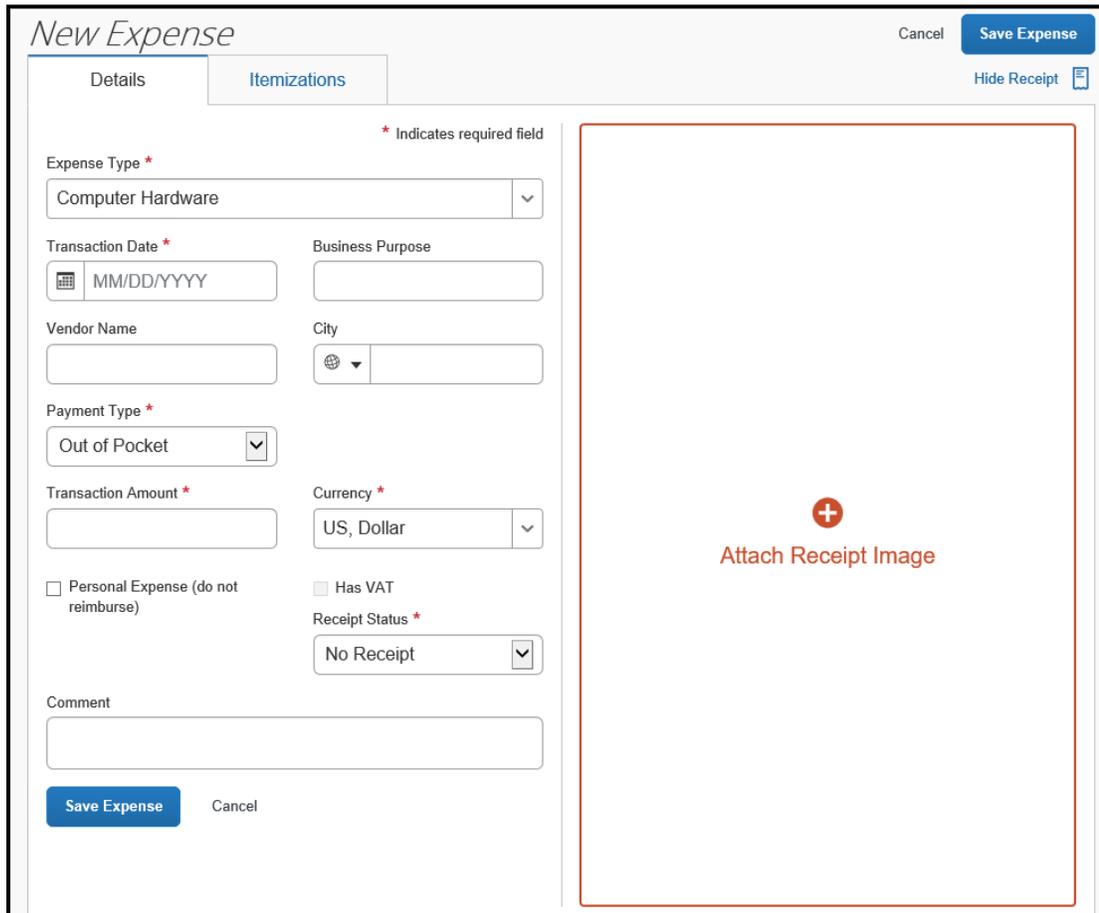
The page refreshes, displaying the required and optional fields for the selected expense type.

**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

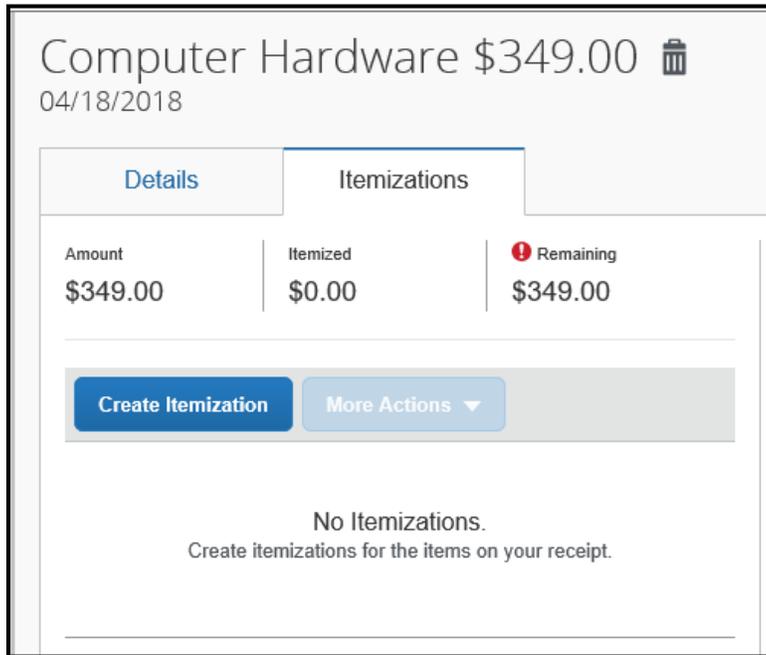


## Itemizing Expenses

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.



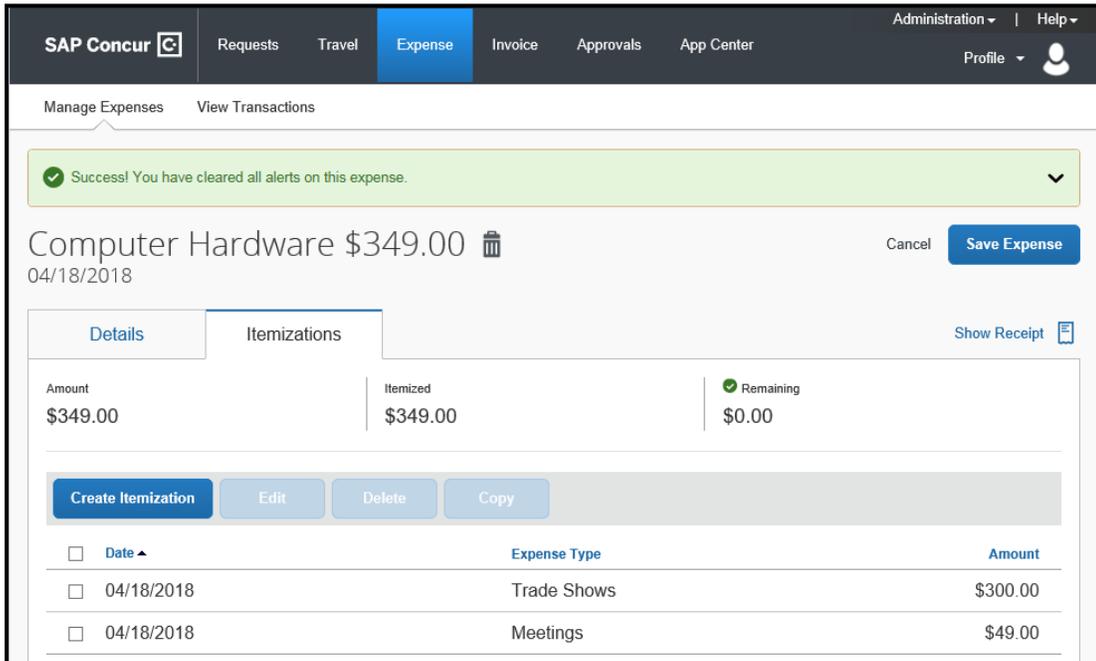
Computer Hardware \$349.00 		
04/18/2018		
Details	Itemizations	
Amount	Itemized	 Remaining
\$349.00	\$0.00	\$349.00

[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, there is a navigation bar with 'Expense' selected. Below the navigation bar, there are tabs for 'Manage Expenses' and 'View Transactions'. A green success alert at the top reads: 'Success! You have cleared all alerts on this expense.' Below the alert, the main header shows 'Computer Hardware \$349.00' with a trash icon and a date of '04/18/2018'. There are 'Cancel' and 'Save Expense' buttons. The 'Itemizations' tab is active, showing a summary table:

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

Below the summary table are buttons for 'Create Itemization', 'Edit', 'Delete', and 'Copy'. A table below these buttons lists the itemizations:

<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

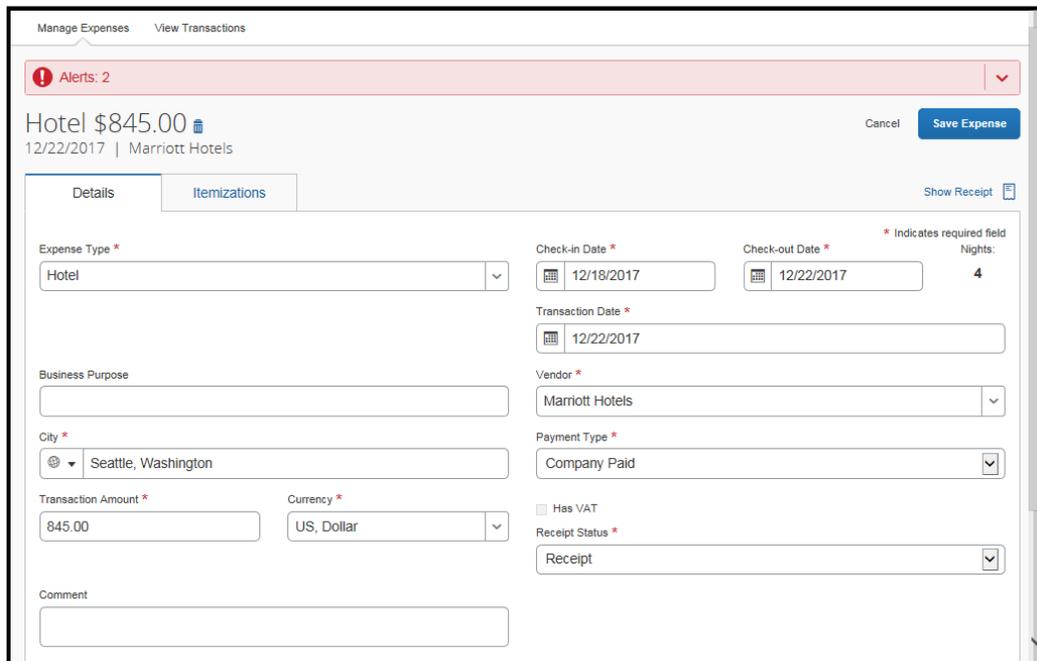
A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. You must itemize these expenses so that they can be reimbursed correctly. Lodging Itemization allows you to quickly itemize recurring room rates and taxes. You 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.

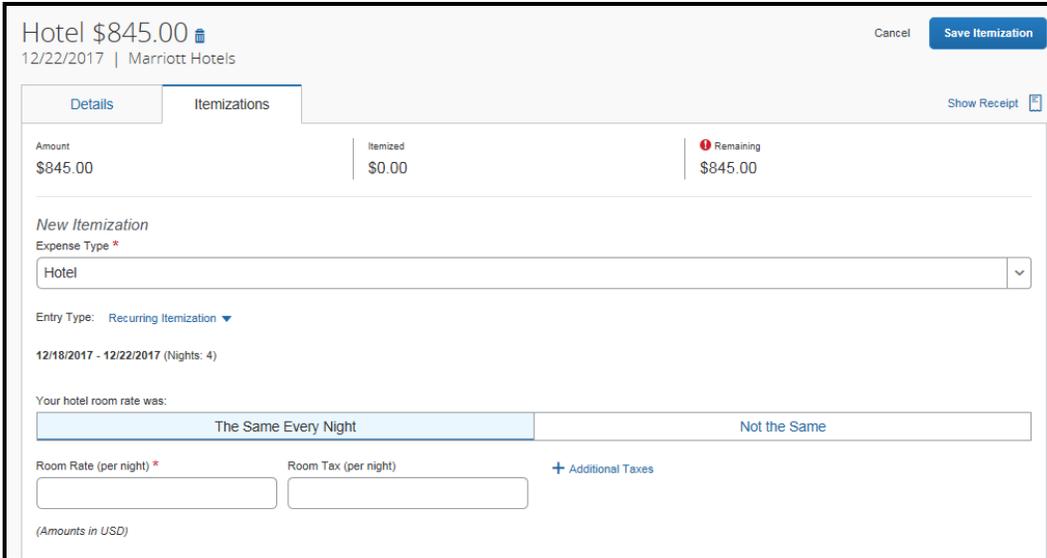
2. Complete the fields as directed by your company.



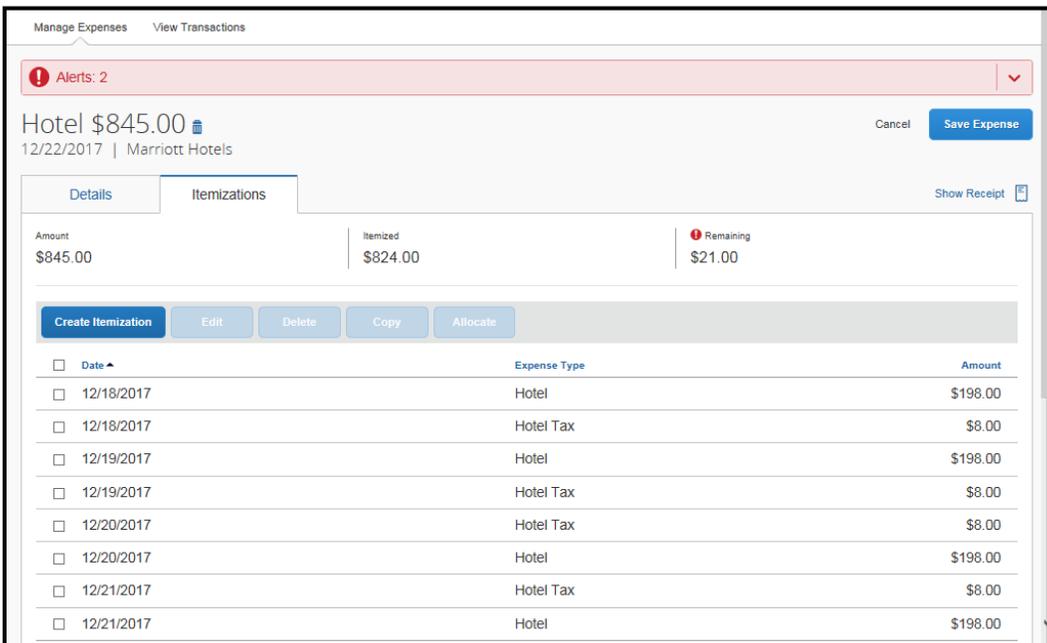
The screenshot displays the 'Manage Expenses' interface with the 'Details' tab selected. The header shows 'Hotel \$845.00' and '12/22/2017 | Marriott Hotels'. A red alert bar at the top indicates 'Alerts: 2'. The 'Details' tab contains the following fields:

- Expense Type \***: Hotel
- Check-in Date \***: 12/18/2017
- Check-out Date \***: 12/22/2017
- Nights**: 4
- Transaction Date \***: 12/22/2017
- Business Purpose**: (empty)
- Vendor \***: Marriott Hotels
- City \***: Seattle, Washington
- Payment Type \***: Company Paid
- Transaction Amount \***: 845.00
- Currency \***: US, Dollar
- Has VAT**:
- Receipt Status \***: Receipt
- Comment**: (empty)

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**.



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.



Date	Expense Type	Amount
12/18/2017	Hotel	\$198.00
12/18/2017	Hotel Tax	\$8.00
12/19/2017	Hotel	\$198.00
12/19/2017	Hotel Tax	\$8.00
12/20/2017	Hotel Tax	\$8.00
12/20/2017	Hotel	\$198.00
12/21/2017	Hotel Tax	\$8.00
12/21/2017	Hotel	\$198.00

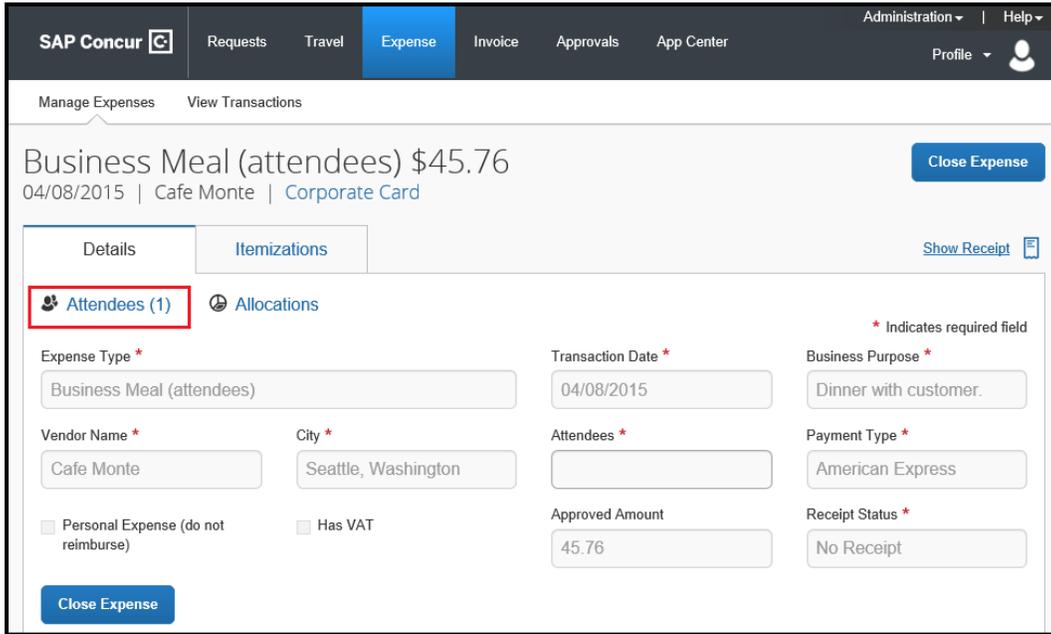
9. Click **Save Expense**.

## 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

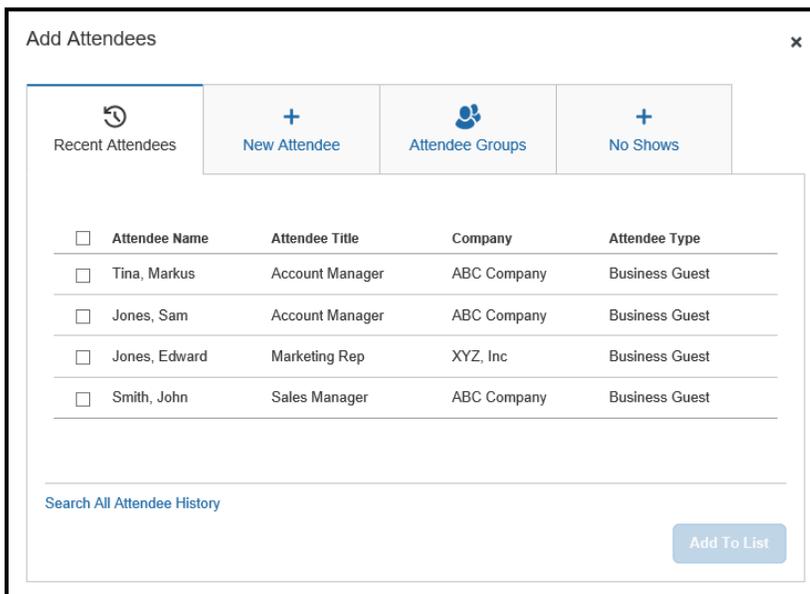
1. From the expense type screen, click **Attendees**.



The screenshot shows the SAP Concur Expense interface. The main header includes 'SAP Concur', navigation tabs for 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center', and user options for 'Administration', 'Help', and 'Profile'. The page title is 'Business Meal (attendees) \$45.76' with a 'Close Expense' button. Below the title, there are tabs for 'Details' and 'Itemizations', with 'Attendees (1)' highlighted in a red box. The form contains several fields: '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' (checkbox), 'Has VAT' (checkbox), 'Approved Amount' (45.76), and 'Receipt Status' (No Receipt). A 'Close Expense' button is at the bottom left.

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

The **Add Attendees** window appears.



The 'Add Attendees' window is shown with a close button (x) in the top right. It features a 'Recent Attendees' section with a refresh icon and four buttons: 'New Attendee', 'Attendee Groups', and 'No Shows'. Below is a table of attendees with checkboxes for selection:

<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

At the bottom, there is a link for 'Search All Attendee History' and an 'Add To List' button.

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**.

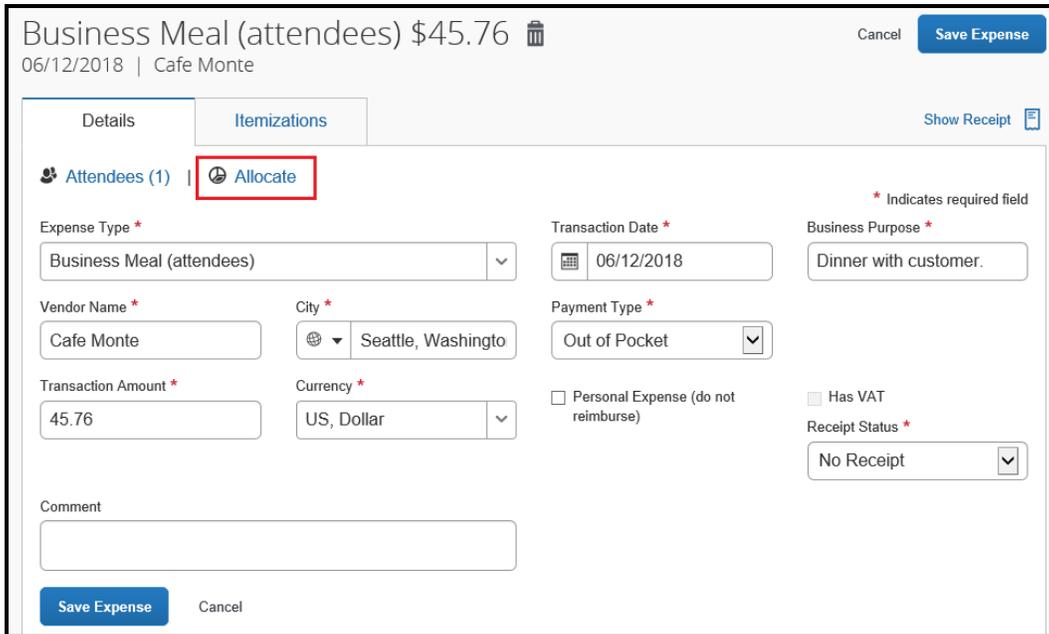
## Allocating Expenses

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 \*

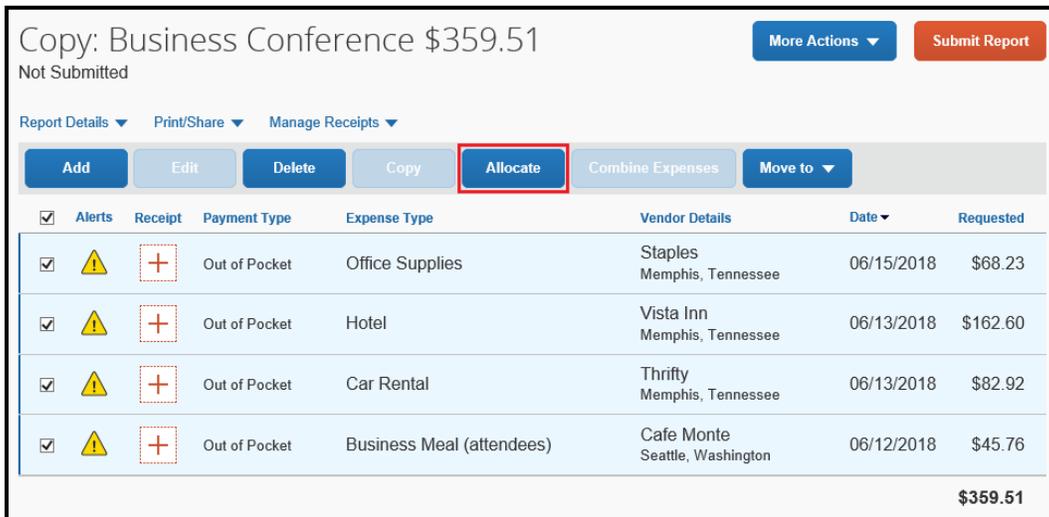
Transaction Amount \*  Currency \*   Personal Expense (do not reimburse)  Has VAT

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](#)

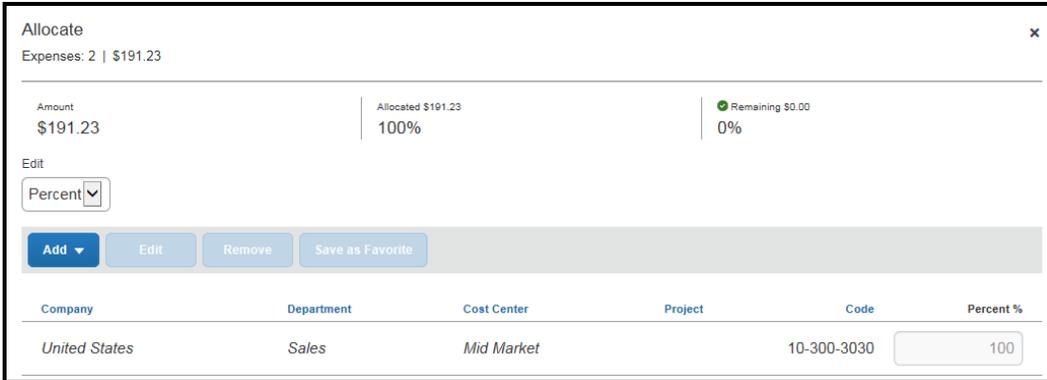
Not Submitted

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

Buttons: Add, Edit, Remove, Save as Favorite

Company	Department	Cost Center	Project	Code	Percent %
United States	Sales	Mid Market		10-300-3030	100

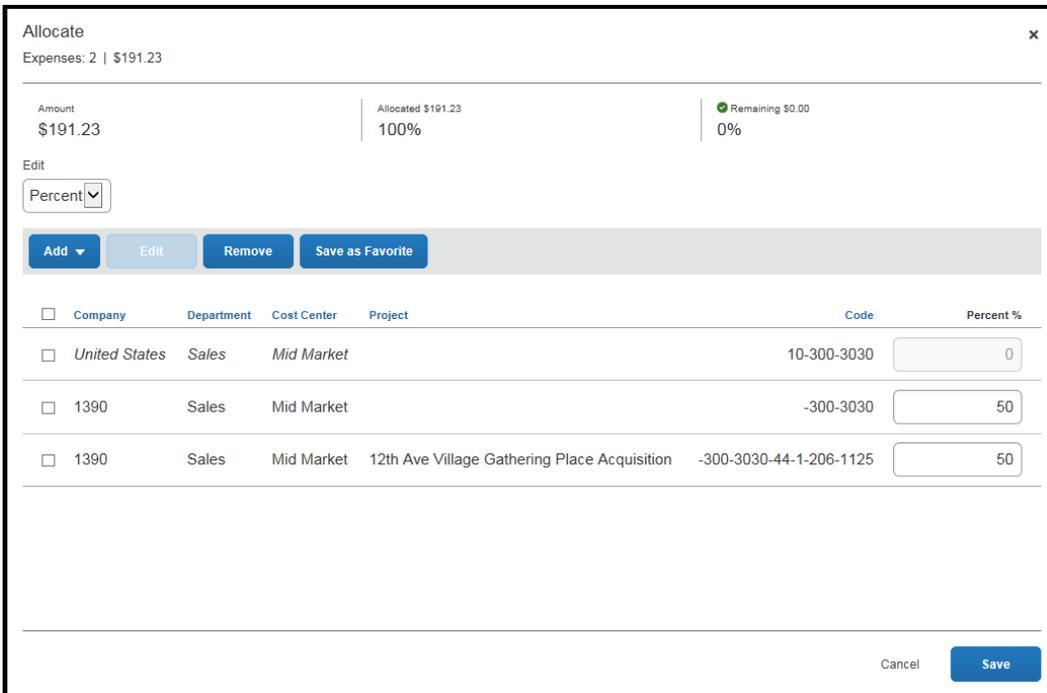
- From the **Edit** dropdown list, select **Percent** or **Amount**.
- Click **Add**.

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.

- Add as many allocations as necessary, from the **New Allocation** or **Favorite Allocations** tabs, and then click **Save**.

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

Buttons: Add, Edit, Remove, Save as Favorite

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

Buttons: Cancel, Save

- 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.

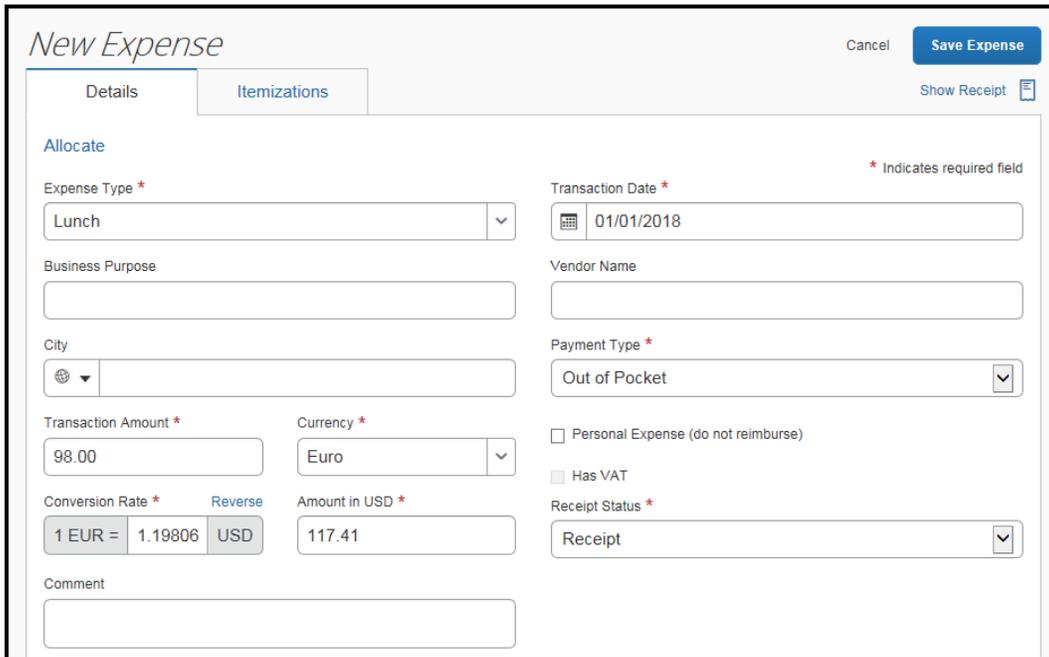
### To account for an expense incurred in another currency

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 displays the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has two tabs: 'Details' (selected) and 'Itemizations'. In the top right corner, there are 'Cancel' and 'Save Expense' buttons, and a 'Show Receipt' link with a document icon. The form is divided into several sections:

- Allocate**: A section header for the main form.
- Expense Type \***: A dropdown menu with 'Lunch' selected.
- Transaction Date \***: A date picker showing '01/01/2018'.
- Business Purpose**: An empty text input field.
- Vendor Name**: An empty text input field.
- City**: A dropdown menu with a globe icon and a downward arrow.
- Payment Type \***: A dropdown menu with 'Out of Pocket' selected.
- Transaction Amount \***: A text input field containing '98.00'.
- Currency \***: A dropdown menu with 'Euro' selected.
- Conversion Rate \***: A text input field showing '1 EUR = 1.19806'. To its right is a 'Reverse' button.
- Amount in USD \***: A text input field showing '117.41'.
- Personal Expense (do not reimburse)**: An unchecked checkbox.
- Has VAT**: An unchecked checkbox.
- Receipt Status \***: A dropdown menu with 'Receipt' selected.
- Comment**: An empty text input field at the bottom.

A legend in the top right corner indicates that an asterisk (\*) denotes a required field.

## 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.

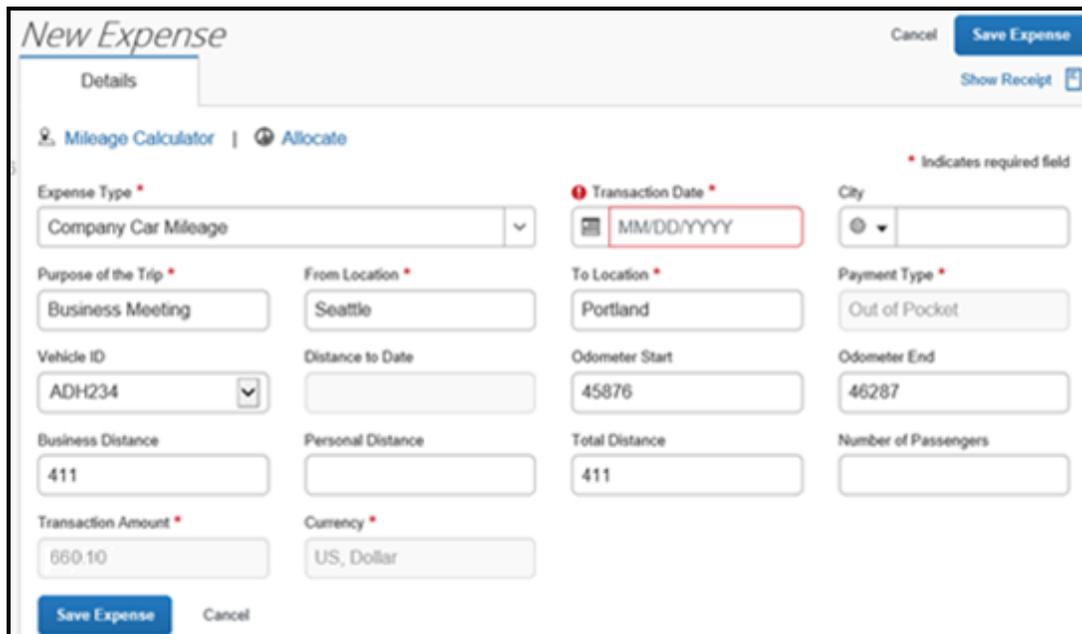
#### NOTES:

- 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, specifically the 'Mileage Calculator' section. 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'. A legend indicates that a red asterisk (\*) denotes a required field. The form contains several input fields:

- Expense Type \***: A dropdown menu with 'Company Car Mileage' selected.
- Transaction Date \***: A date input field with a calendar icon and the placeholder 'MM/DD/YYYY', highlighted with a red border.
- City**: A text input field with a location pin icon.
- Purpose of the Trip \***: A dropdown menu with 'Business Meeting' selected.
- From Location \***: A text input field with 'Seattle' entered.
- To Location \***: A text input field with 'Portland' entered.
- Payment Type \***: A dropdown menu with 'Out of Pocket' selected.
- Vehicle ID**: A dropdown menu with 'ADH234' selected.
- Distance to Date**: An empty text input field.
- Odometer Start**: A text input field with '45876' entered.
- Odometer End**: A text input field with '46287' entered.
- Business Distance**: A text input field with '411' entered.
- Personal Distance**: An empty text input field.
- Total Distance**: A text input field with '411' entered.
- Number of Passengers**: An empty text input field.
- Transaction Amount \***: A text input field with '660.10' entered.
- Currency \***: A dropdown menu with 'US, Dollar' selected.

At the bottom left, there are 'Save Expense' and 'Cancel' buttons.

## 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.

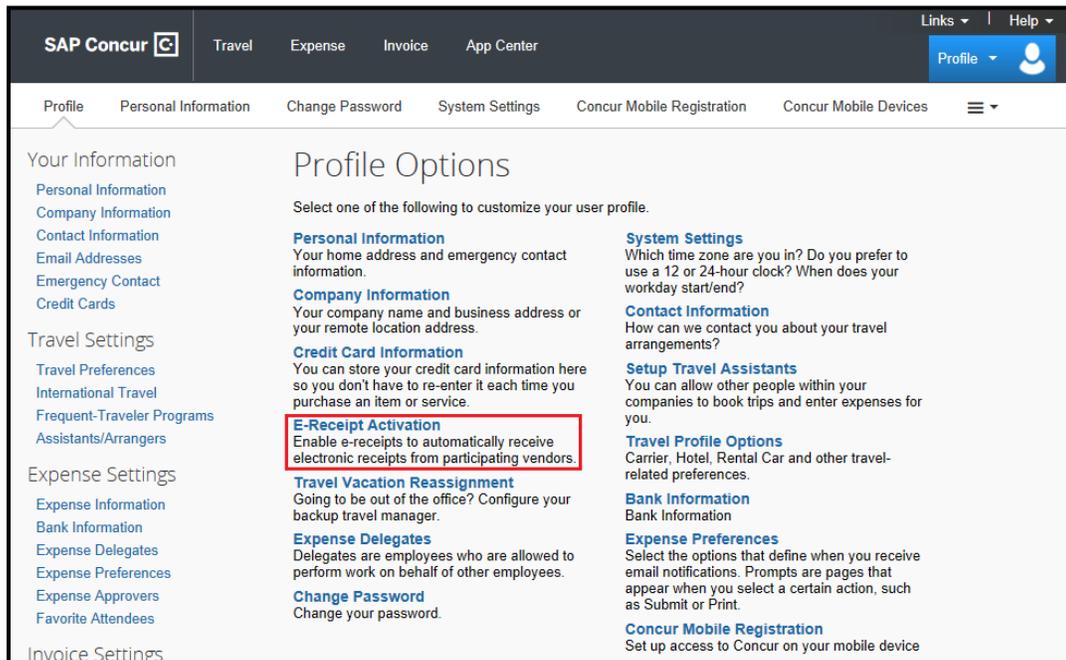
Your company must be enabled to accept e-receipts, and you must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data. Contact your SAP Concur administrator for more information.

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

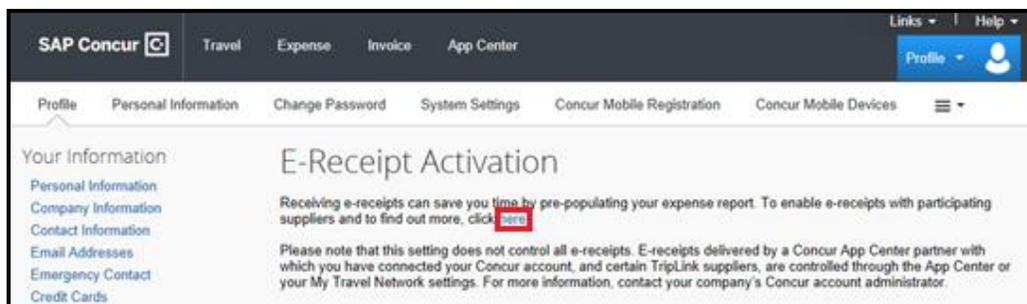
1. Click **Profile**, and then click **Profile Settings**.
2. On the **Profile Options** page, click **E-Receipt Activation**.



The screenshot shows the SAP Concur user interface. At the top, there are navigation tabs for Travel, Expense, Invoice, and App Center. Below that, a user profile dropdown is visible. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Expense Settings', and 'Invoice Settings'. The 'E-Receipt Activation' option is highlighted with a red box. The text for this option reads: 'Enable e-receipts to automatically receive electronic receipts from participating vendors.'

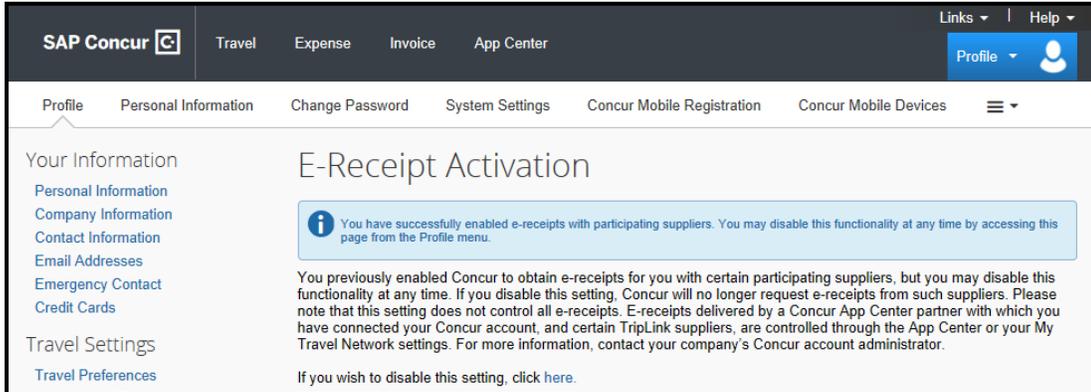
The **E-Receipt Activation and User Agreement** appears.

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



The screenshot shows the SAP Concur user interface. At the top, there are navigation tabs for Travel, Expense, Invoice, and App Center. Below that, a user profile dropdown is visible. The main content area is titled 'E-Receipt Activation' and contains text explaining the benefits of e-receipts and a link to click. The text reads: 'Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more, click **here**.'

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.



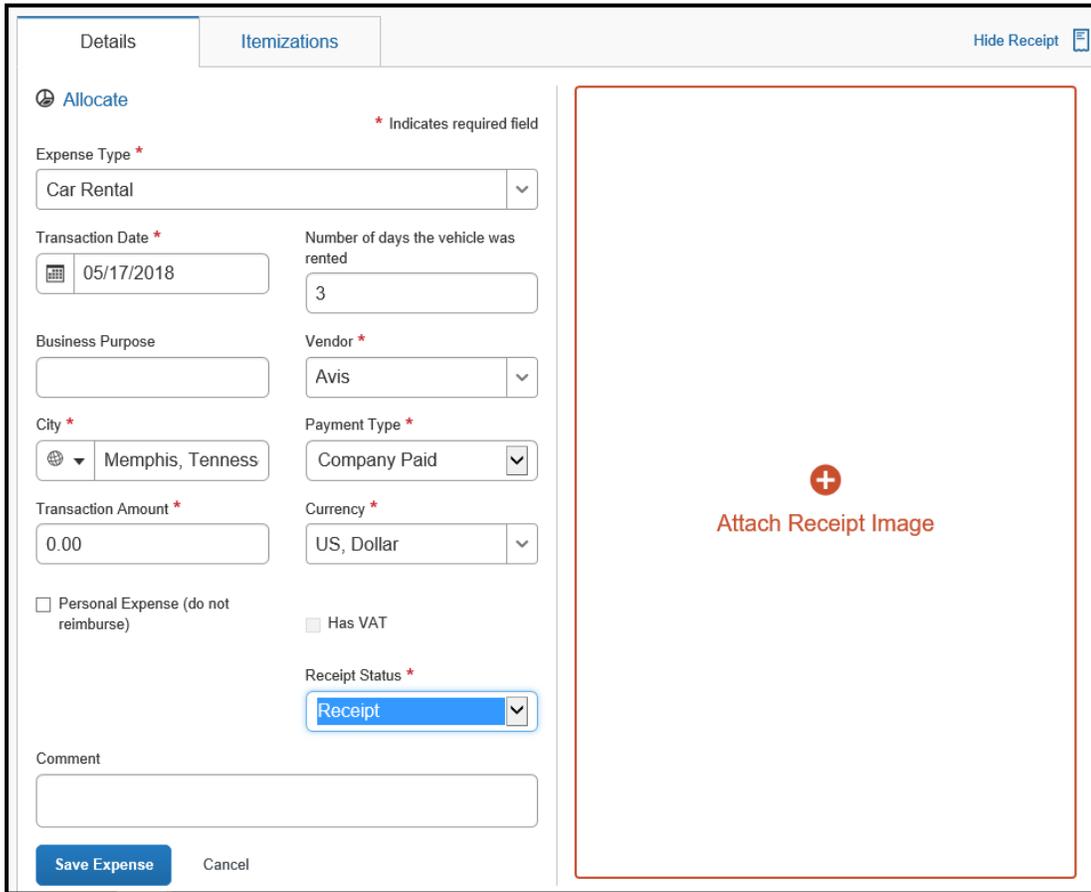
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and menu items: Travel, Expense, Invoice, and App Center. On the right side of the navigation bar, there are links for Links and Help, and a Profile dropdown menu with a user icon. Below the navigation bar, there is a secondary menu with options: Profile, Personal Information, Change Password, System Settings, Concur Mobile Registration, and Concur Mobile Devices. The main content area is titled "E-Receipt Activation". On the left side of the main content area, there is a sidebar menu with categories: "Your Information" (including Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, and Credit Cards) and "Travel Settings" (including Travel Preferences). The main content area features a blue information box with a white 'i' icon, stating: "You have successfully enabled e-receipts with participating suppliers. You may disable this functionality at any time by accessing this page from the Profile menu." Below this box, there is a paragraph of text: "You previously enabled Concur to obtain e-receipts for you with certain participating suppliers, but you may disable this functionality at any time. If you disable this setting, Concur will no longer request e-receipts from such suppliers. Please note that this setting does not control all e-receipts. E-receipts delivered by a Concur App Center partner with which you have connected your Concur account, and certain TripLink suppliers, are controlled through the App Center or your My Travel Network settings. For more information, contact your company's Concur account administrator." At the bottom of the text, there is a link: "If you wish to disable this setting, click [here](#)."

## 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 expense entry form. The form includes the following fields and options:

- Expense Type \***: Car Rental
- Transaction Date \***: 05/17/2018
- Number of days the vehicle was rented**: 3
- Business Purpose**: (empty)
- Vendor \***: Avis
- City \***: Memphis, Tennessee
- Payment Type \***: Company Paid
- Transaction Amount \***: 0.00
- Currency \***: US, Dollar
- Personal Expense (do not reimburse)
- Has VAT
- Receipt Status \***: Receipt
- Comment**: (empty)

At the bottom left, there are buttons for **Save Expense** and **Cancel**. On the right side, a large red-bordered area contains a red plus sign icon and the text **Attach Receipt Image**.

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.

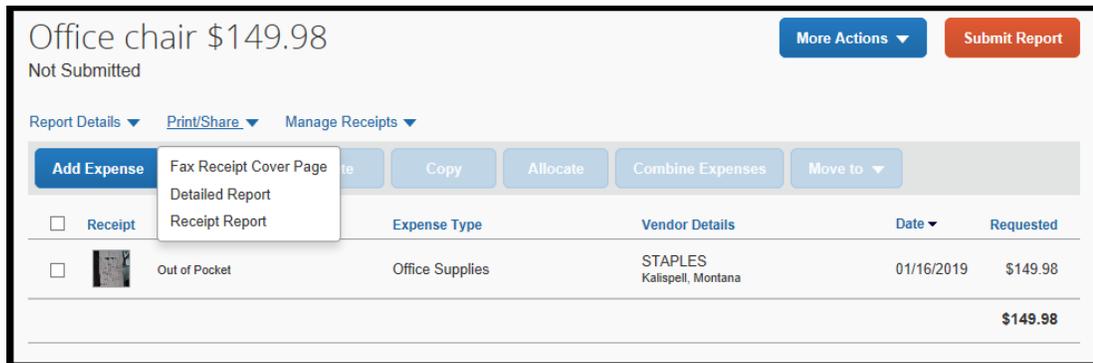
**Note:** You can **Detach** or **Append** the image from the receipt pane.

## 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.



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**.

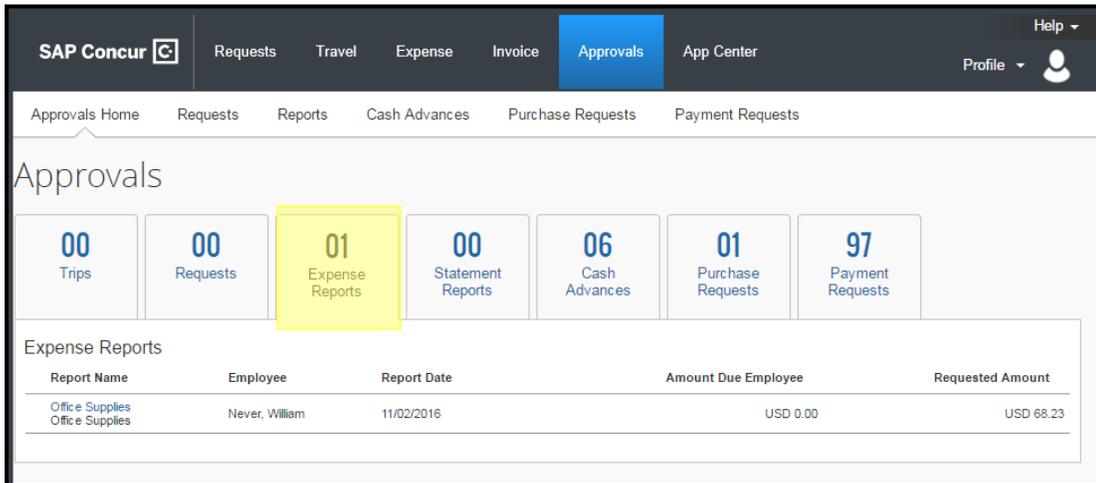
If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

## 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 'Expense Reports' card is highlighted in yellow. Below it, a table lists an expense report for 'Office Supplies' by 'Never, William' on '11/02/2016' with a 'Requested Amount' of 'USD 68.23'.

Report Name	Employee	Report Date	Amount Due Employee	Requested Amount
Office Supplies 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 an expense report titled "Global Tech Sales Training". At the top, there are navigation buttons: "Send Back to Employee", "Approve", and "Approve & Forward". Below the title, there are tabs for "Summary", "Details", "Receipts", and "Print / Email".

An "Exceptions" section is visible, showing two entries:

Expense	Date	Amount	Exception
N/A			La cantidad total es de 10,000. Se ha seleccionado para revision de auditoria.
Hotel	2015-02-20	\$247.94	This itemized entry has sub-entries with one or more exceptions.
Hotel	2015-02-20	\$57.00	This expense entry may be a duplicate of the following expense.

Below the exceptions, there is a table of "Expenses":

Transaction D...	Expense Type	Vendor Name	Business Purp...	City	Payment Type	Amount	Adjusted Cbl...
2015-04-09	Airfare	U.S. AIRWAYS	conference	Seattle, Washi...	American Express	\$510.78	\$510.78
2015-04-03	Hotel	Courtyards		Vienna, Virginia	Company Paid	\$890.00	
2015-02-20	Hotel	Extended Stay	Sales meeting	Memphis, Tenn...	Test Payment T...	\$247.94	
2015-02-17	Business Meal (attendees)	ABC Dining	Conference meal	Memphis, Tenn...	Out of Pocket	\$40.00	\$40.00
2015-02-17	Parking			Memphis, Tenn...	Out of Pocket	\$15.00	\$15.00

On the right side, there is a "Report Summary" section with a "Report Totals" table:

Amount Due Com...	Amount Due Com...	Amount Due Emp...
30.00	\$766.72	\$55.00

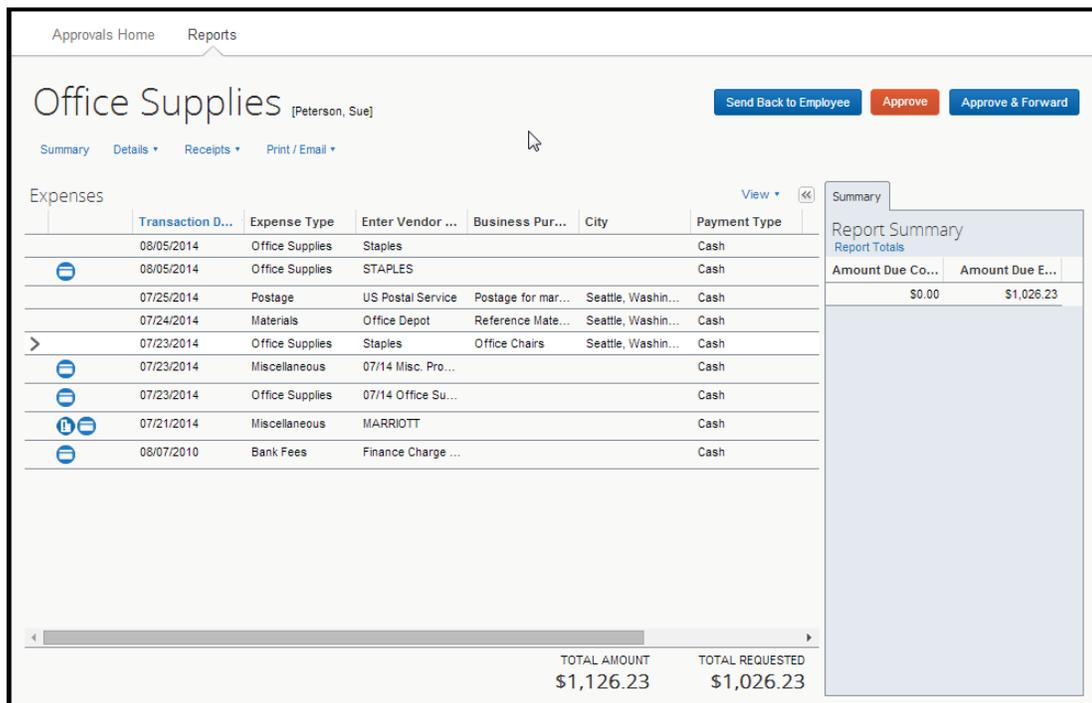
## Sending Back an Expense Report

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.



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

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

TOTAL AMOUNT	TOTAL REQUESTED
\$1,126.23	\$1,026.23

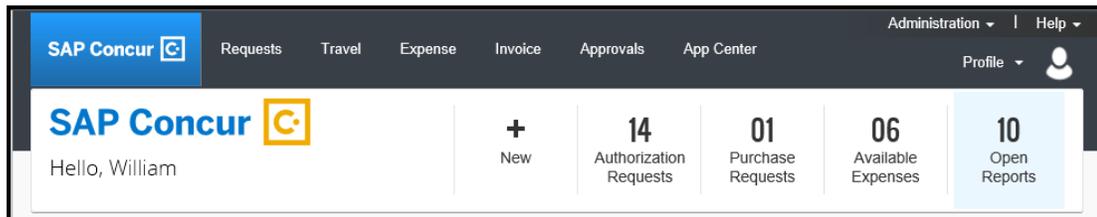
2. Click **Send Back to Employee**.  
The **Send Back Report** window appears.
3. Enter a **Comment** for the employee, explaining why you are returning the report, and then click **OK**.

## Correcting and Resubmitting an Expense Report

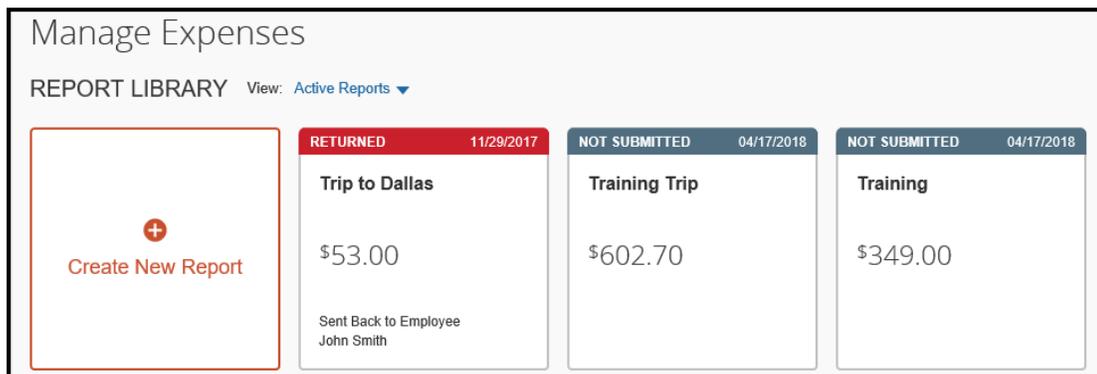
Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

### 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**.