

Concur Expense QuickStart Guide



SAP Concur
Technologies
Version 2.1

September 12, 2022

Document Revision History

Date	Description	Version	Author
08/22/2014	Concur Expense QuickStart Guide	1.0	Concur
04/09/2015	Concur Expense QuickStart Guide UI Updates	1.1	Concur
05/19/2015	Concur Expense QuickStart Guide UI Update	1.2	Concur
10/15/2015	Concur Expense Images Added	1.3	Concur
08/11/2016	Concur Expense QuickStart Guide UI Update	1.4	Concur
08/24/2016	Concur Expense Formatting Corrected	1.5	Concur
12/20/2017	Concur NextGen Expense UI, Font Update	1.6	SAP Concur
07/18/2018	SAP Concur Rebranding	1.7	SAP Concur
08/15/2018	Reorganized Topics	1.8	SAP Concur
01/24/2019	NextGen Expense UI Updates	1.9	SAP Concur
01/4/2020	Updated the Sign In section	2.0	SAP Concur
09/13/2022	Formatting Updates	2.1	SAP Concur

Proprietary Statement

These documents contain proprietary information and data that is the exclusive property of SAP Concur Technologies, Inc., Bellevue, Washington, and its affiliated companies (collectively, "SAP Concur"). If you are an active SAP Concur client, you do not need written consent to modify this document for your internal business needs. If you are *not* an active SAP Concur client, no part of this document can be used, reproduced, transmitted, stored in a retrievable system, translated into any language, or otherwise used in any form or by any means, electronic or mechanical, for any purpose, without the prior written consent of SAP Concur Technologies, Inc.

Information contained in these documents applies to the following products in effect at the time of this document's publication, including but not limited to:

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

The above products and the information contained in these documents are subject to change without notice. Accordingly, SAP Concur disclaims any warranties, express or implied, with respect to the information contained in these documents, and assumes no liability for damages incurred directly or indirectly from any error, omission, or discrepancy between the above products and the information contained in these documents.

© 2004 – 2022 SAP Concur. All rights reserved.

SAP Concur® is a trademark of SAP Concur Technologies, Inc. All other company and product names are the property of their respective owners.

Published by SAP Concur Technologies, Inc.
601 108th Avenue, NE, Suite 1000
Bellevue, WA 98004

Table of Contents

Document Revision History	2
Proprietary Statement.....	3
Table of Contents.....	4
Welcome to SAP Concur	5
Signing in to SAP Concur	5
Exploring the SAP Concur Home Page	6
Expense only	6
Expense and Travel	7
Updating Your Expense Profile	8
Delegates	8
Acting as a Delegate.....	9
Creating a New Expense Report.....	10
Copying an Expense	11
Adding Card Transactions to an Expense Report.....	12
From the open expense report.....	12
From the Available Expenses section.....	12
Adding an Out-of-Pocket Expense to an Expense Report.....	14
Itemizing Expenses.....	15
Itemizing Nightly Lodging Expenses.....	17
Adding Attendees to a Business Expense	19
Allocating Expenses	21
Converting Foreign Currency Transactions.....	23
Entering Personal Car Mileage.....	24
Activating E-Receipts.....	25
Uploading Receipts using Available Receipts.....	27
Printing and Submitting an Expense Report.....	28
Reviewing and Approving an Expense Report.....	29
Adding an Additional Review Step	30
Sending Back an Expense Report	31
Correcting and Resubmitting an Expense Report	32

Welcome to SAP Concur

SAP Concur integrates your expense reporting with a complete travel booking solution. SAP Expense provides all the tools you need to book travel and then create and submit your expense reports.

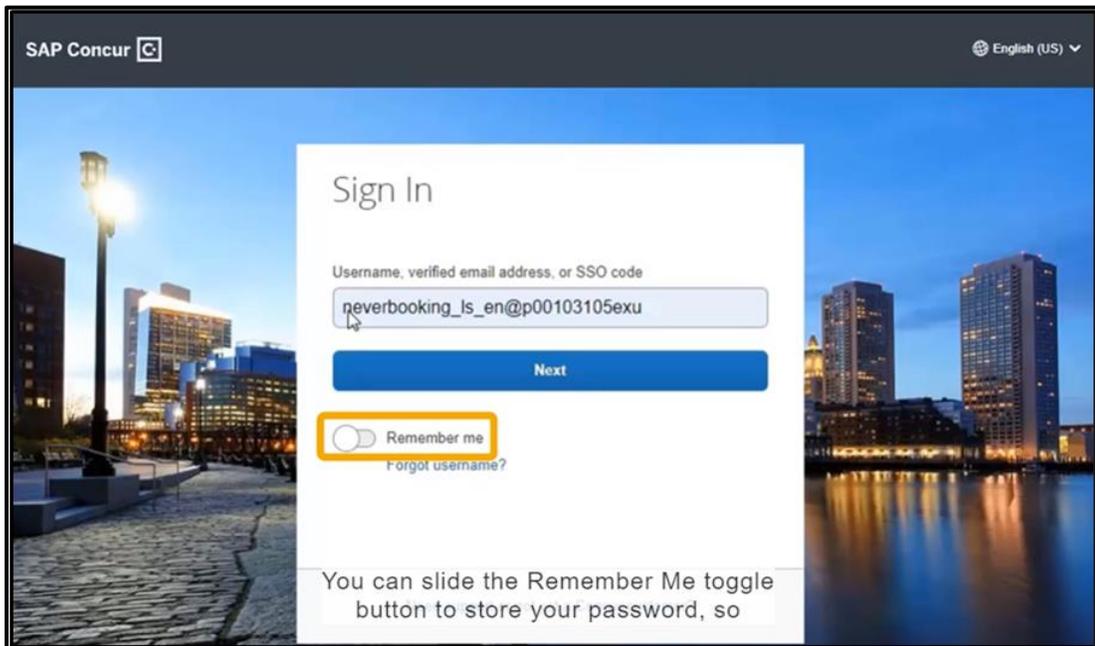
Signing in to SAP Concur

To sign in to SAP Concur

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

If you have forgotten your username, select the **Forgot username?** link.

You can slide the **Remember me** toggle button 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, enter the temporary password that was provided to you.

If you have forgotten your password, select the **Forgot password?** link.

3. Select **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.

Exploring the SAP Concur Home Page

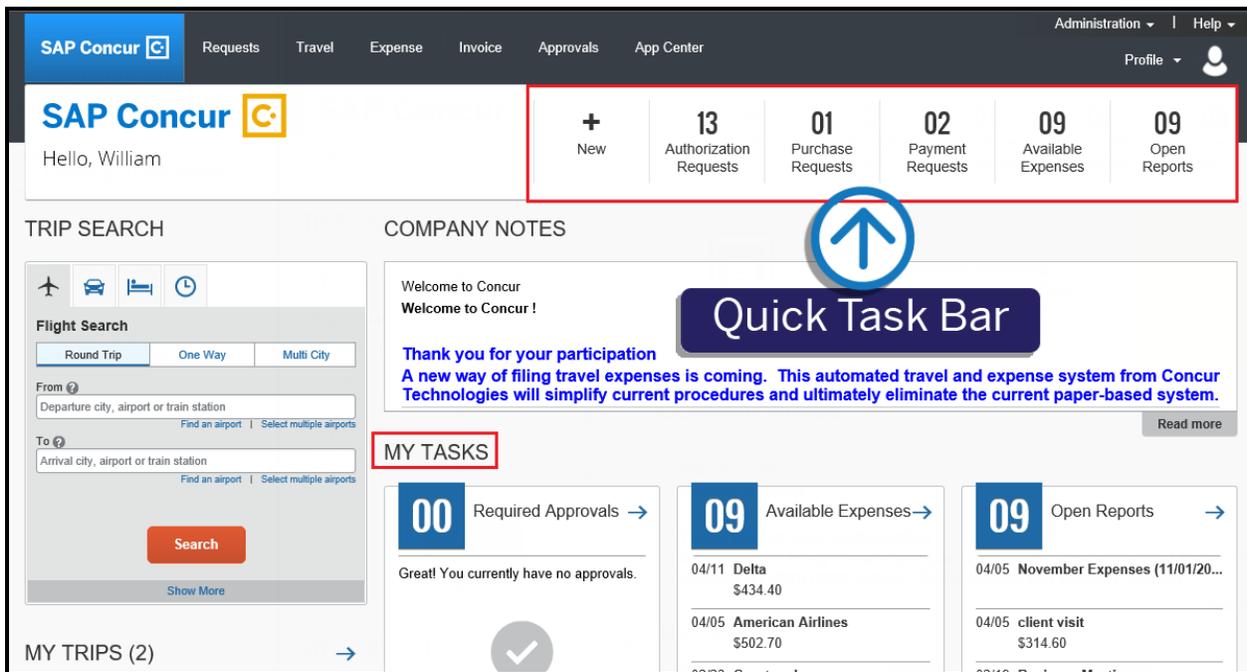
The SAP Concur home page contains the following sections.

Note: To return to the SAP Concur home page from any other page, select 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"> Start a new report, request, cash advance, payment request, etc. Open reports and requests Manage available expenses
My Tasks	This section shows your available expenses, open reports, and approvals requiring attention.

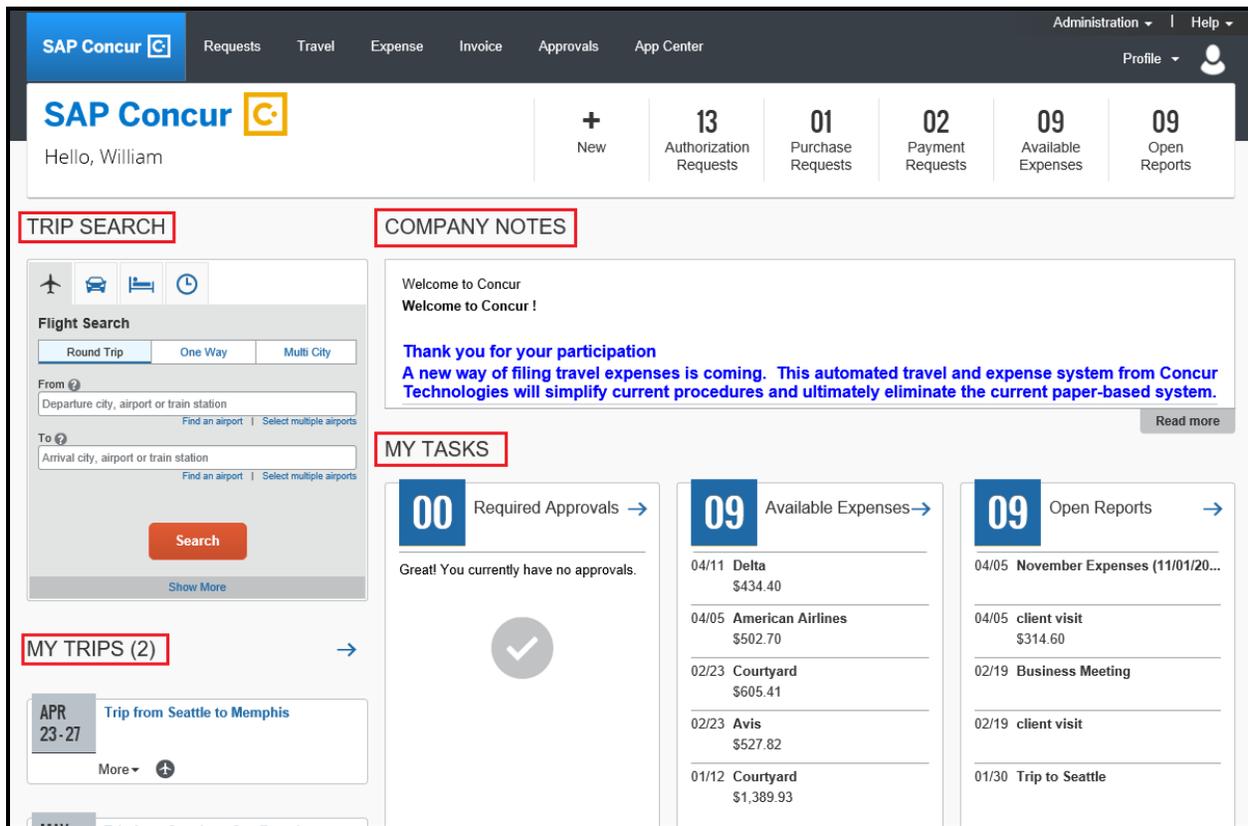


The screenshot displays the SAP Concur home page interface. At the top, there is a navigation menu with options like 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. Below the navigation, a summary bar provides key metrics: 13 Authorization Requests, 01 Purchase Requests, 02 Payment Requests, 09 Available Expenses, and 09 Open Reports. A prominent 'Quick Task Bar' is highlighted with a red box and an upward-pointing arrow. Below this, the 'MY TASKS' section is also highlighted with a red box, showing three task categories: '00 Required Approvals' (with a message 'Great! You currently have no approvals.'), '09 Available Expenses' (listing expenses for Delta and American Airlines), and '09 Open Reports' (listing reports for November Expenses and a client visit). On the left side, there is a 'TRIP SEARCH' widget with fields for 'From' and 'To' and a 'Search' button.

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: Flight: Use to book a flight. You can also book hotel and reserve a car at the same time. Car, Hotel, Limo, or Rail: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (Flight 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 Required Approvals, Available Expenses, and Open Reports.



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.

Expense Delegates

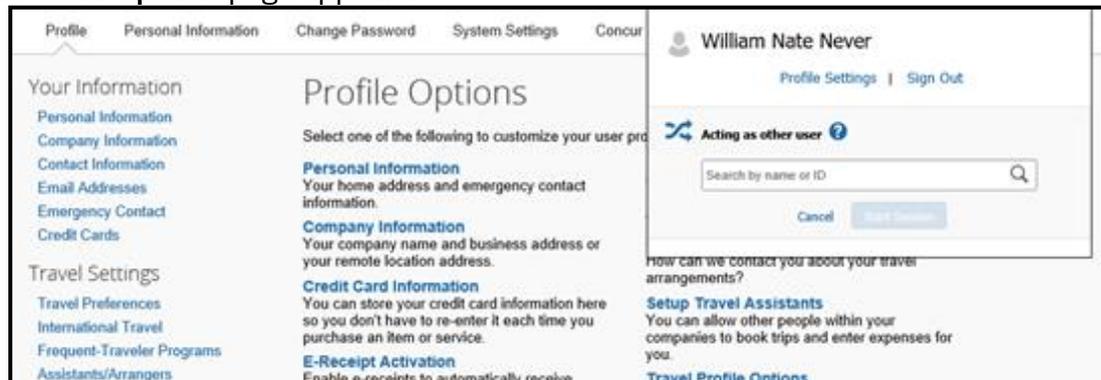
If you are acting as an Expense *delegate* for another employee (*delegator*):

- 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. Select **Profile > Profile Settings**.

The **Profile Options** page appears.



2. Select 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

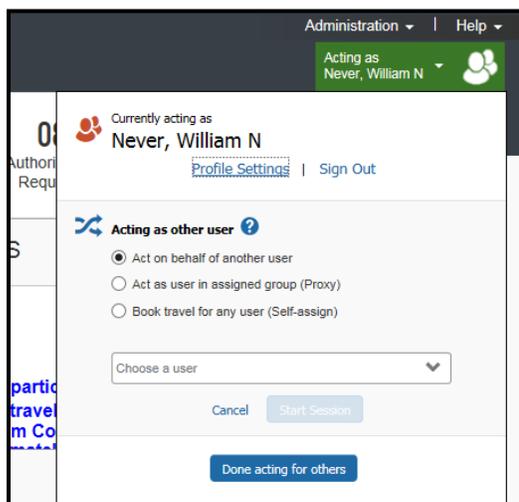
1. Select **Profile > Act on behalf of another user**.
2. Select the appropriate delegator's name.
3. Select **Start Session**.

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 select a different name.

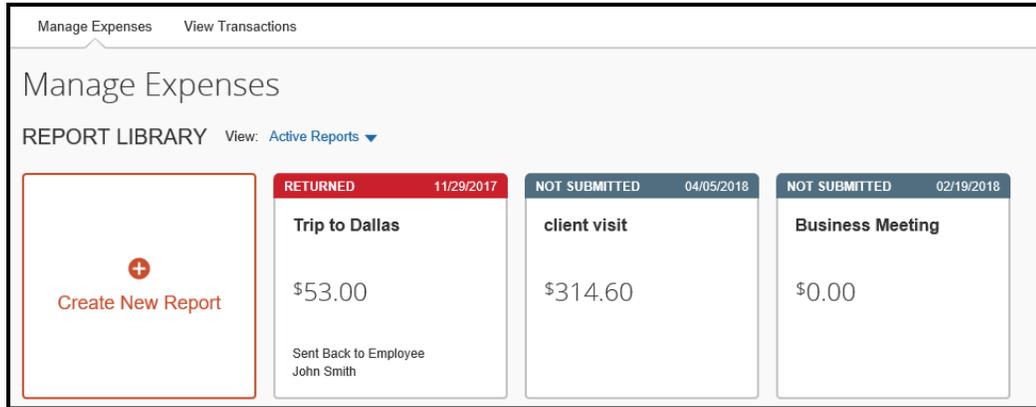
5. To return to your own tasks, select **Acting as**, and then select **Done acting for others**.



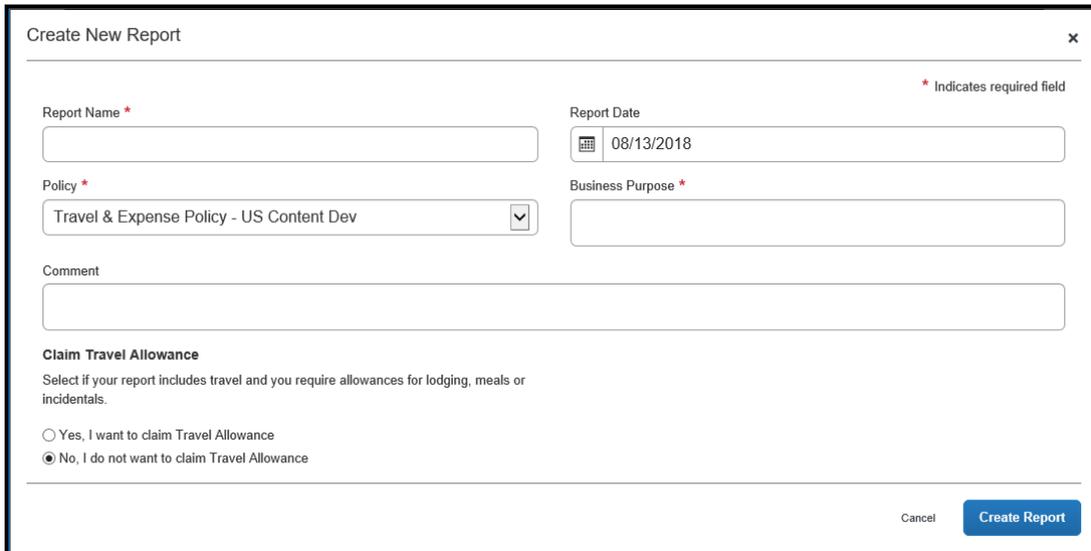
Creating a New Expense Report

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 select **Start a Report**.
 - or -
 - From the **Expense** menu, select **Manage Expenses** (on the **Expense** sub-menu), and then select the **Create New Report** tile.



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



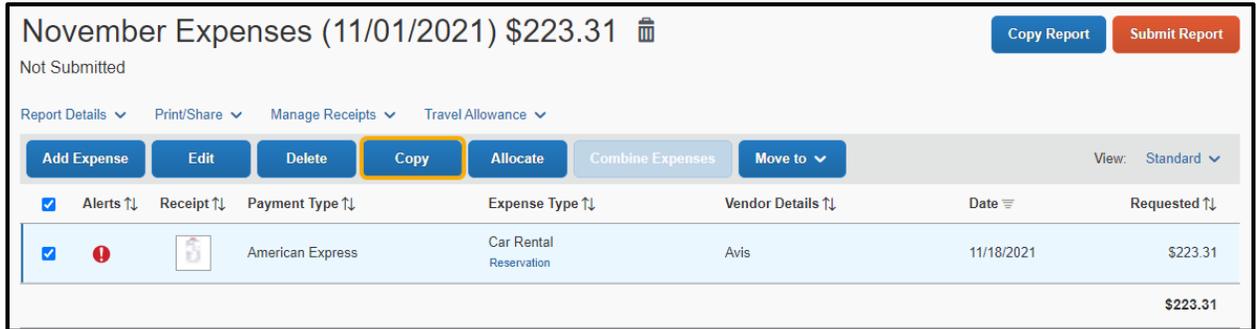
3. Select **Create Report**.
Available cash advances are displayed in an information prompt (select **View** to assign advances).
4. At this point, you will likely either:
 - Add an out-of-pocket expense to your expense report
 - Add company card transactions to your expense report

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. Select **Copy**.



The screenshot shows the SAP Concur interface for an expense report titled "November Expenses (11/01/2021) \$223.31". The report is marked as "Not Submitted". At the top right, there are "Copy Report" and "Submit Report" buttons. Below the title, there are several tabs: "Report Details", "Print/Share", "Manage Receipts", and "Travel Allowance". A row of action buttons is visible: "Add Expense", "Edit", "Delete", "Copy" (highlighted with a yellow box), "Allocate", "Combine Expenses", and "Move to". Below the buttons, there is a table with columns: "Alerts", "Receipt", "Payment Type", "Expense Type", "Vendor Details", "Date", and "Requested". The table contains one row of data for an expense from American Express for Car Rental Reservation at Avis, dated 11/18/2021, with a value of \$223.31. The total amount for the report is \$223.31.

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.

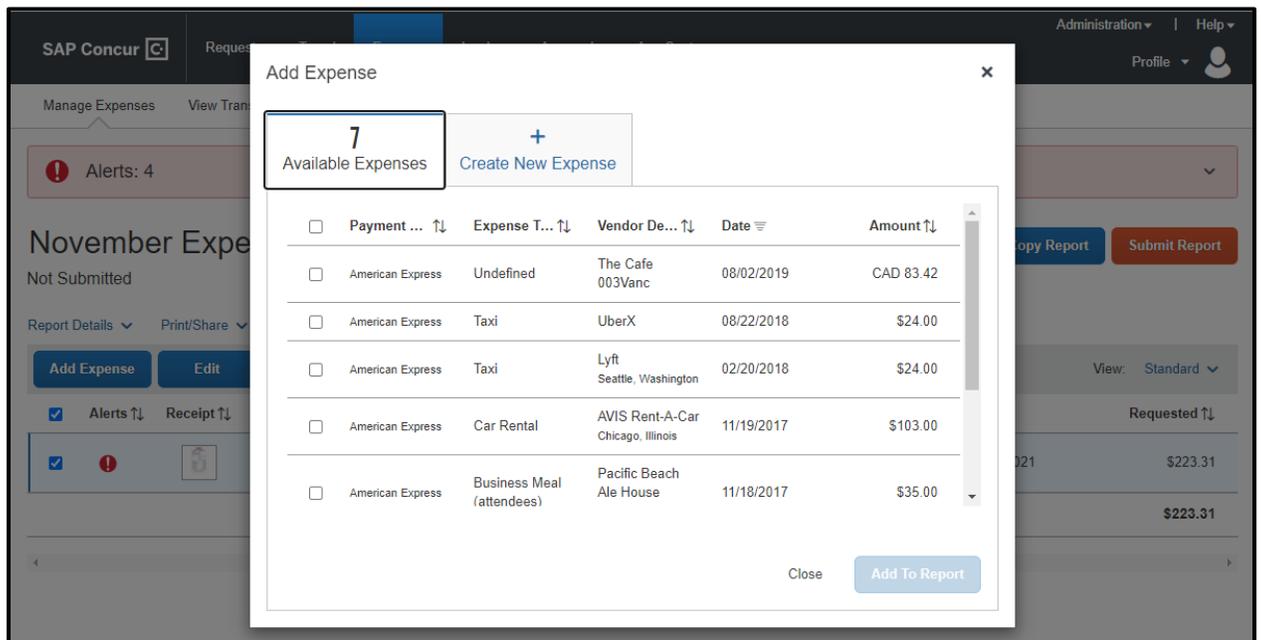
You can add card transactions to an expense report in the following ways:

- 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. Select **Add Expense**.
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. Select **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. Select **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, select **Add**, and then select the **Create New Expense** tab.
2. Search for or select the appropriate expense type from the list.

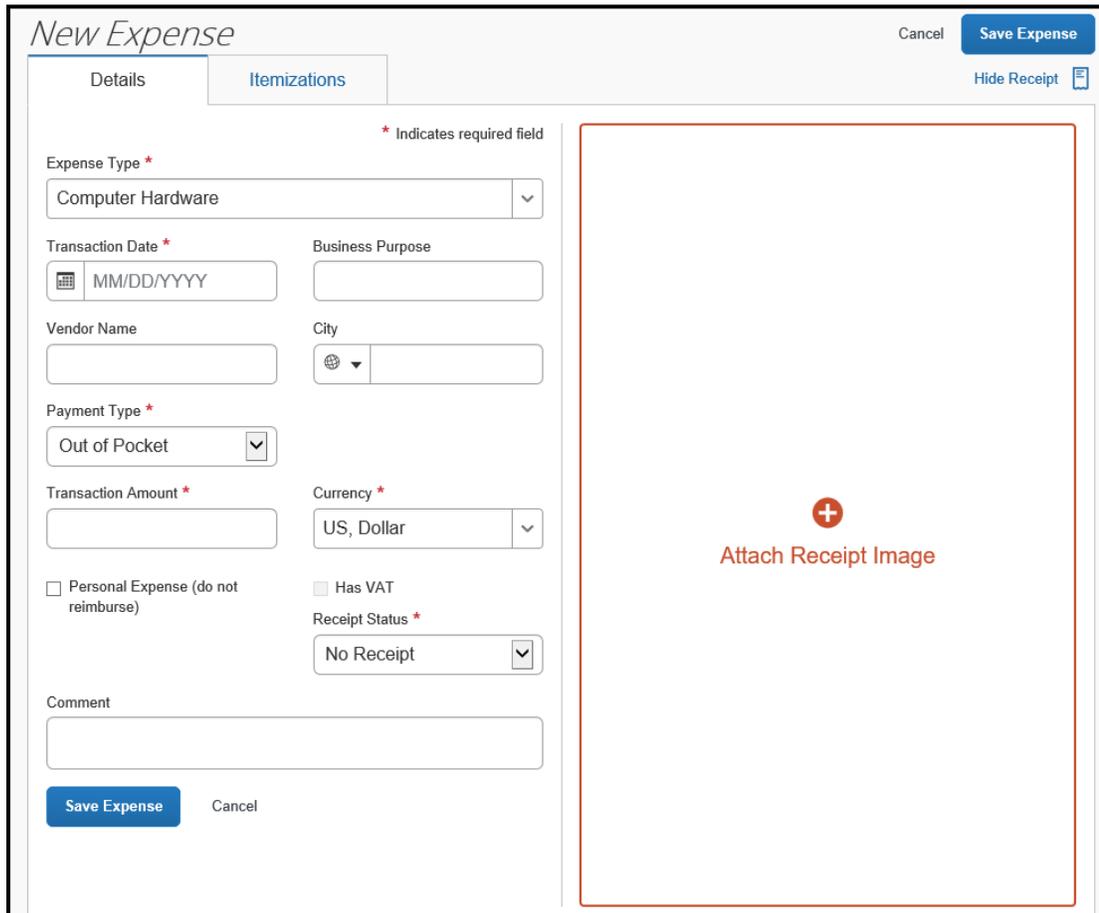
The page refreshes, displaying the required and optional fields for the selected expense type.

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

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

Select 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

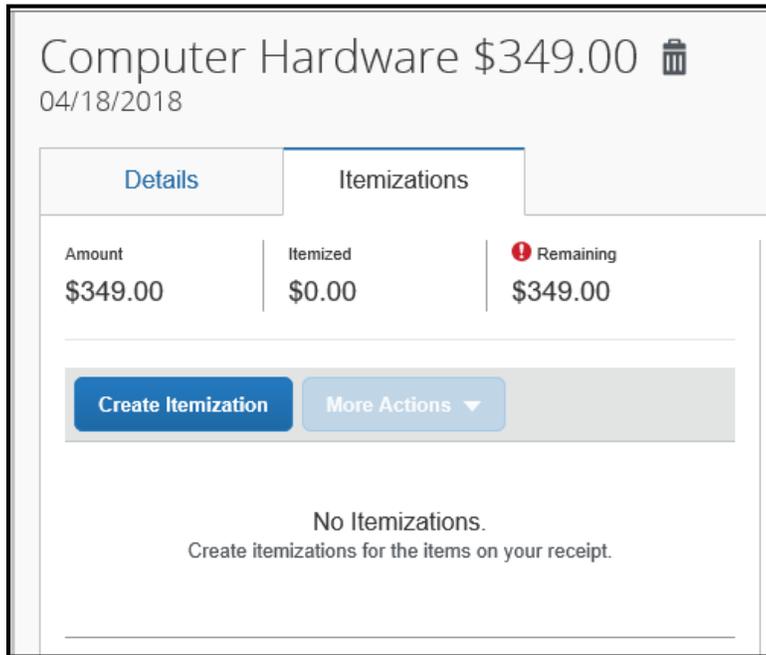


Itemizing Expenses

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 select 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, indicates that you need to itemize this expense.



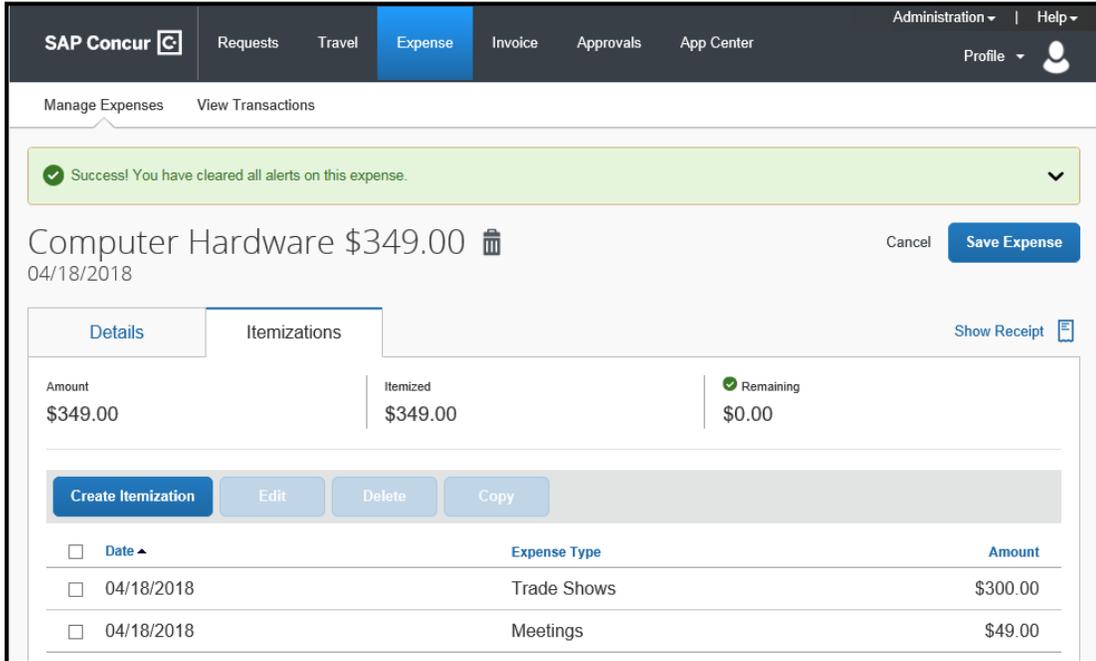
The screenshot shows the SAP Concur interface for an expense titled "Computer Hardware" with a total amount of \$349.00 and a date of 04/18/2018. The "Itemizations" tab is selected, showing a summary table with the following data:

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

Below the table, there is a "Create Itemization" button and a "More Actions" dropdown menu. The interface also displays the message "No Itemizations. Create itemizations for the items on your receipt."

2. On the **Itemizations** tab, select **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. Select **Save Itemization**.
The newly created itemization appears.
6. For each additional itemization, on the **Itemizations** tab, select **Create Itemization**, and then 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 interface for managing an expense. At the top, there is a navigation bar with 'Expense' selected. Below it, a green alert box displays a success message: 'Success! You have cleared all alerts on this expense.' The main content area shows an expense for 'Computer Hardware' with a total amount of \$349.00 and a date of 04/18/2018. A 'Save Expense' button is visible. Below this, there are tabs for 'Details' and 'Itemizations'. The 'Itemizations' tab is active, showing a summary table:

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

Below the summary table, there are buttons for 'Create Itemization', 'Edit', 'Delete', and 'Copy'. A table lists the itemized amounts:

Date	Expense Type	Amount
04/18/2018	Trade Shows	\$300.00
04/18/2018	Meetings	\$49.00

7. Select **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.

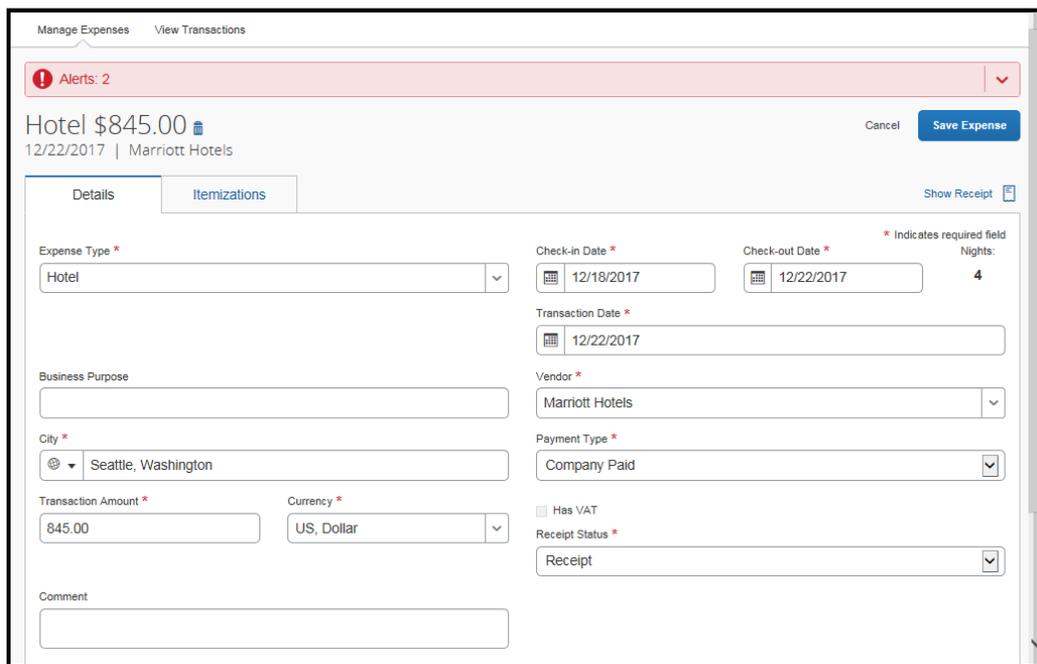
To create a lodging expense

1. With the expense report open, select **Add Expense**, 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.

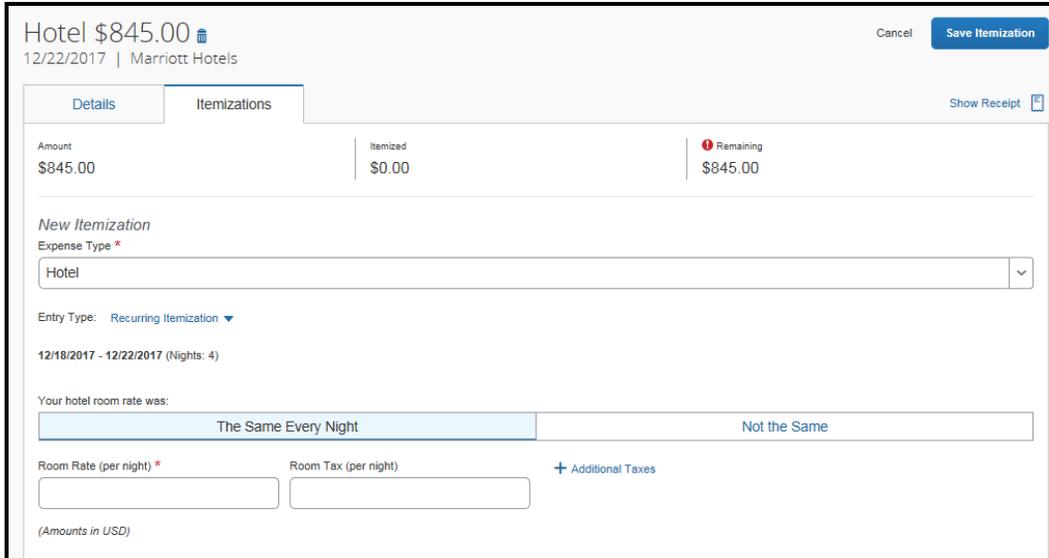
2. Complete the fields as directed by your company.



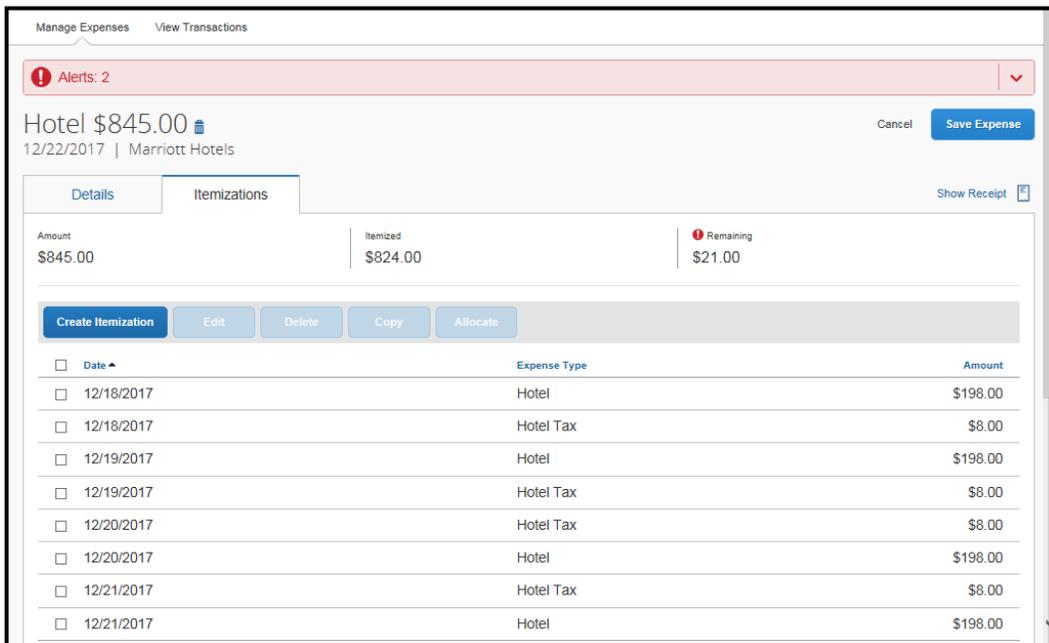
The screenshot shows the 'Manage Expenses' interface in SAP Concur. At the top, there are tabs for 'Manage Expenses' and 'View Transactions'. Below this is an 'Alerts: 2' notification bar. The main header displays 'Hotel \$845.00' with a calendar icon, and the date '12/22/2017' and vendor 'Marriott Hotels'. There are 'Cancel' and 'Save Expense' buttons. The form is divided into two tabs: 'Details' (selected) and 'Itemizations'. The 'Details' tab contains the following fields:

- Expense Type ***: A dropdown menu with 'Hotel' selected.
- Check-in Date ***: A date picker showing '12/18/2017'.
- Check-out Date ***: A date picker showing '12/22/2017'. To its right, a field indicates '* Indicates required field Nights: 4'.
- Transaction Date ***: A date picker showing '12/22/2017'.
- Business Purpose**: An empty text input field.
- Vendor ***: A dropdown menu with 'Marriott Hotels' selected.
- City ***: A dropdown menu with 'Seattle, Washington' selected.
- Payment Type ***: A dropdown menu with 'Company Paid' selected.
- Transaction Amount ***: A text input field containing '845.00'.
- Currency ***: A dropdown menu with 'US, Dollar' selected.
- Has VAT**: An unchecked checkbox.
- Receipt Status ***: A dropdown menu with 'Receipt' selected.
- Comment**: An empty text input field.

3. On the **Itemizations** tab, select **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. Select **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

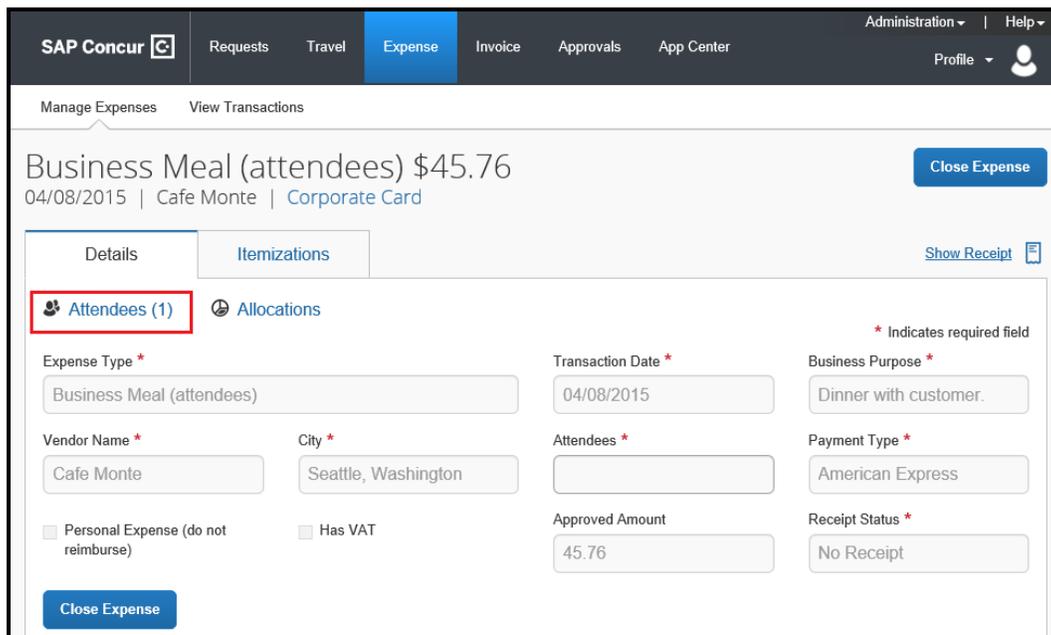
9. Select **Save Expense**.

Adding Attendees to a Business Expense

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

To add attendees to a business expense

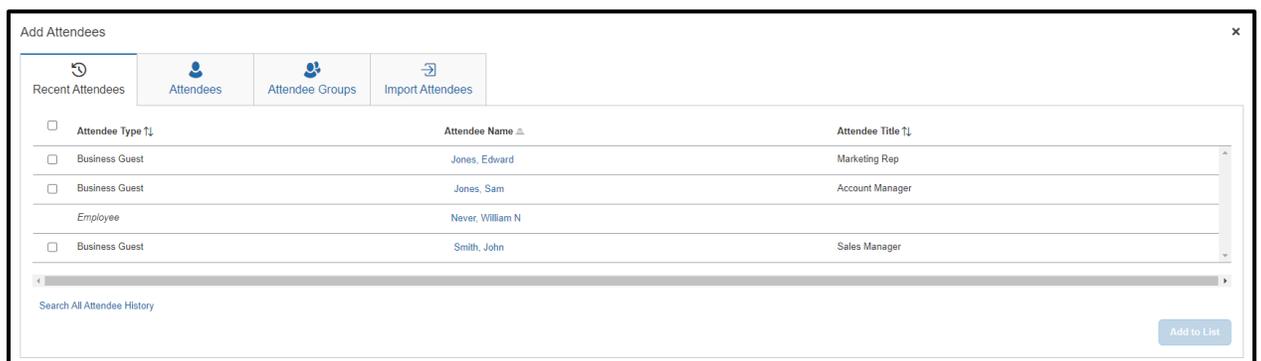
1. From the expense type screen, select **Attendees**.



The screenshot shows the SAP Concur Expense screen. The top navigation bar includes 'Requests', 'Travel', 'Expense' (selected), 'Invoice', 'Approvals', and 'App Center'. The main content area displays 'Business Meal (attendees) \$45.76' with a 'Close Expense' button. Below this, there are tabs for 'Details' and 'Itemizations', with 'Attendees (1)' selected. The 'Attendees' tab shows a form with fields 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.

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

The **Add Attendees** window appears.



The screenshot shows the 'Add Attendees' window. It has a title bar 'Add Attendees' and a close button. Below the title bar are tabs for 'Recent Attendees', 'Attendees' (selected), 'Attendee Groups', and 'Import Attendees'. The main area is a table with columns 'Attendee Type', 'Attendee Name', and 'Attendee Title'. The table contains the following rows:

Attendee Type	Attendee Name	Attendee Title
<input type="checkbox"/> Business Guest	Jones, Edward	Marketing Rep
<input type="checkbox"/> Business Guest	Jones, Sam	Account Manager
<input type="checkbox"/> Employee	Never, William N	
<input type="checkbox"/> Business Guest	Smith, John	Sales Manager

At the bottom of the window, there is a search bar labeled '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, select **Create New Attendee**, complete the required fields, and then select **Create Attendee**.
 - **Attendee Groups** – Select from your **Favorites** or **My Team** (these are configured in your **Profile** settings).
3. Select **Add to List**.

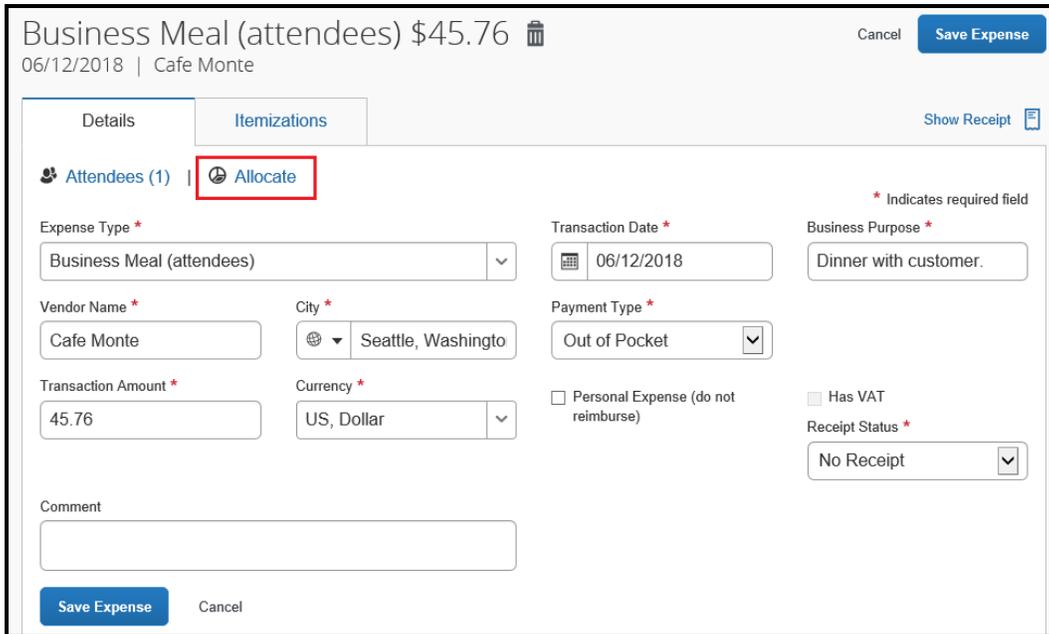
Allocating Expenses

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, select **Allocate**.



Business Meal (attendees) \$45.76  Cancel Save Expense

06/12/2018 | Cafe Monte Show Receipt 

Details **Itemizations**

 Attendees (1) | **Allocate**

* Indicates required field

Expense Type * Transaction Date * Business Purpose *

Vendor Name * City * Payment Type *

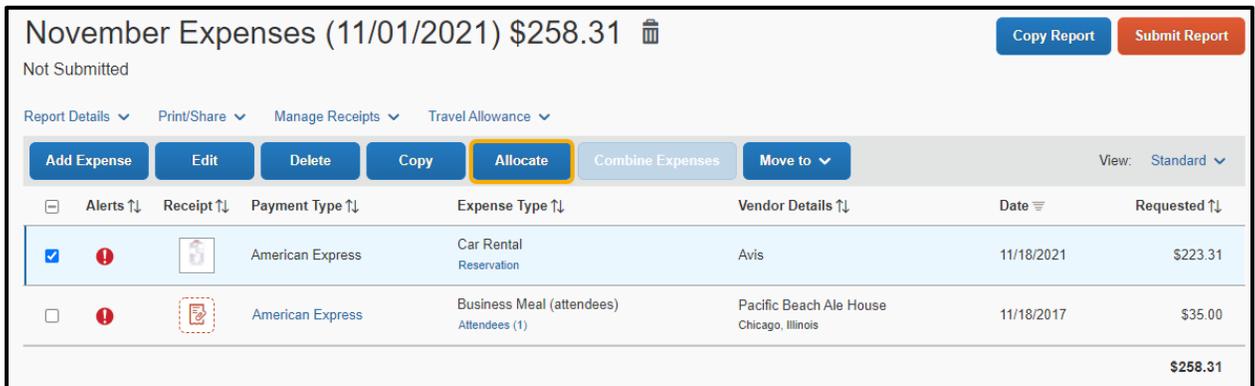
Transaction Amount * Currency * Personal Expense (do not reimburse) Has VAT

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 select **Allocate**.



November Expenses (11/01/2021) \$258.31  Copy Report Submit Report

Not Submitted

Report Details Print/Share Manage Receipts Travel Allowance

Add Expense Edit Delete Copy **Allocate** Combine Expenses Move to View: Standard

<input type="checkbox"/>	Alerts <input type="text"/>	Receipt <input type="text"/>	Payment Type <input type="text"/>	Expense Type <input type="text"/>	Vendor Details <input type="text"/>	Date <input type="text"/>	Requested <input type="text"/>
<input checked="" type="checkbox"/>			American Express	Car Rental Reservation	Avis	11/18/2021	\$223.31
<input type="checkbox"/>			American Express	Business Meal (attendees) Attendees (1)	Pacific Beach Ale House Chicago, Illinois	11/18/2017	\$35.00
							\$258.31

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



Allocate
Expenses: 1 | \$223.31

Amount: \$223.31 | Allocated \$223.31 (100%) | Remaining \$0.00 (0%)

Default Allocation Code: 10-300-3030 | Percent %: 100

Buttons: Add, Edit, Remove, Save as Favorite

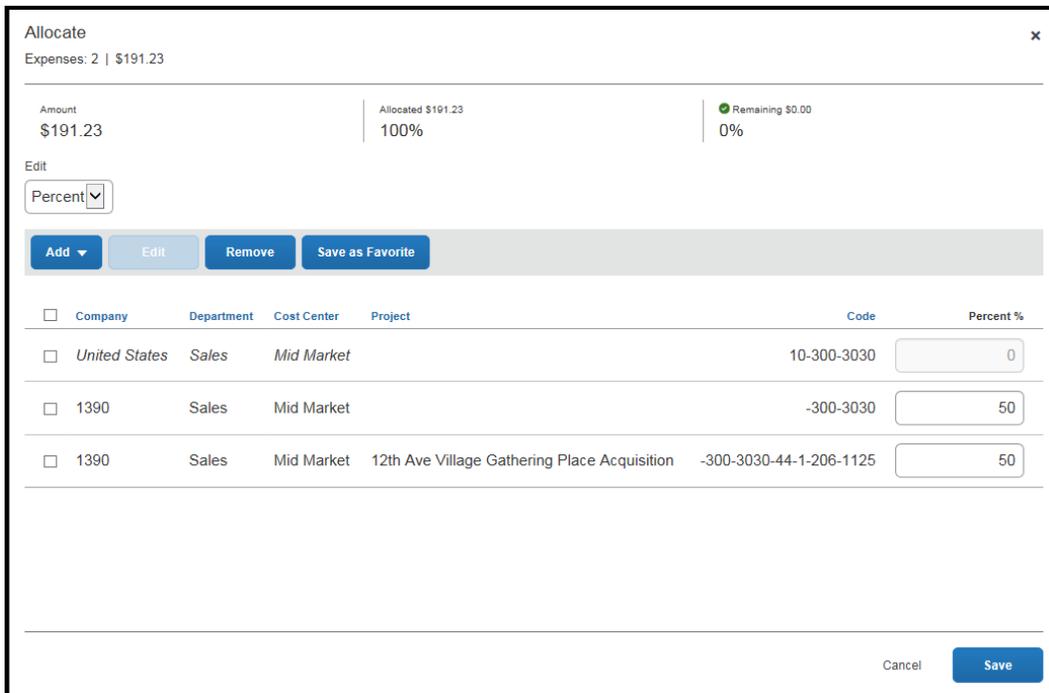
- From the **Edit** dropdown list, select the **Percent** or **Amount** tab.
- Select **Add**.

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 select **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

- Select **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.

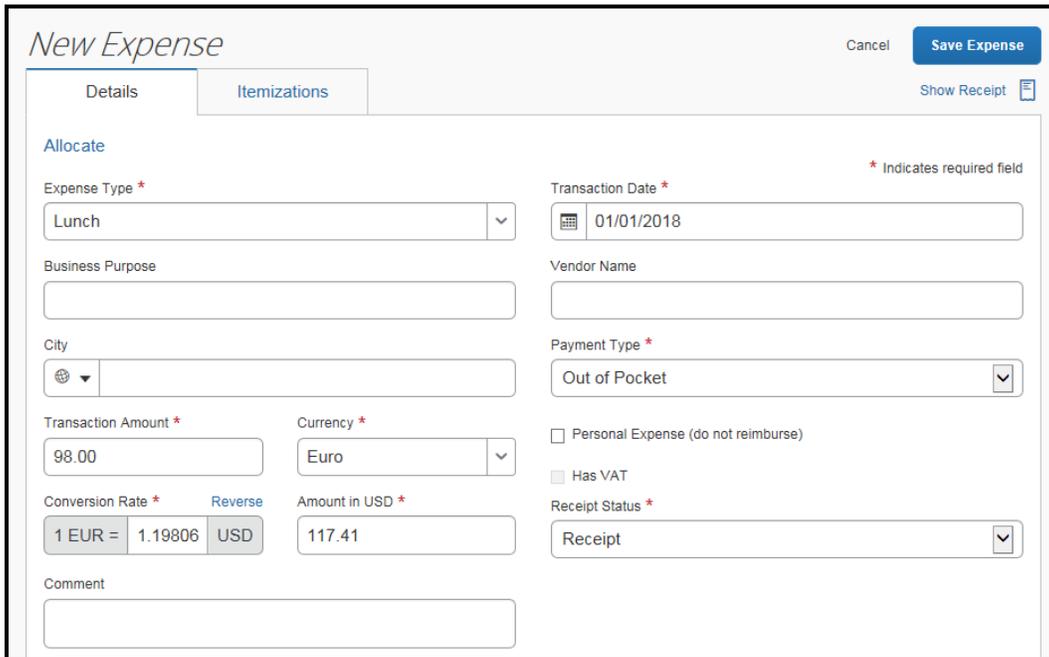
To account for an expense incurred in another currency

1. With the report open, select **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, select **Reverse** next to the **Conversion Rate** field.

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



The screenshot displays the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has a 'Cancel' button and a 'Save Expense' button in the top right corner. There are two tabs: 'Details' (selected) and 'Itemizations'. A 'Show Receipt' button with a document icon is also present. The form is divided into several sections:

- Allocate**: A section header for the 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 containing '1.19806'. To its right is a 'Reverse' button.
- Amount in USD ***: A text input field containing '117.41'.
- Receipt Status ***: A dropdown menu with 'Receipt' selected.
- Personal Expense (do not reimburse)**: An unchecked checkbox.
- Has VAT**: An unchecked checkbox.
- Comment**: An empty text input field at the bottom.

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, select **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. Select **Save Expense**.

New Expense
Cancel **Save Expense**

Details **Itemizations**
Show Receipt 

 Mileage Calculator * |  Allocate

Expense Type *

Transaction Date *

City

Purpose of the Trip *

From Location

To Location

Payment Type

Vehicle ID *

Odometer Start *

Odometer End *

Distance *

Number of Passengers

Save Expense
Save and Add Another
Cancel

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.

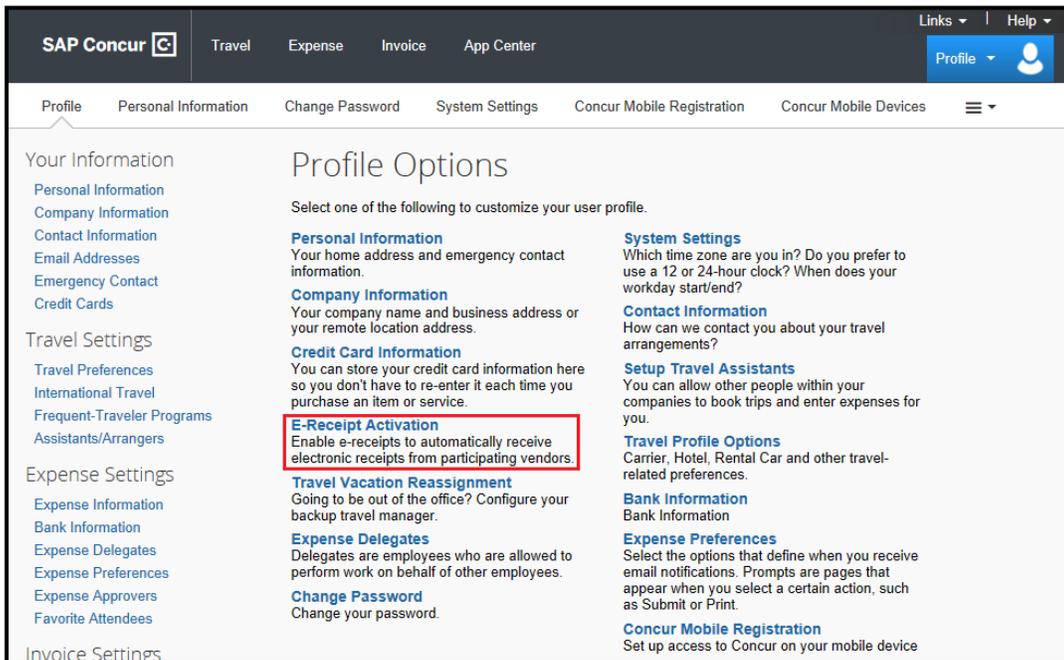
Your company must be enabled to accept e-receipts, and you must opt-in from your **Profile** before e-receipts activate in Expense. Some vendors require additional paperwork before they can send e-receipt data. Contact your SAP Concur administrator for more information.

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

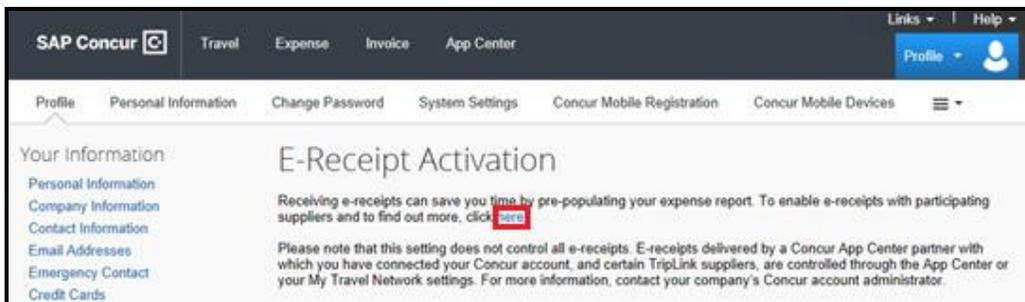
1. Select **Profile**, and then select **Profile Settings**.
2. On the **Profile Options** page, select **E-Receipt Activation**.



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.'

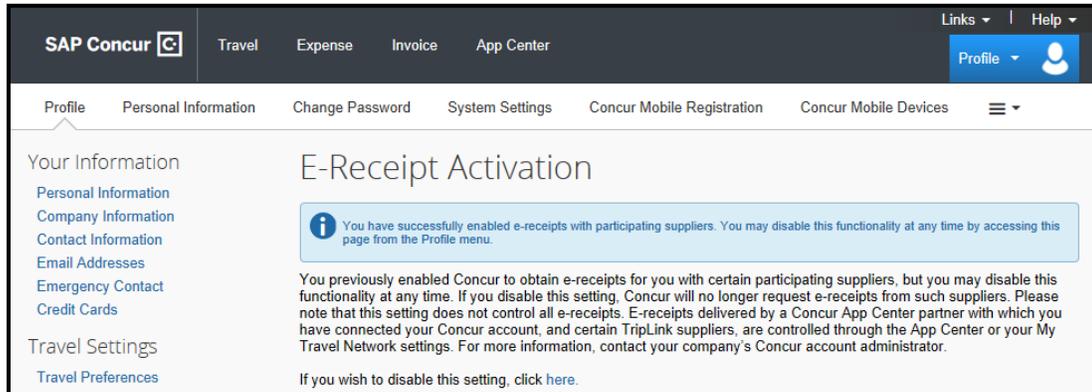
The **E-Receipt Activation and User Agreement** appears.

3. On the **E-Receipt Activation** page, select 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 how e-receipts can save time by pre-populating expense reports. 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**.' The 'here' link is highlighted with a red box.

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



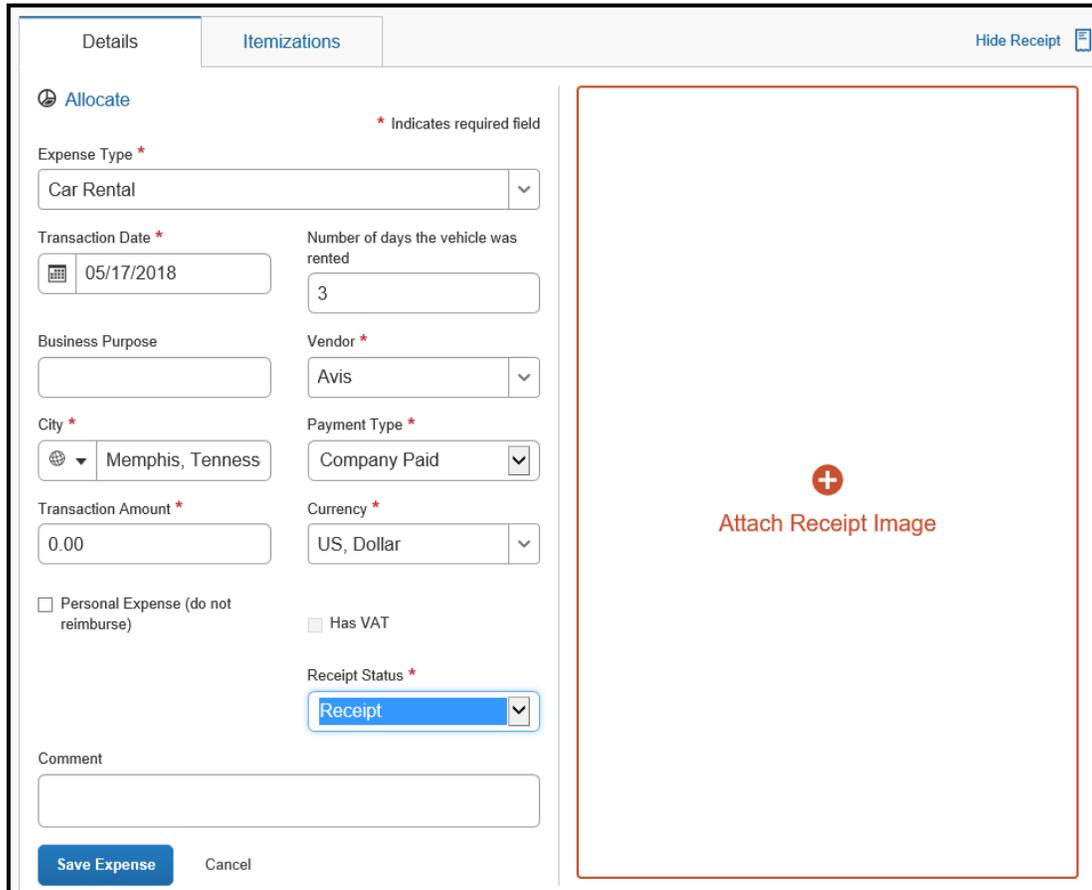
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with the SAP Concur logo and menu items: Travel, Expense, Invoice, and App Center. On the right side of the navigation bar, there are links for Links and Help, and a Profile dropdown menu with a user icon. Below 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 explaining that the user has previously enabled e-receipts for certain participating suppliers and that they can disable this functionality at any time. It also notes that this setting does not control all e-receipts and that certain TripLink suppliers are controlled through the App Center or My Travel Network settings. 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 fields for Expense Type (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), Has VAT, and Receipt Status (Receipt). A large red-bordered area on the right side of the form contains a red plus sign icon and the text 'Attach Receipt Image'. At the bottom left, there are 'Save Expense' and 'Cancel' buttons.

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

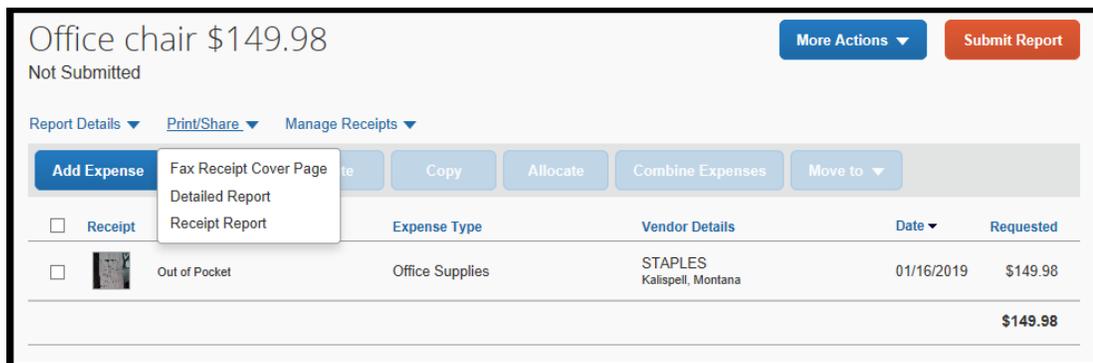
Note: You can **Detach** or **Append** the image from the receipt pane.

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, select **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 select **Print**.

To submit your expense report

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

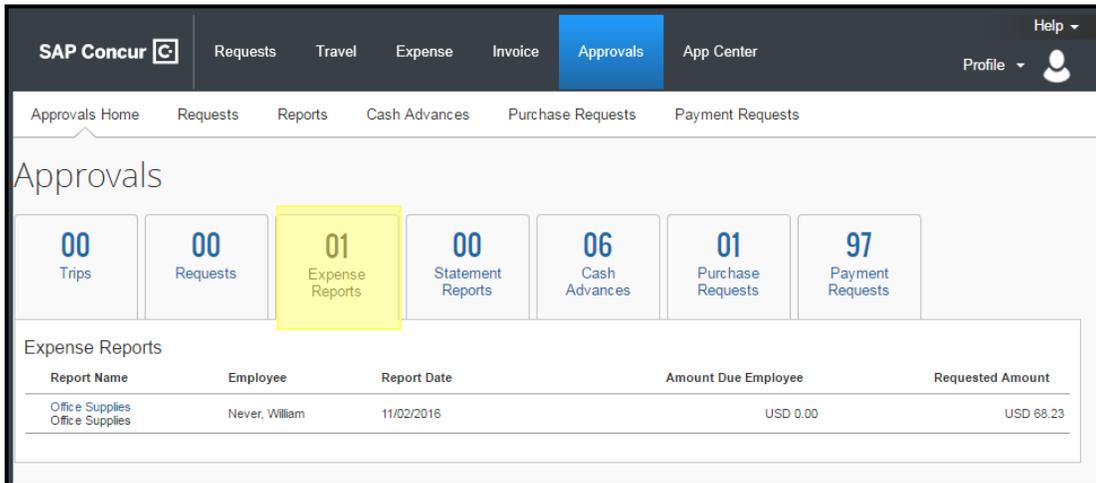
If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

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**, select **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 select **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**, select **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 select **Approve & Forward**. Enter the **User-Added Approver**, and add a comment, as needed.
3. Select **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 right, there are buttons for "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	\$899.00	
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 table of totals:

Report Totals	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**, select **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. Select **Send Back to Employee**.

The **Send Back Report** window appears.

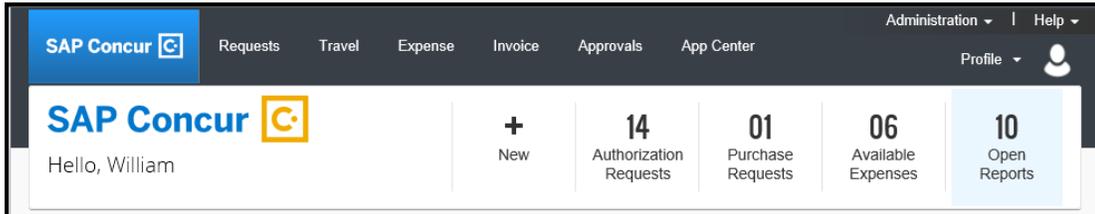
3. Enter a **Comment** for the employee, explaining why you are returning the report, and then select **OK**.

Correcting and Resubmitting an Expense Report

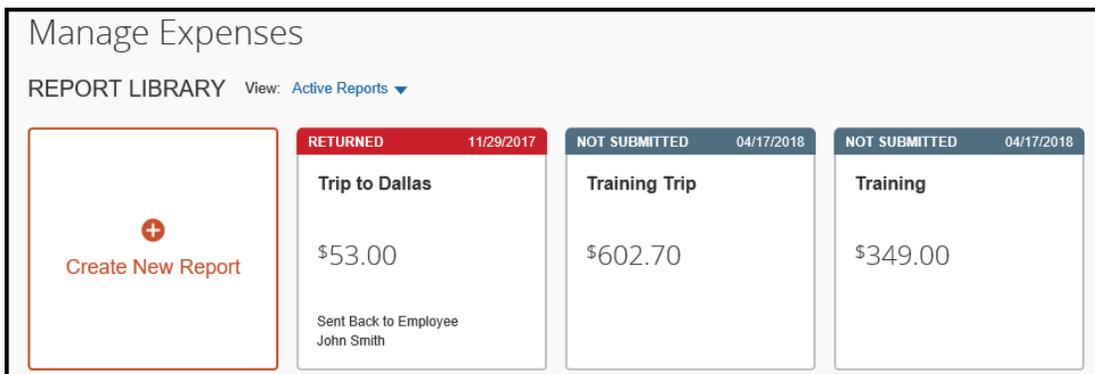
Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

To correct and resubmit an expense report

1. To open the report, on the SAP Concur home page, on the Quick Task Bar, select 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. Select the returned report tile to open the report.
3. Make the requested changes, and then select **Submit Report**.