

Concur Expense QuickStart Guide

SAP Concur



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

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Signing In to SAP Concur

To sign in to SAP Concur

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

NOTES:

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

SAP Concur

Sign In

User Name

Password

Remember user name on this computer

[Sign In](#)

[Forgot your user name?](#)

[Forgot your password?](#)

[Change language](#)

English (US)

SAP

SAP Concur

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

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Exploring the SAP Concur Home Page

The SAP Concur home page contains the following sections.

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

Expense only

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

Section	Description
Quick Task Bar	This section provides Quick Tasks (links) so you can: <ul style="list-style-type: none"> • 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 shows the SAP Concur home page for a user named William. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. A user profile dropdown shows 'Hello, William'. A summary bar displays counts: '+ New', '13 Authorization Requests', '01 Purchase Requests', '02 Payment Requests', '09 Available Expenses', and '09 Open Reports'. The main content area features a 'TRIP SEARCH' section with flight search options, a 'COMPANY NOTES' section with a 'Quick Task Bar' announcement, and a 'MY TASKS' section with three task cards: '00 Required Approvals', '09 Available Expenses', and '09 Open Reports'.

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.

The screenshot displays the SAP Concur user interface. At the top, there is a navigation bar with tabs for Requests, Travel, Expense, Invoice, Approvals, and App Center. The user's name, William, is visible. A dashboard shows key metrics: 13 Authorization Requests, 01 Purchase Requests, 02 Payment Requests, 09 Available Expenses, and 09 Open Reports.

The main content area is divided into several sections:

- TRIP SEARCH:** A form for searching flights, including fields for departure and arrival cities, and a search button.
- COMPANY NOTES:** A message from the administrator welcoming the user and announcing a new automated travel and expense system.
- MY TASKS:** A section with three cards:
 - Required Approvals:** Shows 00 approvals with a message: "Great! You currently have no approvals."
 - Available Expenses:** Shows 09 expenses with a list:

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

04/05	November Expenses (11/01/20...
04/05	client visit \$314.60
02/19	Business Meeting
02/19	client visit
01/30	Trip to Seattle
- MY TRIPS (2):** A section showing upcoming trips, with one example: "APR 23-27 Trip from Seattle to Memphis".

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.


SAP Concur  Administration | Help

Requests Travel Expense Invoice Approvals App Center Profile 

Profile Personal Information Change Password System Settings Concur

William Nate Never
[Profile Settings](#) | [Sign Out](#)

Acting as other user 

Search by name or ID 

[Cancel](#) [Start Session](#)

Profile Options

Select one of the following to customize your user profile:

- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.
- E-Receipt Activation**
Enable e-receipts to automatically receive

How can we contact you about your travel arrangements?

- Setup Travel Assistants**
You can allow other people within your companies to book trips and enter expenses for you.
- Travel Profile Options**

Your Information

- [Personal Information](#)
- [Company Information](#)
- [Contact Information](#)
- [Email Addresses](#)
- [Emergency Contact](#)
- [Credit Cards](#)

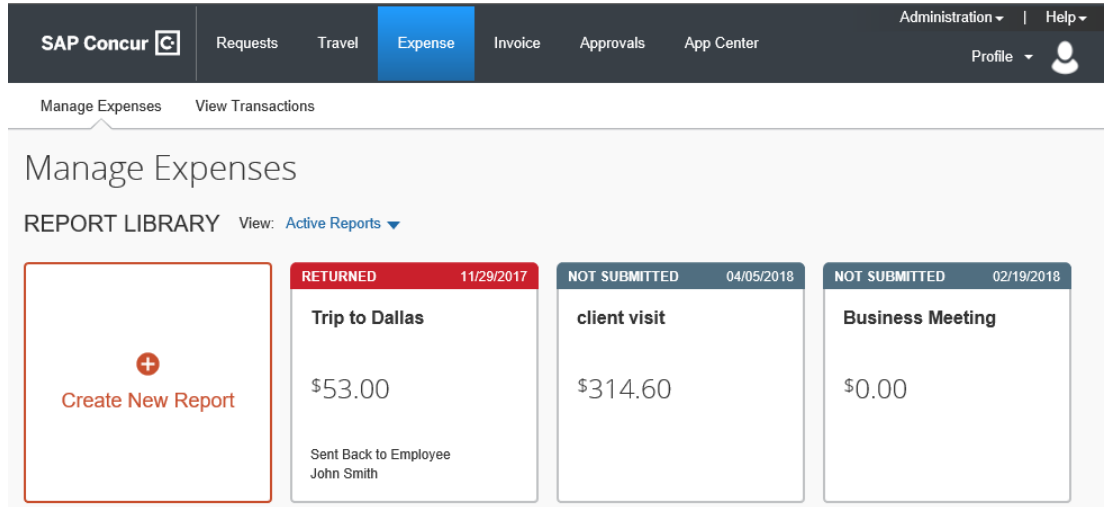
Travel Settings

- [Travel Preferences](#)
- [International Travel](#)
- [Frequent-Traveler Programs](#)
- [Assistants/Arrangers](#)

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

Adding Card Transactions to an Expense Report

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

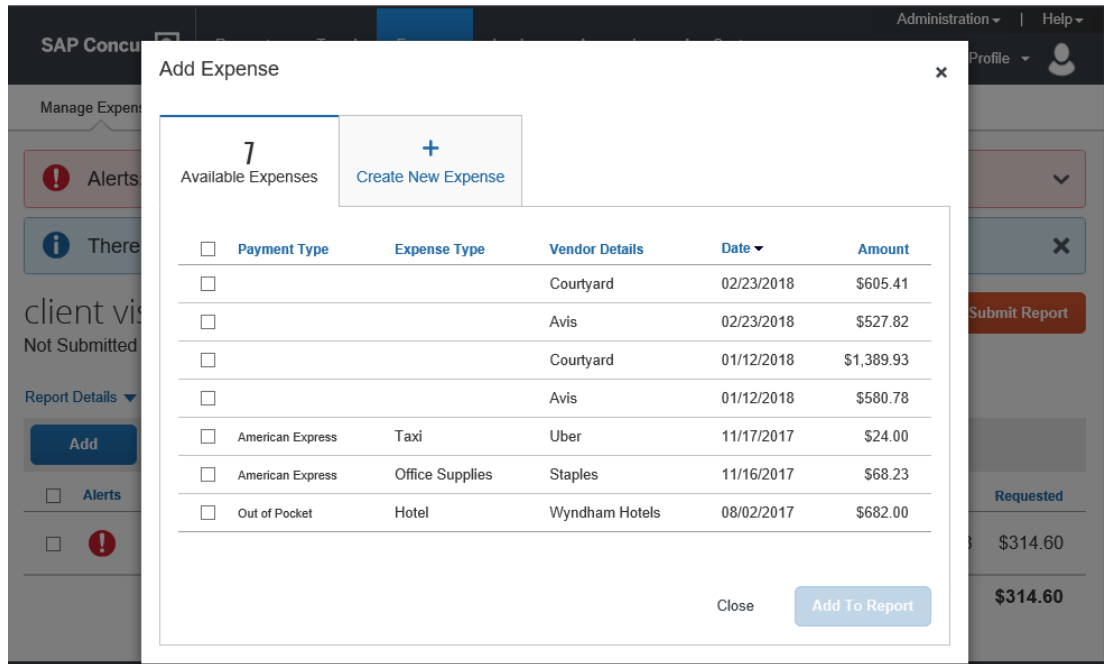
You can add card transactions to an expense report in the following ways:

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

From the open expense report

To add card transactions within the open report

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



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

From the Available Expenses section

To assign transactions to a report from the Available Expenses section

1. From the **Available Expenses** section (you might need to scroll down) select a check box next to each appropriate transaction.
TIP: Select the uppermost check box to select all transactions.
2. Click **Move to**.

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

AVAILABLE EXPENSES View: All Expenses ▾

<input type="checkbox"/>	Receipt	Payment Type		Vendor Details	Date ▾	Amount
<input type="checkbox"/>			Trip to Dallas	Courtyard	01/12/2018	\$1,389.93
<input type="checkbox"/>			Office Supplies			
<input type="checkbox"/>			Trip to Seattle			
<input checked="" type="checkbox"/>		Company Paid	Business Trip	Alaska Airlines	12/11/2017	\$171.40
<input type="checkbox"/>		American Express	Conference in Miami	Staples	11/16/2017	\$68.23
<input type="checkbox"/>			Monthly Office Supplies	Fairfield Inns	09/29/2017	\$374.03
<input type="checkbox"/>		Company Paid	Trip to Miami	American Airlines	09/07/2017	\$1,026.10
<input type="checkbox"/>			Client Visit			
<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

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:

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

The screenshot shows the 'New Expense' form with the following fields and options:

- Expense Type ***: Computer Hardware (dropdown)
- Transaction Date ***: MM/DD/YYYY (calendar icon)
- Business Purpose**: (text input)
- Vendor Name**: (text input)
- City**: (text input with globe icon)
- Payment Type ***: Out of Pocket (dropdown)
- Transaction Amount ***: (text input)
- Currency ***: US, Dollar (dropdown)
- Personal Expense (do not reimburse)
- Has VAT
- Receipt Status ***: No Receipt (dropdown)
- Comment**: (text input)

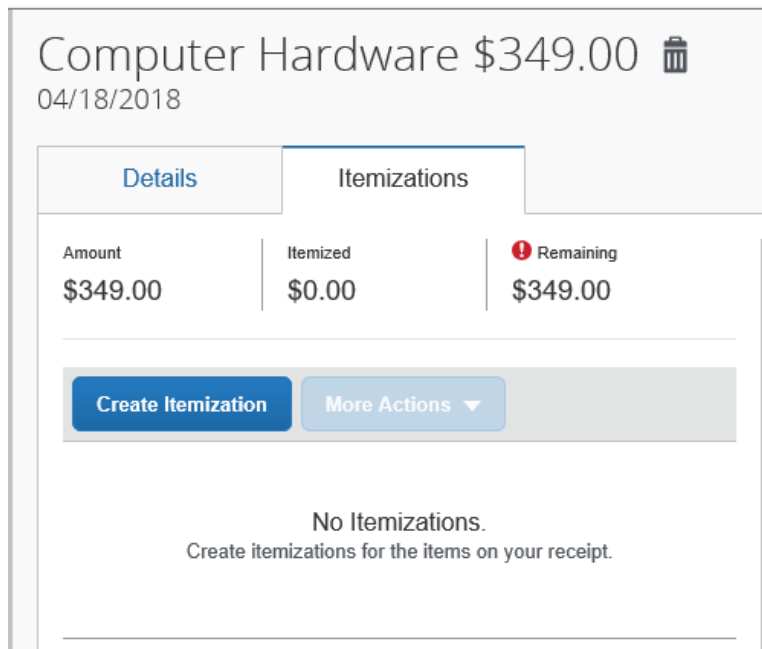
Buttons: **Save Expense** (blue), **Cancel** (grey), **Hide Receipt** (blue with icon), **Attach Receipt Image** (large red box with a plus icon).



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 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense' (selected), 'Invoice', 'Approvals', and 'App Center'. On the right, there are links for 'Administration', 'Help', and 'Profile'. Below the navigation bar, there are two tabs: 'Manage Expenses' and 'View Transactions'. A green success alert box 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, a 'Cancel' link, and a 'Save Expense' button. The date '04/18/2018' is displayed below the header. There are two tabs: 'Details' and 'Itemizations' (selected). A 'Show Receipt' link is on the right. A summary table shows: Amount \$349.00, Itemized \$349.00, and Remaining \$0.00. Below this are buttons for 'Create Itemization', 'Edit', 'Delete', and 'Copy'. A table lists itemizations with columns for 'Date', 'Expense Type', and 'Amount':

<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

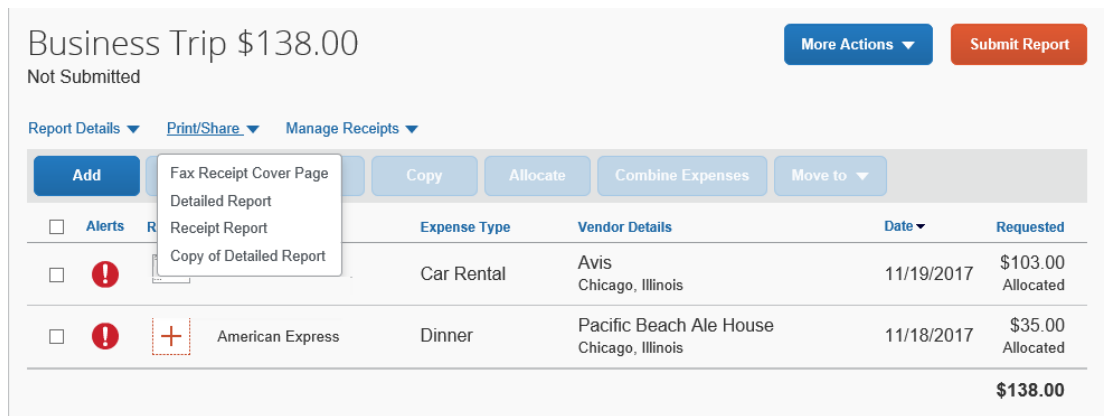
7. Click **Save Expense**.

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.
 - **Copy of Detailed Report:** Prints a copy of the detailed report.



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**.

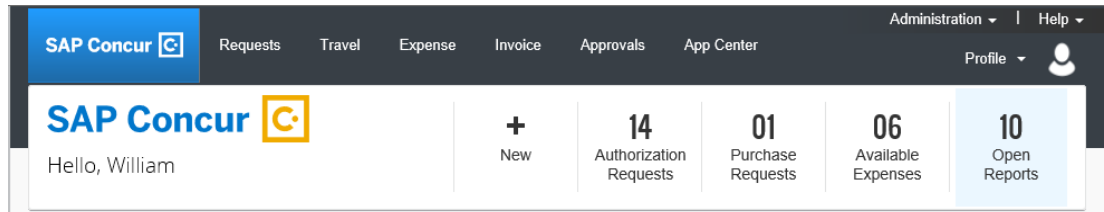
If you cannot successfully submit the report, a message appears describing the report error or alert. Correct the error, or if you require help to complete the task, contact your SAP Concur administrator.

Correcting and Resubmitting an Expense Report

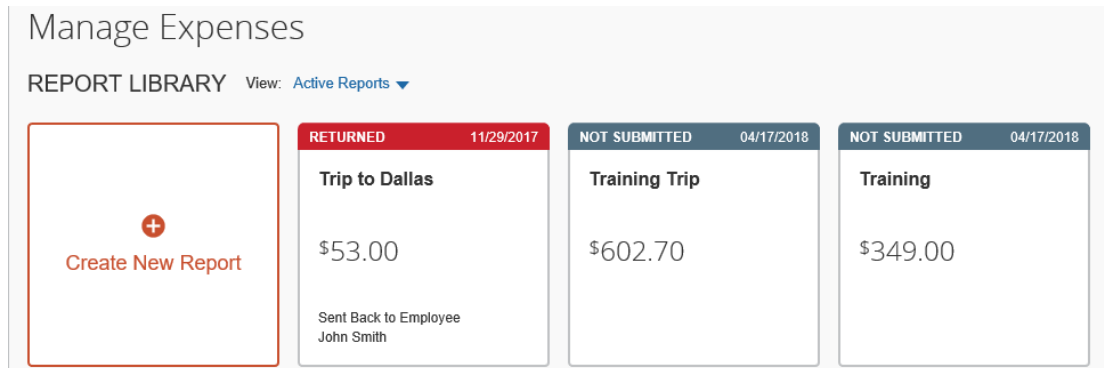
Your Expense approver might send a report back to you if an error is found. The approver will include a comment explaining why the report was returned to you.

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**.

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. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense' (selected), 'Invoice', 'Approvals', and 'App Center'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, there are two tabs: 'Manage Expenses' and 'View Transactions'. The main content area displays 'Business Meal (attendees) \$45.76' with a 'Close Expense' button. Below this, there are two tabs: 'Details' (selected) and 'Itemizations'. A 'Show Receipt' link is also present. Under the 'Details' tab, there are two sections: 'Attendees (1)' (highlighted with a red box) and 'Allocations'. The 'Attendees (1)' section contains a form with the following 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 (do not reimburse)' (checkbox), 'Has VAT' (checkbox), 'Approved Amount' (45.76), and 'Receipt Status' (No Receipt). A 'Close Expense' button is located at the bottom left of the form. A legend indicates that an asterisk (*) denotes a required field.

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

The **Add Attendees** window appears.

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

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

You can add attendees in several ways:

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

3. Click **Save**.


Allocating Expenses


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

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

To allocate your expenses

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

Business Meal (attendees) \$45.76  Cancel Save Expense

06/12/2018 | Cafe Monte 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 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
							\$359.51

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

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

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

4. Click **Add**.

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

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

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

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

Allocate
Expenses: 2 | \$191.23

Amount: \$191.23 | Allocated \$191.23 (100%) | Remaining \$0.00 (0%)

Edit: Percent

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

6. Click **Save**.

Converting Foreign Currency Transactions

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

To account for an expense incurred in another currency

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

Note the following:

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

The screenshot shows the 'New Expense' form in SAP Concur. The form is titled 'New Expense' and has two tabs: 'Details' (selected) and 'Itemizations'. There are buttons for 'Cancel', 'Save Expense', and 'Show Receipt'. The form is divided into several sections:

- Allocate**: This section contains the following fields:
 - Expense Type ***: A dropdown menu with 'Lunch' selected.
 - Transaction Date ***: A date field with '01/01/2018' entered.
 - Business Purpose**: An empty text field.
 - Vendor Name**: An empty text field.
 - City**: A field with a globe icon and a dropdown arrow.
 - Payment Type ***: A dropdown menu with 'Out of Pocket' selected.
 - Transaction Amount ***: A text field with '98.00' entered.
 - Currency ***: A dropdown menu with 'Euro' selected.
 - Conversion Rate ***: A field showing '1 EUR = 1.19806 USD' with a 'Reverse' button next to it.
 - Amount in USD ***: A text field with '117.41' entered.
 - 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 field.

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**.

Trip to San Francisco \$171.40
Not Submitted

More Actions ▾ Submit Report

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"/>	!		Company Paid	Airfare	Alaska Airlines San Francisco, California	12/11/2017	\$171.40 Allocated

\$171.40

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.

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 with the following fields and values:

- Expense Type ***: Company Car Mileage
- Transaction Date ***: MM/DD/YYYY (highlighted with a red border)
- City**: (empty)
- Purpose of the Trip ***: Business Meeting
- From Location ***: Seattle
- To Location ***: Portland
- Payment Type ***: Out of Pocket
- Vehicle ID**: ADH234
- Distance to Date**: (empty)
- Odometer Start**: 45876
- Odometer End**: 46276
- Business Distance**: 417000
- Personal Distance**: (empty)
- Total Distance**: 417000
- Number of Passengers**: (empty)
- Transaction Amount ***: 126,100.00
- Currency ***: US, Dollar

Buttons: Save Expense, Cancel, Show Receipt

Itemizing Nightly Lodging Expenses

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

To create a lodging expense

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

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

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

2. Complete the fields as directed by your company.

The screenshot shows the 'Manage Expenses' interface. At the top, there are tabs for 'Manage Expenses' and 'View Transactions'. Below this is a red alert bar with 'Alerts: 2'. The main header displays 'Hotel \$845.00' with a trash icon, and '12/22/2017 | Marriott Hotels'. There are 'Cancel' and 'Save Expense' buttons. Below the header are two tabs: 'Details' (selected) and 'Itemizations'. A 'Show Receipt' link is also present. The form contains several fields: 'Expense Type' (dropdown menu with 'Hotel' selected), 'Check-in Date' (calendar icon, '12/18/2017'), 'Check-out Date' (calendar icon, '12/22/2017'), and 'Nights' (value '4'). A note '* Indicates required field' is next to the dates. 'Transaction Date' is '12/22/2017'. 'Business Purpose' is an empty text field. 'Vendor' is a dropdown menu with 'Marriott Hotels' selected. 'City' is a dropdown menu with 'Seattle, Washington' selected. 'Payment Type' is a dropdown menu with 'Company Paid' selected. 'Transaction Amount' is '845.00' and 'Currency' is 'US, Dollar'. There is a 'Has VAT' checkbox which is unchecked. 'Receipt Status' is a dropdown menu with 'Receipt' selected. A 'Comment' text field is at the bottom.

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

Hotel \$845.00 12/22/2017 | Marriott Hotels Cancel [Save Itemization](#)

Details **Itemizations** [Show Receipt](#)

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

New Itemization

Expense Type *

Entry Type: [Recurring Itemization](#) ▼

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

Your hotel room rate was:

The Same Every Night Not the Same

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

(Amounts in USD)

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

Manage Expenses [View Transactions](#)

Alerts: 2 Cancel [Save Expense](#)

Hotel \$845.00 12/22/2017 | Marriott Hotels [Show Receipt](#)

Details **Itemizations**

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

[Create Itemization](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#)

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

9. Click **Save Expense**.

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.

Enabling E-Receipts

Once your company has e-receipts enabled, a message will appear on the SAP Concur home page, prompting you to sign up.

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

To sign up for e-receipts

1. Either:
 - On the SAP Concur home page, click **Sign up here**. The **E-Receipt Activation** page appears.
 - or -
 - Click **Profile > Profile Settings > E-Receipts Activation** (in the **Other Settings** section of the left-side menu).

NOTE: One or both of these options might be available to you.

2. Click **E-Receipt Activation**. The **E-Receipt Activation and User Agreement** appears.
3. Click **I Accept**. The E-Receipts confirmation appears.
4. Once you have accepted the user agreement, all of your corporate cards are opted-in. You can choose to opt-out a particular card in **Profile > Credit Cards**. Select the **Edit** icon for the card, and uncheck the **Receive e-receipts for this card** check box.

Profile Personal Information Change Password System Settings Mobile Registration Travel Vacation Reassignment

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards

Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs

Request Settings
Request Information
Request Delegates

E-Receipt Activation

Enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers!

Click here to enable the automatic collection of electronic receipts and folio data, or "e-receipts", from participating suppliers!
[E-Receipt Activation](#)

Once you complete the e-receipt activation, the e-receipts generated by your transaction with a participating supplier will be automatically collected and matched with your itineraries and expense reports. You can access and print these e-receipts at any time from your Trip Library. If your company uses Expense, then your e-receipts will be automatically matched with your itineraries and expense reports, as applicable, so you can avoid keying in folio data and submitting paper receipts for your expense reports. Participating suppliers of our e-receipt program are identified by our icon during the online booking process:

View sample e-receipts: [Car](#) [Hotel](#) [Taxi](#)

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 in **Details** view.
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.

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**.

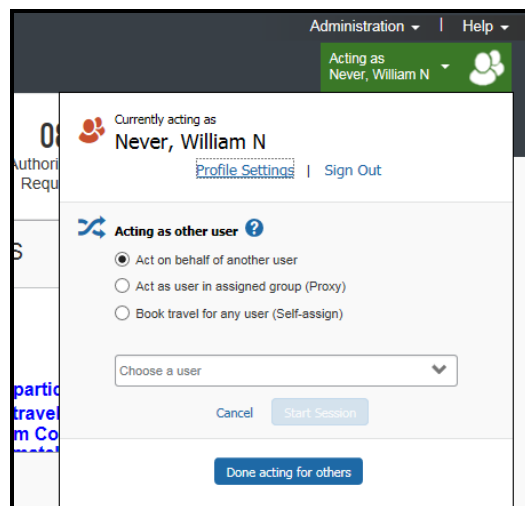
NOTE: Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.

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.



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 interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals' (highlighted), and 'App Center'. Below this, there are sub-navigation links: 'Approvals Home', 'Requests', 'Reports', 'Cash Advances', 'Purchase Requests', and 'Payment Requests'. The main content area is titled 'Approvals' and features several tiles representing different report types: 'Trips' (00), 'Requests' (00), 'Expense Reports' (01, highlighted in yellow), 'Statement Reports' (00), 'Cash Advances' (06), 'Purchase Requests' (01), and 'Payment Requests' (97). Below these tiles is a table titled 'Expense Reports' with the following data:

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**.

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.

Approvals Home Reports

Office Supplies [Peterson, Sue]

Summary Details Receipts Print / Email

Send Back to Employee Approve Approve & Forward

Expenses View

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 Summary
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**.

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.

Global Tech Sales Training [Never, William]

[Send Back to Employee](#)
[Approve](#)
[Approve & Forward](#)

Summary Details Receipts Print / Email Hide Exceptions

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.

Expenses	Transaction D...	Expense Type	Vendor Name	Business Purp...	City	Payment Type	Amount	Adjusted Clat...
	2015-04-09	Airfare	U.S. AIRWAYS	conference	Seattle, Washin...	American Express	\$518.78	\$518.78
>	2015-04-03	Hotel	Courtyards	Sales meeting	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

Report Summary		
Report Totals	Amount Due Com...	Amount Due Emp...
	\$0.00	\$766.72
		\$55.00