



Quick Reference Guide -

How to submit expenses in Concur

MC Onboarding Pack



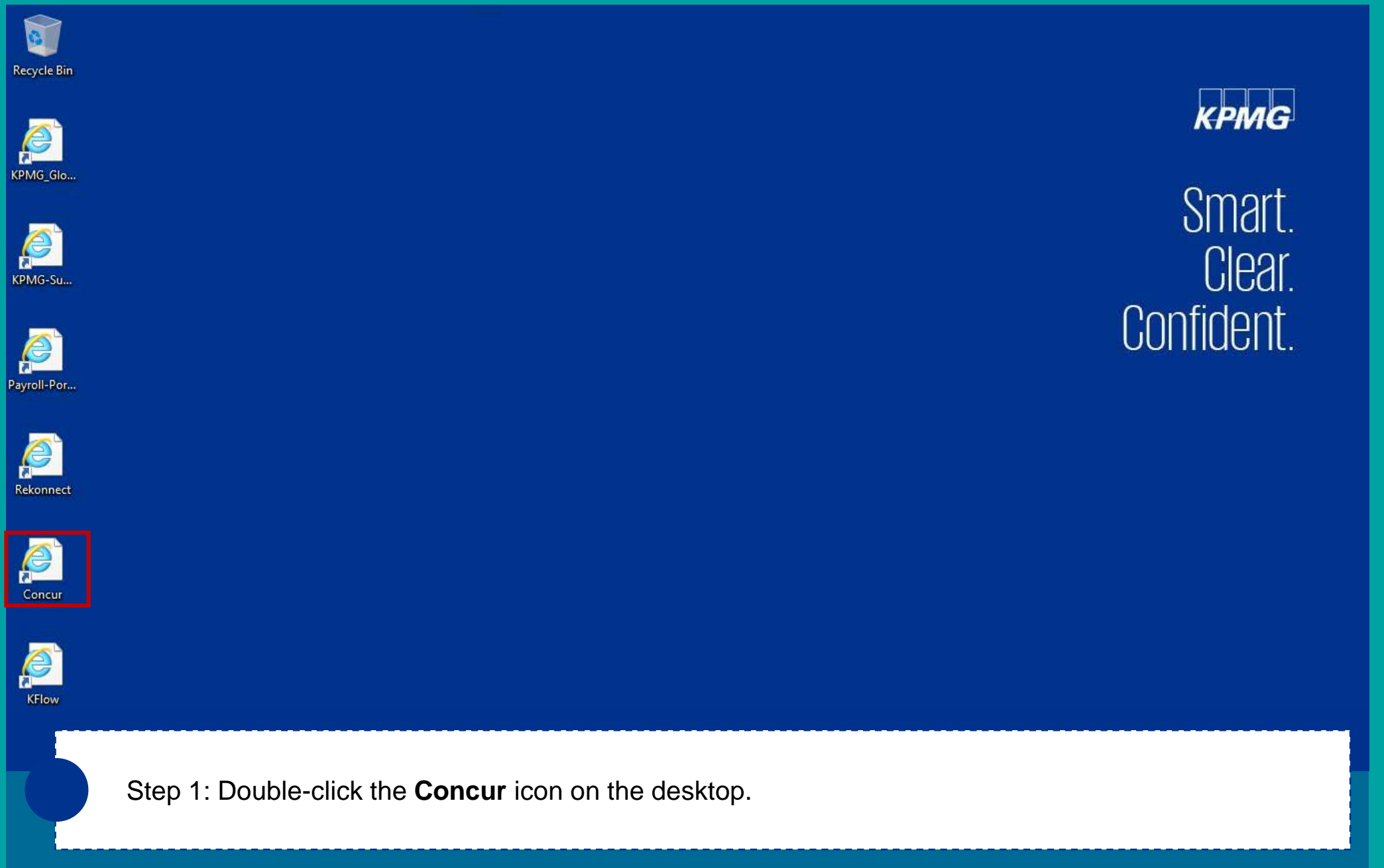
About Concur

Concur is the new expense and travel management tool of KPMG India. It is an integrated, secure, flexible and user friendly system used to submit Other Payroll Expenses (OPE), raise domestic and international travel requests and approve claims.

Using Concur you can create and / or submit:



The online system provides a user-friendly platform to start a request, start a claim, upload receipts, check on pending expenses requests and any open claims.



Step 1: Double-click the **Concur** icon on the desktop.

Home

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https://www.concursolutions.com/home.asp

Search...

SAP Concur

Requests

Expense

App Centre

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KPMG

Hello, Rejiraj

+ Start a Request

+ Start a Claim

+ Upload receipts

00 Authorisation Requests

02 Available Expenses

00 Open Claims

COMPANY NOTES

Window Snip

Concur User Manual

[You may please click here for Concur user manuals and FAQ documents](#)

Flight / Train / Bus Reservations

Request you to get in touch with emergency travel booking team (011-43337776, ets@atbyatra.com) for any emergency requests, for bookings post 6 PM on weekdays, weekends or holidays for quick resolution.

Hotel Reservations

Read more

MY TASKS

00 Open Requests

You currently have no active requests.

02 Available Expenses

04/01 ZAAKPAY- UBER BV PG
INR 1.00

04/01 ZAAKPAY- UBER BV PG
INR -1.00

00 Open Claims

You currently have no open claims.

Step 2: Click the **Expense** tab.

Browser address bar: <https://www.concursolutions.com/Expense/Client/default.asp>

Expense Centre

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Manage Expenses

ACTIVE CLAIMS

[Claim Library](#)


Create New Claim

AVAILABLE EXPENSES

All Cards ▾

Move ▾ Delete

<input type="checkbox"/> Expense Detail	Expense	Source	Date ▲	Amount
<input type="checkbox"/> ZAAKPAY- UBER BV PG GURGAON	Breakfast		04/01/2019	INR 1.00

Step 3: Click **Create New Claim**.

Browser address bar: <https://www.concursolutions.com/expense/client/default.asp>

Expense Centre

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Create a New Expense Claim

Claim Header

a

Description	Expense Report Number	Policy	Comment
<input type="text" value="Client Site Visit"/>	<input type="text"/>	<input type="text" value="KGS Local Expenses"/>	<input type="text"/>
Project	Task	PML Budget Amount Balance	
<input type="text" value="1 BLR-MC-UK-KLA (1196411)"/>	<input type="text" value="2 OPE (99)"/>	<input type="text"/>	
Centrum Sale Memo Number	Advance Settlement Date	Employee Return Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Requests

<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
--------------------------	--------------	------------	-----------	---------------	-----------------	------------------

b

Step 4: Under **Claim Header**

- (a) Enter the details such as **Description**, **Policy**, **Project** and **Task**
- (b) Click **Next**.

Expense Centre

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Client Site Visit

a [+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

[Delete Claim](#) [Submit Claim](#)

[Show Exceptions](#)

Expenses

☐ [Date](#) [Expense](#) [Move](#) [Delete](#) [Copy](#) [View](#)

Adding New Expense

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input type="checkbox"/>	04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR -1.00	INR -1.00

New Expense

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

b

☒ Recently Used Expense Types

Domestic Travel-Conveyance	Domestic Travel-Airfare	Domestic Travel-Hotel Expenses
Domestic Travel-Meal&Refresh		

All Expense Types

Meals	...Office Expenses	...Other
Domestic Travel-Meal&Refresh	PML-Speaker Expense	PML-Photographer Expense
		PML-Venue Booking
Office Expenses	Other	Travel and Lodging Expenses
Domestic Travel-Equient Hire	Domestic Travel - GH Expenses	Domestic Travel-Airfare
Domestic Travel-Event Expense	Domestic Travel-Cellphone Exp	Domestic Travel-Conveyance
Domestic Travel-Photo Expense	Domestic Travel-Daily Allow	Domestic Travel-Hotel Expenses
Domestic Travel-Speaker Exp	Domestic Travel-Others	Domestic Travel-Train
Domestic Travel-Venue Booking	PML-Equipment Hire	

TOTAL AMOUNT TOTAL REQUESTED

Step 5: To create a new expense:

(a) Click **+ New Expense**

(b) Under the **New Expense** tab, choose the expense type to submit.

Expense Centre

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Client Site Visit

[+ New Expense](#)
[Import Expenses](#)
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Expenses

☐ [Date](#) [Expense](#) [Amount](#) [Requested](#)

Adding New Expense

Date	Expense	Amount	Requested
04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR -1.00	INR -1.00

[Move](#) [Delete](#) [Copy](#) [View](#)

[Delete Claim](#) [Submit Claim](#) [Show Exceptions](#)

a

New Expense

Expense Type: Domestic Travel-Airfare

Receipt Date: 25/01/2019

Business Purpose: Client visit

Airline: IndiGo

Expense Location: Bangalore, INDIA

Boarding Pass Available: Yes

Travel Status: Aailed

Ticket Number:

Seat Class: Economy

Departure Airport: (BLR) Bangalore, India

Arrival Airport: Gandhi International Airport, India

Payment Type: Cash

Amount: 2,500.00 INR

Tax Posted Amount:

Approved Amount:

Receipt Status: Hard Copy Receipt Available

Personal Expense (do not reimburse): ☐

Additional Information:

Project Code: KGS NSEZ BLR-MC-UK-KLA

Task: OPE (99)

b

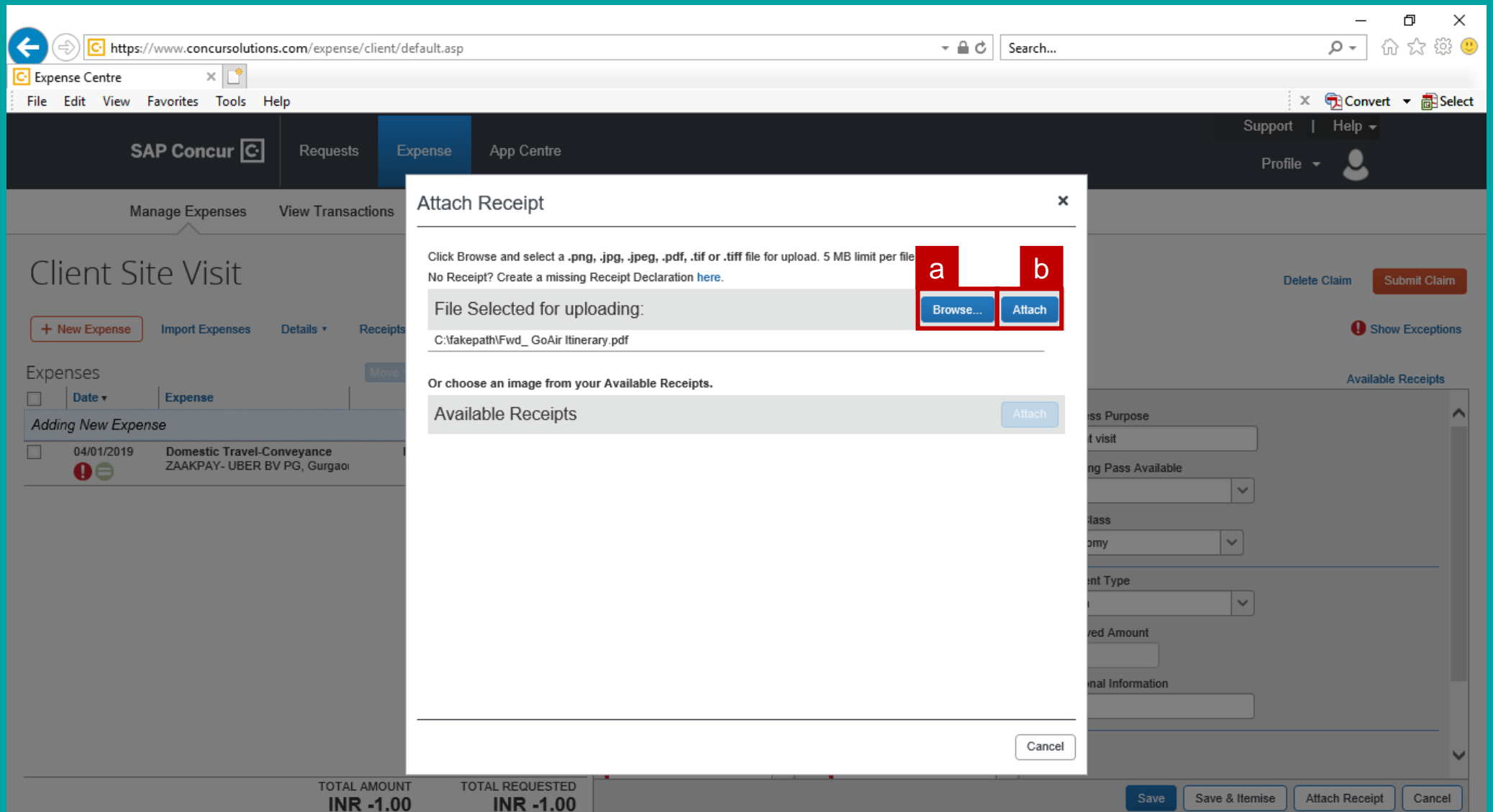
Available Receipts

TOTAL AMOUNT: INR -1.00
 TOTAL REQUESTED: INR -1.00

[Save](#) [Save & Itemise](#) [Attach Receipt](#) [Cancel](#)

Step 6:

- Enter all the mandatory detail textboxes marked with red line
- Click **Attach Receipt** to upload the receipt of this expense.



Step 7: To attach the receipt:

- (a) Click **Browse...** to locate and upload the receipt
- (b) Click **Attach**.

Expense Centre

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Client Site Visit

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[Show Exceptions](#)

[Delete Claim](#) [Submit Claim](#)

Expenses

[Move](#) [Delete](#) [Copy](#) [View](#)

<input type="checkbox"/>	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR -1.00	INR -1.00

New Expense

a [Receipt Image](#)

b

Expense Type: Domestic Travel-Airfare

Receipt Date: 25/01/2019

Business Purpose: Client visit

Airline: IndiGo

Expense Location: Bangalore, INDIA

Boarding Pass Available: Yes

Travel Status: Aailed

Ticket Number:

Seat Class: Economy

Departure Airport: (BLR) Bangalore, India

Arrival Airport: Gandhi International Airport, India

Payment Type: Cash

Amount: 2,500.00 INR

Tax Posted Amount:

Approved Amount:

Receipt Status: Hard Copy Receipt Available

☐ Personal Expense (do not reimburse)

Additional Information:

Project Code: KGS NSEZ BLR-MC-UK-KLA

Task: OPE (99)

[Save](#) [Save & Itemise](#) [Attach Receipt](#) [Cancel](#)

TOTAL AMOUNT: INR -1.00

TOTAL REQUESTED: INR -1.00

Step 8:

- (a) The receipt is attached and shows in a new tab
- (b) Click **Save & Itemise**.

Expense Centre

File Edit View Favorites Tools Help

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Manage Expenses View Transactions

Client Site Visit

[Delete Claim](#) [Submit Claim](#)

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses				
	Date	Expense	Amount	Requested
<input type="checkbox"/>	25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00	INR 2,500.00

[Move](#) [Delete](#) [Copy](#) [View](#)

New Itemisation

Available Receipts

Total Amount: INR 2,500.00 | Itemised: INR 0.00 | Remaining: **INR 2,500.00**

Expense Type

Choose an expense type

TOTAL AMOUNT
INR 2,499.00

TOTAL REQUESTED
INR 2,499.00

[Save](#) [Cancel](#)

Step 9: The item is added under the **Expenses** list. Similarly, following the previous steps, you can submit a claim for a different expense type such as Hotel, Meals etc.

Expense Centre

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Client Site Visit

[+ New Expense](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print / Email](#)

Expenses

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input type="checkbox"/>	25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00	INR 2,500.00

Move Delete Copy View

New Itemisation

Total Amount: INR 2,500.00 | Itemised: INR 0.00 | Remaining: **INR 2,500.00**

Expense Type

Choose an expense type

Available Receipts

TOTAL AMOUNT TOTAL REQUESTED

Step 10: If there is any existing AMEX expense, you can move it to this new claim. Click **Import Expenses** link

Expense Centre

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Client Site Visit

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Expenses

☐ [Date](#) [Expense](#) [Amount](#) [Requested](#)

[Adding New Expense](#)

No Expenses Found

a **b** **c**

Available Expenses

All Cards

Move Delete

Expense Detail	Expense	Source	Date	Amount
AKPAY- UBER BV PG GURGAON	Domestic Travel-Conveyance		04/01/2019	INR 1.00
<input checked="" type="checkbox"/> ZAAKPAY- UBER BV PG GURGAON	Domestic Travel-Conveyance		04/01/2019	INR -1.00

Step 11:

- (a) Select AMEX from the list
- (b) Select the expense
- (c) Click **Move**.

Expense Centre

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Client Site Visit

Delete Claim Submit Claim

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input type="checkbox"/>	25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00	INR 2,500.00
Adding New Itemisation				
<input type="checkbox"/>	04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR -1.00	INR -1.00

TOTAL AMOUNT
INR 2,499.00

TOTAL REQUESTED
INR 2,499.00

New Itemisation

Available Receipts

Total Amount: INR 2,500.00 | Itemised: INR 0.00 | Remaining: INR 2,500.00

Expense Type
Choose an expense type

Save Cancel

Step 12: The AMEX expense is added to the new list. Now, click **Submit Claim**.

Browser window showing the SAP Concur Expense Centre interface. The URL is <https://www.concursolutions.com/expense/client/default.asp>. The page displays the "Client Site Visit" expense entry, including a table of expenses and a "Final Review" pop-up dialog.

Expenses Table:

Date	Expense	Amount
25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00
04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR 0.00

Summary: TOTAL AMOUNT: INR 2,499.00, TOTAL REQUESTED: INR 2,499.00

Final Review Pop-up:

Final Review

Claim Submit Confirmation

Are you sure you want to submit this claim?

Submit Claim Cancel

Step 13: In the **Final Review** pop-up, click **Submit Claim**.

Browser window showing the SAP Concur Expense Centre interface. The URL is <https://www.concursolutions.com/expense/client/default.asp>. The page displays the "Client Site Visit" expense entry and an "Approval Flow for Claim: Client Site Visit" pop-up window.

The pop-up window shows the "Level 1 Approver" as Gandhi, Georgina E. and the "Approval for Processing" field. The "Submit Claim" button is highlighted with a red box.

The background interface includes the SAP Concur logo, navigation tabs (Requests, Expense, App Centre), and a table of expenses:

Expenses	Date	Expense	Amount
<input type="checkbox"/>	25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00
Adding New Itemisation			
<input type="checkbox"/>	04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR 2,499.00

Summary: TOTAL AMOUNT INR 2,499.00, TOTAL REQUESTED INR 2,499.00. Available Receipts: Amount: INR 2,500.00 | Itemised: INR 0.00 | Remaining: INR 2,500.00.

Step 14: The **Approval Flow for Claim** pop-up shows the approver name. Click **Submit Claim**.

Browser window showing the SAP Concur Expense Centre interface. The URL is <https://www.concursolutions.com/expense/client/default.asp>. The page displays the "Client Site Visit" expense claim summary, including a table of expenses and a summary of the claim.

Client Site Visit

Approver: Gandhi, Georgina E.

Expense Claim Summary:

Claim Total :	INR 2,499.00
Less Personal Amount :	INR 0.00
Amount Claimed :	INR 2,499.00
Amount Rejected :	INR 0.00

Company Disbursements:

Amount Due Employee :	INR 2,500.00
Amount Due AMEX :	INR 0.00
Total Paid By Company :	INR 2,500.00

Employee Disbursements:

Amount Owed Company :	INR 0.00
Total Owed By Employee :	INR 0.00

Available Receipts:

Total Amount: INR 2,500.00 | Itemised: INR 0.00 | Remaining: **INR 2,500.00**

Expenses Table:

Date	Expense	Amount	Request
25/01/2019	Domestic Travel-Airfare IndiGo, Bangalore, INDIA	INR 2,500.00	INR 2,500.00
04/01/2019	Domestic Travel-Conveyance ZAAKPAY- UBER BV PG, Gurgaon	INR -1.00	INR -1.00

Summary:

TOTAL AMOUNT	TOTAL REQUESTED
INR 2,499.00	INR 2,499.00

The "Claim Successfully Submitted" pop-up window is displayed, showing the summary of the expense claim. The "Close" button is highlighted with a red box.

Step 15: The **Claim Successfully Submitted** pop-up shows the summary of the expense claim. Click **Close**.

Browser address bar: <https://www.concursolutions.com/expense/client/default.asp>

Expense Centre

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Manage Expenses

ACTIVE CLAIMS

[Claim Library](#)


Create New Claim

SUBMITTED 25/01/2019

Client Site Visit


INR2,499.00

Submitted & Pending Reporting Manager
Gandhi, Georgina E.

AVAILABLE EXPENSES

All Cards ▾

Move ▾ Delete

<input type="checkbox"/> Expense Detail	Expense	Source	Date ▲	Amount
<input type="checkbox"/> ZAAKPAY- UBER BV PG GURGAON	Domestic Travel-Conveyance		04/01/2019	INR 1.00

Step 16: The new expense claim is successfully submitted.



Thank you

This document is designed by
KGS MC Solutions and Digital Learning





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