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:

Flight / Train / Bus reservations	Hotel reservations	AMEX claims

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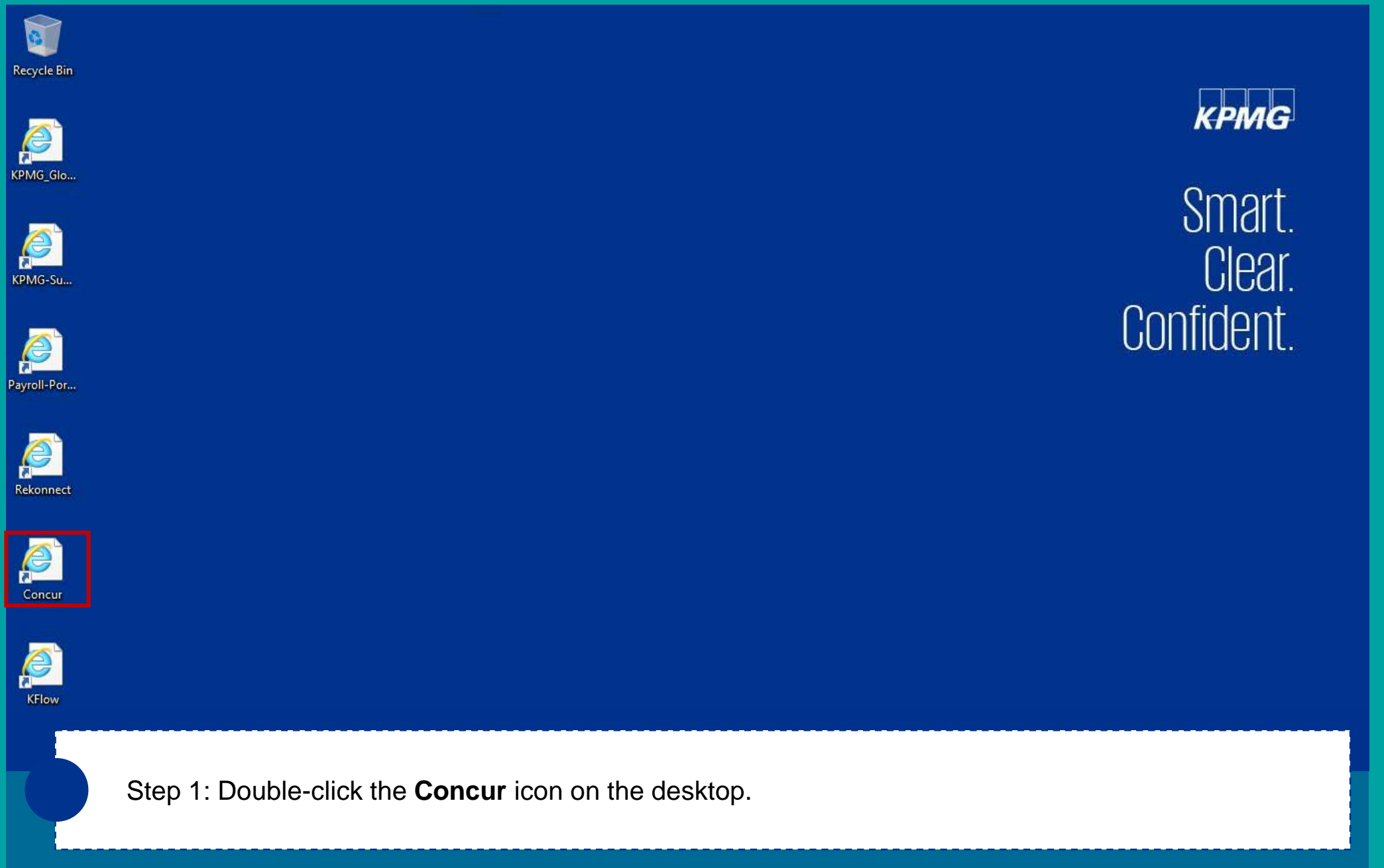
Step 1: Double-click the **Concur** icon on the desktop.

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

SAP Concur | Requests | **Expense** | App Centre

Support | Help ▾

Profile ▾

Manage Expenses   View Transactions

Manage Expenses

ACTIVE CLAIMS

Claim Library →

➕
Create New Claim

AVAILABLE EXPENSES

All Cards ▾

Move ▾   Delete

☐	Expense Detail	Expense	Source	Date ▲	Amount
☐	**ZAAKPAY- UBER BV PG** GURGAON	Breakfast	⊖	04/01/2019	INR 1.00

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

Step 4: Under **Claim Header**
- (a) Enter the details such as **Description**, **Policy**, **Project** and **Task**
- (b) Click **Next**.

Step 5: To create a new expense:
- (a) Click **+ New** Expense
- (b) Under the **New Expense** tab, choose the expense type to submit.

Step 6:
  (a) Enter all the mandatory detail textboxes marked with red line
  (b) Click **Attach Receipt** to upload the receipt of this expense.
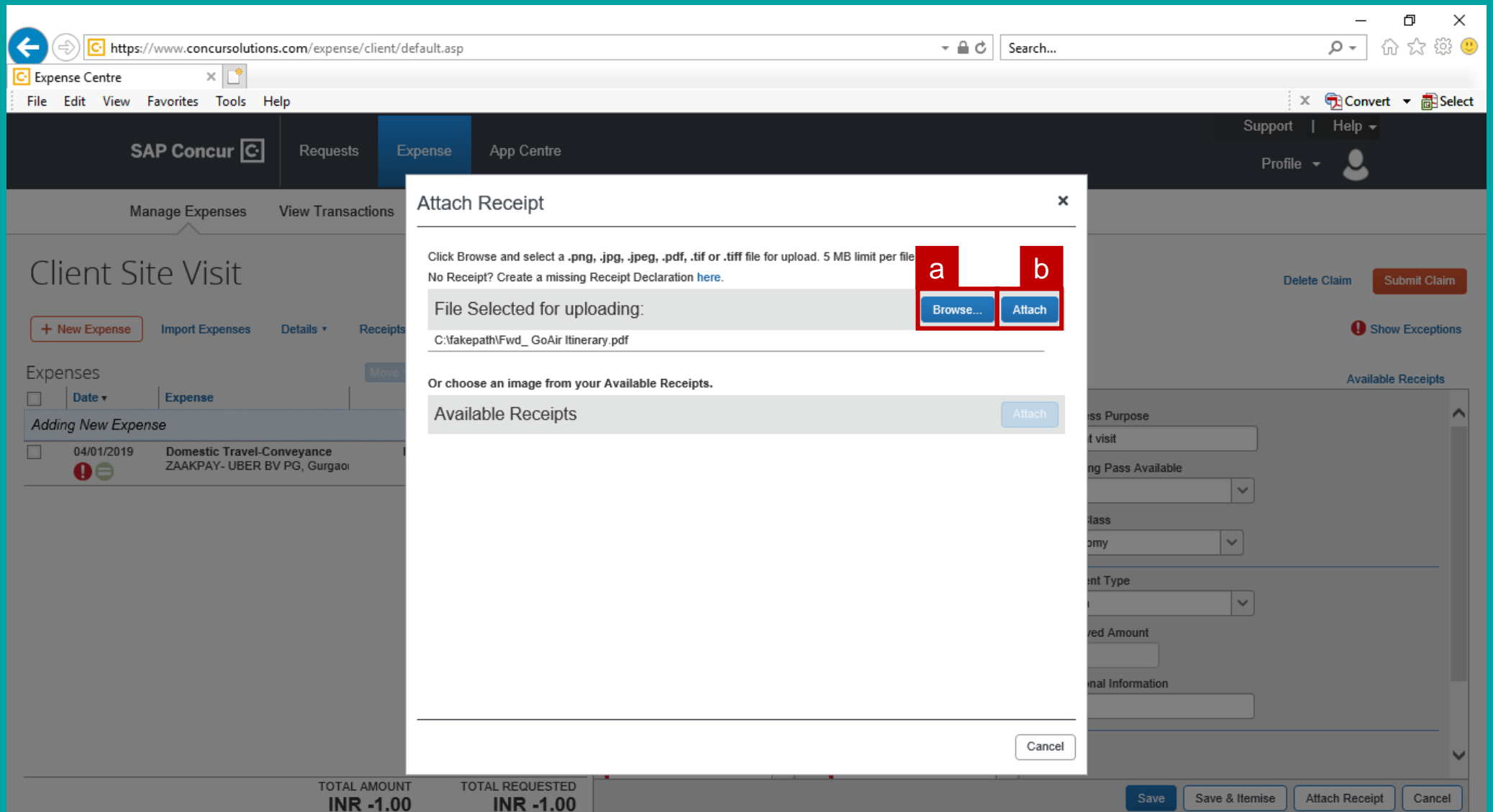
Step 7: To attach the receipt:
- (a) Click **Browse…** to locate and upload the receipt
- (b) Click **Attach**.

Step 8:
- (a) The receipt is attached and shows in a new tab
- (b) Click **Save & Itemise**.

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.

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

Step 11:
(a) Select AMEX from the list
(b) Select the expense
(c) Click **Move**.

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

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

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

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

Step 16: The new expense claim is successfully submitted.

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Thank you

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