

# SAP Concur Quick Start Checklist

Before logging into Concur for the first time, training videos are available to help give you a better understanding of Concur and how to use the system. Below is a condensed list of recommended videos to get started and initial login steps to take.

## Getting Started

- ☐ Signing in to SAP Concur with Two-Factor Authentication (2FA) [4-min. Video Link](#) or [Document Link](#)

## Expense End-User

- ☐ Updating Your Expense Profile [2-min. Video Link](#) or [Document Link](#)
- ☐ Working with Expense Assistant [2-min. Video Link](#)
- ☐ Creating a New Expense Report [2-min. Video Link](#) or [Document Link](#)
- ☐ Adding an Out-of-Pocket Expense to an Expense Report [2-min. Video Link](#) or [Document Link](#)
- ☐ Itemizing Expenses [2-min. Video Link](#) or [Document Link](#)
- ☐ Working with Available Receipts [2-min. Video Link](#) or [Document Link](#)
- ☐ Entering Personal Car Mileage [2-min. Video Link](#) or [Document Link](#)

## Expense Approver/Manager

- ☐ Reviewing & Approving an Expense Report [1-min. Video Link](#) or [Document Link](#)

## SAP Concur Expenselt – download the mobile app


- ☐ [How-To: Working with Expenselt - Android](#)
- ☐ [How-To: Working with Expenselt - iOS](#)

## SAP Concur Mobile App

- ☐ [SAP Concur Mobile App User Resources \(iPhone\)](#)
  - Videos & Tip Sheets in this section are specifically geared towards the iPhone platform
- ☐ [SAP Concur Mobile App User Resources \(SAP Concur Mobile App User Resources \(Android\)\)](#)
  - Videos & Tip Sheets in this section are specifically geared towards the Android platform

## Upon Initial Login into Concur

To make your Concur experience the best, there are a few items you need to confirm and set up first.

Most of the steps are under **Profile Settings**: Click on the  Icon in the upper right hand corner. Click on the “Your Information” tab and follow this checklist down the left-hand side:

### **Under Your Information**

#### *Personal Information*

- ☐ Confirm the spelling of your name

#### *Email Address*

- ☐ Verify your email address by clicking “Verify” and following the prompt
  - Streamlined process to email receipts to your account in Concur from a verified email address
    - Verify that their email address is correct, if it is correct, then click “**Verify**” and once an email is received with the verification code, copy/paste the code into Concur
    - After the email address has been verified: [Process receipt images with OCR technology](#) to create an expense line item like the mobile app, emails should be sent to [receipts@expenseit.com](mailto:receipts@expenseit.com)

### **Under Expense Settings**

#### *Expense Delegates*

- ☐ Add delegate(s) (if desired)

#### *Expense Preferences*

- ☐ Turn off any email notifications by unchecking the box

#### *Expense Approvers*

- ☐ Confirm your expense report approver

#### *Vehicle Configuration*

- ☐ If you will need to expense personal car mileage in the mobile app you will need to confirm a personal and/or company car is visible in your Vehicle Configuration.

#### *Favorite Attendees*

- ☐ You can add favorite attendees/groups here to expedite adding them to your expenses. You must use Advanced Search to add another employee using Concur.