

# CONCUR

EXPENSE REPORT TRAINING

# CONCUR

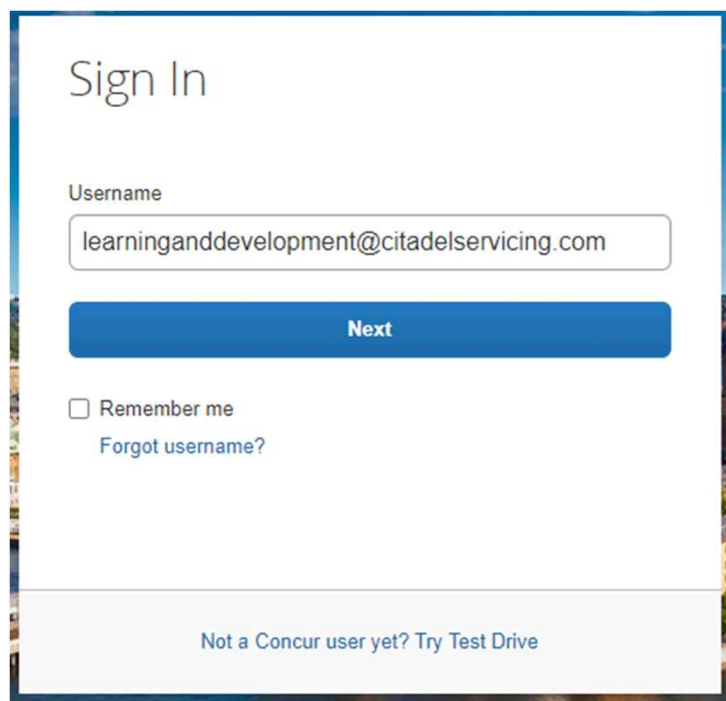
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- For reimbursement on work related expenses, our company uses Concur
- It is important to read all reimbursement policies and confer with your manager before making purchases to ensure it is a covered transaction as there are limitations and other restrictions.
- Concur is safe, easy to use, and comes in an app format to be used on most smart phones.



# CONCUR LOGIN

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A screenshot of the Concur login interface. At the top, it says "Sign In". Below that is a "Username" label and a text input field containing the email address "learninganddevelopment@citadelservicing.com". A blue "Next" button is positioned below the input field. Underneath the button is a checkbox labeled "Remember me" and a blue link that says "Forgot username?". At the bottom of the form, there is a link that reads "Not a Concur user yet? Try Test Drive".

Sign In

Username

learninganddevelopment@citadelservicing.com

Next

☐ Remember me

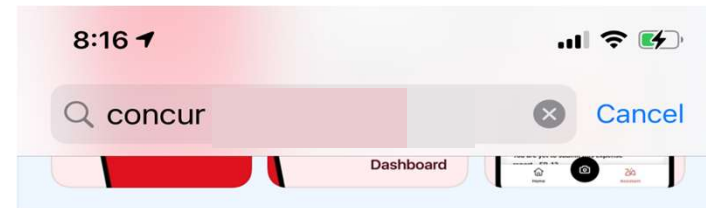
[Forgot username?](#)

[Not a Concur user yet? Try Test Drive](#)

- In your web browser, you will type in **ConcurSolutions.com**
- Once you reach the login page, you will enter your company email address and click **NEXT**.
- Then, select the **Forgot Password** button.
- An email will be sent to you to setup your password.
- If you have not received an email from Concur after 20 minutes, please reach out to Accounting to trouble shoot.

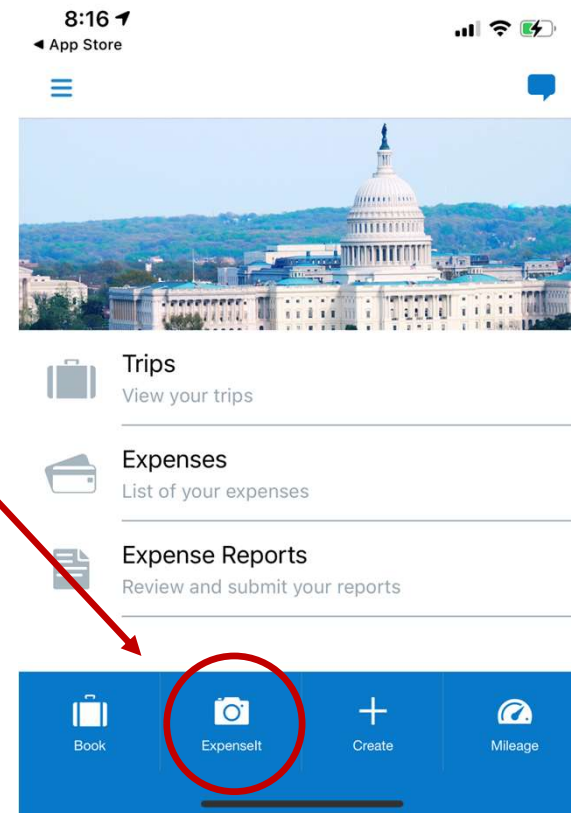
# CONCUR APP

- The easiest way to utilize concur is by downloading the app.
- From your app store, search for “SAP Concur”
- You will download it to your phone then login with the same credentials you use to login to the desktop version.
- Please note: you MUST login to Concur via your desktop and set up your password before you can set up the app.



# CONCUR EXPENSE TRACKING

- Once you are logged, you will see a homepage listing options such as Trips, Expenses and Expense Reports.
- At the bottom in blue, you will see a camera icon that says Expense It.
- Click on this icon and make sure to allow the app access to your photos and camera.
- Then you just take a picture of your receipt and the app will save it.
- Now that you have picture of your receipts, you can create your expense report.



# CONCUR CREATING AN EXPENSE REPORT

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- You can either create the report on your desk top or the app. Instructions for the app will be slightly different and it is less user friendly due to limited viewing options..
- We recommend utilizing the app for taking photos of your receipts, then logging into the desktop version to create your report.
- Once you are logged into the desktop version, the photos of the receipts taken on the app will appear, allowing you to select the ones you want and add them to an expense report.
- You will select Upload Receipts from the main page. This will show you all available receipts so you can select them, then after selecting the ones you want, click Create New Report.

# CONCUR CREATING AN EXPENSE REPORT

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- You will name the report and the time period. Typically it will be the 1<sup>st</sup> of the month to the last day of the month since these must be submitted on a monthly basis and are due on the last day of each month.

Example:            Report Name: November 2020 Expenses

                         Date: Nov 30, 2020

                         Business Purpose:

                         Comment:

- Reports must be submitted on the last day of each month and require manager approval to qualify for reimbursement.
- Human Resources makes final approvals on all expenses.

# CONCUR CREATING AN EXPENSE REPORT

- For Mileage, you can add it after you create the expense report.
- You will click on the **Quick Expenses** button on the top left and select **Mileage Expenses**.
- You will then enter the date and the starting address along with the destination address. Concur will automatically calculate the mileage reimbursement for you.

The screenshot shows the 'Quick Expenses' window with the 'Mileage Expenses' tab selected. Under 'Journey Details', the 'Vehicle ID' is set to 'Fixed rate car' and the 'Expense Type' is 'Personal Car Mileage'. A table below contains journey entries with columns for Map, Transaction Date, From Location, To Location, and Business Distance. The first entry shows a date of 11/01/2020, from Earth to Mars, with a distance of 4800000000. There are four empty rows below it, each with a gear icon for settings.

Map	Transaction Date	From Location	To Location	Business Distance
>	11/01/2020	Earth	Mars	4800000000
>				
>				
>				
>				



# CONCUR SUBMITTING AN EXPENSE REPORT

- Once receipts and mileage are added, click **Submit Report**.

The screenshot displays the SAP Concur 'Expense' report submission interface. At the top, a dark navigation bar includes the 'SAP Concur' logo, 'Travel', 'Expense' (selected), and 'App Center' tabs. On the right, there are links for 'Support', 'Help', 'Profile', and a user icon. Below the navigation bar, the 'Manage Expenses' section is active for the month of '11/2020'. A red arrow points from the 'Expense' tab to the 'Submit Report' button, which is circled in red. The interface includes buttons for '+ New Expense', '+ Quick Expenses', 'Import Expenses', 'Details', 'Receipts', and 'Print / Email'. A table for 'Expenses' is shown with columns for 'Date', 'Expense Type', 'Amount', and 'Requested'. A 'New Expense' form is partially visible on the right, showing an 'Expense Type' input field.

- This will send the report to your supervisor to review and approve.
- The report will then go to accounting and HR for final approval.
- For any questions regarding qualified expenses, please refer to your supervisor or the Employee Cintranet and Handbook.

# CONCUR SUBMITTING AN EXPENSE REPORT

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- Expense Accounts (Per the Company Employee Handbook)

*The Company will reimburse employees for reasonable expenses incurred through business with prior authorization from management. Receipts are required. If you are required to drive your personal vehicle on Company business, you must prove to the Company's satisfaction that you have a valid driver's license and current automobile insurance. Employees without a valid driver's license or current automobile insurance may not drive on behalf of the Company. The Company will reimburse you at the prevailing federal mileage reimbursement rate. This reimbursement is intended to cover wear and tear on your vehicle and your gas and automobile insurance expenses while you use your vehicle on Company business. All expense account reports must be filed by the third business day of following month in which the expense was incurred. If you have any questions about the Company's expense reimbursement policy, contact your manager.*

# INTERNET & PHONE EXPENSES FOR COVID

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- Please refer to the General Announcement on the Cintranet regarding the reimbursement for internet and phone expenses incurred as a result of working from home.
- Additional home expenses such as increased internet, phone or high speed upgrade costs will be reimbursed separately and are not through Concur but on a separate Excel expense report.
- Reach out to your supervisor for additional questions regarding the item requirements and cost limitations to qualify for reimbursement on these specific items.