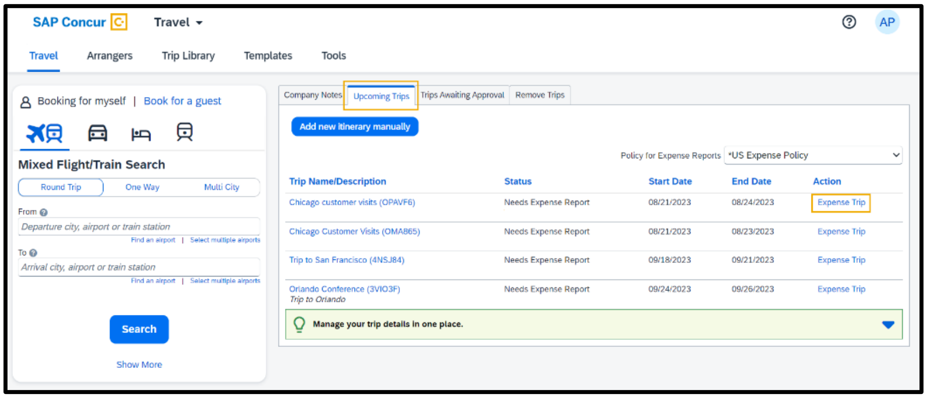
Creating an Expense Report based on a Completed Trip

You can create an expense report after completing your trip.

1. From the **Travel** menu on the **Upcoming Trips** tab, select **Expense Trip**.

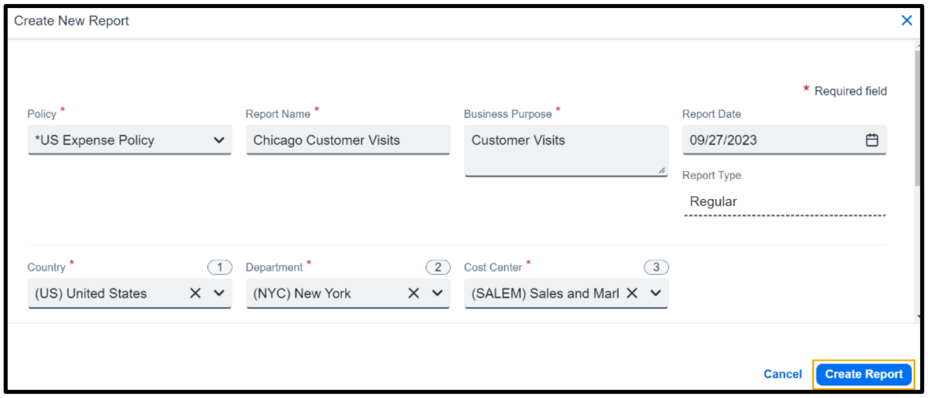

SAP Concur
Travel
Travel
Arrangers
Trip Library
Templates
Tools
AP
Booking for myself | Book for a guest
Mixed Flight/Train Search
Round Trip
One Way
Multi City
From
Departure city, airport or train station
Find an airport | Select multiple airports
To
Arrival city, airport or train station
Find an airport | Select multiple airports
Search
Show More
Company Notes
Upcoming Trips
Trips Awaiting Approval
Remove Trips
Add new itinerary manually
Manage your trip details in one place.

Policy for Expense Reports: *US Expense Policy

Trip Name/Description	Status	Start Date	End Date	Action
Chicago customer visits (OPAVF6)	Needs Expense Report	08/21/2023	08/24/2023	Expense Trip
Chicago Customer Visits (OMA865)	Needs Expense Report	08/21/2023	08/23/2023	Expense Trip
Trip to San Francisco (4NSJ84)	Needs Expense Report	09/18/2023	09/21/2023	Expense Trip
Orlando Conference (3VIO3F) *Trip to Orlando*	Needs Expense Report	09/24/2023	09/26/2023	Expense Trip

2. On the **Create New Report** page, complete the required and optional fields as appropriate (required fields are indicated with a red asterisk).

   Your company defines the fields that appear on this page. Note that some fields are already pre-populated.


Create New Report
* Required field
Cancel
Create Report

Policy *: *US Expense Policy
Report Name *: Chicago Customer Visits
Business Purpose *: Customer Visits
Report Date: 09/27/2023
Report Type: Regular
Country * (1): (US) United States
Department * (2): (NYC) New York
Cost Center * (3): (SALEM) Sales and Marl

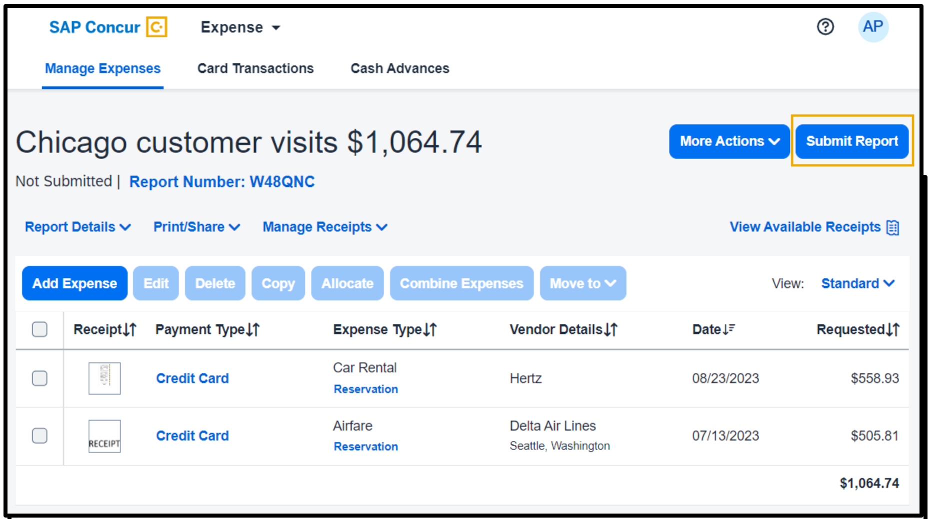
3. After you have completed entering your information, select **Create Report**.

The system will automatically add all credit card transactions that are tied to the purchase of your trip to your expense report. It will also add any transactions where the dates are between the date you left and the date you returned.

The system assigns expense types using merchant codes contained in each credit card transaction. If it cannot determine an expense type, the system assigns the expense type as **Undefined**. You must correct any Undefined expense types before you can submit an expense report.

Note that the **Car Rental** expense has an attached e-receipt. E-receipts are electronic versions of receipt data that are sent directly to SAP Concur to replace imaged paper receipts.

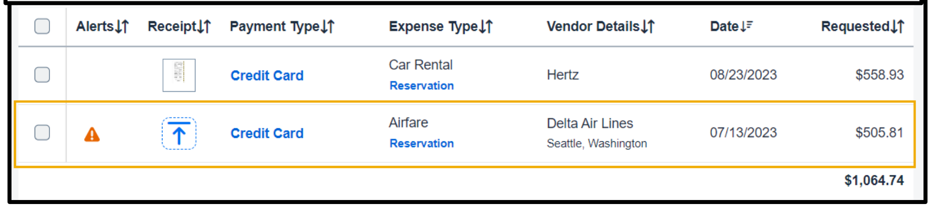
4. In the open report, select any expense that requires additional action, and update the information.


SAP Concur
Expense
Manage Expenses
Card Transactions
Cash Advances
More Actions
Submit Report
Report Details
Print/Share
Manage Receipts
View Available Receipts
Add Expense
Edit
Delete
Copy
Allocate
Combine Expenses
Move to
View: Standard

Chicago customer visits $1,064.74

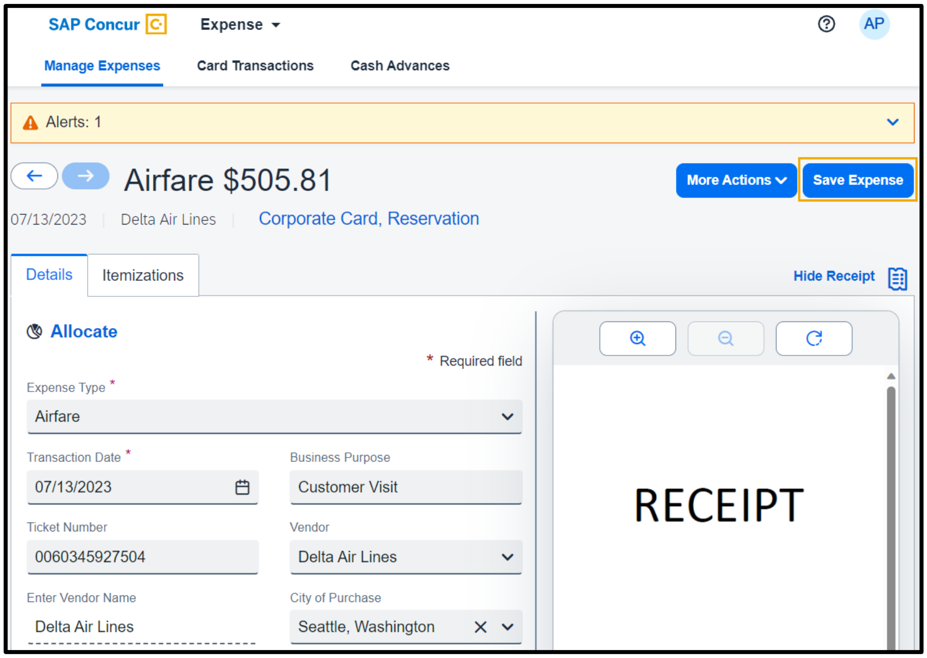
Not Submitted | Report Number: W48QNC

☐	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐		Credit Card	Car Rental Reservation	Hertz	08/23/2023	$558.93
☐	RECEIPT	Credit Card	Airfare Reservation	Delta Air Lines Seattle, Washington	07/13/2023	$505.81
						$1,064.74



☐	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐			Credit Card	Car Rental Reservation	Hertz	08/23/2023	$558.93
☐	⚠		Credit Card	Airfare Reservation	Delta Air Lines Seattle, Washington	07/13/2023	$505.81
							$1,064.74

5. After you enter the appropriate information, select **Save Expense**.


SAP Concur
Expense
Manage Expenses
Card Transactions
Cash Advances
More Actions
Save Expense
Details
Itemizations
Hide Receipt
Allocate
RECEIPT

⚠ Alerts: 1

Airfare $505.81

07/13/2023 | Delta Air Lines | Corporate Card, Reservation

* Required field

Expense Type *: Airfare

Transaction Date *: 07/13/2023

Business Purpose: Customer Visit

Ticket Number: 0060345927504

Vendor: Delta Air Lines

Enter Vendor Name: Delta Air Lines

City of Purchase: Seattle, Washington

6. After you have updated all your report's expenses, select **Submit Report**.

Last updated: 27 September 2023