

## Concur QRG

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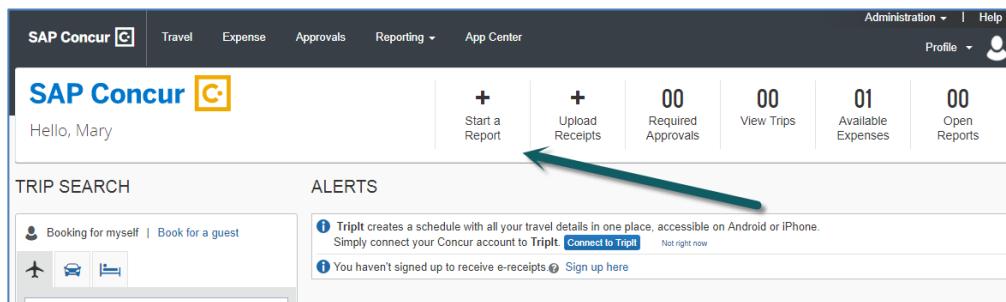
### Accessing Concur

Concur is the online tool we use to book travel and submit expense reports for Company credit cards: <https://www.concursolutions.com/nui/signin/v1>

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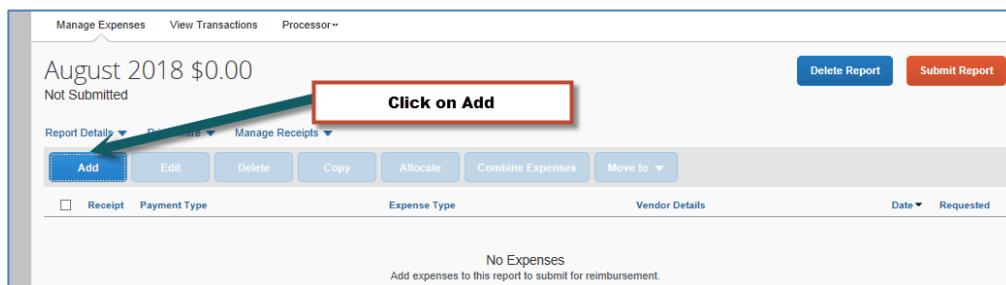
### Starting a report

Enter appropriate information and select **Start a Report**.



### Adding charges

If charges do not automatically appear, select **Add**.



Select the charges to include on this report. You should pull in charges through the 5<sup>th</sup> of the current month.

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### Entering details

Red alerts indicate additional details are required.



## Attaching receipts

Attach the receipt before selecting the expense type or adding the business purpose.



		Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		US Bank		Miscellaneous Expense	DUNKIN #349308 Q35 Tempe, Arizona	08/17/2018	\$21.60	
<input type="checkbox"/>		US Bank		Miscellaneous Expense	GROWLER USA-PHOENIX Phoenix, Arizona	08/22/2018	\$96.86	

**Note:** If a receipt is not required (see [Receipt policy](#)) or is attached after adding the expense or business purpose, you will need to save the expense twice before Concur will update the record.

The receipt is available to view directly from this screen. You can open it as well to see the larger image.

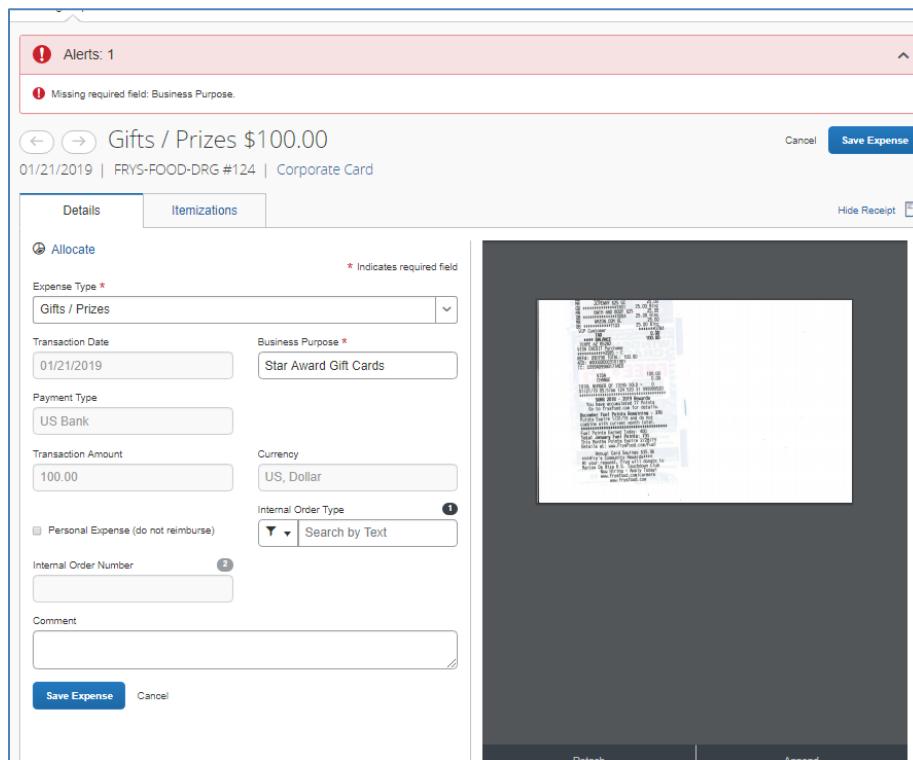
Yellow alerts indicate that the receipt is not attached. Be sure to follow receipt policy and attach when required. It's preferred that **ALL** receipts are attached, regardless of the amount, due to IRS regulations. The yellow alert is currently a warning, not a hard stop. Future audit enhancement **will require** receipt attachment.



		Alerts	Receipt	Payment Type	Expense Type	Vendor Details
<input type="checkbox"/>			US Bank		Automotive Fuel Costs (Company Vehicle Only)	SHELL OIL 10047281000 Scottsdale, Arizona

## Entering business purpose and expense type

After the receipt is attached, enter the Business Purpose and Expense Type. Allocate and add internal order # when applicable.



Alerts: 1

Missing required field: Business Purpose.

Gifts / Prizes \$100.00

01/21/2019 | FRY'S-FOOD-DRG #124 | Corporate Card

Details Itemizations Hide Receipt

Allocate

Expense Type \*: Gifts / Prizes

Transaction Date: 01/21/2019

Business Purpose \*: Star Award Gift Cards

Payment Type: US Bank

Transaction Amount: 100.00

Currency: US, Dollar

Internal Order Type: Search by Text

Personal Expense (do not reimburse):

Internal Order Number:

Comment:

Save Expense Cancel

Save the expense. Repeat for each charge.

## Contact

Contact Kathy Reid with any questions related to using Concur and the processing of credit card reports.