

ATTACHING A RECEIPT

This step-by-step guide will show you:

- Attach a Receipt using Expenselt & Expense Assistant
- Other ways to attach a receipt – Web and Mobile

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EXPENSEIT & EXPENSE ASSISTANT

By far the easiest way to attach receipts is to use the combination of Expenselt and Expense Assistant.

Expenselt is an element within the SAP Concur app that automatically turns receipts into expense entries and sends them directly to Concur for you. This is the quickest and easiest way to create an expense!

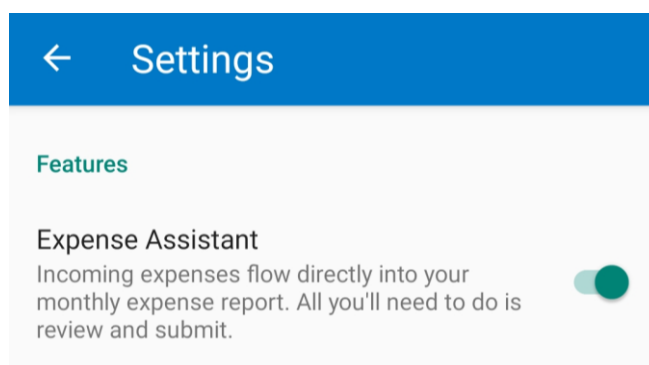
Expenselt allows you to digitise receipts as soon as you receive them, therefore, eliminating the need to try and keep track of all your paper copies.

Expense Assistant adds all of your expenses in your Available Expenses list to any open expense report.

Expense Assistant will continue to add all of your new incoming expenses that have a date that matches the calendar month of the expense report to that expense report.

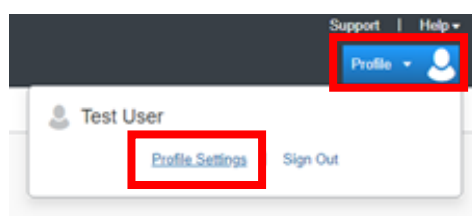
To enable on the Mobile version,

- Go to 'Settings'
- Toggle on the 'Expense Assistant' option



To enable on the web version,

- Go to 'Profile'
- Then 'Profile Settings'
- Select 'Expense Preferences'



EXPENSEIT & EXPENSE ASSISTANT (CONT.)

Profile Options

Select one of the following to customise your user profile.

Personal Information

Personal Information

Bank Information

Bank Information

Request Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Company Car

Company Car

Change Password

Change your password.

System Settings

Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Expense Delegates

Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Personal Car

Personal Car

Concur Mobile Registration

Set up access to Concur on your mobile device

Select the dropdown under 'Sign me up for...' next to 'Expense Assistant using this method' and choose 'By month'

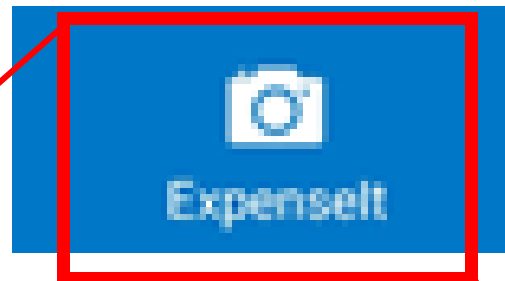
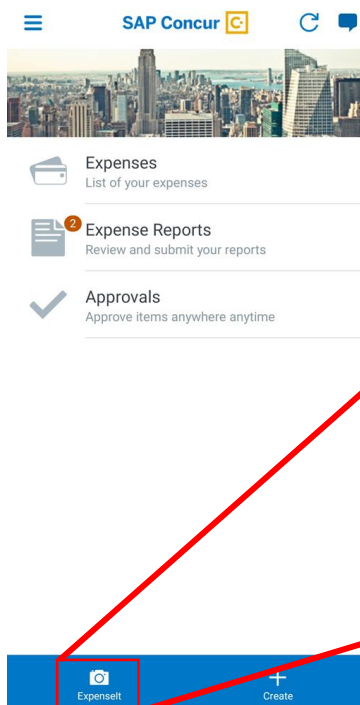
Sign me up for...

Expense Assistant using this method: **By Month** ▼

By Month
None

The easiest way to use these two features is to use them on the mobile app. Here is how to do that:

a) To start working with Expenselt, on your SAP Concur home screen, press Expenselt



EXPENSEIT & EXPENSE ASSISTANT (CONT.)

b) To take a picture of your receipt, lay the receipt flat and hold your device as steady as possible, and then press the Capture button. Expenselt uses optical character recognition (OCR) to read the amount



c) You will be shown a Preview Image, select 'Use' if you are happy or 'Retake' if you think the image is not very clear



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EXPENSEIT & EXPENSE ASSISTANT (CONT.)

d) Verify or correct the amount on the receipt. You can upload multiple receipts using the Next Receipt button and then press 'Done'

Confirm Amount

Cedars Inn, Barnstaple Invoice

Room: 1
Breakfast: 1
Tax: 1
Total: 239.46

What is the amount on this receipt ?

239.46

Incorrect

Finalize

Cedars Inn, Barnstaple Invoice

Room: 1
Breakfast: 1
Tax: 1
Total: 239.46

239.46

NEXT RECEIPT

DONE

e) The receipt is analysed and uploaded by expense categories, this may take a couple of minutes. Expenselt also itemizes your complicated hotel bills. Once the receipt is uploaded as an expense, Expense assistant will move it into the correct month's report. If there is not an open report for the month in question, Expense Assistant will create one

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EMAILING IN RECEIPTS

One of the other easiest ways to get a receipt into Concur is by emailing it in.

a) As long as your email has been verified (Getting Started & Making your first claim Guide), you can simply forward an image or PDF of your receipt to receipts@expenseit.com. If you do not intend to use Expenselt (we advise you do!) then you can email your receipts to receipts@concur.com for them to go automatically into your claim.

b) This will then be processed in the same way as if you had used Expenselt on the mobile app. With Expense Assistant turned on, it will be processed and feed into the correct report. If not, it will appear in available expenses.

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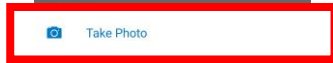
OTHER OPTIONS (MOBILE)

Should you choose not to utilise Expenselt and Expense Assistant, you do have several other options. Start by creating a new Expense., either from the home screen or within an Expense Report.

- Whilst in the Expense press 'Add Receipt'
- You will be presented with several options:

OTHER OPTIONS (MOBILE) (ONT.

a) Press 'Take Photo'



b) Centre the Receipt so it is entirely in the frame and then click the capture button



c) You will then be asked to either 'Add Page' if you have multiple pages of the receipt or select 'Use' if you are happy. You also have a bin icon to delete the receipt and re-take if you are not happy



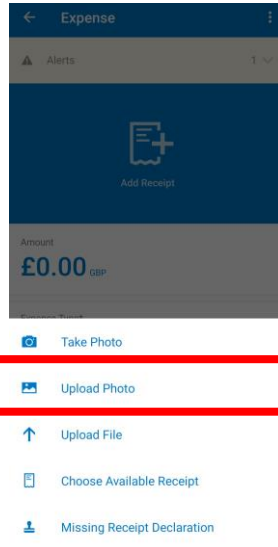
d) Once you have clicked Use, the Receipt will attach and you can carry on with your expense

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OTHER OPTIONS (MOBILE) (ONT.

Upload Photo:

e) Select 'Upload Photo'

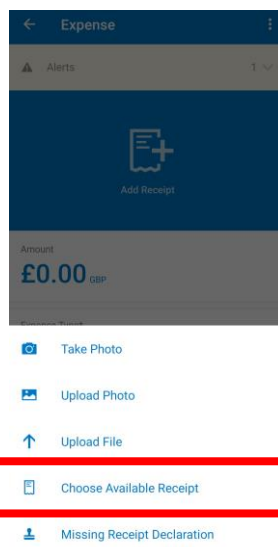


f) You will be shown the photos saved in your phone, press the one you would like to use and it will be attached



Choose available receipt:

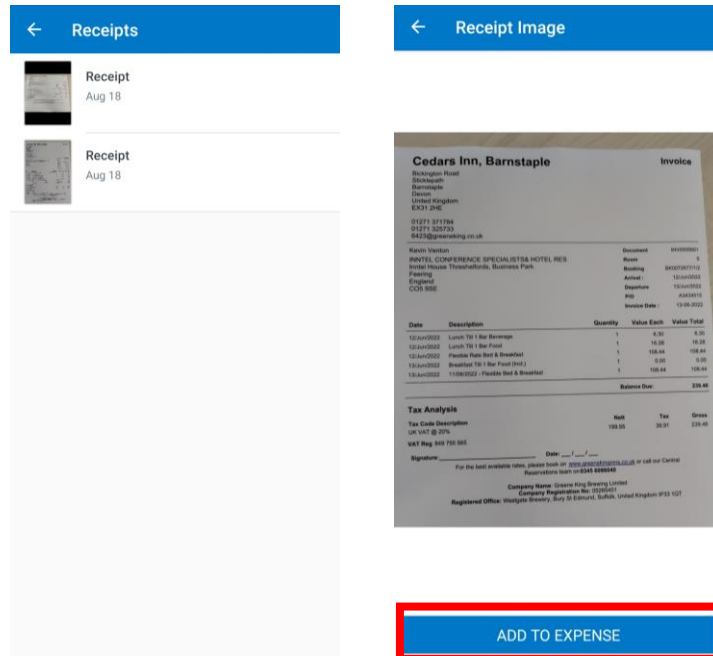
g) Select 'Choose Available Receipt'



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OTHER OPTIONS (MOBILE) (ONT.

h) You will be shown Receipts that are saved in your 'Available Expenses'. These are ones you have previously emailed in to Concur. Click the relevant receipt and then 'Add To Expense'



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OTHER OPTIONS (WEB)

When on the Web version you have two other options available to you.

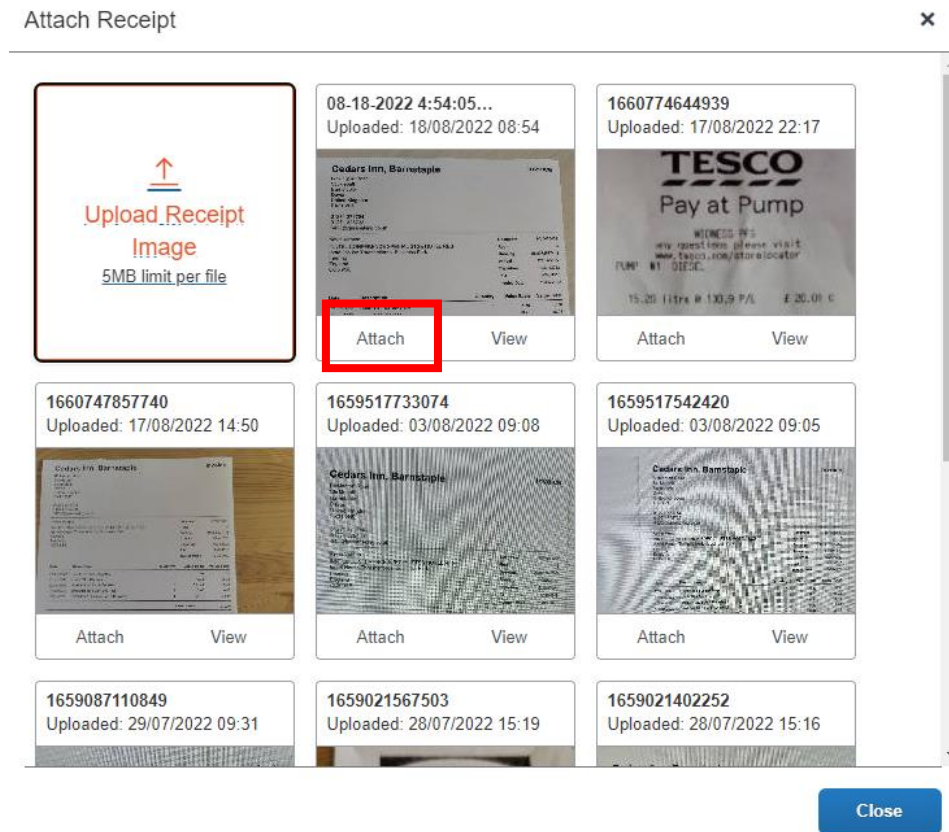
a) Open a new Expense and click 'Upload Receipt Image'

The screenshot shows the 'New Expense' form in the SAP Concur web interface. The form is divided into two main sections: 'Details' and 'Itemisations'. The 'Details' section contains various fields for entering expense information, including 'Expense Type' (set to 'Parking'), 'Transaction Date', 'Business Purpose', 'Parking Type', 'Country' (set to 'UNITED KINGDOM (GB)'), 'Amount', 'Receipt Status' (set to 'No Receipt'), 'Payment Type' (set to 'Cash'), 'Currency' (set to 'UK, Pound Sterling'), 'Personal Expense' checkbox, 'Cost Centre' (set to '(99850) FSS'), and a 'Comment' field. On the right side of the form, there is a large rectangular area with a red border and the text 'Upload Receipt Image' in red, indicating where to click to upload a receipt image. The top navigation bar includes links for 'Requests', 'Expense', 'Reporting', and 'App Centre', along with user profile and help options.

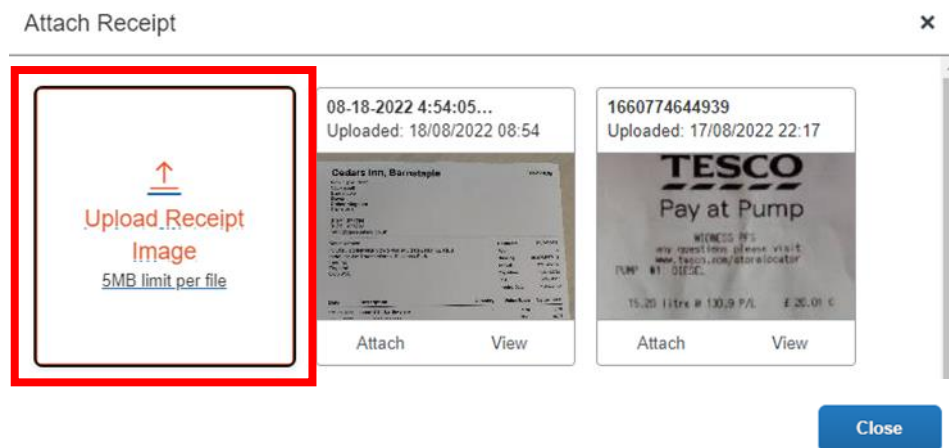
4

OTHER OPTIONS (WEB) (ONT.

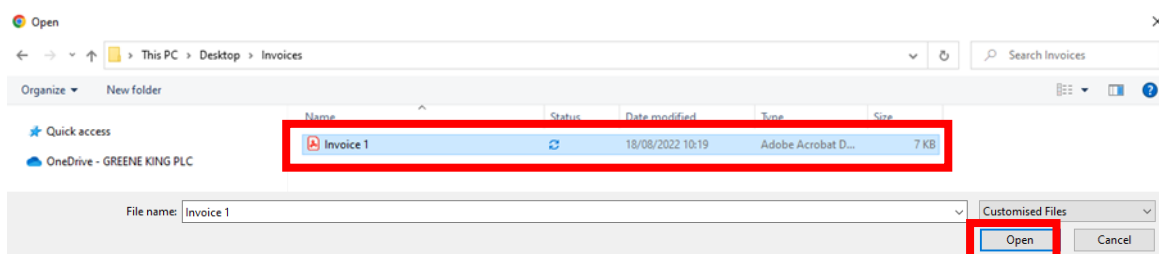
b) You are then shown all the available receipts in your available receipts (these are ones you have previously emailed in). You can click 'View' to have a look at the receipt, or 'Attach' if you are ready to 'Attach'



c) In the top left you also have the option 'Upload Receipt Image'



Click this and you are able to browse your PC to add a saved file. Select the file, and click 'Open'





For training issues and support with the system please contact Concur Support...



PHONE NUMBERS

01284 843300



EMAIL ADDRESSES

Concur@greeneking.co.uk

The Concur Support team do not set the expense policy, please treat them with respect and show 'We Care'.

Line Managers are unable to override limits that are set out in the policy. Any feedback on policy points should be directed to your Line Manager who can pick this up with HR.