

SAP Concur

MAKING A  
CLAIM ON THE  
WEB**This step-by-step guide will show you:**

- Make a claim on the web version of Concur
- Edit, itemise & submit your Expense
- Check the status of your claim

Concur is Greene King's solution for reimbursing employees for business expenses.

**Before incurring any expenses, please ensure you have read the expense policy which can be found on the Vault.**

1

**UPLOADING A RECEIPT**

The first step of making a claim on Concur is to upload your receipt. There are multiple ways to do this. For a comprehensive guide please visit our 'Attaching A Receipt' guide. In this guide we will cover the easiest way when using the web version of Concur:

If you have obtained a physical receipt then the easiest way to upload this will be by using Expenselt on the mobile app. To see how to do this please visit our Getting Started & Making Your First Claim Guide or our Attaching a Receipt guide (as mentioned already).

If you do not want to use the mobile app, the easiest way to upload a receipt on the web version will be to email the receipt in. To do this you need to do the following:

- Obtain an image of your receipt. This may be an attachment that you have been emailed electronically by the company in question or you may take a picture of the receipt on a device you have.
- You then simply need to email this image to [receipts@expenseit.com](mailto:receipts@expenseit.com)

This will then be processed by Expenselt. Expenselt is an element within SAP Concur that automatically turns receipts into expense entries and sends them directly to Concur for you. Expenselt uses optical character recognition (OCR) to read the amount.

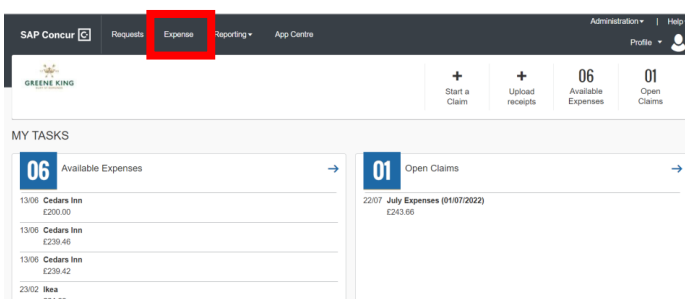
The receipt is analysed and uploaded by expense categories. Expenselt also itemizes your complicated hotel bills. Once the receipt is uploaded as an expense, Expense assistant will move it into the correct month's report. If there is not an open report for the month in question, Expense Assistant will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

2

**EDITING AN EXPENSE**

You may then want to open and edit the expense, to do this:

- From the homepage, click on 'Expense'

**PLEASE NOTE:**

If you are completing a mileage claim, this is quite a different process. Please visit our 'Company & Personal Car Business mileage Claims' guide for comprehensive instructions on submitting a mileage claim along with your fuel receipts.

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## EDITING AN EXPENSE (CONT.)

### b) Select the correct Expense claim

Manage Expenses

CLAIM LIBRARY View: Active Claims

Create New Claim

NOT SUBMITTED 22/07/2022

July Expenses (01/07/2022)

£243.66

### c) Then tick the relevant Expense and select 'Edit'

SAP Concur

Manage Expenses Process Claims

Alerts: 19

July Expenses (01/07/2022) £243.66

Not Submitted

Copy Claim Submit Claim

Add Expense Edit Delete Copy Combine Expenses Move to

Alerts	Receipt	Payment Type	Expense Type	Supplier Details	Date	Amount	Requested
<input checked="" type="checkbox"/>		Cash	Public Transport	Subway Glasgow, Strathclyde Region	19/07/2022	£4.20	£4.20
<input type="checkbox"/>		Cash	Hotel	Cedars Inn Barnstaple, UNITED KINGDOM	13/06/2022	£238.46	£238.46 Itemised
						£243.66	£243.66

### d) Then edit any details you need to

Hotel £239.46

13/06/2022 Cedars Inn

Details Itemisations

Expense Type \* Hotel

Check-in Date \* DD/MM/YYYY 13/06/2022

Check-out Date \* 13/06/2022

Nights: 0

Transaction Date \* 13/06/2022

Business Purpose \* None Selected

Area of Purchase \* None Selected

Country \* UNITED KINGDOM (GB)

Amount \* 239.46

Receipt Status \* No Receipt

Comment

Vendor \* Cedars Inn

Payment Type \* Cash

Currency \* UK, Pound Sterling

Cost Centre \* (99850) FSS

Save Expense Cancel

Cedars Inn, Barnstaple Invoice

1600830374497

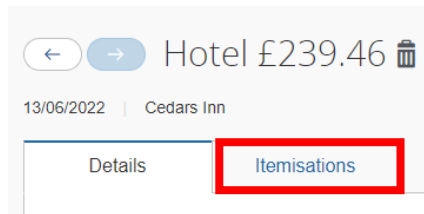
e) You will always need to edit the 'Business Purpose' which explains the reason for your claim, this should be a clear description of why you are making a claim. You will also always need to amend the 'Receipt Status'. Depending on the sort of Expense, there may be other fields you need to amend, but these will be highlighted in red if they need changing.

3

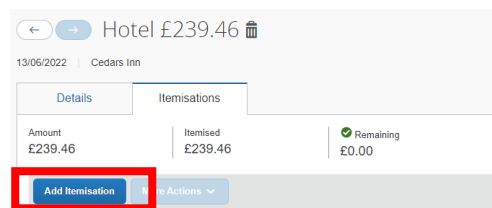
## ITEMISATION

Expenselt will Itemise certain things, such as Hotel Bills for you but you may need to use this feature for other things. For example you may buy fuel and your lunch at a fuel station and only obtain one receipt for both. In this instance you would want to itemise the different items to be able to put the fuel under one expense type, and any food under another.

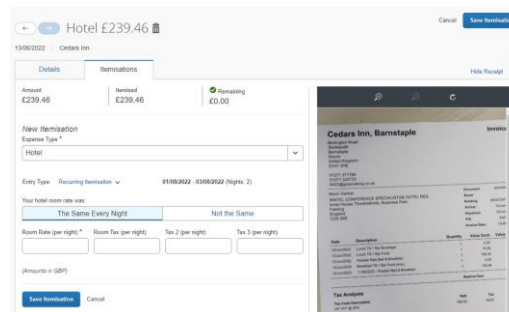
a) To itemise your expense, start by clicking on the Itemisation tab



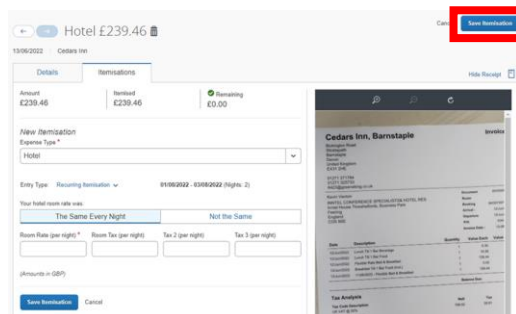
b) Click 'Add Itemisation'



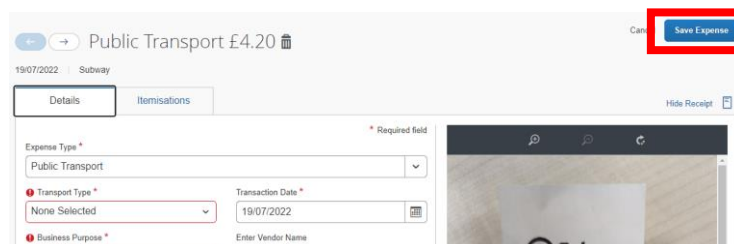
c) You will then be prompted to select the Expense Type and then fill out details of the Itemisation



d) When finished, select 'Save Itemisation'



e) Once you have completed any changes to the Expense and added any Itemisations, select 'Save Expense'



## SUBMITTING A CLAIM

a) Once you have added all your expenses for the month and checked they are correct, simply go into the report and select 'Submit' at the top

Alerts T1	Receipt T1	Payment Type T1	Expense Type T1	Supplier Details T1	Date T1	Amount T1	Requested T1
<input type="checkbox"/>		Cash	Public Transport	Subway Glasgow, Strathclyde Region	19/07/2022	£4.20	£4.20
<input type="checkbox"/>		Cash	Hotel	Cedars Inn Barnstaple, UNITED KINGDOM	13/06/2022	£239.46	£239.46 (Rounded)
						£243.66	£243.66

b) You will then be asked to agree to a few points, if agreed select 'Accept & Continue'

By clicking on the Submit button I confirm that:

I have read and understood the Greene King Expenses Policy and this is a true and accurate claim for expenses that I have incurred on behalf of Greene King. There are no items relating to personal or unallowable expenses.

All required receipt images have been attached to this claim.

I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.

Cancel

Accept & Continue



### GENERAL GUIDANCE

- Submit your expenses once every month
- Once submitted your claim will go to the Concur Audit team for checking
- The team will make sure you have receipts for all claims, the receipts you have submitted match to the information you have entered into to the system and adjust VAT if necessary
- When Concur find issues they will ask you to correct these before your claim is submitted to your Line Manager
- Please review your claim before submitting to make sure it is accurate as if the Concur Audit team find errors it will slow down the payment process
- Once verified by the audit team your claim will be sent to your Line Manager for approval

**KEEP ALL RECEIPTS UNTIL YOU HAVE BEEN PAID FOR YOUR CLAIM!**

**Claim dates:**

This needs to match the receipt date. When using Expenselt the system will automate this for you. The mobile app defaults to today's date so if you are not up to date with recording your claims remember to amend the date.

**Receipt images:**

Ensure they are clear, and you have not cut off any of the receipt/invoice details.

**Receipts are required for all transactions:**

Missing receipts will be accepted by your Line Manager in exceptional circumstance. Claims without supporting receipts cannot be validated and VAT cannot be claimed back. Make sure you do what is best for the business.

**Use the correct expense type, not just miscellaneous:**

Where there is an expense type please use it so we can ensure that costs are reported in the correct area of the accounts. Miscellaneous should only be used in exceptional circumstances when there is not suitable expense type for the item being claimed. Before committing to the spend make sure that the item you are wanting to purchase can be claimed back via expenses, approved suppliers are available for most items. If you are not sure please contact the Concur support team.

**Some receipts have the VAT number &/or the date on the reverse:**

Make sure you take photo of the front and reverse of the receipt so Concur Audit can check the date is correct and we can claim back the VAT.

**Business purposes:**

Explains the reason for your claim, this should be a clear description of why you are making a claim. If your claim is unusual you can use the comments field to explain further. Please be aware claims are not only checked by your Line Manager and Concur Audit they are checked by the Finance teams and regularly Audited by our Internal Auditors. All teams need to understand what you are claiming and why.

**Train tickets:**

With the from and to locations shown should be used to support your claim. Sometimes the ticket machine will hold onto the receipts so please get into the habit of photographing your receipts as you go.

**Leave meaningful comments:**

The Concur audit team are an external company so abbreviations that may be well known within Greene King are not by Concur.

**POLICY POINTS****Top up of travel cards**

Topping up of oyster cards and other travel cards are not permitted: Receipts should be submitted for all claims including details of the individual journeys, note you won't be able to make a claim for 'topping up' a tag or oyster card. Please sign up to the relevant online accounts that provide you with your journey details.



## POLICY POINTS

### Who pays?

When expenses are incurred in a group, the most senior employee in the group must pay and subsequently claim the expenses.

### Keep claims to 1 per month

Claims over 3 months old will need additional approval and may be rejected. Claims that cover more than one month take longer for the Auditors to check and tend to include more errors so can be returned multiple times delaying payment.

### Staff Entertainment

When you're arranging staff entertainment please let your manager know before you organise an event so they can agree the budget for this.

### Tips & Gratuities

Discretionary tips and gratuities are not considered a necessary business expense and should not be claimed. Make sure you check your bill before paying and making your claim.

### Greene King Accommodation

When possible, we encourage you to use Greene King accommodation when a property is situated within 10 miles of your destination.

### Recognition Expense Type

Recognition expense type is to be used when claiming back rewards that have been awarded to employees. If you want to recognise an employee, please speak to your line manager first to ensure that this is appropriate and that there is the department budget to cover the cost of the reward and the additional Tax & NI. Greene King has to settle the Tax and NI due so it's important that the correct expense type is used and the name of the employee receiving the gift is detailed on Concur. Personal gifts such as cards or gifts for birthdays, weddings, christenings, new homes, or someone new to the team, to name but a few. Are personal gifts from you and you can't claim them through expenses.

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## CHECKING STATUS OF CLAIM

You may want to check what stage of the process your claim is at, to do that:

To check the status of a claim

a) From the 'Home' screen select 'Expense'

The screenshot displays the SAP Concur 'Expense' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense' (highlighted), 'Reporting', and 'App Centre'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, there are four main action buttons: 'Start a Claim', 'Upload receipts', '06 Available Expenses', and '01 Open Claims'. The 'MY TASKS' section is divided into two columns. The left column, '06 Available Expenses', lists three items: '13/06 Cedars Inn £200.00', '13/06 Cedars Inn £239.46', and '13/06 Cedars Inn £239.42', followed by '23/02 Ikea £164.00'. The right column, '01 Open Claims', shows '22/07 July Expenses (01/07/2022) £243.66'. Both columns have a right-pointing arrow.

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## CHECKING STATUS OF CLAIM (CONT.)

b) The screen will then show the status of all claims you have outstanding

The screenshot displays the SAP Concur 'Manage Expenses' interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense' (highlighted), 'Reporting', and 'App Centre'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation bar, the 'Manage Expenses' section is active, with a 'CLAIM LIBRARY' view set to 'Active Claims'. A red box highlights a claim entry with the status 'NOT SUBMITTED' and a date of '22/07/2022'. Below this, a claim titled 'July Expenses (01/07/2022)' is shown with a value of '£243.66'. To the left of the claim list is a button labeled 'Create New Claim' with a red plus icon.



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



#### PHONE NUMBERS

01284 843300



#### EMAIL ADDRESSES

[Concur@greeneking.co.uk](mailto: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.