



Concur App

Expense Reimbursement Guide



Concur Accounts

- If you have already been set up with a Concur account, you will download the app and log in.



- If you have not yet been set up with a Concur account, please contact:
 - Danielle Gregoire at dgregoire@pef.org



Reimbursement Rates

- Meals are reimbursed at the following rates for PEF Members as of 4/1/23:

Meal	Regions 1-9	Regions 10-12
Breakfast	\$ 12.00	\$ 15.00
Lunch	\$ 20.00	\$ 23.00
Dinner	\$ 40.00	\$ 50.00

- The mileage reimbursement rate as of 1/1/23 is .655 per mile



Logging In


- Your username will be provided to you in an email. A temporary password will also be sent. If you would like to create your own password please do the following:
- Log in with your username, press next, choose forgot password. You will be emailed a link to reset your password. Follow the instructions in the email.

Logging In

- Fill in your username as explained on Slide 3

10:47

Done concur solutions.com AA ↻

SAP Concur 



Sign In

Username, verified email address, or SSO code

Next

Remember me

[Forgot username?](#)

< >  




Logging In

- Choose forgot password to change it. An email will be sent to you. Follow the instructions in the email to change your password.

10:36

Done concur solutions.com AA ↻

SAP Concur 



Forgot Password

<

Enter the username associated with your account. We will send an email with a link to reset your password.

Username

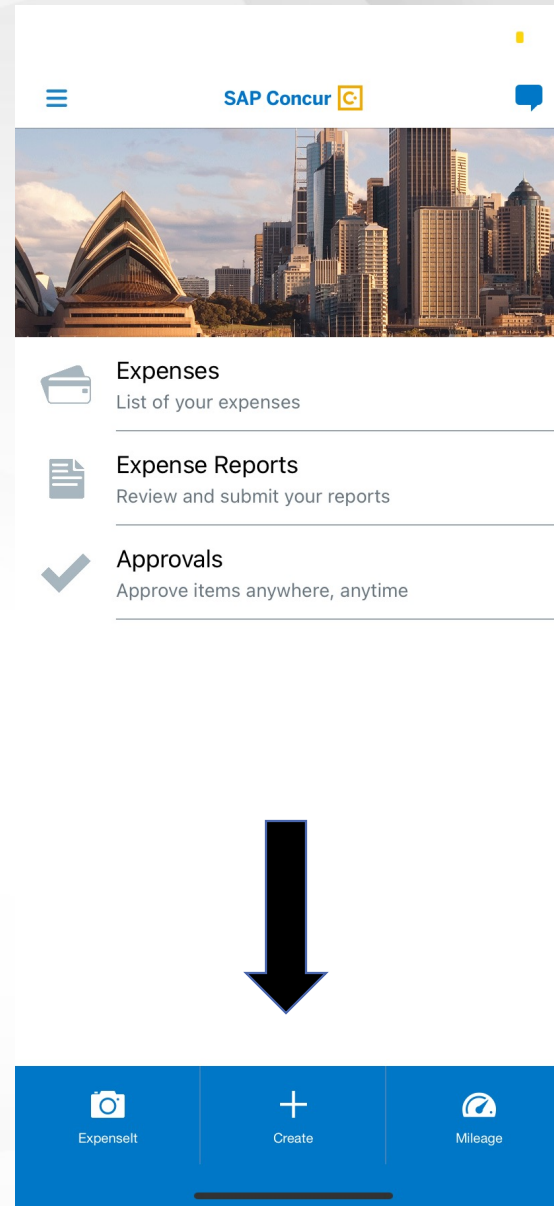
Send

< >  



Starting a New Expense

- Click on
+
Create



Creating the Expense



- Choose the Expense Type, enter in the amount and the date on the receipt.

A screenshot of a mobile application interface for creating an expense. The top bar is blue with 'Cancel', 'Expense', and 'Save' buttons. Below is a large blue button with a receipt icon and the text 'Add Receipt'. The 'Amount' field shows '\$0.00 USD'. Below that are fields for 'Expense Type', 'Date' (set to 'April 7, 2023'), 'Vendor', 'Location', and 'Comment'. A section labeled 'OPTIONAL' is visible between the date and vendor fields.

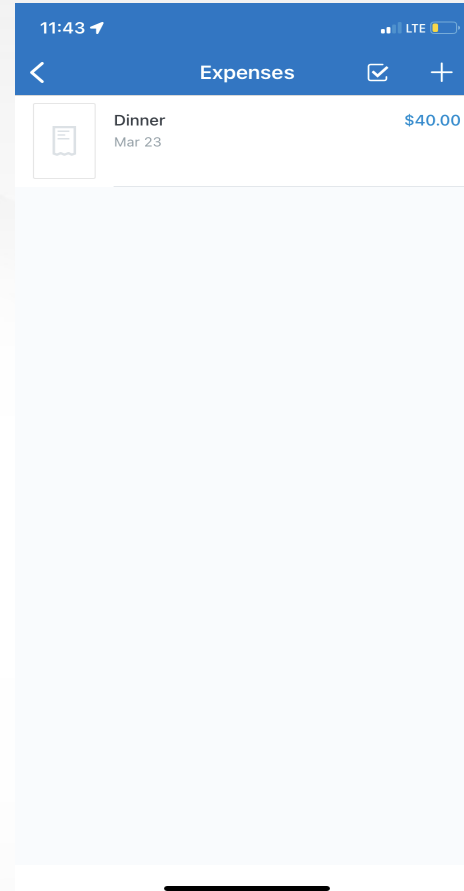
- Add the receipt next. When you tap on Add Receipt it will bring up options. Choose one. Then tap save.

A screenshot of the same mobile application interface, but with a modal menu open over the 'Add Receipt' button. The modal has a blue header with a receipt icon and 'Add Receipt' text. Below the header is a warning message: 'You must attach a receipt image to this expense'. The modal lists several options: 'Add Receipt', 'Take Photo', 'Upload Photo', 'Upload File', 'Choose Available Receipt', and 'Cancel'.

Creating the Expense



- This is what it will look like when it is saved.



Creating the Expense



- Tap on the expense that you just saved.
- Make sure to scroll all the way to the bottom to fill in all the required information.
- Save the expense

A screenshot of a mobile application interface for creating an expense. The top bar is blue with 'Close', 'Expense', and 'Save' buttons. Below the bar is a blue area with a white receipt icon and the text 'Add Receipt'. The main content area is white and contains the following fields: 'Amount' with a value of '\$35.00 USD', 'View Attendees' with a right arrow, 'Expense Type*' with a value of 'Dinner' and a right arrow, 'Date*' with a value of 'Mar 23, 2023' and a right arrow, 'Description', 'Vendor', 'City', and 'Currency*'.

10:11	Close	Expense	Save
Add Receipt			
Amount	\$35.00 USD		
View Attendees	>		
Expense Type*	Dinner >		
Date*	Mar 23, 2023 >		
Description			
Vendor			
City	>		
Currency*			

A screenshot of the same mobile application interface, showing the 'Personal*' toggle switch turned off. The 'Comment' field has a value of '0' and a right arrow. The 'Department/Committee*' and 'Meal Expense Location*' fields are marked as 'Required Field'.

10:12	Close	Expense	Save
Description			
Vendor			
City	>		
Currency*	US, Dollar >		
Payment Type*	Cash >		
Amount*	35.00		
Personal*	<input type="checkbox"/>		
Comment	0 >		
Department/Committee*	Required Field >		
Meal Expense Location*	Required Field >		

Do not click Personal or you will not be reimbursed!





Creating the Report

- Tap on the expense that you just saved again. At the bottom of the screen tap on Move to Report button.

10:09

Cancel Expense Save

Add Receipt

Amount
\$35.00 USD

Expense Type
Dinner >

Date
April 7, 2023 >

OPTIONAL

Vendor

Location >

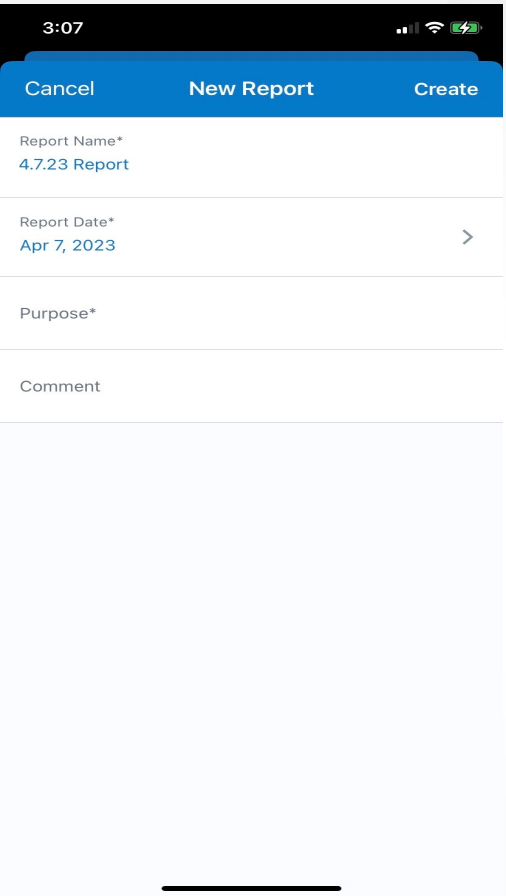
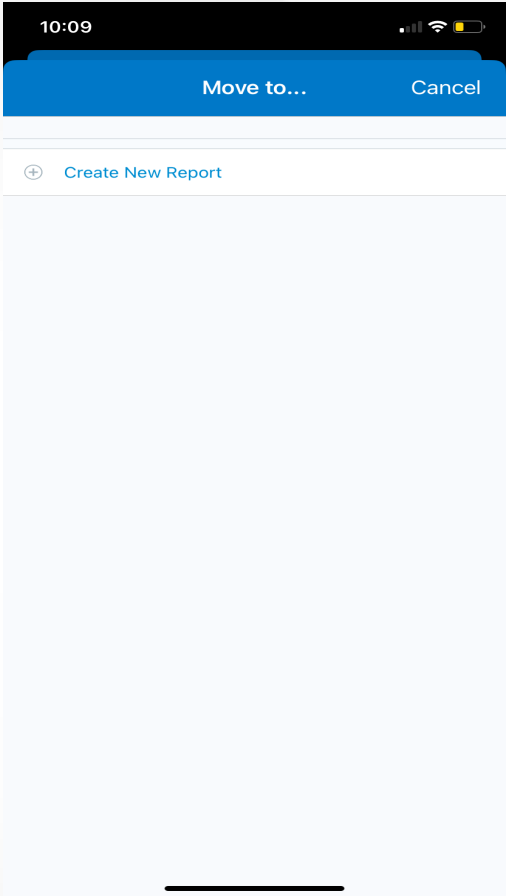
Comment

Move To Report

Creating the Report



Create New Report



Name the Report



Report Date can be today's date



Purpose should describe why you are being reimbursed

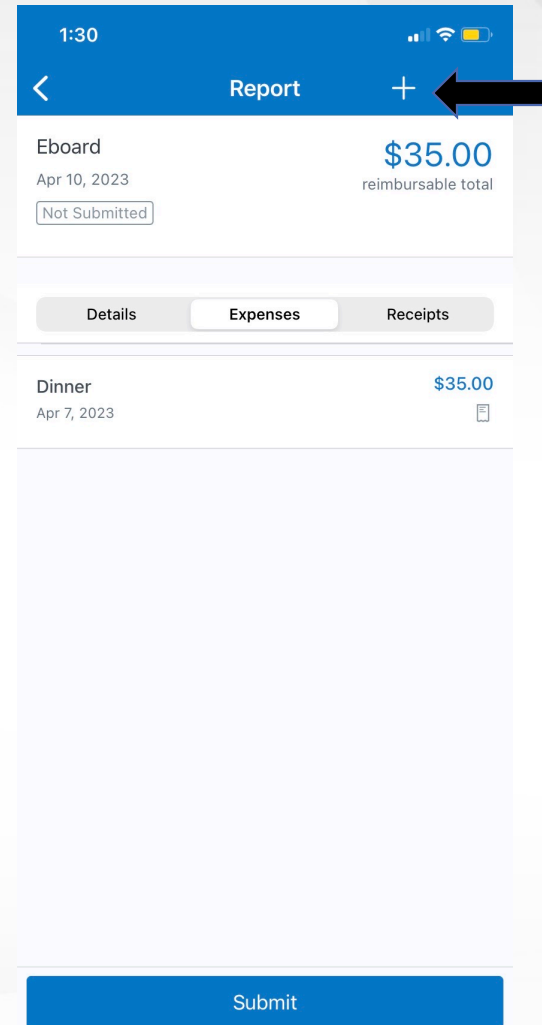


Tap create when done

Adding another expense to the Report



- To add more expenses to your report, press the + sign. Then you can click on add new expense.



Mileage vs. Gasoline



- Use the Mileage – Personal Car expense type when you drove your personal car to the meeting
- Use the Gasoline expense type when you drove a rental car to the meeting

Expense Type: Mileage



- Select the date you traveled
- For Description list where you traveled to and from (ex: home to eboard)
- Click on Add Route icon in blue at the top of the screen. This will fill in the from and to locations when completed.

A screenshot of a mobile application interface for entering a new expense. The screen is titled 'New Expense' and has a blue header with 'Close' and 'Save' buttons. Below the header is a blue button with a white map icon and the text 'Add Route', with a black arrow pointing to it from the right. The form fields below are: 'Amount' with a value of '\$0.00 USD'; 'Distance*' with a value of '0'; 'Expense Type*' with a value of 'Mileage - Personal Car'; 'Date*' with a value of 'Mar 23, 2023' and a right-pointing arrow; 'Description*' with a red 'Required Field' label and a black arrow pointing to it from the right; 'From Location*' with a red 'Required Field' label; and 'To Location*' with a red 'Required Field' label.

It should look like this when entered. Once done, click on Use Route on the bottom.

A screenshot of a mobile application interface for a distance calculator. The screen is titled 'Distance Calculator' and has a blue header with 'Cancel' and 'Options' buttons. Below the header are two input fields for addresses: '116870 Troy-Schenectady Rd, Latham, NY...' and '100 E Onondaga St, Syracuse, NY 13202,...', each with a close button. Below the input fields is a 'Add Destination' button. The main part of the screen is a map showing a route between the two locations. At the bottom of the screen is a blue button with the text 'Use Route' and '136.3 miles', with a black arrow pointing to it from the left.

Expense Type: Mileage



- Click on Save in the top right corner.

2:10
Close New Expense Save

Amount
\$0.00 USD

Route Details >

Distance*
136

Expense Type*
Mileage - Personal Car

Date*
Apr 7, 2023 >

Description*
Eboard

From Location*
1168 Troy-Schenectady Rd, Latham, NY 12110, USA

Click on the back arrow.



2:10
< Expense ...

Amount
\$89.08 USD

Route Details >

Distance*
136

Expense Type*
Mileage - Personal Car

Date*
Apr 7, 2023 >

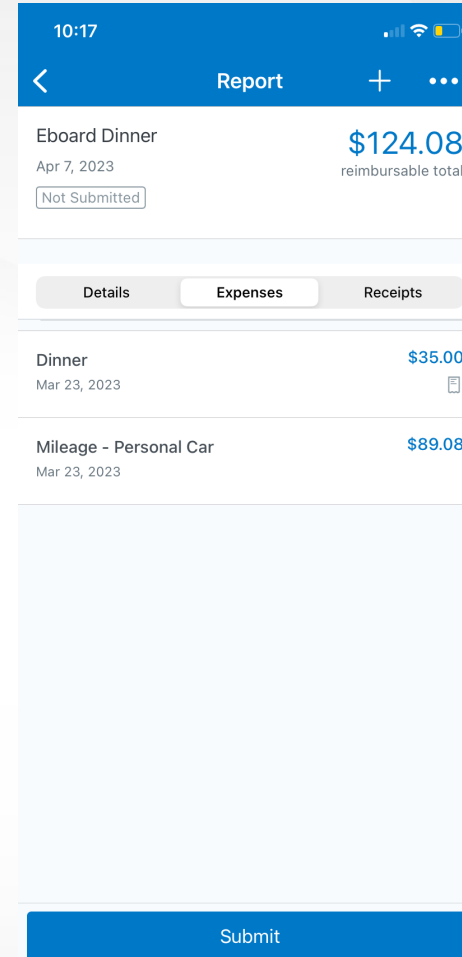
Description*
Eboard

From Location*
1168 Troy-Schenectady Rd, Latham, NY 12110, USA

Submitting Report



- Once you have entered all expenses for that specific meeting, you may click the Submit button on the bottom of the screen.



Submitting Report



- Once the report is submitted, it will automatically be sent to the proper individual for approval
- Once the report has received proper approval, the Finance Department will send a check to your home address on file
- If you prefer direct deposit, please give Danielle a call at 518-785-1900x257 to set it up.