Concur Mobile Android QuickStart Guide

SAP Concur

SAP Concur Technologies
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Getting Started with Concur Mobile – Pin setup

You use the Concur Mobile Registration tool to create a PIN code for access to the SAP Concur Mobile application.

1. To access Concur Mobile Registration, click Profile, and then click Profile Settings.

2. Click Concur Mobile Registration.
You can choose to use your SAP Concur password to access the mobile application or you can use a different password, called a mobile PIN.

3. Click the create a Concur Mobile PIN link

4. Create and retype your Mobile PIN, and then click Set Concur Mobile PIN.

You can now log in to your mobile device using your User Name and the PIN you created.
Logging on to Concur Mobile Android

1. To log on to SAP Concur, from your Android device, press the SAP Concur icon.
2. From the Sign in to Concur screen, enter your Work Email or Username, and then press Next.

3. Enter your Mobile Pin or Password, and then press SIGN IN TO CONCUR.
4. Press the **SAP Concur** menu icon to see a list of options and partner apps that make it easy for you to navigate and perform your travel and expense tasks.

You can use the menu items to access **Leave Feedback**, **Help**, **Privacy Policy**, **Settings**, to **Sign Out** of the app, or access partner applications, such as, **TripIt** or **ExpenseIt**.
Booking a Trip

You can use the mobile application to make travel reservations. In this example, you will see how to book a flight.

1. To book travel segments, from the SAP Concur home page, press the Book icon.
2. To start searching for a flight, press **Book a Flight**.
Your designated home airport will appear in the **Departure City** field.

3. Enter your **Departure** and **Arrival City**.
4. Enter your **Departure** and **Return Date** and **Time**.
5. Scroll down to verify or change the **Class of Service** and **Refundable Only Fares** options, and then press **Search**.
The flight search results appear. You can scroll down, to see other flight options.

6. Press Reserve.
7. Press OK to confirm that you want to reserve this flight.
8. Review your travel itinerary. You can add a hotel or rental car, as needed. See the Booking a Hotel and Booking a Rental Car tip sheets for more information.
Creating an Expense Report

Using the SAP Concur mobile application, you can create new expense reports.

You can create expense reports by selecting expenses, and then creating an expense report for those expenses. You can also create a new expense report and then add expenses to it later. In this tip sheet, you will see how to use both methods.

**Adding expenses to an existing expense report**

2. Long press an expense to select it.
3. Select any additional expenses you want to add to your expense report, and then press Add To Report.

The selected expenses are added to your report.

Adding expenses to a new expense report


The report is assigned a default Report Name. You can accept the default or change it. In this example, you will use the default report name.
2. Enter a **Business Purpose**, and then press **Save**.

In the SAP Concur mobile application, all your company’s custom fields are available and all required fields (indicated in red) are enforced.

The expense report is created and includes the selected expenses.

3. Press the **Back** button to return to the **Expenses** screen.
Creating Quick Expenses

You can create Quick Expenses, which are new expenses that are not attached to an expense report. Since Quick Expenses are not attached to an expense report, you only need to enter basic information, such as the expense type, transaction date, amount, and any required receipts.

You can complete custom fields and other required fields when you add the expense to an expense report.

If a Quick Expense is associated with a corporate card transaction, the system will attempt to match the two items when the card charge is imported from the bank.

1. From the SAP Concur home screen, press Expense.
You will first attach a receipt. You can use your device’s camera to take a picture of your receipt or browse through your gallery of existing images to find a receipt image.

In this example, you will see how to attach an existing image.

2. Press the **Expense Type** field, and then select an expense type.
3. Press the **Amount** field, and then enter the amount of the expense.

You can also change the currency type as needed.

4. Press **Done**.

In the SAP Concur mobile application, all your company’s custom fields are available and all required fields (indicated in red) are enforced.

The expense report is created and includes the selected expenses.
5. Press the **Add Receipt** icon.

6. Select where you want to attach the receipt from – **Camera**, **From Library**, or **Available Receipts**

For this example, press **From Library** to attach the receipt from the library.
7. Select the appropriate image file.
8. Complete the **Date**, and **Optional** fields, as needed, and then press **Save**.
The quick expense is added to the list of unassigned expenses.
Avoiding Duplicate Expense Transactions

When your Mobile expenses are created manually with the Create feature, they do not automatically match with your company card charges, or with your ExpenseIt created expenses. Therefore, the expense can appear as a duplicate.

One way to avoid duplicate expense transactions is to use ExpenseIt for receipt capture and expense creation instead of using the Create feature. ExpenseIt will create expense entries for you from the receipt image and automatically populate your expense details when it is added to a report. Note that ExpenseIt is a paid add-on service, so you might not have this option available on your SAP Concur mobile app.

If your company does not have ExpenseIt or a company credit card, you can use the Create feature to create a Mobile expense. This feature is a quick way to enter the basic expense entry details so that you don’t forget to enter the expense.

Note: When you create a mobile expense, it does not show any of your company's custom fields, so when you add the Mobile expense to a report, you will need to input additional information.

If you have a company card, transactions might take up to three business days to process and will then be added to your Expenses. We recommend that you wait for your company card transaction to display in your Expenses, and then simply attach your required receipt before adding it to a new or existing expense report.
Once the expense is available, you will need to attach a receipt image before submitting your report for approval.

1. If you need to attach a receipt image to an *existing* company card expense, click **Expenses**.
2. Press the expense that you want to add the receipt to.

**Note:** Contact your administrator if the expense does not appear within three business days.

The Expense details display with the information from your card transaction.

3. Press **Add Receipt**.
You can add your receipts from your device’s camera, photo library, or Available Receipts.

4. For this example, press Camera.

5. Press the Capture button to take a picture of the receipt.
The receipt is now attached to the expense, and you can save it for later use, or move it to a report.

6. For this example, press **Move To Report**.
You can add the expense to an existing report or click the + icon to create a new report.
Working with Company Card Charges

In the SAP Concur mobile application, imported company card transactions are available in the Expenses section.

1. To add corporate card charges to an expense report, press Expenses.

You will see a list of unassigned expenses, which includes all expenses within the SAP Concur system that you have not attached to an expense report. This might include Quick Expenses that you created in the mobile application and unassigned corporate card transactions.
The **Credit Card** icons indicate that the expenses are corporate card charges.

2. To add company card charges to an expense report, long press the expense you want to add.

3. Select the expenses(s) that you want to add.
4. When you are done selecting your expenses, press the **Add to Report** icon.
The charges are added to the report. You can select a charge to edit it. You can also “left swipe” a charge to view more options, such as viewing details, adding a receipt, or deleting the expense from this expense report.

5. Press **Submit**.

The report is submitted for approval.
Attaching Receipts and Submitting a Report

You use the mobile application to add receipts to your expenses and expense reports.

The following steps show you how to add receipts to expense line items, and then submit your expense report.


2. Press New Expense.
3. Select the appropriate expense type.

4. Complete the Expense details before you attach the receipt.

5. Press Save, and then press Attach Receipt.
You can select an image from your receipt store, from your device’s photo gallery, or take a photo with your device’s camera. In this example, you will see how to select an image from your **Receipt Store**.

6. Press **Select from Receipt Store**.

7. Long press the appropriate receipt, and then press **Select for Expense**.
8. Press **OK**.
9. Press **Save**.

After the receipt is attached, the receipt and timestamp icons appear with this expense. In addition to adding receipts to each line item, you can also add receipts to the report header.
When the expense report is complete, you can submit it for approval.

10. Press **Submit**.

You will see a list of any important reminders or warnings (such as missing receipts) for this expense report.

11. Press **OK**, and then press **OK** again to continue.

The expense report is submitted and is pending approval from your manager.
Adding Personal Car Mileage

You use Personal Car Mileage to be reimbursed for business use of your personal vehicle. This does not include your normal commute. For this expense type, you enter the distance you drove, and the system automatically calculates the reimbursement amount.

You can enter mileage expenses from the main screen or from within an expense report.

1. To add a mileage expense, from the SAP Concur home screen Press Mileage.
You can choose to add the mileage expense to a new expense report or to an existing expense report.

**To add a mileage expense to an existing report**

2. Select the expense report.

The **Transaction Date** will default to the current date, but you can change it, as needed. This date will determine the reimbursement rate for this expense.

3. Complete the appropriate information, and then press **Save**.

   Note that the **Amount** is automatically calculated based on the **Distance** entered and you cannot change this field.

The mileage expense is added to the report.
To add a mileage expense to an open report

1. Press the + symbol, and then press New Expense.

2. Scroll down to select the Personal Car Mileage expense.
3. Complete the necessary fields. Required fields are marked in red.

   Note that the **Amount** is automatically calculated.

4. Press **Save**.

   The expense report is now ready to submit.
Adding Attendees to an Expense

You can add attendees to an expense before submitting a report.

1. To add attendees to an expense, on the Report screen, open the expense that requires attendees.

2. Press Attendees.
Depending on your configuration, you might be automatically added as an attendee.

3. To add more attendees, press the + symbol.

You can add attendees in three ways. You can add previously-used attendees, attendees from your contact list, or create new attendees.

In this example, you will see how to add previously-used attendees.

4. Press Search.
You can perform a search based on your favorite attendees or an individual search to locate attendees.

5. To create a new attendee, press the + symbol.

6. Press New, and then complete the required fields marked in red.
7. Press Save.
You will see the updated list of attendees for the expense. The average amount per person is automatically calculated.

8. Press the Back button.
9. Press Save.

The report is now ready to submit.
Adding Out-of-Pocket Expenses

You can use the mobile application to create out-of-pocket expenses.

In the following example, you will see how to add an out-of-pocket expense directly to an expense report.


2. Press New Expense.

You will see a list of expense types. The expense types are grouped by category. Depending on your configuration, there may be expenses available online that are not available in the mobile application.
3. Search for and select the appropriate Expense Type.

All your company’s custom fields are available, and all required fields are listed in red.

4. Complete the fields as needed.

   Note that the Payment Type defaults to Out of Pocket.

5. Enter the Amount, and then press Done.

6. Press Save.

The out-of-pocket expense is added to the expense report.
**Itemizing Nightly Lodging Expenses**

In the SAP Concur system, unless your company specifically does not require it, you will need to itemize all Hotel expenses. You itemize your hotel invoice expenses so that your company can correctly account for all expenditures.

Note that in your company’s configuration, the **Hotel** expense might be listed as **Room Rate** or **Lodging**.

1. To begin itemizing your hotel bill, from the **Report** screen, press the **Hotel** expense.
2. Press Itemization.

3. In the Nights section, provide basic information about the hotel stay, including the Check-in Date, Check-out Date, and Number of Nights.
4. In the **Recurring Charges (each night)** section, enter the recurring charges of your hotel stay, which include charges such as **Room Rate** and **Room Tax** on the hotel bill.

After entering your Room Rate and Room Tax, you can adjust for any rate changes during your stay.

5. Enter any additional recurring charges, such as onsite parking or nightly internet charges.

6. After entering all recurring charges, press **Done**.
As you add each expense, the system automatically keeps track of the total. You must continue itemizing expenses until the Remaining amount is $0.

7. To continue itemizing all incidentals, press the + symbol.
8. Update the expenses you need to itemize, and then press **Done**.
If an expense is personal, or not reimbursable for any reason, select the **Personal Expense** check box. When you select this option, the system will automatically deduct the amount of this expense from the total amount that the company reimburses. If the charge was on a company credit card, you might have to pay this amount directly to the bank or pay the company.

9. Press **Save**.
You must account for any one-time charges that appear on your bill, such as room service, in-room movie, and mini-bar.

10. Continue itemizing until the Remaining Amount is $0.

11. Press the Back button.

12. Press Save.

Once the Remaining amount is $0.00 your Hotel expense is ready to submit.
Working with Exceptions

Exceptions appear when your expense report contains a rule violation or is missing required information. The exceptions icon indicates that there are exceptions in a report.

Exceptions can be red or yellow. **Red** exceptions indicate an error that you must correct before you can submit these expenses. **Yellow** exceptions are informational and indicate that you have violated a policy and that your expenses might receive additional review. Exceptions that are visible to you will also be visible to the approver and expense processor.

1. To review an exception, from the **Report** screen, press the entry.
For this example, the exception is yellow and contains an informational message. For this type of exception, you are not required to make any changes. However, you can add additional information in the Comment field to help approvers and expense processors complete their reviews.

2. Scroll down and enter an explanation for the exception in the Comment field, and then press OK.
3. Press Save.
Note that the yellow exception still displays. The approver or expense processor will review this exception and either approve or send back the expense.
Working with Foreign Currency
You can use the mobile application to enter transactions in foreign currencies. The system automatically converts the amount to your local reimbursement currency.

1. From the Report screen, press Add Expenses.

2. Press New Expense.
3. Search for and select the appropriate Expense Type.

4. Scroll down and select the appropriate transaction currency. Notice that the system automatically converts your foreign currency amount into your reimbursement amount and displays the exchange rate.
5. Enter the transaction **Amount** in the foreign currency, and then press **Save**.

The foreign currency transaction is added to the expense report.

The system automatically converts your foreign amount into your reimbursement amount and displays the exchange rate.