

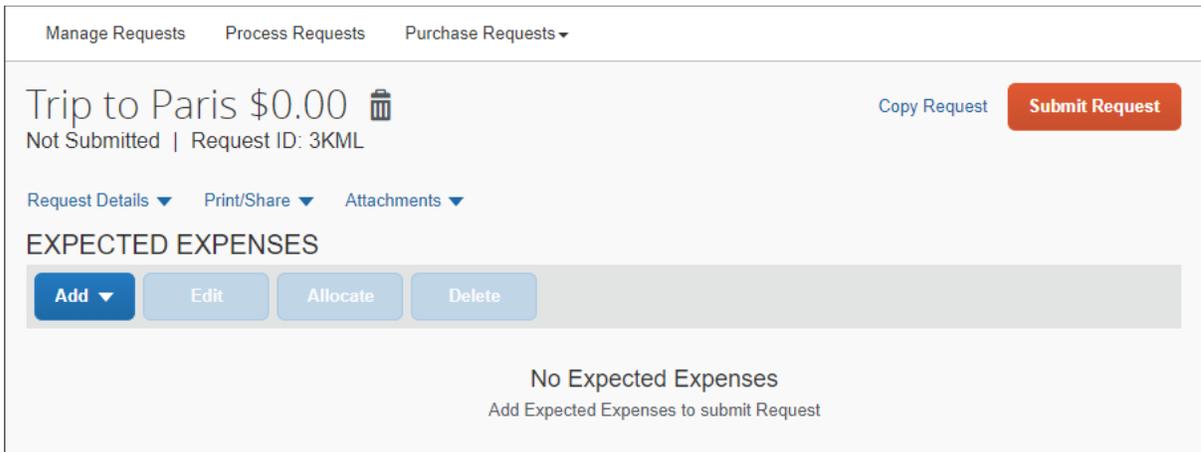
Request: Adding Expected Expenses



CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

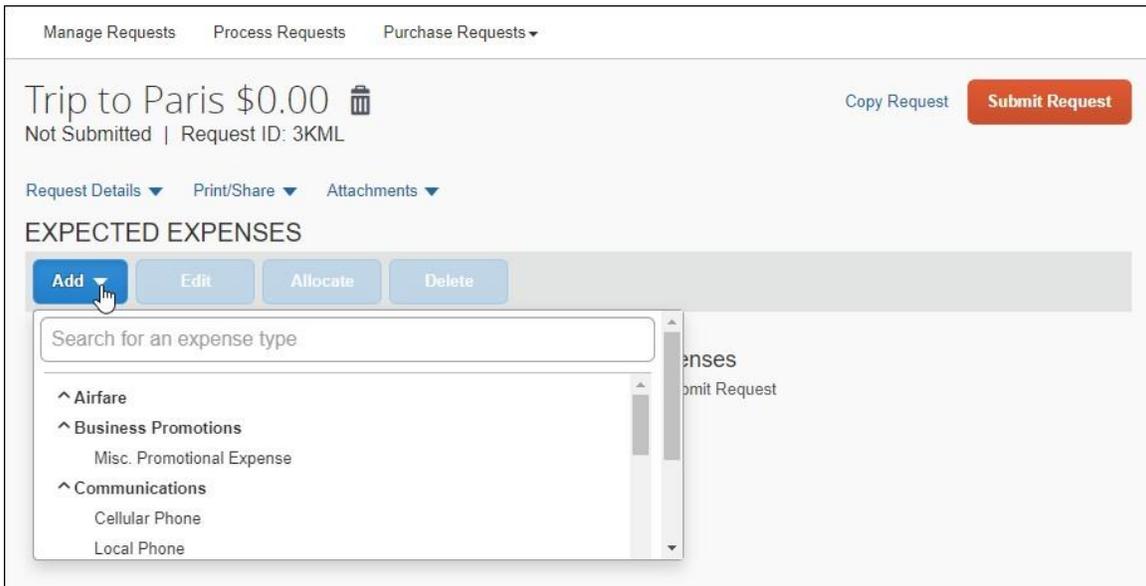
Adding Expected Expenses

After completing the Request Header Information (see Request-User-Guide) and clicking Create button, the **Expected Expenses** page opens.



To

1. To get started, click the **Add** button to view the list of expense types and segment types, and then select the applicable expense type.



2. Clicking an expense type opens the expected expense details page for the selected expense type.

3. Complete the fields and click **Save Expense**. The expected expense is added to the **Expected Expenses** list.

← → Hotel/Lodging \$300.00 🗑️

11/04/2020 | A.H.M.I. Hotels

Details Itemizations

⊙ Allocate * Required field

Expense Type * ?
Hotel/Lodging

Check-in Date * 11/02/2020 📅 Check-out Date * 11/04/2020 📅 Nights: 2

Transaction Date * 11/04/2020 📅 Vendor * A.H.M.I. Hotels

City of Purchase * 🌐 ▼ San Diego, California Hotel/Lodging Address

Payment Type * Out of Pocket

Amount * 300.00 Currency * US, Dollar

Expenses – you can provide estimates for all Expense Types including airfare, hotel, car rental, meals, parking, registration, etc.

- a. For **Personal Car Mileage**, you will need to register a car under **Concur/Profile/Profile Settings/Personal Car** – complete this step in order to add **Personal Car Mileage** Expense Type to an Expense Report.

New Expense: 02. Personal Car Mileage \$0.00

11/16/2020

Cancel

Save

 Allocate

Travel Start Date

11/16/2020

Travel End Date

11/19/2020

Distance *

Mileage Rate *

0.575

Amount - Will automatically calculate when you hit save.

Currency

US, Dollar

Comments To/From Approvers/Processors

Save

Cancel

Submit Request once all estimated expenses have been added

Test Trip 2021 \$220.00 

Copy Request

Submit Request

Not Submitted | Request ID: 4GDU

Create Expense Report Monthly or Quarterly for mileage.
Multiple Expense Reports can be linked to one Request