

EXPENSE REPORT: HOSPITALITY- ADDING ATTENDEES TO BUSINESS MEALS



CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE

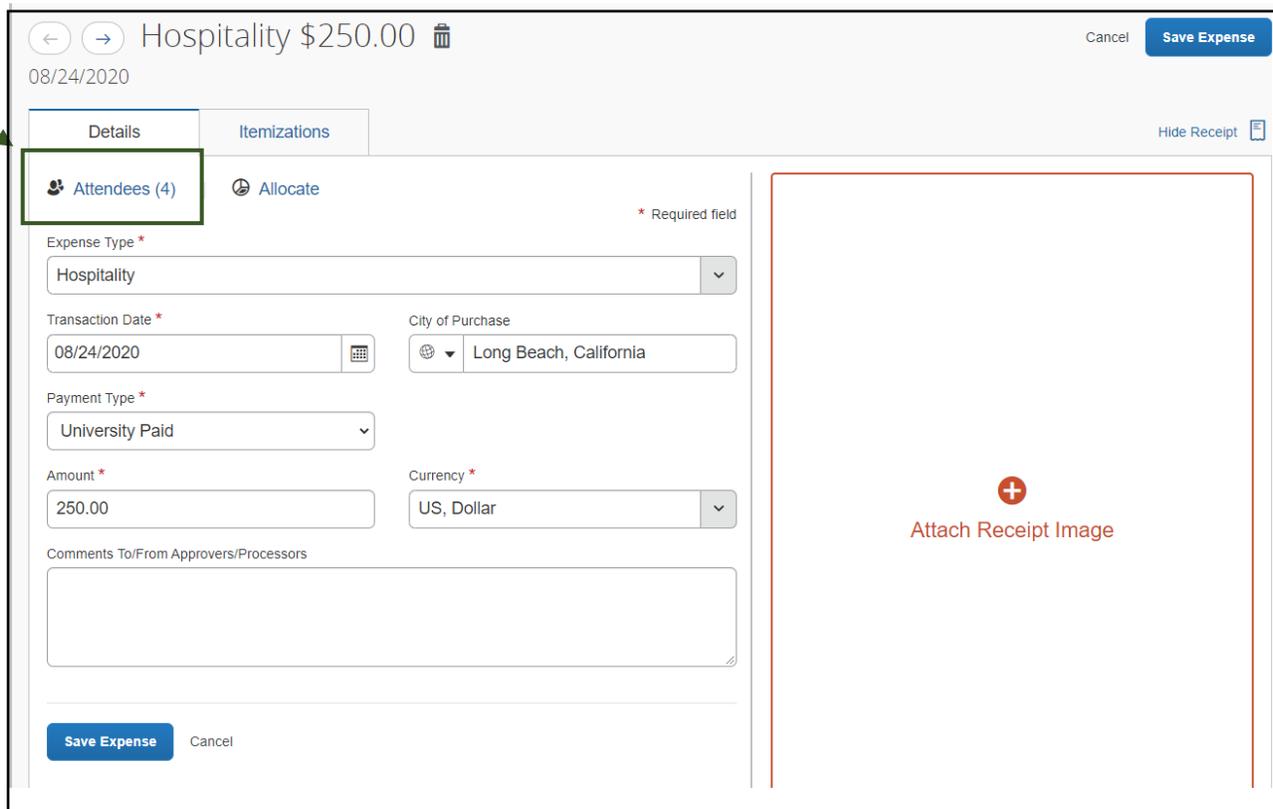
Adding Attendees to Business Meals

For business meals or entertainment expenses, you must identify all attendees associated with the expense. Users can add attendees and attendee groups to the system in the Expense Profile Settings (See **Favorite Attendees** section for instructions).

To add one or more individual attendees to an expense:

Select the Expense Type - Hospitality. Complete the necessary fields.

1. Click **Attendees**, then click **Add**.



The screenshot shows a web interface for adding a Hospitality expense. The header displays "Hospitality \$250.00" and the date "08/24/2020". There are "Cancel" and "Save Expense" buttons in the top right. Below the header are two tabs: "Details" (selected) and "Itemizations". In the "Details" tab, there is a section for "Attendees (4)" which is highlighted with a green box and an arrow. Next to it is an "Allocate" button. Below this are several required fields: "Expense Type" (set to Hospitality), "Transaction Date" (08/24/2020), "City of Purchase" (Long Beach, California), "Payment Type" (University Paid), "Amount" (250.00), and "Currency" (US, Dollar). A "Comments" field is also present. On the right side of the form, there is a large red-bordered area with a plus sign icon and the text "Attach Receipt Image". At the bottom left, there are "Save Expense" and "Cancel" buttons.

- For new attendees, select **Attendees**. Other options are **Recent Attendees** and **Attendee Groups**

Attendees

Hospitality | \$250.00

Attendees: 4

Add Remove Create Group Copy from Request

<input type="checkbox"/>	Attendee Name	Attendee Title	Institution/Company	*Host	Attendee Type	Attendee Count	Amount
<input type="checkbox"/>	Fein, Brian			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/>	monterrosa, Bernadette			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/>	Rudder, Dawn			No	Faculty/Staff	1	\$62.50
<input type="checkbox"/>	watkins, Naomi			No	Faculty/Staff	1	\$62.50

- Select Attendee Type, then search by first or last name.
- If this is the first time this attendee has been used, you will need to **Create New Attendee**. This option pops up when it cannot find the attendee name
- Click **Save & Add Another** or **Save** if done adding attendees.

Add Attendees

Recent Attendees Attendees Attendee Groups

Attendee Type: Alumni

Attendee Name: Search by first or last name

More Search Options

Can't find an attendee? [Create New Attendee](#)

Close

Add Attendees

Recent Attendees Attendees Attendee Groups

Attendee added: Bernadette monterrosa

Attendee Type: Faculty/Staff

Attendee Name: Search by first or last name

More Search Options

6. Attach completed Concur Hospitality Form. Use **Attach Receipt Image** to append the form to the itemized receipt.
7. Attach **ITEMIZED receipt** for the Hospitality expense. The expense type will only be accepted by Payment Services with an itemized receipt attached.

Attach Receipt

Select a receipt image or reuse one from this report:

Available Receipts Receipts in Report


Upload Receipt Image
5MB limit per file

Conference receipt.pdf
Uploaded: 9/8/2020 1:20 PM



[Attach](#) [View](#)