Adding a Delegate

A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as creating, submitting, and approving expense reports

1. To add a delegate to your user profile, select **Profile**, and then select **Profile Settings**.



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For this example, you will see how to add an Expense delegate.

2. On the **Profile Options** page, select **Expense Delegates**.



A delegate will need the same level or higher permissions to act on your behalf.

3. To add a new delegate, from the **Delegates** tab, select **Add**.



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Your Information	Expense De	legat	es					
Company Information	Delegates Delegate For							
Contact Information Email Addresses	Add Save Delete							
Sponsored Guest Users Emergency Contact Credit Cards	Delegates are employees who a Search by employee name, en	re allowed to p mail address or	erform work or login id.	h behalf of ot	her employee	s.		
Travel Settings	Expen thare del	egates. By ass	igning permiss	Add	Cancel	e assigning	permissions for Exp	ense and Reques
Travel Preferences International Travel Frequent-Traveler Programs		Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
Assistants/Arra Request Ser	earch for t	the		0				
Request Inform appro	opriate de	lega	ite.		0			
Request Preferences								

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5. Assign permissions to the new delegate, using the appropriate check box(es).

Note: To allow a delegate to email receipts into a user's Available Receipts library, you must select the Can View Receipts check box.

6. When you are done assigning all the delegate permissions, select **Save**.

Travel Settings	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
Travel Preferences International Travel Frequent-Traveler Programs	Andersson, Erik Is-traveler- sv@p00103105exu.se							
Assistants/Arrangers	Bauer, Thomas Is-traveler- de@p00103105evu							
Request Settings	de@peeresresexe							
Request Information Request Delegates	Dorsey, Kevin kevind@p00103105.com						11/18/2014	2
Request Approvers Favorite Attendees	Dupont, Martin Is-traveler- fr@p00103105exu	0				0		
Expense Settings Expense Information	Hansen, Hans Is-traveler- no@p00103105exu.no					٥		
Bank Information Expense Delegates Expense Preferences	Hansen, Jens S Is-fraveler- da@p00103105exu.dk	0				0		
Expense Approvers Company Car Favorite Attendees	Janssen, Peter Is-traveler- nl@p00103105exu.nl							
nvoice Settings	Kowalski, Adam Is-traveler- pl@p00103105exu.pl							
Invoice Information Invoice Delegates Invoice Preferences	Never, William suep_ls_en@p00103105exu		0	9				6
Invoice Approvers Other Settings	Ninguém, João Is-traveler- ptpr@p00103105exu	0	0	8	0	8		0



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To allow a delegate to email receipts, both you and the delegate must verify your email addresses in your respective **Profile Settings** and email accounts.

7. To verify an email address, select **Profile**, and then select **Profile Settings**.

You must first verify your email address, and then the assigned delegate (acting on your behalf) and verify their email address to enable receipt submission via email to receipts@concur.com.

- To begin the email verification process, select Email Addresses.
- In the Email Addresses section, select Travel Arrangers/Delegates.







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10. To verify your email address, select Verify, and then in the Verification Email Sent pop-up window, select OK.



	esses				Go to top
Please add	at least one email address.				
How do I	add an email address?				
 Travel An Travel An code. Tra trip to Co 	rangers / Delegates rangers and Delegates can initiate the real Arrangers and Delegates should nour on behalf of another user. An E	he verification process on be verify their email address in xpense Delegate can forwar	half of a user their own pro	. The user will re ofile. A Travel Arr Concur on beha	ceive the verification anger can forward a if of another user.
The follow	ving must be complete:				
1. The Tr 2. The Us 3. The Tr	avel Arranger or Expense Delegate ser should verify email address in ov avel Arranger or Expense Delegate	should verify email address i m profile should be in the User's list o	in own profile f Arrangers of	Delegates, resp	ectively.
Once the - The Arri line of the - The Del Subject li	se steps are complete: anger can send the trip email to plan e email legate can send the receipt email to ne of the email.	s@concur.com, and include receipts@concur.com, and i	the traveler's nclude the us	verified email a er's verified ema	ddress in the Subject il address in the
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ting wie t	ensure was are with or receipt is asso	chaited to the contest user.			
Why show	uld I verify my email address?				
Haw do I	verify my email address?			0	and an armall addressed
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	suep_ls_en@p00103105exu	Not Verified	Verify	Yes	
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Email 1 Sponsored Selow are ti	Guest Users	u are sponsoring)	Go to top
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Email 1 Sponsored Below are th Your Sponse	Guest Users he non-staffinon-employee users yo ored Users No 5	u are sponsoring	Ct V) erify.	Go to top

11. For verification purposes, type the code (sent by SAP Concur) in the **Enter Code** field, and then select **OK**.

Note that you can copy and paste the code in the **Enter Code** field.

Email Add	Iresses				Go to	o top
Please ad	d at least one email a <mark>ddress.</mark>					
How do	I add an email address?					
 Travel A Travel A code. T trip to C 	Arrangers / <u>Delegates</u> Arrangers and Delegates can initiat ravel Arrangers and Delegates sho concur on behalf of another user. An	e the verification process on be uld verify their email address in n Expense Delegate can forwa	ehalf of a use n their own p rd a receipt t	er. The user will re rofile. A Travel Arr to Concur on beha	eceive the verifica ranger can forwar alf of another use	rtion rd a
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Once th - The A line of t - The D Subject	ese steps are complete: rranger can send the trip email to p he email. elegate can send the receipt email line of the email.	lans@concur.com, and include to receipts@concur.com, and	e the traveler include the u	's verified email a ser's verified ema	ddress in the Sub ail address in the	oject
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How do	<u>l verify my email address?</u>					
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		Enter Code				
			OK			

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Once both you and your delegate have successfully verified your email addresses, a delegate can email receipts on your behalf for use in expense reporting.

The delegate will send an email to receipts@concur.com with the attached receipt images.

Note: Enter only the user's (for whom you are delegating for) verified email address in the Subject line.



Emailed images sent by your delegate will display in the **Available Receipts** library of your profile, just as if you had done it yourself.

Manage Expenses	Cash Advances	Processor+	Administer Authorization Requests	
Manage Ex REPORT LIBRA	(penses ARY Vew Activ	e Reports 💌		
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