SAP Concur Mobile App QuickStart Guide (Mobile iPhone)
## Document Revision History

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Logging on to Concur Mobile iPhone

1. To log on to SAP Concur, press the SAP Concur app on your iPhone.
2. From the Sign in screen, enter your username, verified email address or SSO code, and press Next.

3. Enter your Password or PIN, and then press Sign in to Concur.
On the **SAP Concur** application home screen, you can view your current travel and expense highlights.
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 Travel icon.
2. Press Book a Trip.

3. To start searching for a flight, press Flight.
Your designated home airport will appear in the Departure City field.

4. Search for and select your Departure and Arrival City.
5. Select the appropriate Departure Date and Time, and then press Book Air.
6. Select the appropriate Return Date and Time, and then press Book Air.
7. Press Search.

The flight search results appear. You can scroll down, to see other flight options.

8. Select the best flight options for your trip, and then press Reserve.
9. Press OK to confirm that you want to reserve this flight.
Review your travel itinerary.
You can add a hotel or rental car, as needed.
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.

1. On the SAP Concur home screen, press the Expense icon.
2. Press Expenses.

3. Press the ellipsis (...) icon, and then press Select.
4. Select the expenses that you want to add to your expense report, and then press **Move To Report**.
You can add these expenses to a new report by pressing **Create New Report**, or to an existing expense report by selecting a report from the list. In the following example, you will see how to add the expenses to a new expense report.

5. On the **Move to...** screen, press **Create New Report**.
The report is assigned a default **Report Name**. You can accept the default name or change it.

6. To change the report name, press the **Report Name** field.
7. Enter the new report name.

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

8. Enter the optional fields, as needed.
9. Press **Create**.
The expense report is created and includes the selected expenses.

10. Press **Expense**.
Creating Manual Expenses

You can create Manual Expenses, which are new expenses that are not attached to an expense report. Because Manual 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 Manual 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.
2. Press the + icon and then press Create Manual Expense.

3. Press the Expense Type field, and then select an expense type.
4. Press the **Amount** field, and then enter the amount of the expense.
   You can also change the currency type as needed.

5. Press **Done**.

6. Press the **Add Receipt** icon.
Select where you want to attach the receipt from – **Camera**, **Photos**, or **Available Receipts**.

7. For this example, press **Upload Photo** to attach the receipt from the library.
8. Select the appropriate image file.
9. 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.

The Smart Matching functionality ensures that your company card charges and ExpenseIt items are matched to their corresponding Mobile expenses. This helps eliminate duplicate expenses. If you created a duplicate expense, the systems compares it to your company card charges or ExpenseIt item expenses.

If you add multiple expense entries to an expense report, Smart Matching will analyze the expenses, and then SAP Concur will match the multiple items together into a single expense entry.
Once the expense is available, you must 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, press 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.

You can add your receipts from your device’s camera, your phone’s photo library, or from your Available Receipts.

3. For this example, press Add Receipt to add your receipts using your phone’s camera.
4. 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 To Report**.

   You can add the expense to an existing expense report, or you can 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.

5. 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.

6. To add a company card charges to an expense report, **swipe left**, and then press **Move**.

You can move the company charge to an existing expense report or create a new report.

7. To add company card charges simultaneously, press the **ellipsis** icon and press **Select**.
8. Select the company card charges that you want to add. When you are done, press **Move To Report**.

You can move the company charge to an existing expense report or create a new report.
The charges are added to the report.

You can press on an expense to view more options, such as viewing details, adding a receipt, or deleting the expense from this report.

You can also “left swipe” a charge to delete it from the expense report.

Deleted company card charge will return to available expenses.

9. 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.

1. From the SAP Concur homepage, press Expense.
2. Press the report that contains the expense that you want to add the receipt to.

3. Press the expense.
4. Press **Add Receipt**.
You can take a picture of your receipt with your phone’s camera, select an image from your device’s photo album, or from your Available Receipts. In this example, you will see how to select an image from your Available Receipts.

5. Press **Choose Available Receipt**.
6. Select the appropriate receipt.

7. Press **Select**.
8. Press the **Back** arrow.

After the receipt is attached, the receipt icon appears with this expense. You can also add receipts to the report summary instead of to an individual expense.

After the expense report is complete, you can submit it for approval.

9. Press **Submit**, and then press **Submit** again to confirm that you want to submit the report.

The expense report is submitted for approval.
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 add the mileage expense to a new expense report or to an existing expense report. In this example, you will see how to add it to an existing expense report.

1. From the **SAP Concur** home screen, press **Expense**.
2. To add the mileage expense to an existing expense report, select the expense report.

3. Press the + symbol.
4. Press **Add New Expense**.

5. In the **Search** field, start typing the name of the mileage expense.

6. Select the **Personal Car Mileage** expense.
7. On the New Expense screen, enter the appropriate information.
8. Enter the Distance, Transaction Date, and other required fields.

The Amount is automatically calculated based on the Distance and Transaction Date field.

9. Press Save.

The mileage expense is added to the existing expense report.
Adding Attendees to an Expense
You can add attendees to an expense before submitting a report.

1. On the SAP Concur home screen, press the Expense icon.
2. To create an expense with attendees, on the **Reports** screen, select a report to open it.

3. To create a new expense, press the + symbol.
4. Press **Add New Expense**.

5. Select an **Entertainment**, **Business Meal**, or **Group Meals** expense type. In this example, you will see how to add a **Business Meals (Attendees)** expense.
6. On the **New Expense** screen, complete the optional and required fields (indicated with an asterisk *).

7. Scroll down and press the **Amount** field.

8. On the **Amount** screen, enter the amount, press **Done**, and then press **Save**.
9. Scroll back up, and then press **Attendees**.

10. To add additional attendees, press the + symbol.

11. Select how you will add the attendees. For this example, press **Search for Attendee**.
You can use the Advanced Search option to search by Attendee Type categories. In this example, you will see how to use the Favorites option to search for and select a previously-used attendee.

12. To search for an attendee, enter all or part of the attendee’s name, and then press the attendee’s name.

13. To add a new attendee, press the + symbol.
14. Press **Add Attendee Manually**.

You will see the data entry form for the default **Attendee Type**. You can select a different Attendee Type, as needed.

15. Enter the attendee information, and then press **Save**.
You will see the updated list with the attendee for the expense. The average amount per person is automatically calculated. Depending on your configuration you might need to add yourself as an attendee.

16. Press **Done**.

The previously-used and newly added attendees are added to the business meal expense.
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.


   ![Expense Report Screen]

   Trip to Seattle
   Oct 10, 2023
   $166.38
   Not Submitted

   Details Expenses Receipts

   Personal Car Mileage
   Oct 9, 2023
   $16.38

   Business Meals (Attendees)
   Oct 9, 2023
   $150.00
   Seattle, Washington - Will's Grill

   Submit

2. Press Add 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.

### 01. TRAVEL EXPENSES
- Hotel
- Incidentals
- Laundry

### 02. TRANSPORTATION
- Airfare
- Airline Fees
- Car Maintenance/Repairs
- Car Rental
- Fuel
- Japan Public Transportation
- Parking
- Personal Car Mileage
- Public Transport
- Taxi
- Tolls/Road Charges
- Train
3. Search for and select the appropriate Expense Type.

All your company’s custom fields are available, and all required fields are listed with an asterisk *.

4. Complete the fields as needed.

Note that the Payment Type defaults to Cash (Out of Pocket).

5. Enter the Amount, and then press Save.
The out-of-pocket expense has been successfully 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, on the **Expense** screen, press **Itemize**.

![Expense Screen Example](image)
2. Enter the Check-in Date and Check-out Date.

Notice that the Number of Nights is calculated based on the Check-in and Check-out Dates.

3. Enter all recurring charges, such as Room Rate and Room Tax.
4. Enter any other additional Room Taxes as needed.
Enter any additional recurring charges. For example, onsite parking or nightly internet charges.

In this example, you will see how to enter a recurring charge for parking.

5. Press **Expense Type**.

6. Search for and select **Parking**.
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, on the Report screen, press the appropriate 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 press **Comment**, and then press **Add Comment**.
3. On the Comments screen, press the plus + icon.

4. Enter a comment, and then press Done.
5. Press **Expense Details**, and then press **Save**.

The approver or expense processor will review the 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. On the SAP Concur home screen, press Expense Reports.
2. Select a report from the **Reports** list.

3. Press the + symbol.
4. Press **Add New Expense**, and then select the appropriate expense type.

5. Press the **Currency** field.
6. Search for and select the appropriate transaction currency.

7. Scroll down, enter the **Amount**, and then press **Done**.

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

8. Press **Save**.

The foreign currency transaction is added to the expense report.