Concur – How to Upload Receipts

Committee for Public Counsel Services

Finance

Contents

How to Upload Receipts to Concur

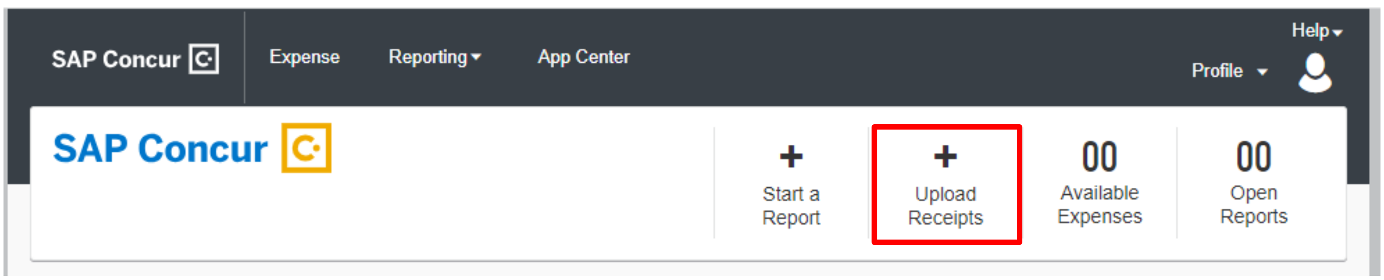
There are several ways to upload receipts to your Concur web-based portal:

1. You can send an email to receipts@concur.com.
2. You can upload receipts to your Concur profile using the **Upload New Receipt** button or **Drag and Drop Files** function, to use later.
3. You can use the **Attach Receipt** button to upload receipts to a particular expense line item.
4. You can attach receipts in the Final Review window.

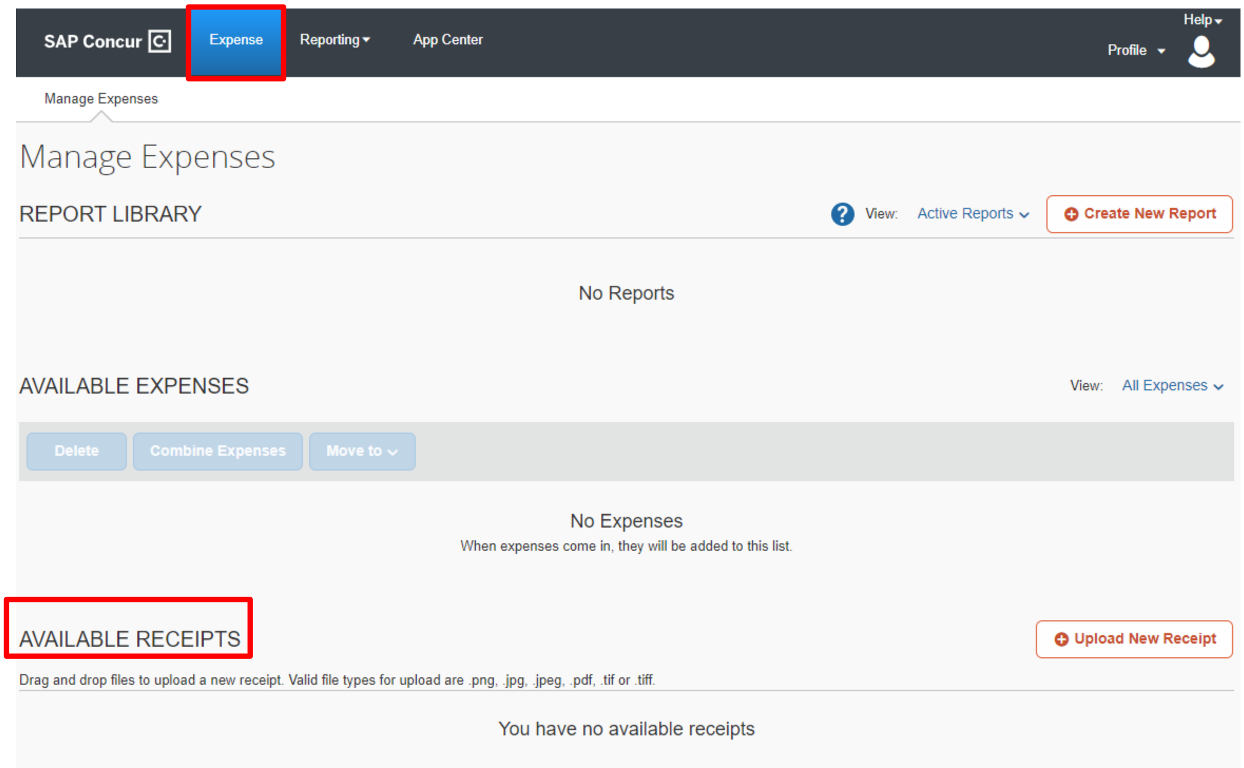
Please make sure the receipt images are legible.

Upload Receipts via Email

1. From your profile home page, select "Upload Receipts".



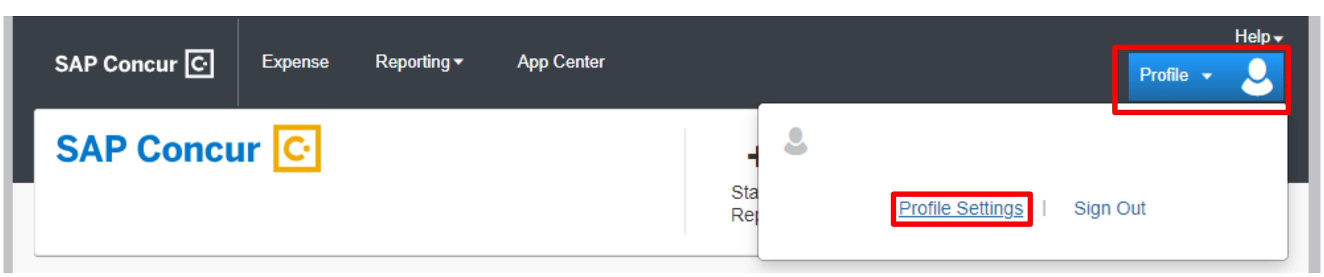
2. If you have already verified your email address, you would simply send an email with the attached receipt to receipts@concur.com. The receipt image will appear under "Available Receipts" by selecting "Expense" for you to select and attach to your expense report.



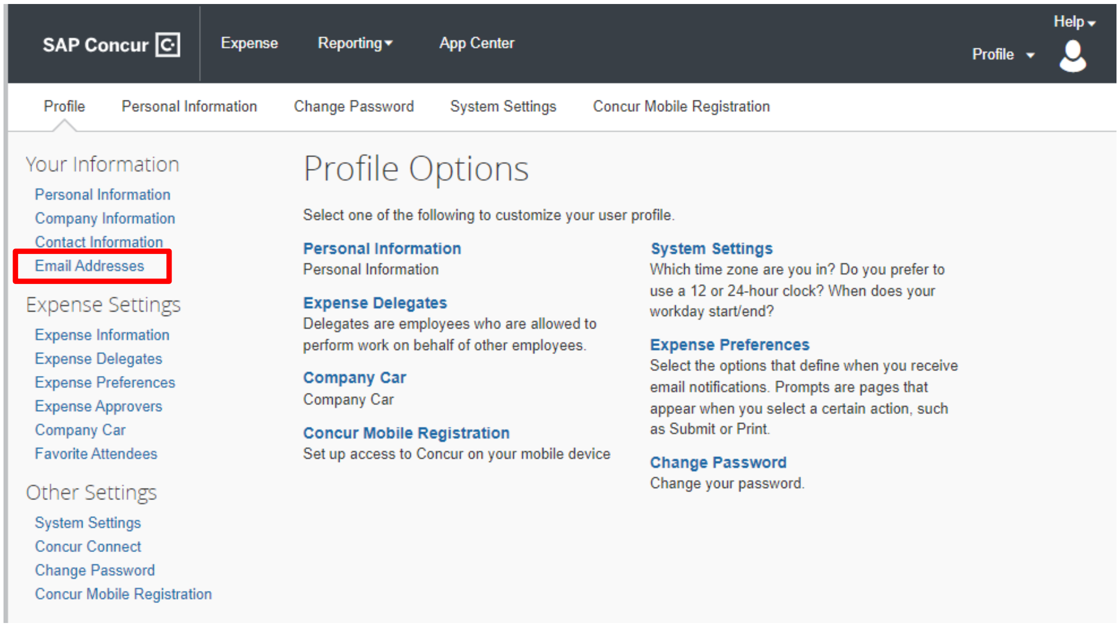
Note: If you have not verified your email address, you will have to complete that task first in order to attach receipts via email (See Step 3).

Verifying your Email Address

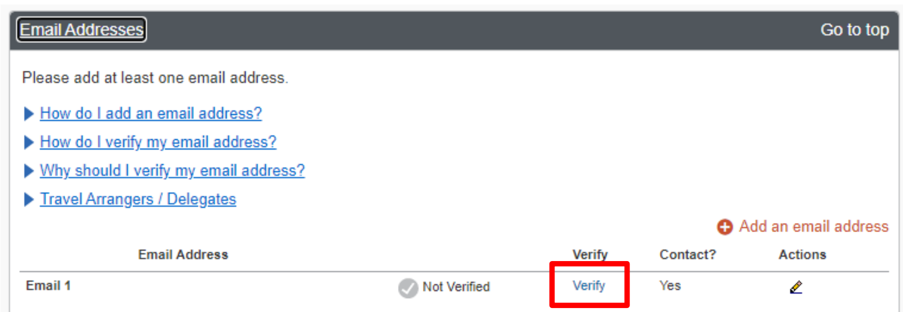
3. Select the "Profile" to expand the drop down box. Select "Profile Settings" link. Once selected, Profile Options page opens.



4. Select “Email Addresses” link.

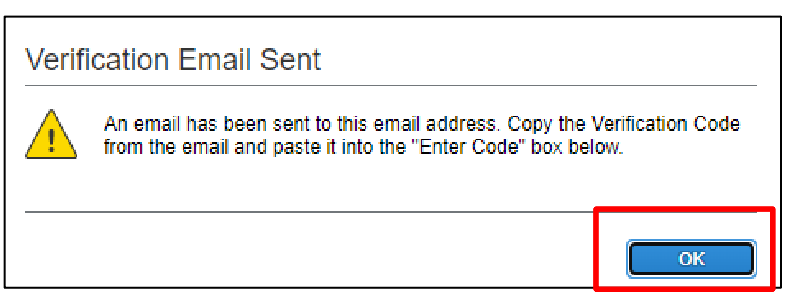


5. “My Profile – Personal Information” opens, under the “Email Addresses” section, your status should read “Not Verified”. Select the “Verify” link.

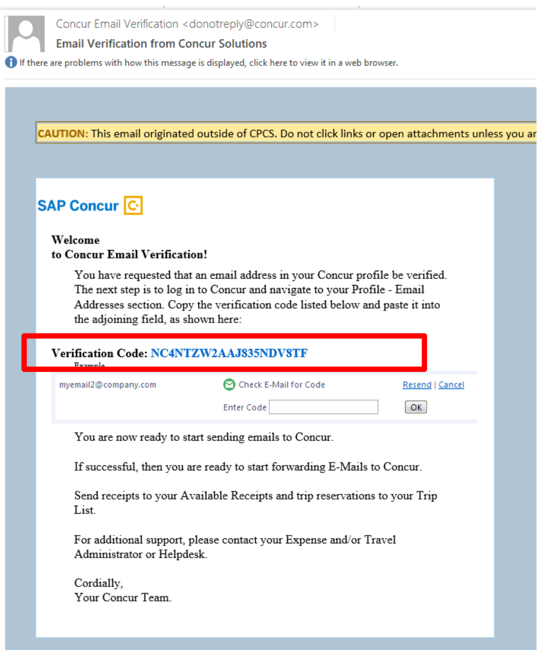


6. The system will nd a verification code to the email address listed. A message box appears confirming an email was sent. Select the “OK” button.

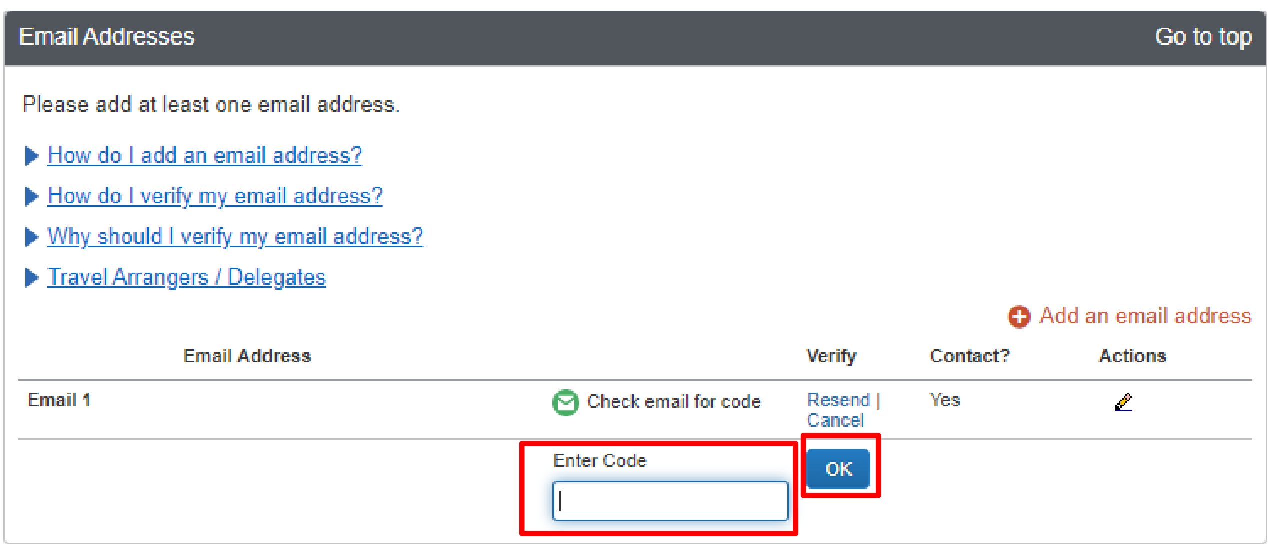
Note: Check your spam/ junk email folder in the event the email does not appear in your email Inbox.



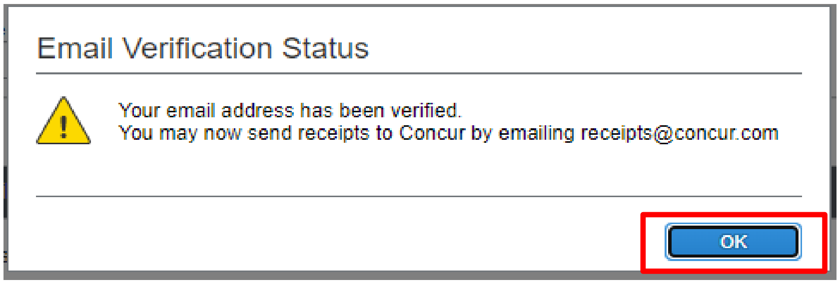
7. Locate the email.

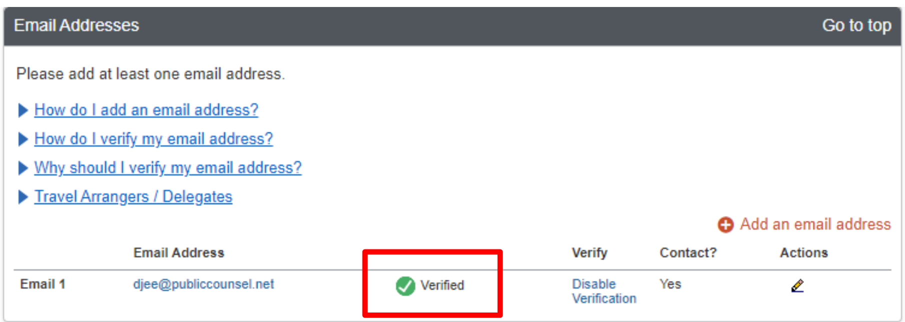


8. In Concur, enter the Verification Code in the “Enter Code” field and select the “OK” button.



9. Once you enter the code correctly, a message box appears confirming the email address has been verified. Select the “OK” button. Your email address status will change to “Verified”.

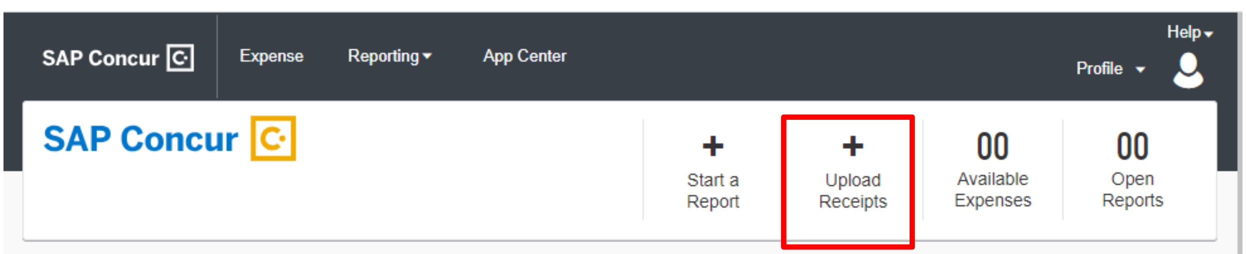




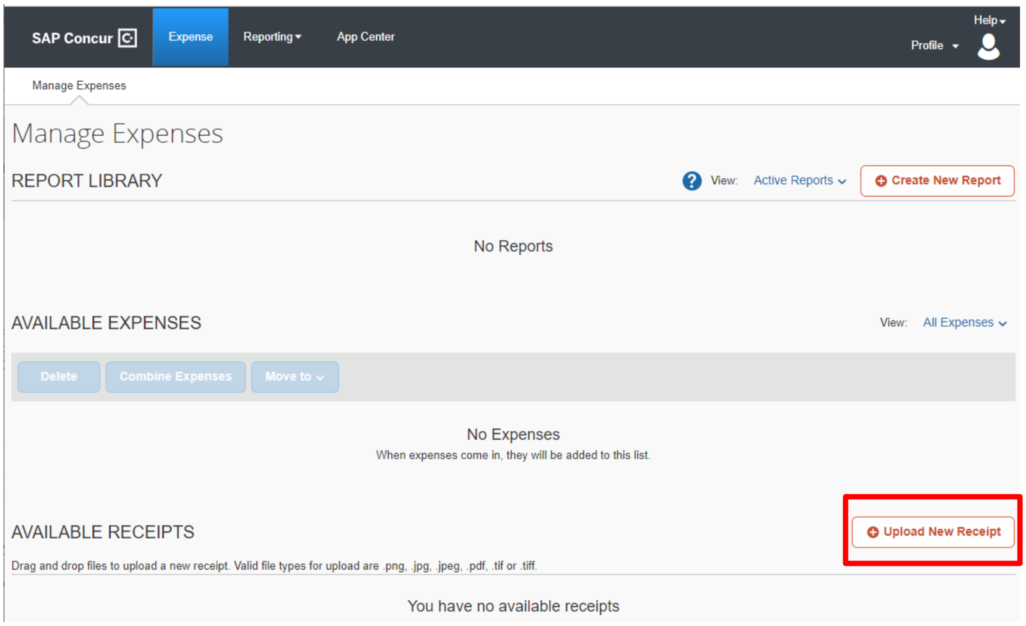
10. You can now start emailing receipts to your Concur profile. The receipts will appear under the “Available Receipts” section.

Upload Receipts Using the “Upload New Receipt” button

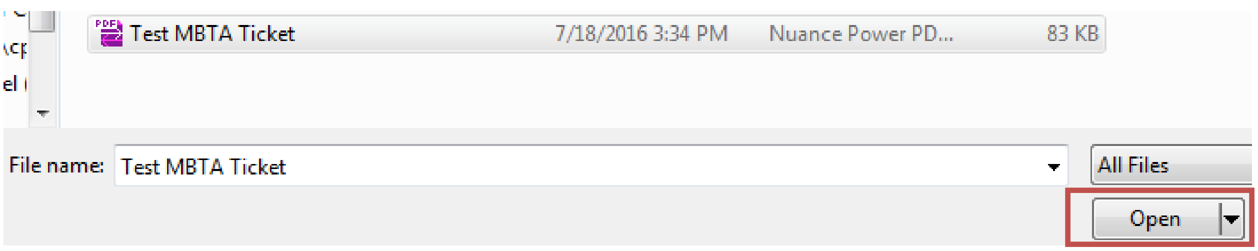
1. From your profile home page, select “Upload Receipts”.



2. Under the “Available Receipts” section, select the “Upload New Receipt” button.



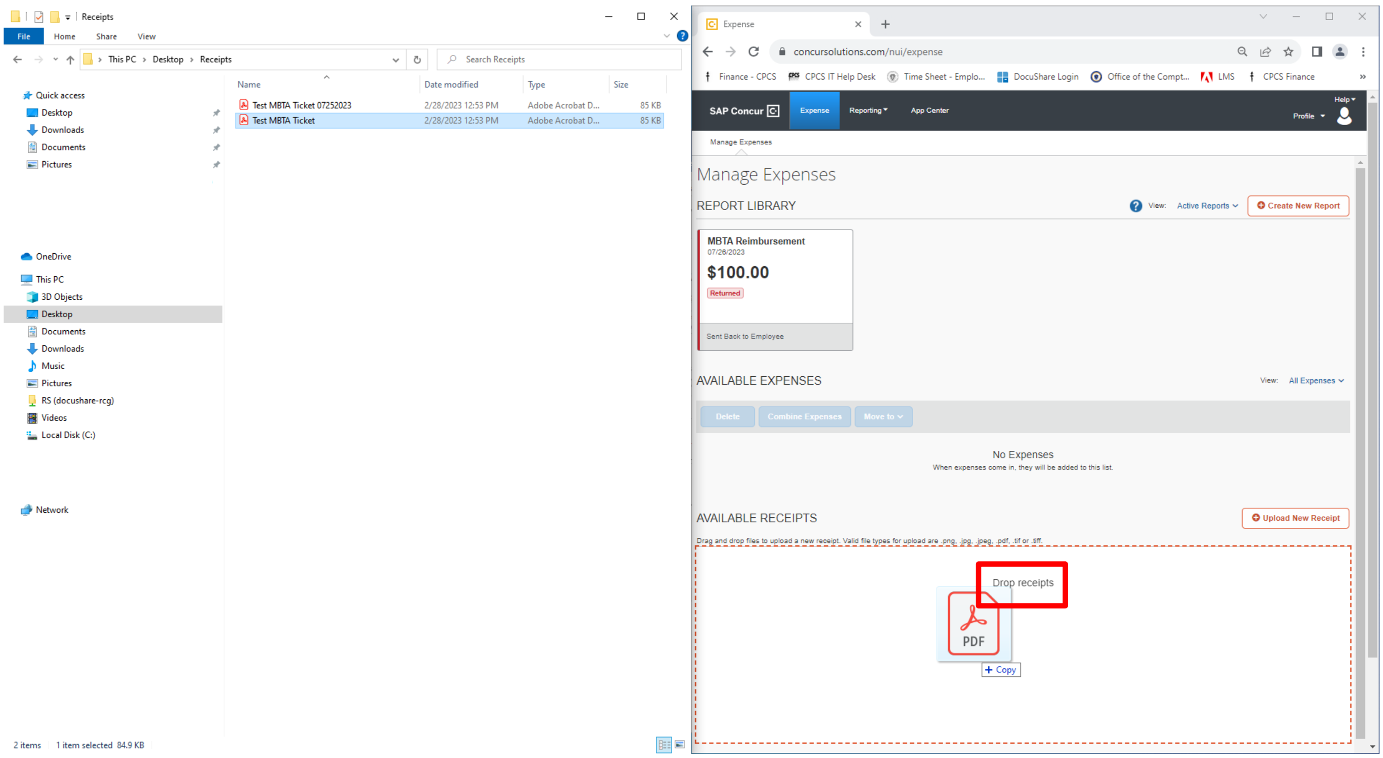
3. Locate and select the appropriate file on your computer, and then select the “Open” button.

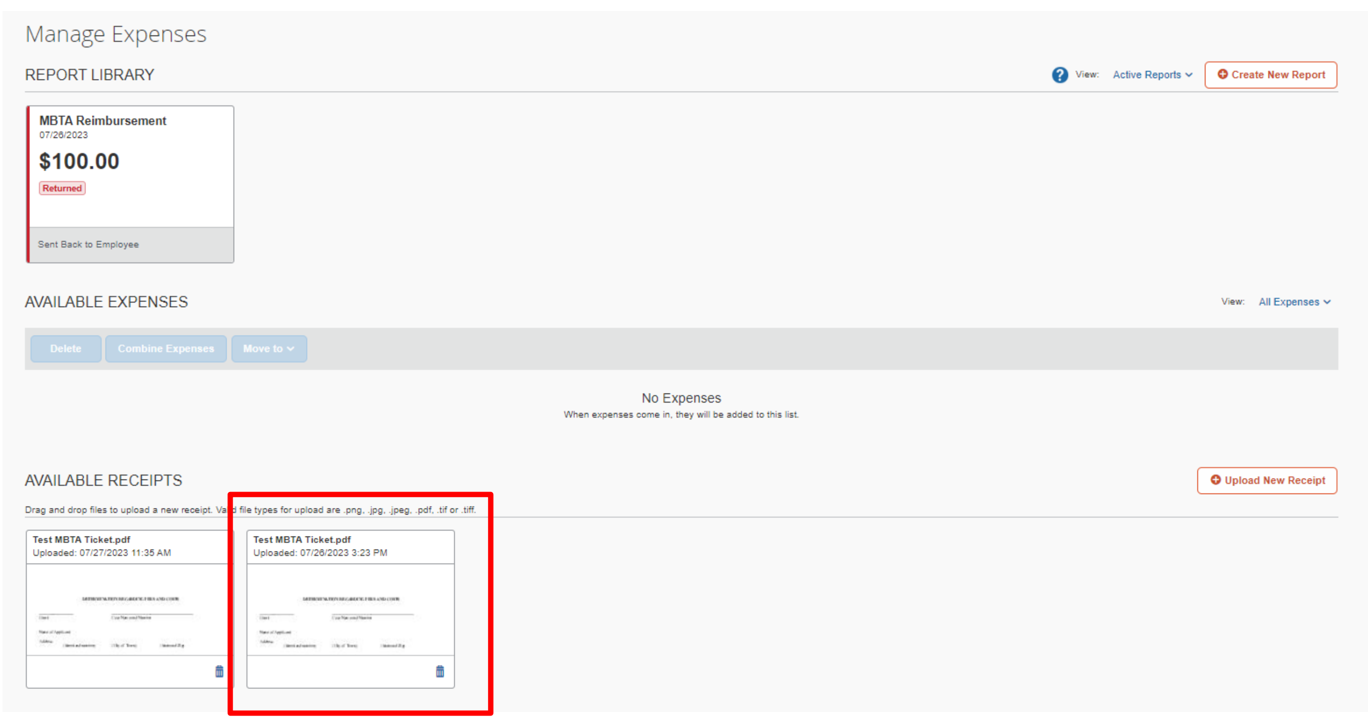


4. You will see the receipt image under the “Available Receipts” section.

Note: You can view a larger image of the receipt by clicking on the file. If you would like to delete the receipt, click on the trash can icon or click on the file and click on the “Delete” button located at the bottom of the image.

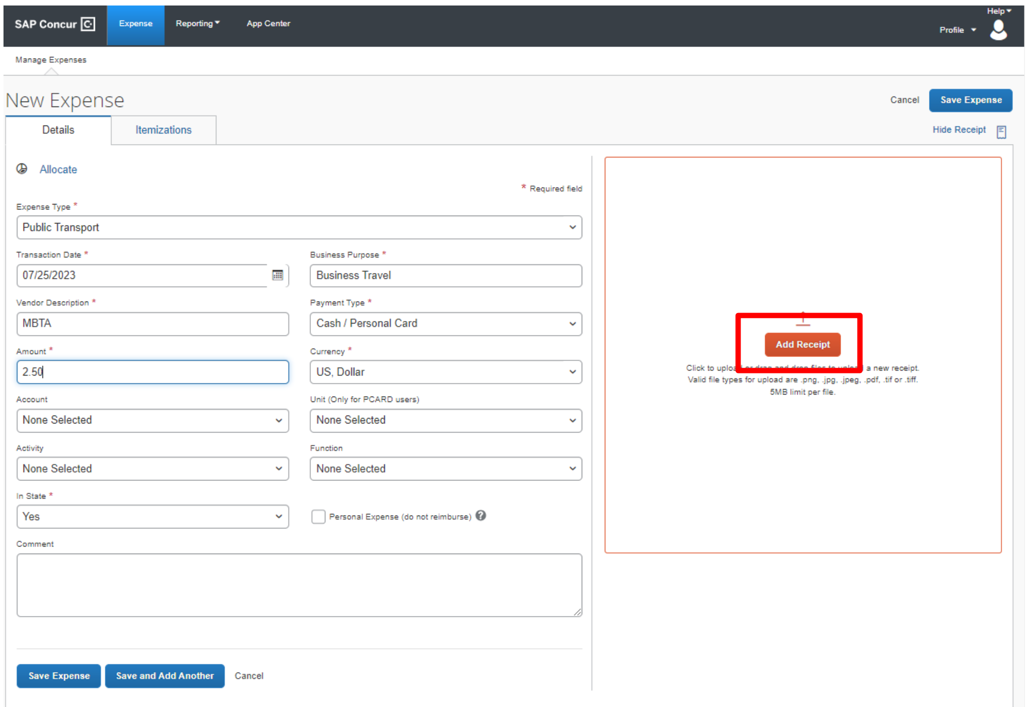
5. Alternatively, you can drag and drop files into the Available Receipts section. Your browser should not be maximized. Select the file you would like to upload. Drag and drop it to the Available Receipts section in Concur. You should see the section change and "Drop receipts" appear. Once dropped, it will upload the file and add as an available receipt



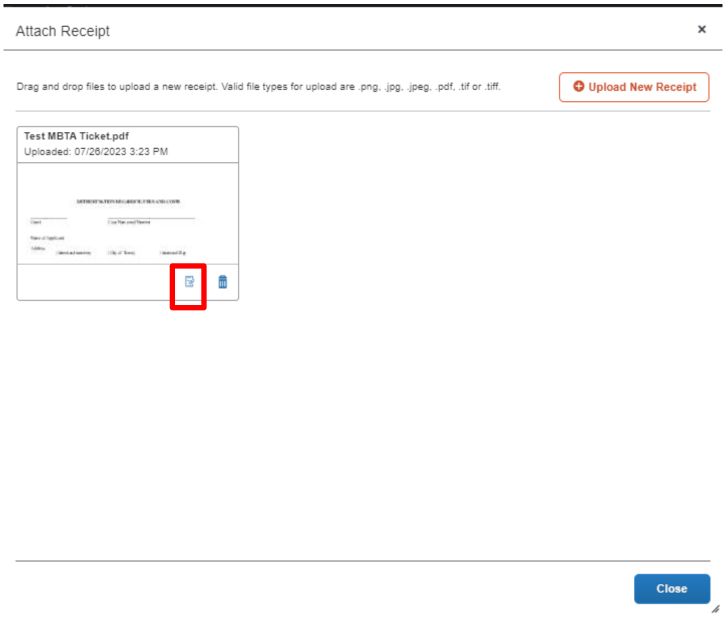


Upload Receipts Using the "Add Receipt" Button

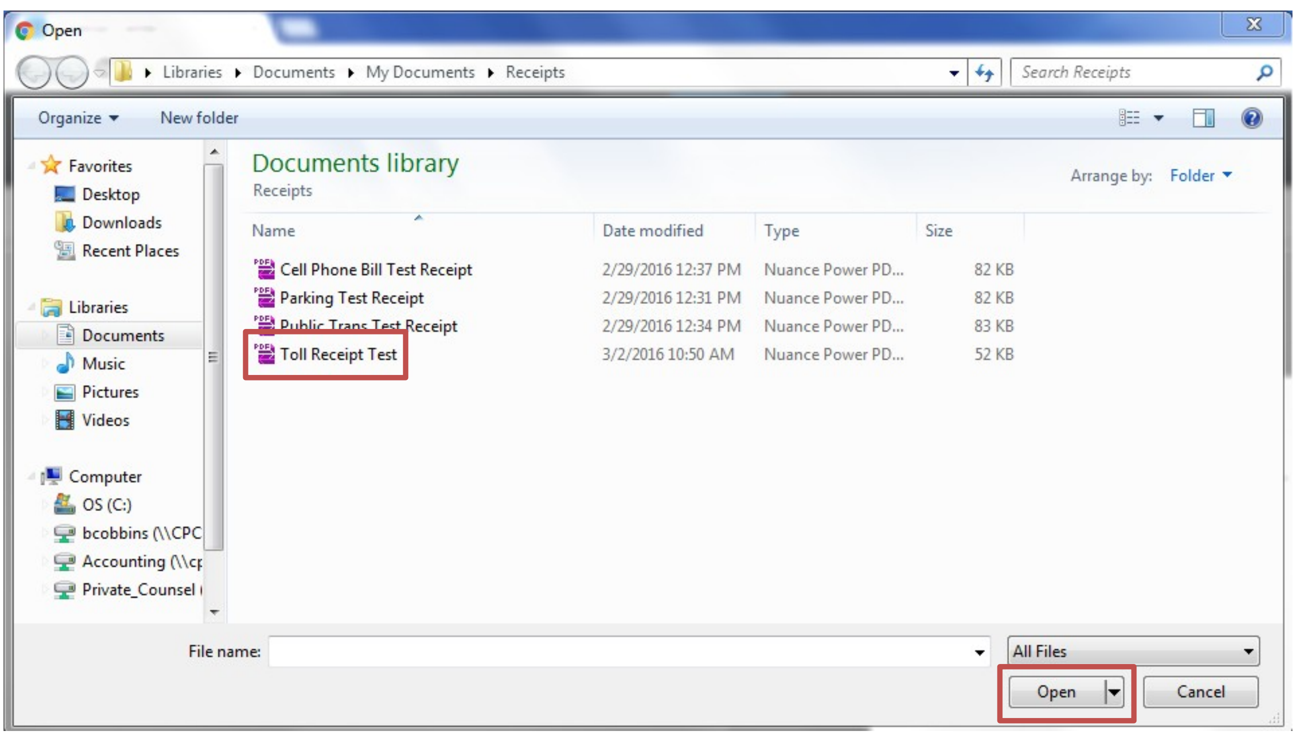
1. After you have created a new report and adding an expense, within the new expense section, select the "Add Receipt" button.



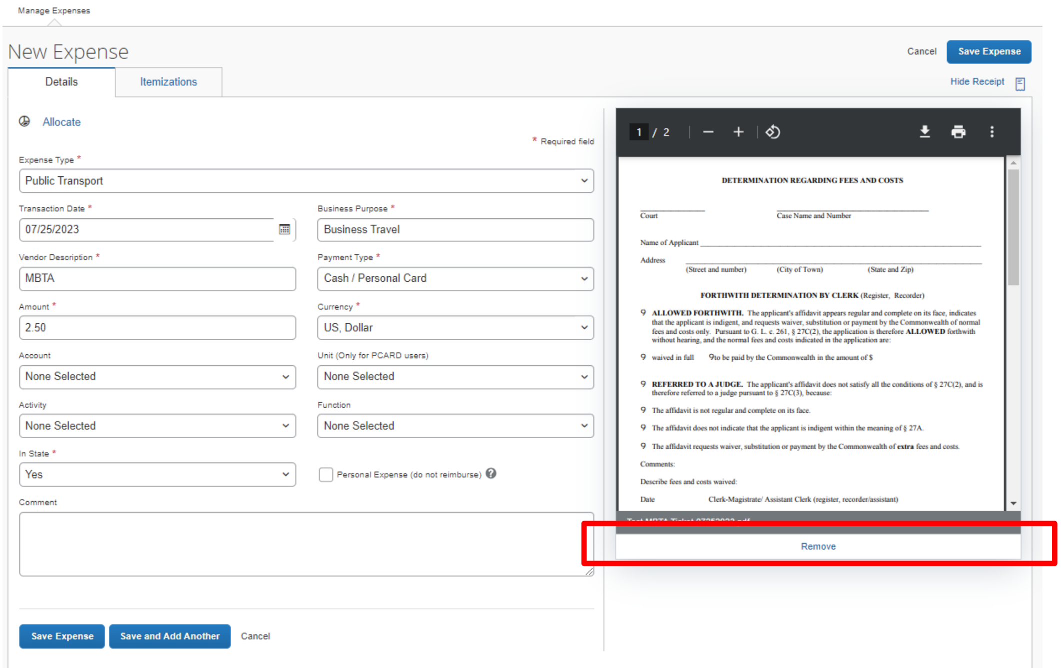
2. If the receipt has already been uploaded, click the “Attach” icon.



If the desired receipt is not listed under “Attach Receipt”, select the “Upload New Receipt” button to locate the file on your computer. Once you have located the file, select the file and then select “Open”.

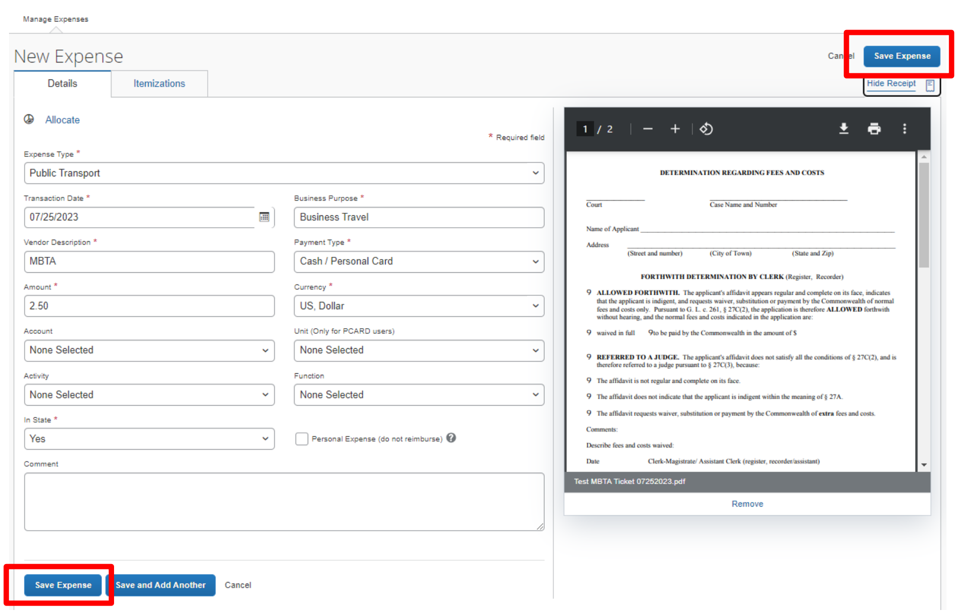


3. Once the file has been uploaded successfully, it will appear in the receipt section of the New Expense entry.

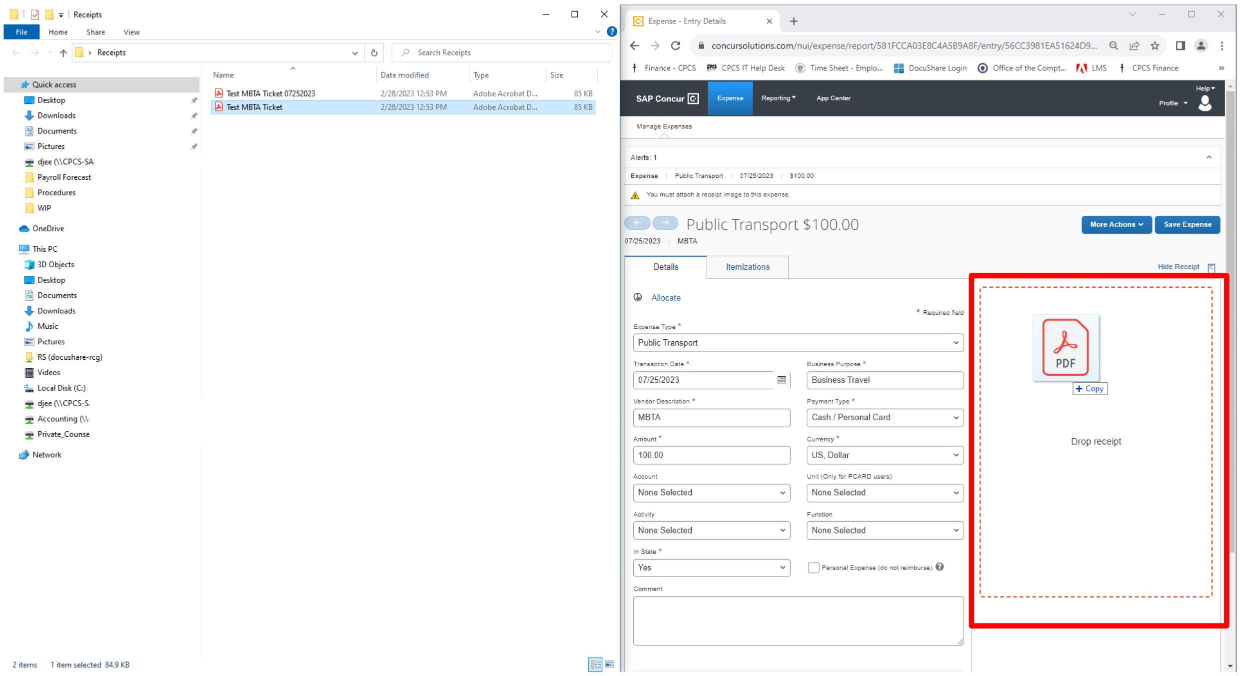


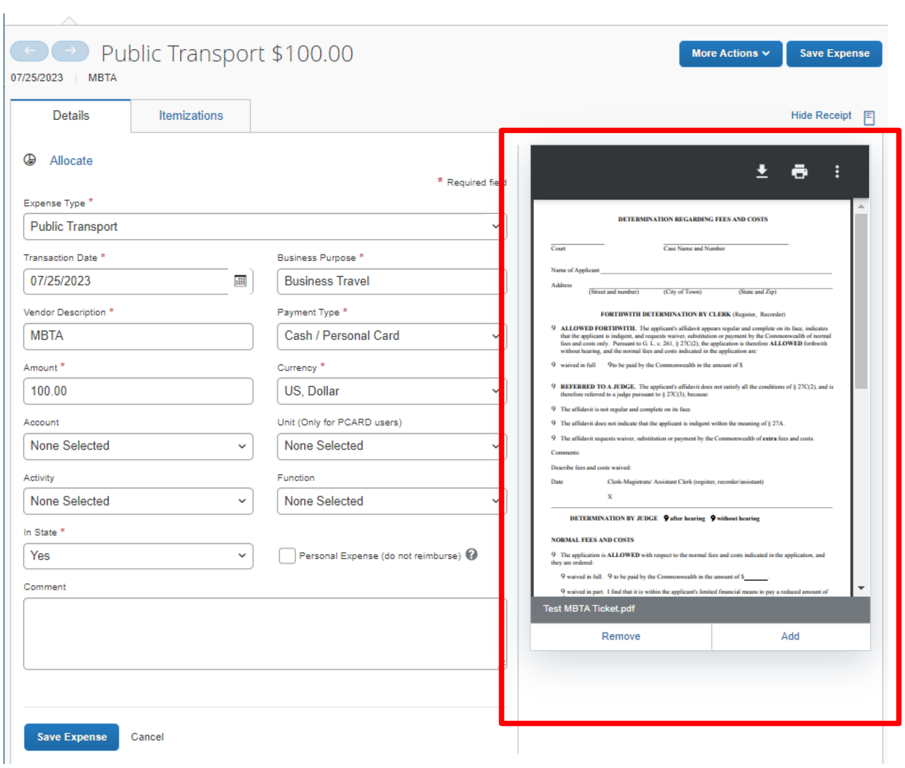
Note: If you need to remove the receipt, select the "Remove" button below the image of the receipt.

4. If you are satisfied with the data entered, select one of the "Save Expense" buttons. If you would like to add another expense to this report, select the "Save and Add Another" button. If you would like to cancel this entry, select one of the "Cancel" links.



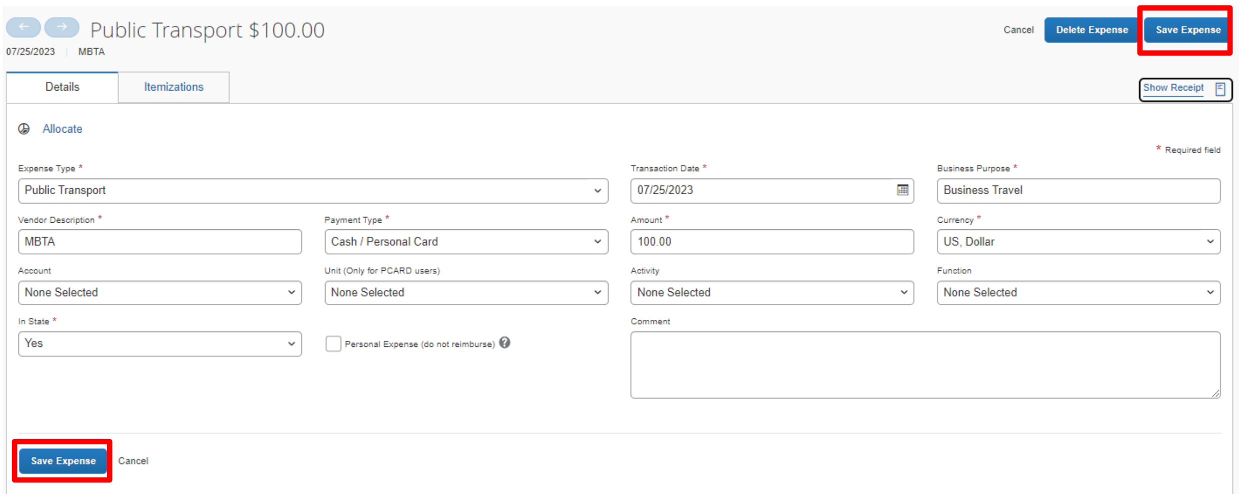
5. Alternatively, you can drag and drop files into the Add Receipt section. Your browser should not be maximized. Select the file you would like to upload. Drag and drop it to the Add Receipt section in Concur. You should see the section change and “Drop receipt” appear. Once dropped, it will upload the file and display the receipt.



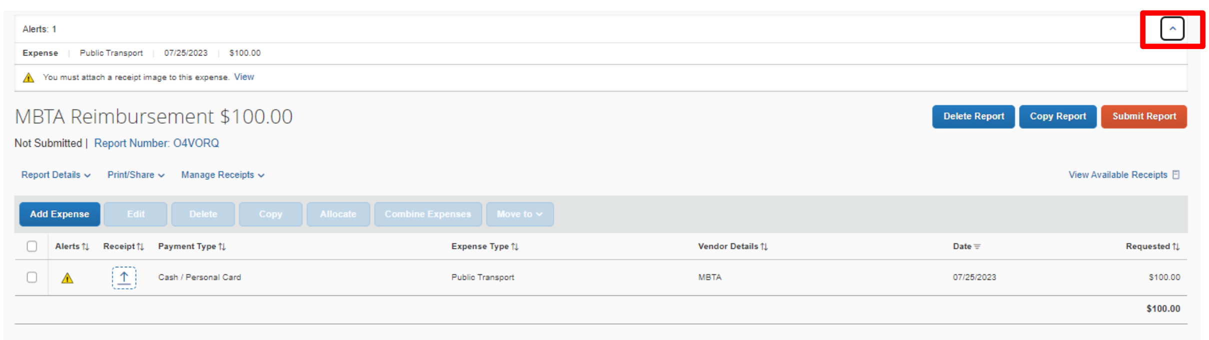


Upload Receipts Under the Final Review Window

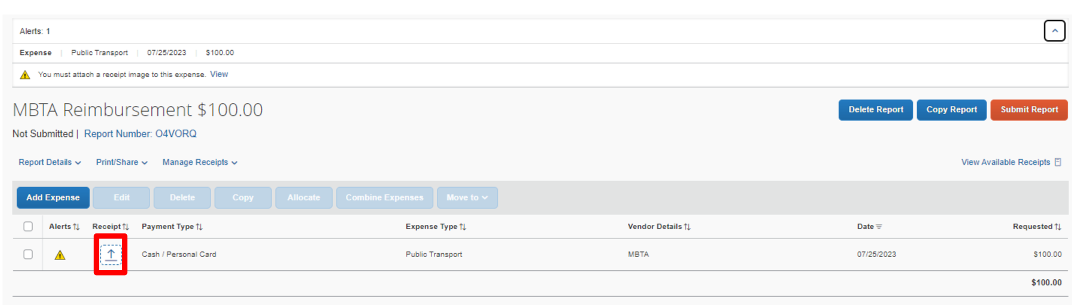
1. Once you enter your non-mileage expense details, select one of the “Save Expense” buttons.



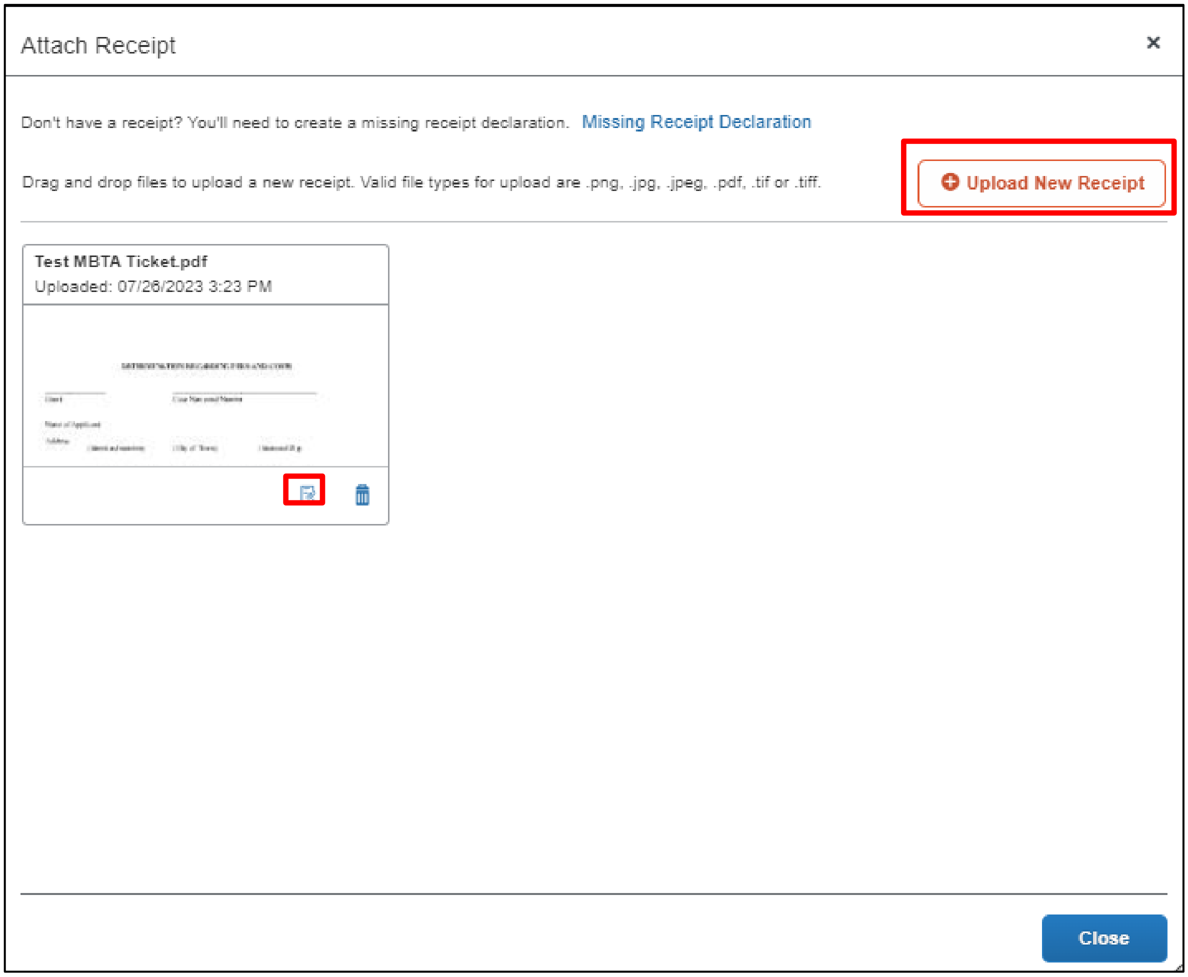
2. Concur will evaluate the expense. If a receipt is required, it will show Alerts. Expand the Alerts by clicking on the expand icon. The Alert message will indicate a receipt is required.



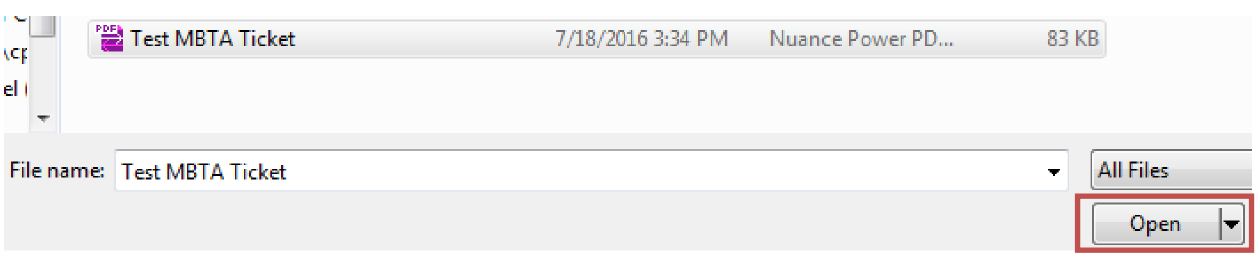
3. Select the Upload icon under the expense detail screen.



4. Either select an existing receipt by clicking on the attach icon or select the "Upload New Receipt" button to locate your receipt file on your computer. If you selected an existing receipt, once you have clicked on the attach icon, the receipt will attach to that expense and the alert will be resolved.

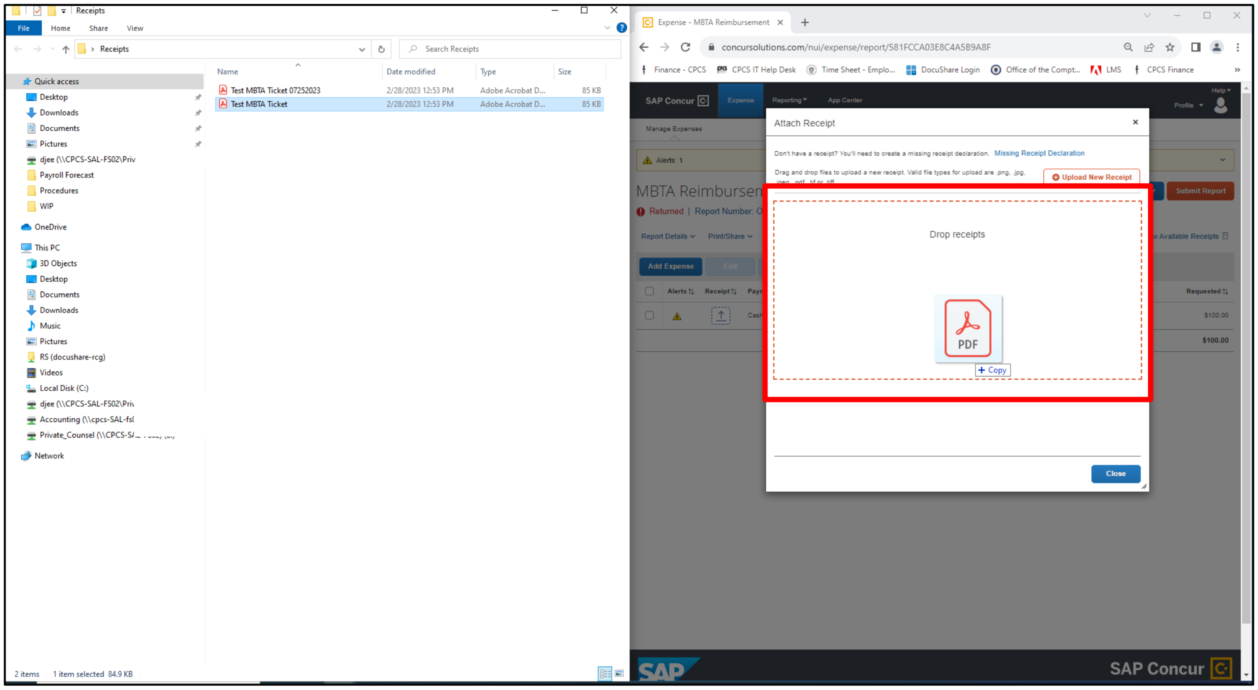


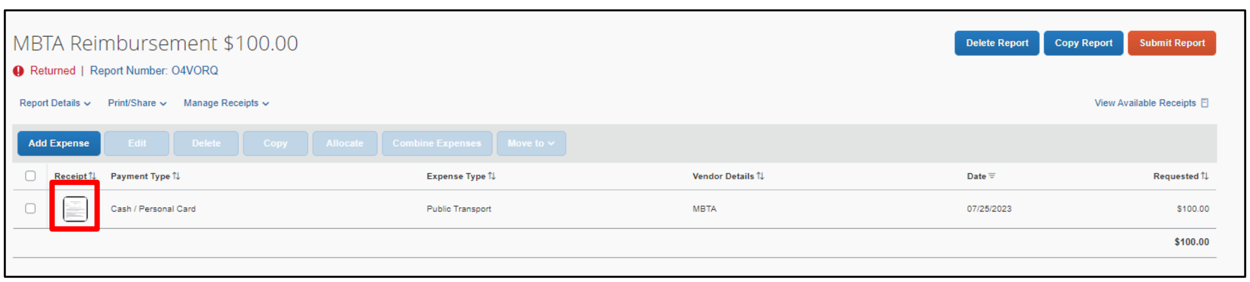
5. Locate and select the appropriate file on your computer, and then select the "Open" button.



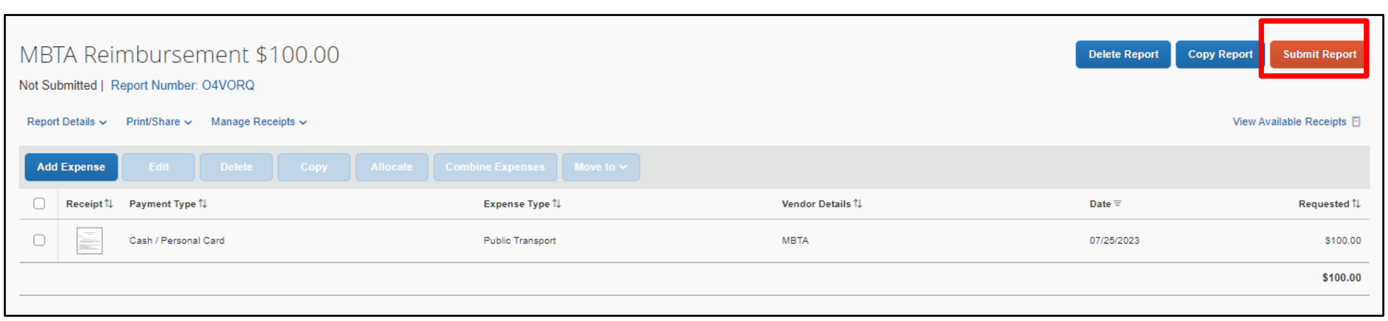
6. The receipt will upload, attach to that expense and the alert will be resolved.

7. Alternatively, you can drag and drop files into the Attach Receipt window. Your browser should not be maximized. Select the file you would like to upload. Drag and drop it to the Attach Receipt window in Concur. You should see the section change and “Drop receipts” appear. Once dropped, it will upload the file and the alert will be resolved.

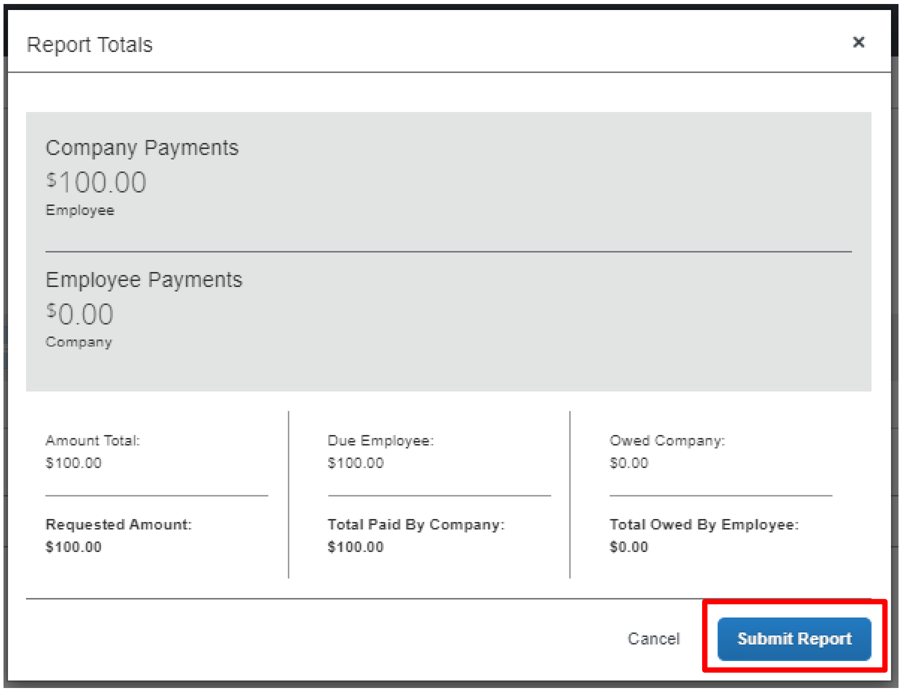




8. You can now proceed with submitting your report by selecting the “Submit Report” button.



9. Conduct a final review of the report submission. If there are no problems, select the “Submit Report” button



10. You will receive a confirmation that your expense report was successfully submitted.