

Concur – How to Upload Receipts

Committee for Public Counsel Services

Finance



Contents

How to Upload Receipts to Concur	2
Upload Receipts via Email	2
Verifying your Email Address	3
Upload Receipts Using the “Upload New Receipt” button	6
Upload Receipts Using the “Add Receipt” Button.....	9
Upload Receipts Under the Final Review Window.....	13

How to Upload Receipts to Concur

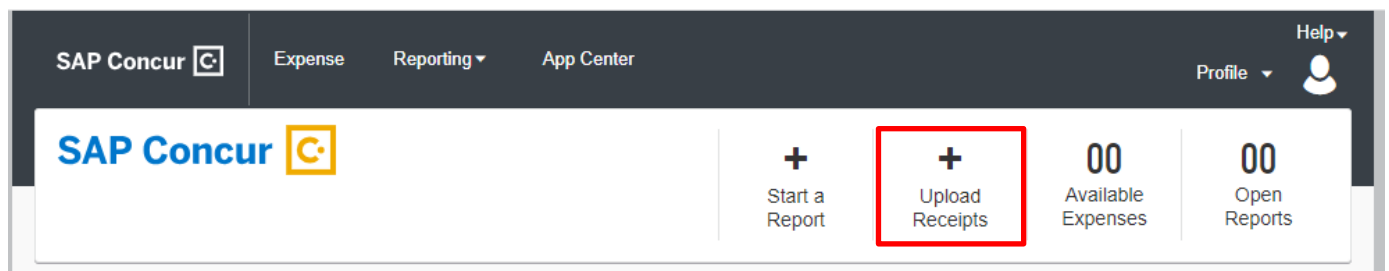
There are several ways to upload receipts to your Concur web-based portal:

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.

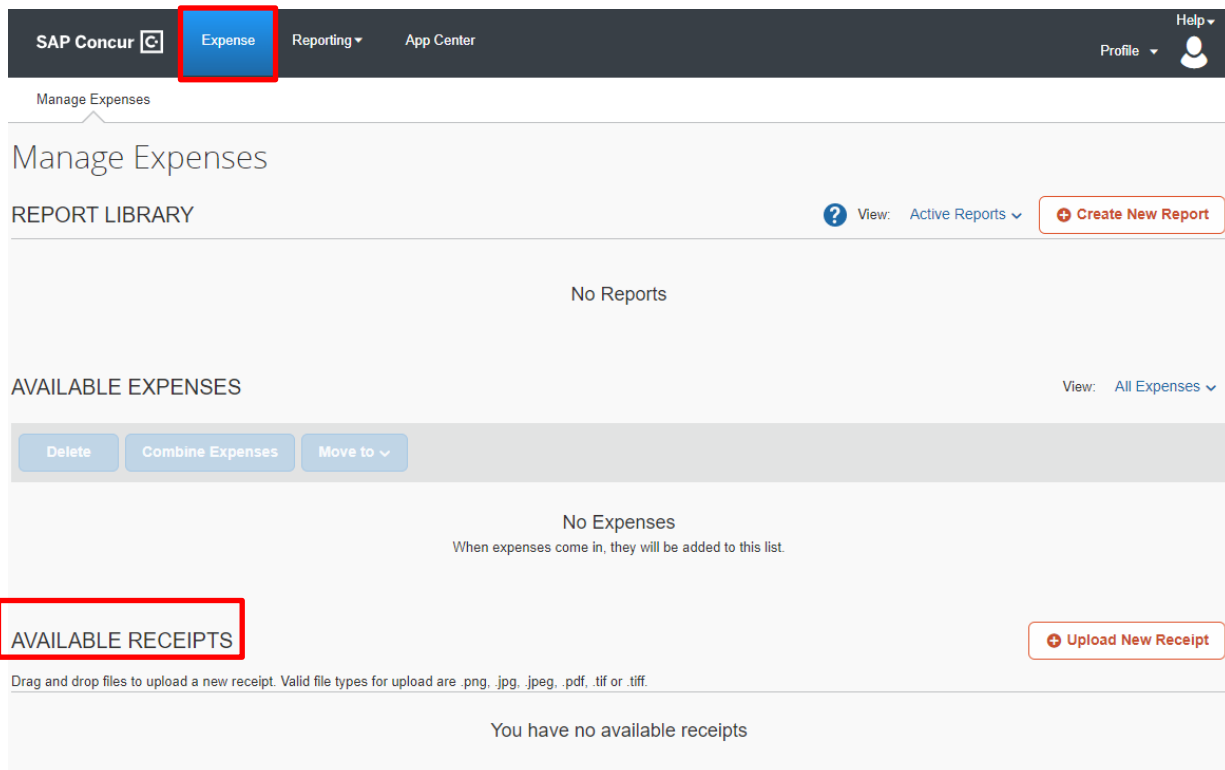
Please make sure the receipt images are legible.

Upload Receipts via Email

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



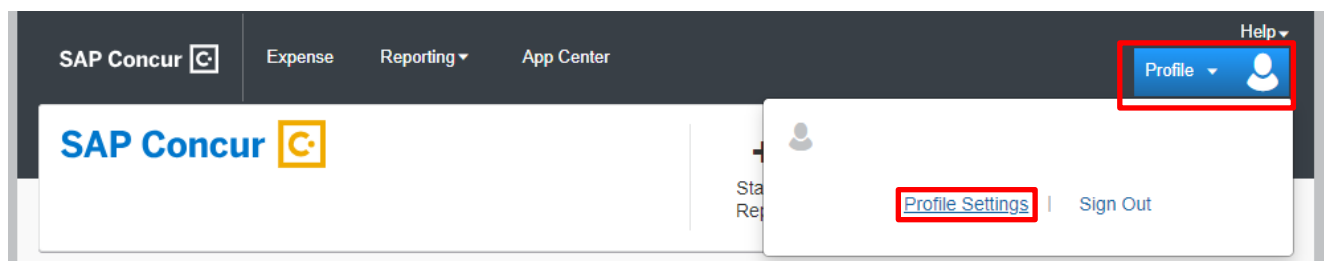
2. If you have already verified your email address, you would simply send an email with the attached receipt to receipts@concur.com. The receipt image will appear under “Available Receipts” by selecting “Expense” for you to select and attach to your expense report.



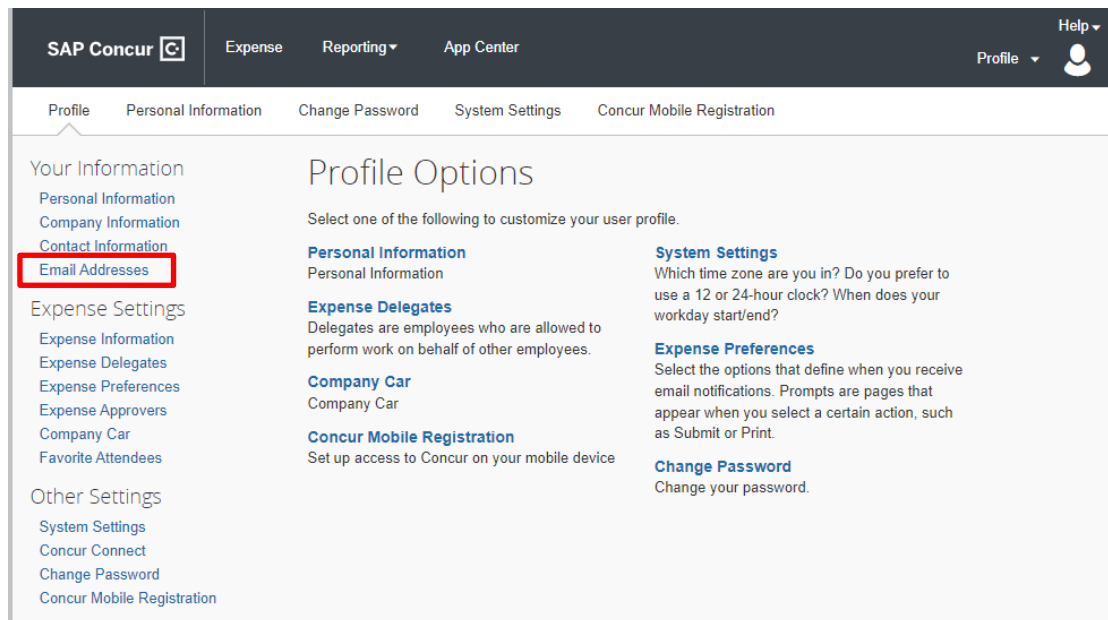
Note: If you have not verified your email address, you will have to complete that task first in order to attach receipts via email (See Step 3).

[Verifying your Email Address](#)

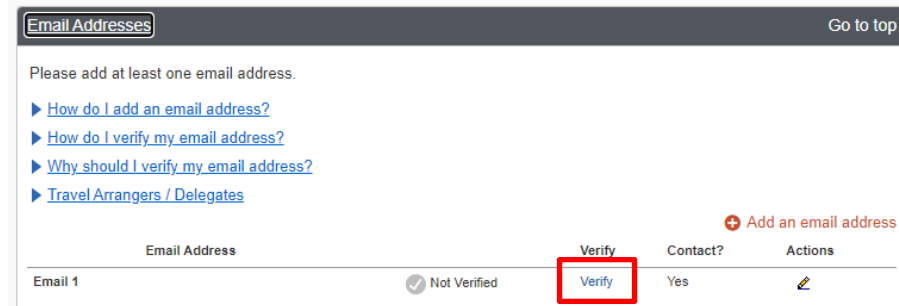
3. Select the “Profile” to expand the drop down box. Select “Profile Settings” link. Once selected, Profile Options page opens.



4. Select “Email Addresses” link.

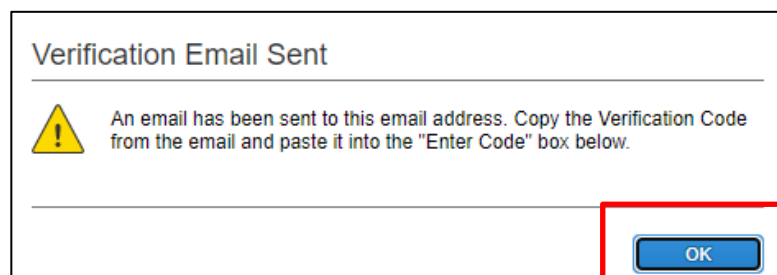


5. “My Profile – Personal Information” opens, under the “Email Addresses” section, your status should read “Not Verified”. Select the “Verify” link.

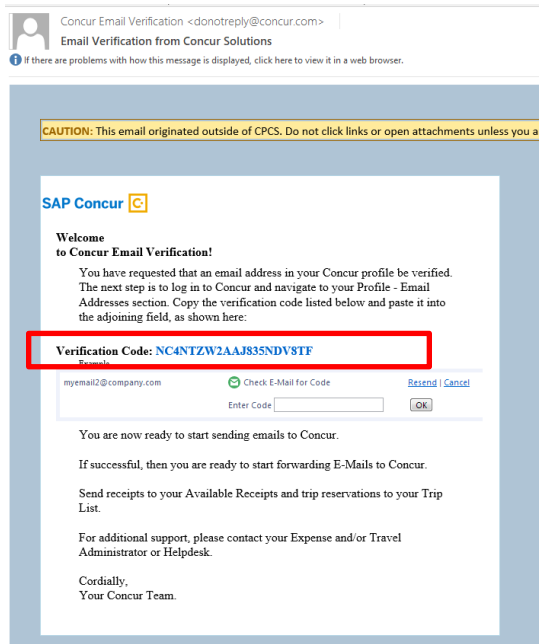


6. The system will send a verification code to the email address listed. A message box appears confirming an email was sent. Select the “OK” button.

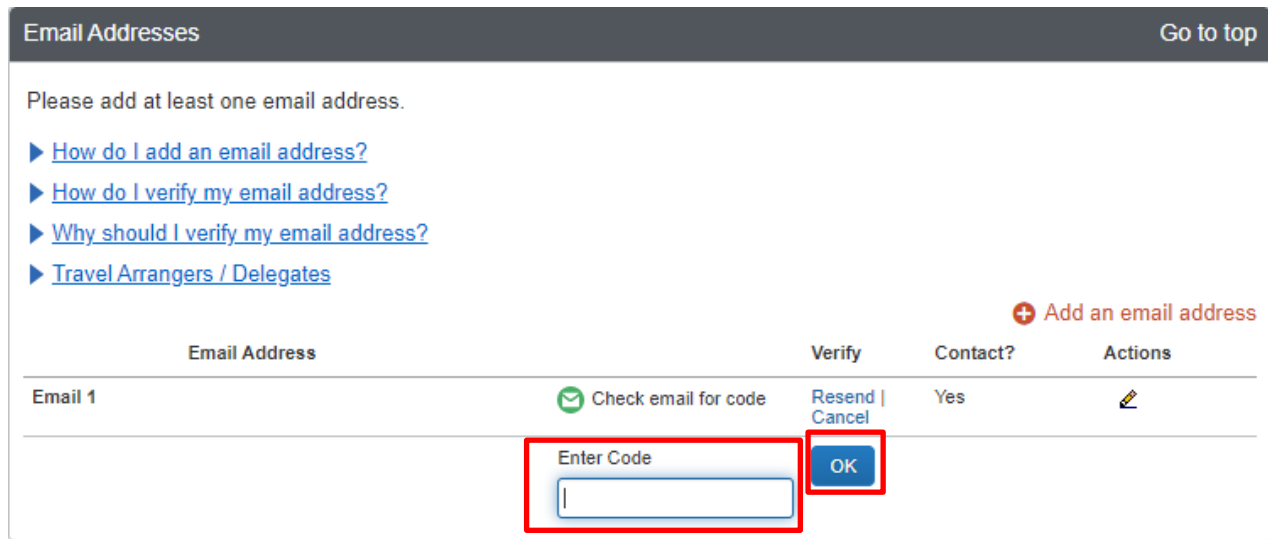
Note: Check your spam/ junk email folder in the event the email does not appear in your email Inbox.



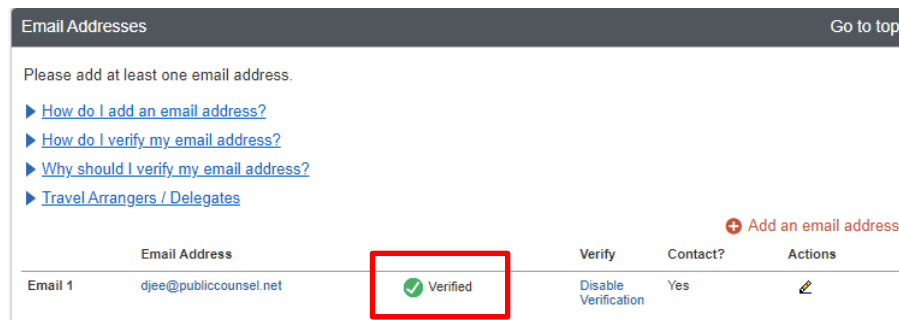
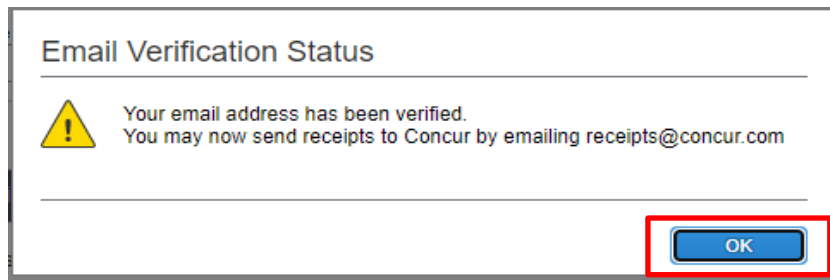
7. Locate the email.



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



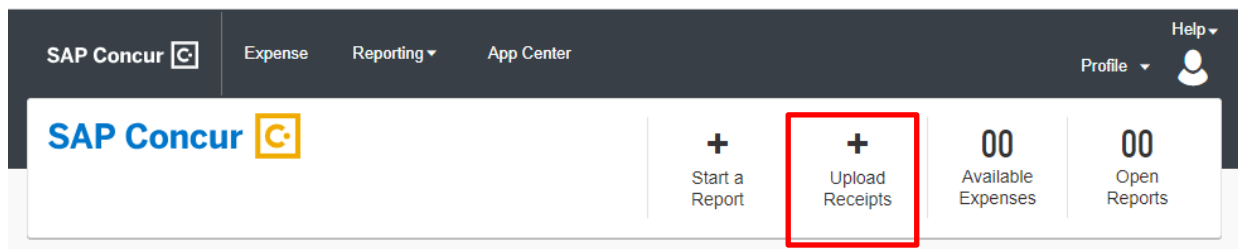
- Once you enter the code correctly, a message box appears confirming the email address has been verified. Select the “OK” button. Your email address status will change to “Verified”.



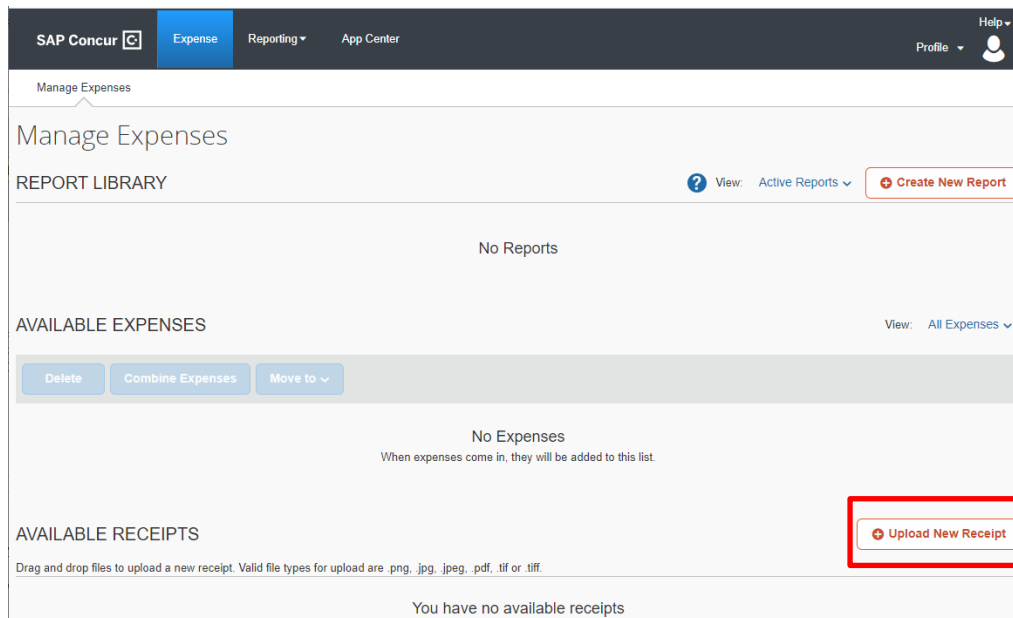
- You can now start emailing receipts to your Concur profile. The receipts will appear under the “Available Receipts” section.

[Upload Receipts Using the “Upload New Receipt” button](#)

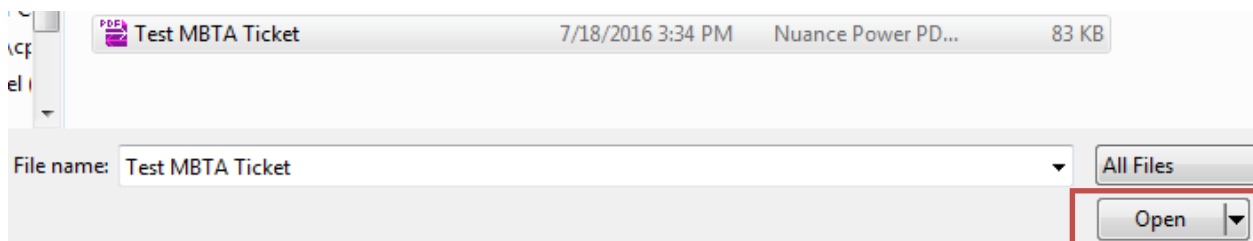
- From your profile home page, select “Upload Receipts”.



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



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

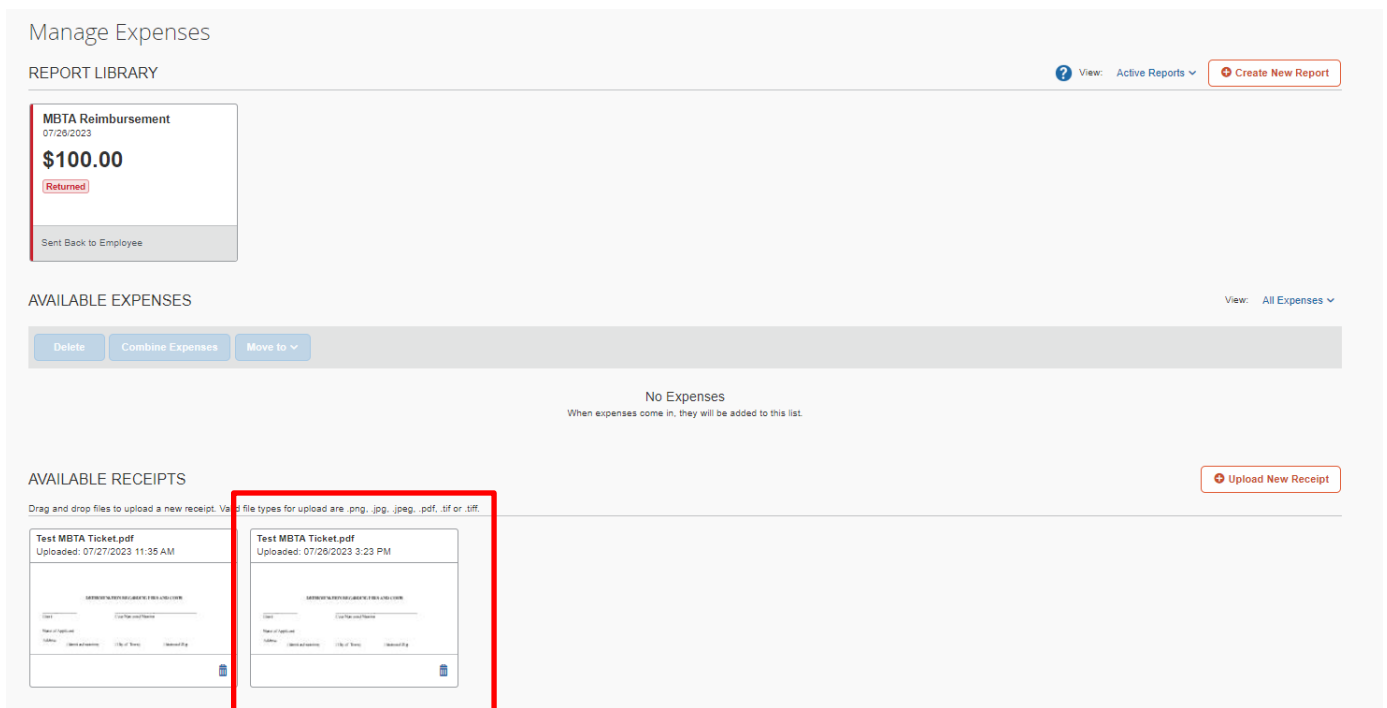
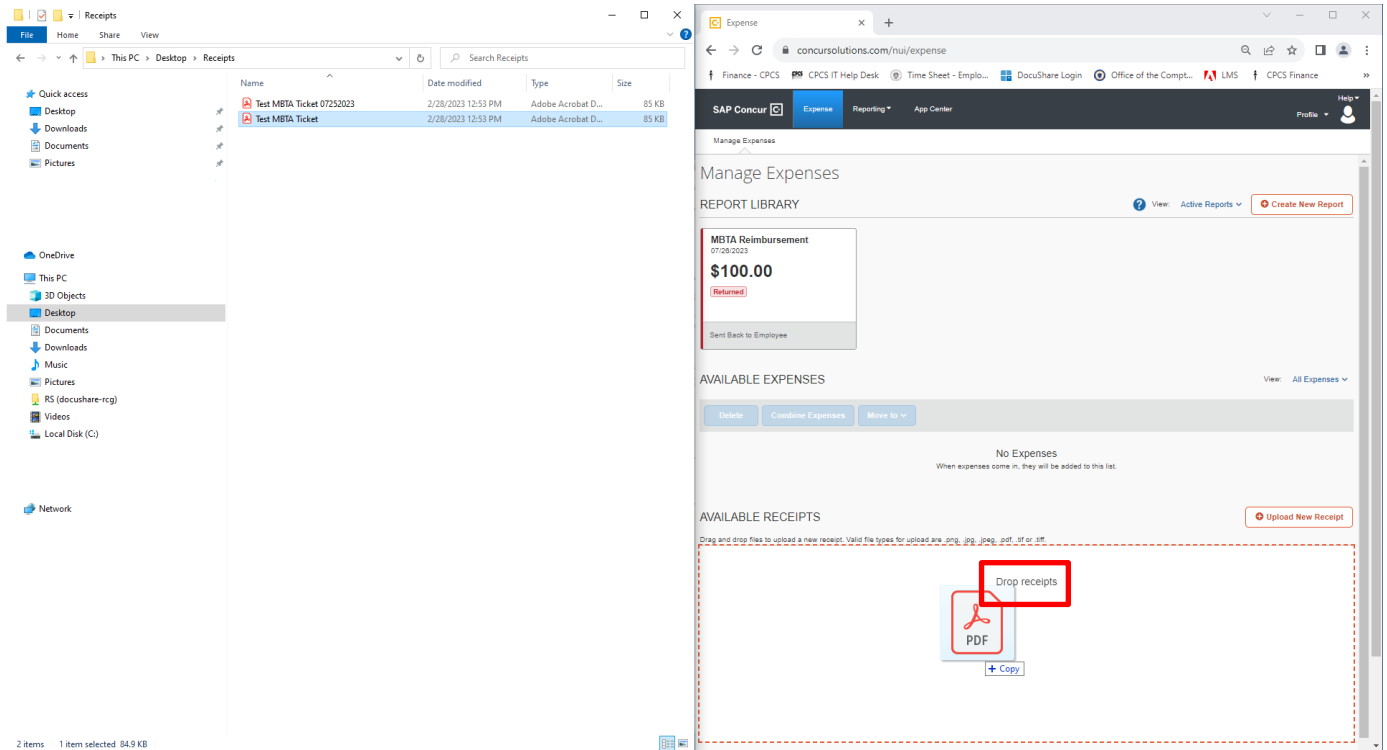


- You will see the receipt image under the “Available Receipts” section.



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.

- 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.

The screenshot displays the SAP Concur 'New Expense' form. The form is divided into two main sections: 'Details' and 'Itemizations'. The 'Details' section is active, showing various fields for expense entry. The 'Add Receipt' button is highlighted with a red box, indicating where to click to upload a receipt. The form includes fields for Expense Type, Transaction Date, Business Purpose, Vendor Description, Amount, Account, Activity, In State, and a Comment field. There are also dropdown menus for Business Purpose, Payment Type, Currency, Unit, and Function. A 'Personal Expense' checkbox is located at the bottom of the form. The 'Add Receipt' button is located in the center of the form, with a red box around it. Below the button, there is a small text box that reads: 'Click to upload a receipt for this expense. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.'

SAP Concur Expense Reporting App Center Profile Help

Manage Expenses

New Expense Cancel Save Expense

Details Itemizations

Allocate

Expense Type * Public Transport

Transaction Date * 07/25/2023

Business Purpose * Business Travel

Vendor Description * MBTA

Payment Type * Cash / Personal Card

Amount * 2.50

Currency * US, Dollar

Account None Selected

Unit (Only for P-CARD users) None Selected

Activity None Selected

Function None Selected

In State * Yes

☐ Personal Expense (do not reimburse) ?

Comment

Save Expense Save and Add Another Cancel

Click to upload a receipt for this expense. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Add Receipt

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

Attach Receipt

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

Test MBTA Ticket.pdf
Uploaded: 07/26/2023 3:23 PM

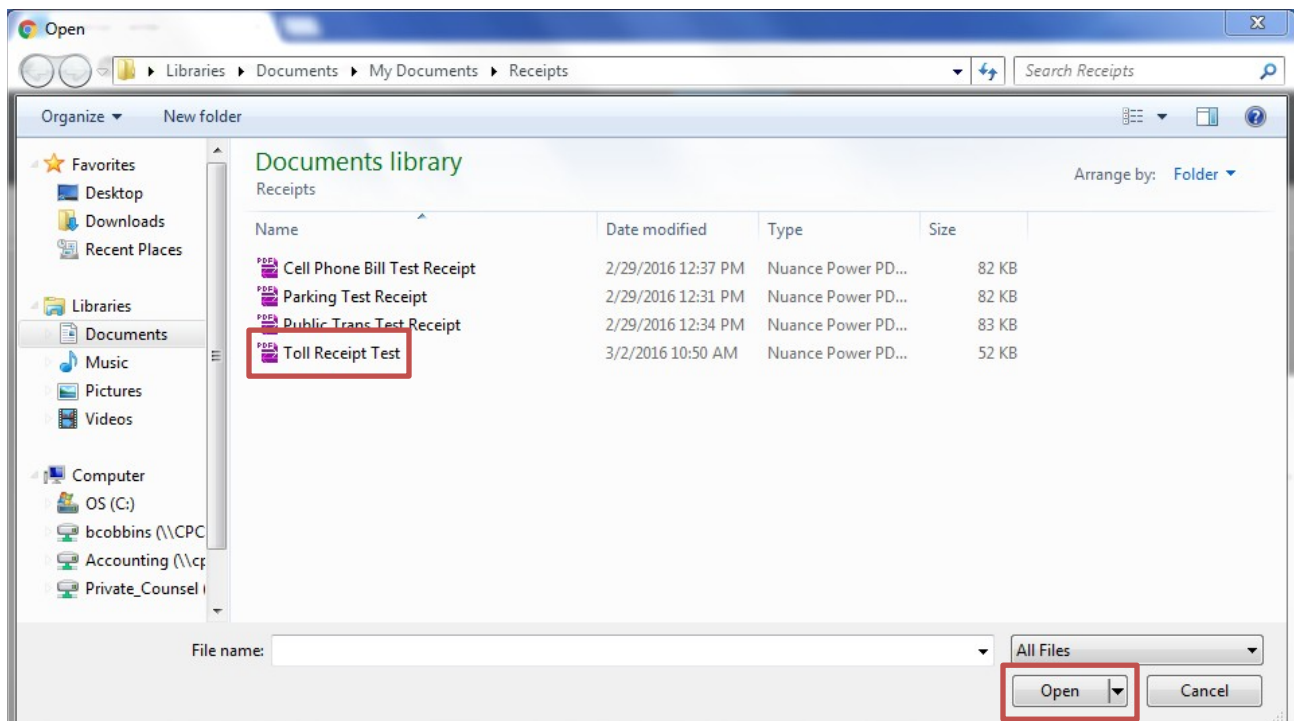
Test MBTA Ticket.pdf

Uploaded: 07/26/2023 3:23 PM

PDF icon

Close

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.

Manage Expenses

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

Allocate

Expense Type * Public Transport

Transaction Date * 07/25/2023

Vendor Description * MBTA

Amount * 2.50

Account None Selected

Activity None Selected

In State * Yes

Comment

Business Purpose * Business Travel

Payment Type * Cash / Personal Card

Currency * US, Dollar

Unit (Only for PCARD users) None Selected

Function None Selected

Personal Expense (do not reimburse) ?

Save Expense Save and Add Another Cancel

1 / 2

DETERMINATION REGARDING FEES AND COSTS

Court Case Name and Number

Name of Applicant

Address (Street and number) (City of Town) (State and Zip)

FORTHWITH DETERMINATION BY CLERK (Register, Recorder)

9 ALLOWED FORTHWITH. The applicant's affidavit appears regular and complete on its face, indicates that the applicant is indigent, and requests waiver, substitution or payment by the Commonwealth of normal fees and costs only. Pursuant to G. L. c. 26B, § 27C(2), the application is therefore ALLOWED forthwith without hearing, and the normal fees and costs indicated in the application are:

9 waived in full 9 to be paid by the Commonwealth in the amount of \$

9 REFERRED TO A JUDGE. The applicant's affidavit does not satisfy all the conditions of § 27C(2), and is therefore referred to a judge pursuant to § 27C(3), because:

9 The affidavit is not regular and complete on its face.

9 The affidavit does not indicate that the applicant is indigent within the meaning of § 27A.

9 The affidavit requests waiver, substitution or payment by the Commonwealth of extra fees and costs.

Comments:

Describe fees and costs waived:

Date Clerk/Magistrate/ Assistant Clerk (register, recorder/assistant)

Remove

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.

Manage Expenses

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

Allocate

Expense Type * Public Transport

Transaction Date * 07/25/2023

Vendor Description * MBTA

Amount * 2.50

Account None Selected

Activity None Selected

In State * Yes

Comment

Business Purpose * Business Travel

Payment Type * Cash / Personal Card

Currency * US, Dollar

Unit (Only for PCARD users) None Selected

Function None Selected

Personal Expense (do not reimburse) ?

Save Expense Save and Add Another Cancel

1 / 2

DETERMINATION REGARDING FEES AND COSTS

Court Case Name and Number

Name of Applicant

Address (Street and number) (City of Town) (State and Zip)

FORTHWITH DETERMINATION BY CLERK (Register, Recorder)

9 ALLOWED FORTHWITH. The applicant's affidavit appears regular and complete on its face, indicates that the applicant is indigent, and requests waiver, substitution or payment by the Commonwealth of normal fees and costs only. Pursuant to G. L. c. 26B, § 27C(2), the application is therefore ALLOWED forthwith without hearing, and the normal fees and costs indicated in the application are:

9 waived in full 9 to be paid by the Commonwealth in the amount of \$

9 REFERRED TO A JUDGE. The applicant's affidavit does not satisfy all the conditions of § 27C(2), and is therefore referred to a judge pursuant to § 27C(3), because:

9 The affidavit is not regular and complete on its face.

9 The affidavit does not indicate that the applicant is indigent within the meaning of § 27A.

9 The affidavit requests waiver, substitution or payment by the Commonwealth of extra fees and costs.

Comments:

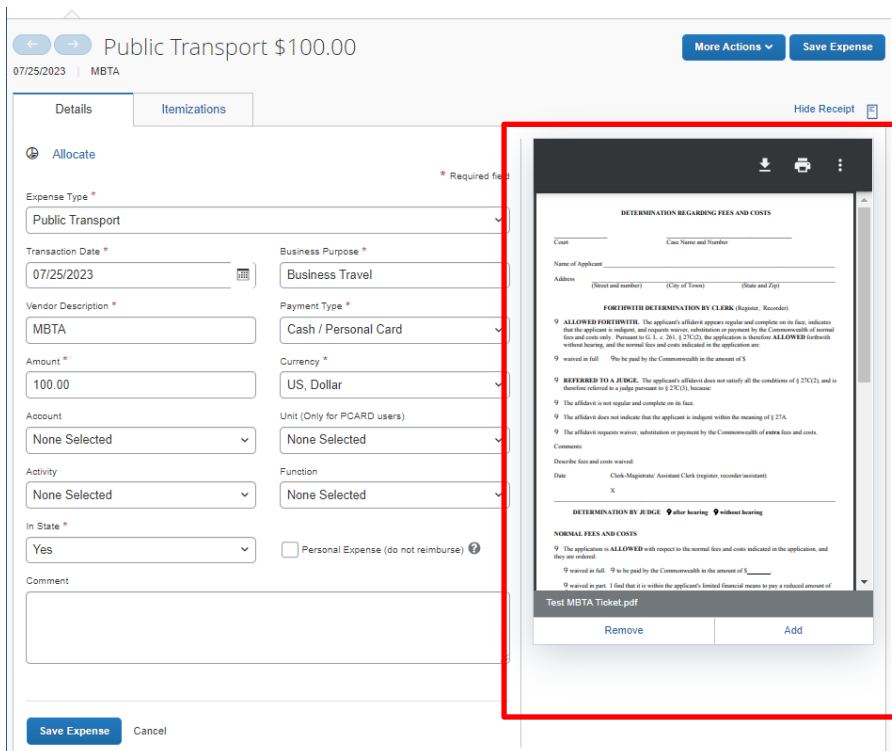
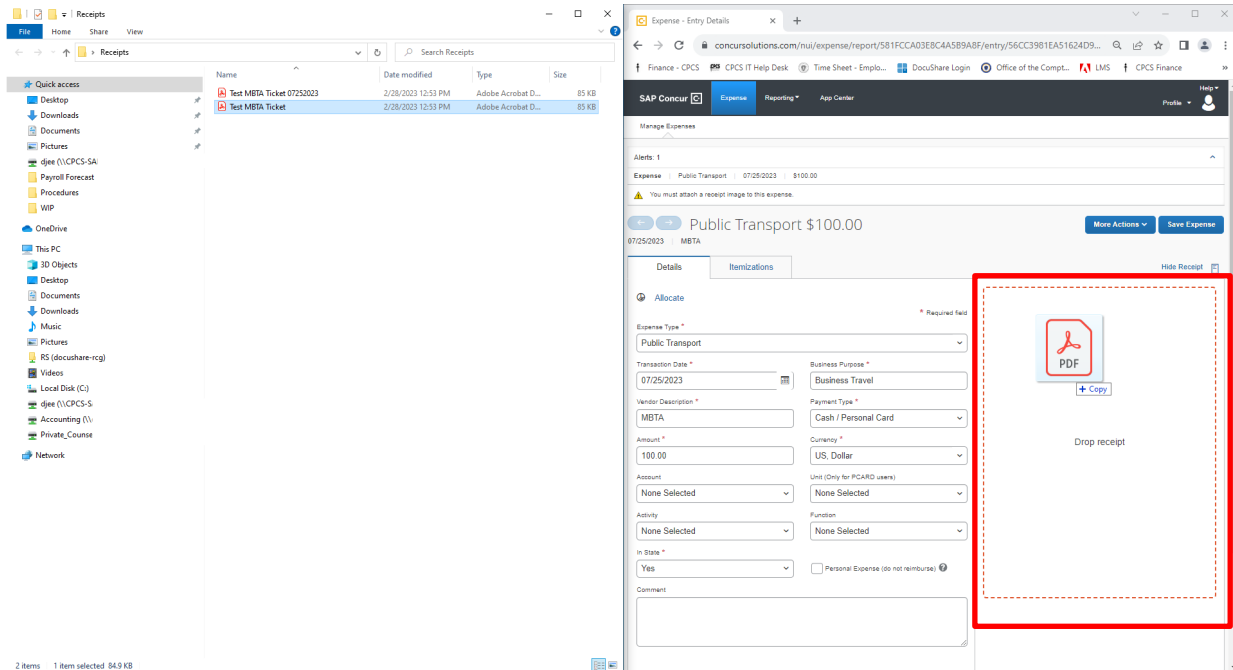
Describe fees and costs waived:

Date Clerk/Magistrate/ Assistant Clerk (register, recorder/assistant)

Test MBTA Ticket 0725023.pdf

Remove

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.

The screenshot shows the 'Public Transport \$100.00' expense entry form. At the top right, there are buttons for 'Cancel', 'Delete Expense', and 'Save Expense' (highlighted with a red box). Below the form fields, at the bottom left, there is another 'Save Expense' button (also highlighted with a red box) and a 'Cancel' button. The form fields include: Expense Type (Public Transport), Transaction Date (07/25/2023), Business Purpose (Business Travel), Vendor Description (MBTA), Payment Type (Cash / Personal Card), Amount (100.00), Currency (US, Dollar), Account (None Selected), Unit (None Selected), Activity (None Selected), Function (None Selected), In State (Yes), and a checkbox for 'Personal Expense (do not reimburse)'. A 'Show Receipt' button is located at the top right of the form area.

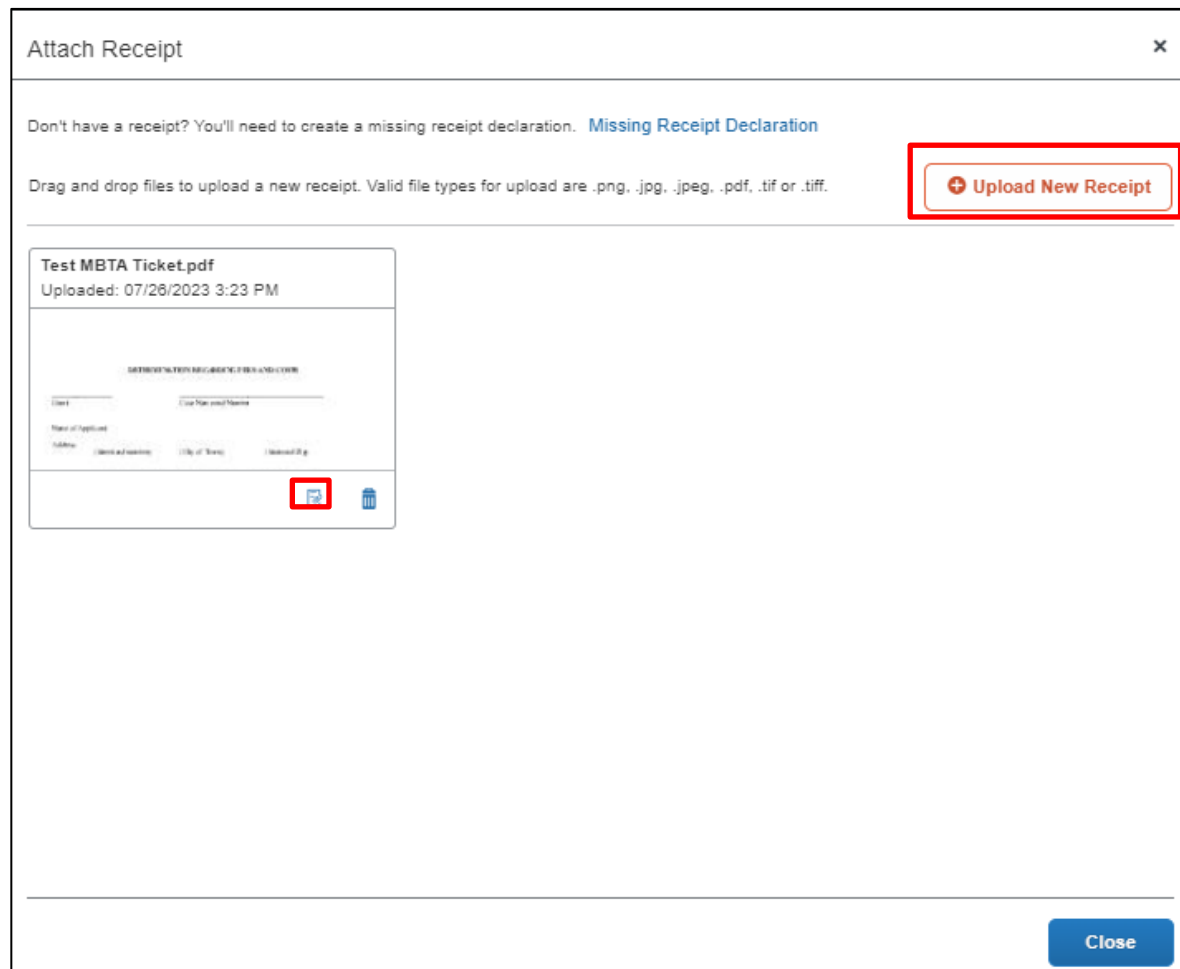
2. Concur will evaluate the expense. If a receipt is required, it will show Alerts. Expand the Alerts by clicking on the expand icon. The Alert message will indicate a receipt is required.

The screenshot shows the 'Alerts' section of the Concur interface. At the top right, there is an expand icon (a small square with an upward arrow, highlighted with a red box). Below the alert message, there is a table with the following columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains one row with a yellow warning icon in the 'Alerts' column, an upload icon in the 'Receipt' column, 'Cash / Personal Card' in the 'Payment Type' column, 'Public Transport' in the 'Expense Type' column, 'MBTA' in the 'Vendor Details' column, '07/25/2023' in the 'Date' column, and '\$100.00' in the 'Requested' column. The total amount is shown as '\$100.00' at the bottom right of the table.

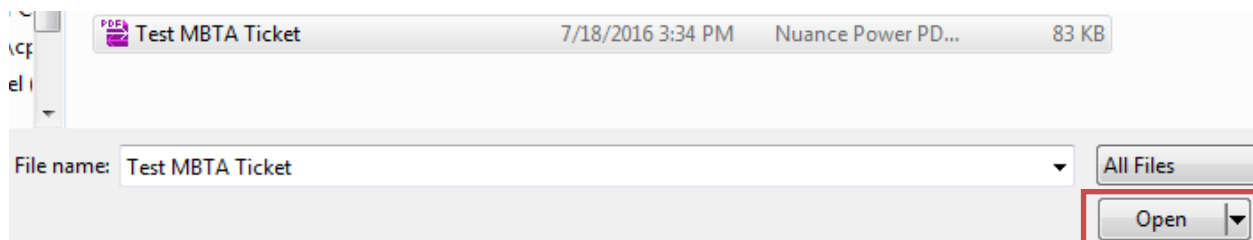
3. Select the Upload icon under the expense detail screen.

This screenshot is identical to the previous one, showing the 'Alerts' section. The 'Receipt' column in the table has an upload icon (a square with an upward arrow) which is highlighted with a red box.

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.

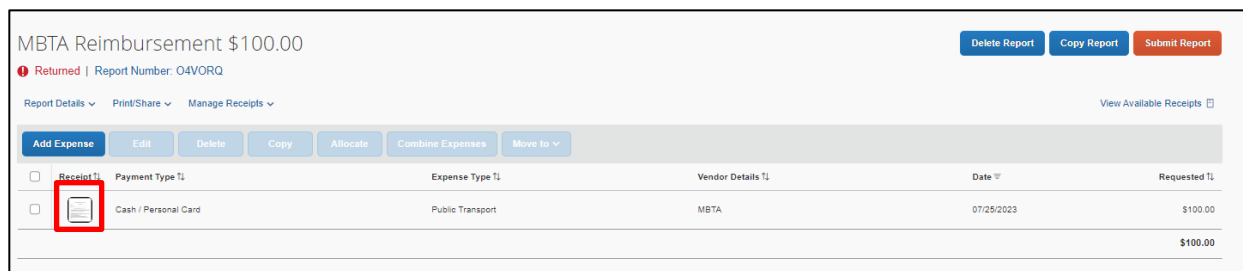
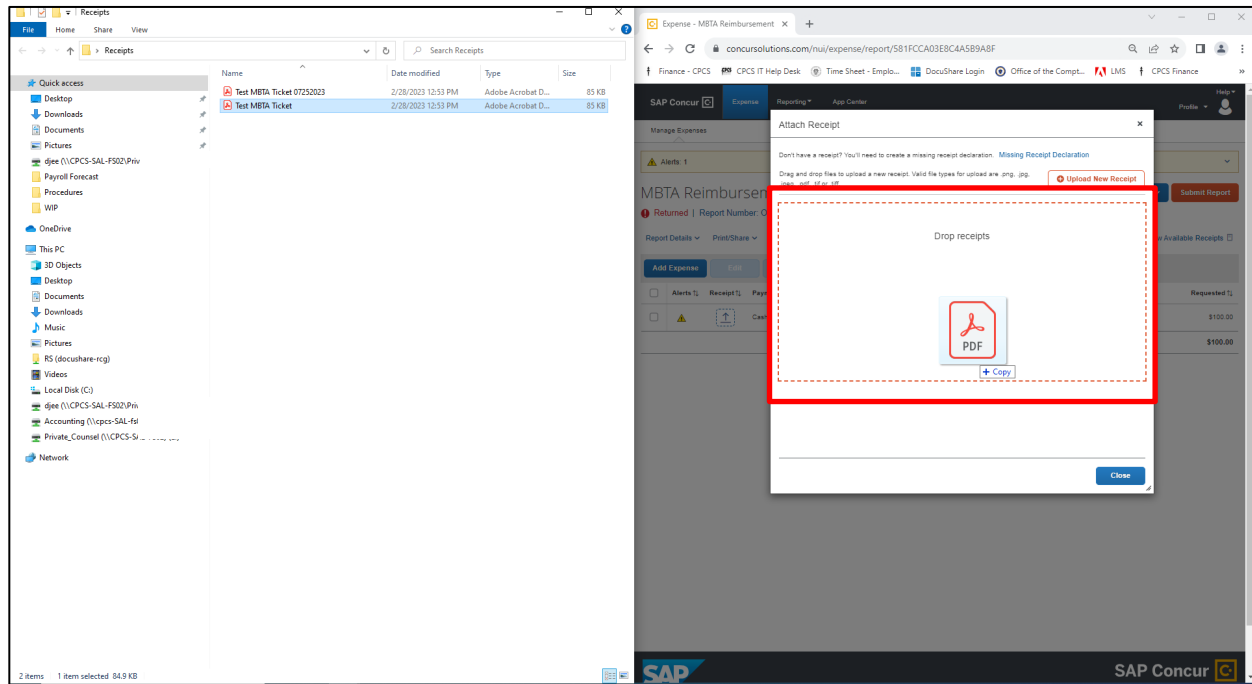


5. Locate and select the appropriate file on your computer, and then select the “Open” button.

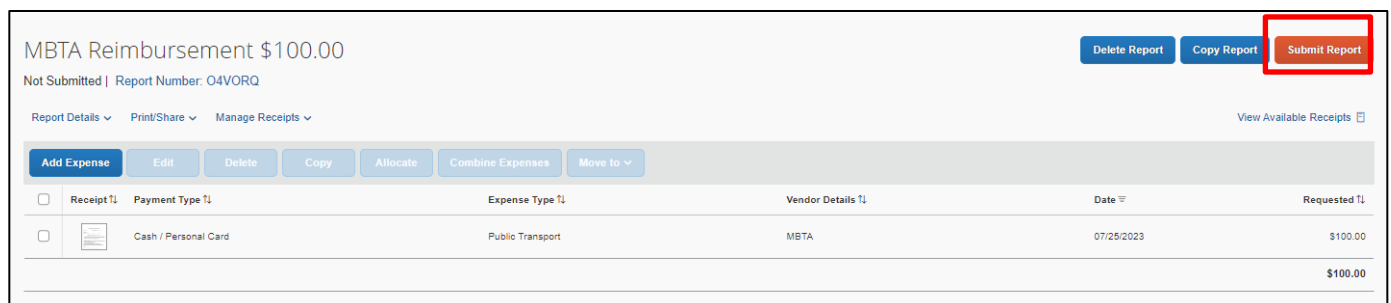


6. The receipt will upload, attach to that expense and the alert will be resolved.

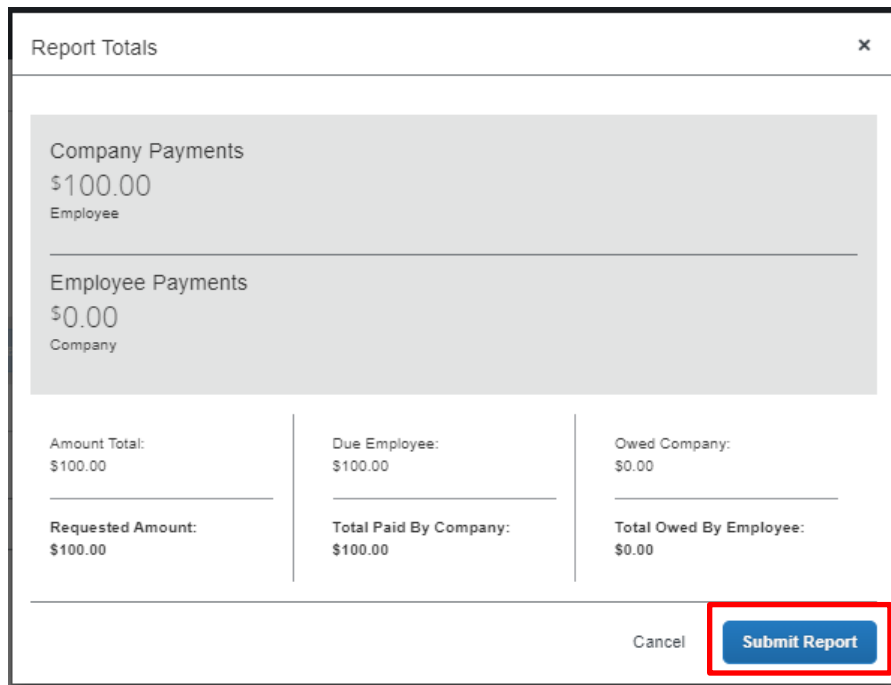
7. Alternatively, you can drag and drop files into the Attach Receipt window. Your browser should not be maximized. Select the file you would like to upload. Drag and drop it to the Attach Receipt window in Concur. You should see the section change and “Drop receipts” appear. Once dropped, it will upload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



The 'Report Totals' window displays a summary of payments. It includes a grey box with 'Company Payments' (\$100.00) and 'Employee Payments' (\$0.00). Below this, a table shows the financial breakdown for both parties, with 'Submit Report' and 'Cancel' buttons at the bottom right.

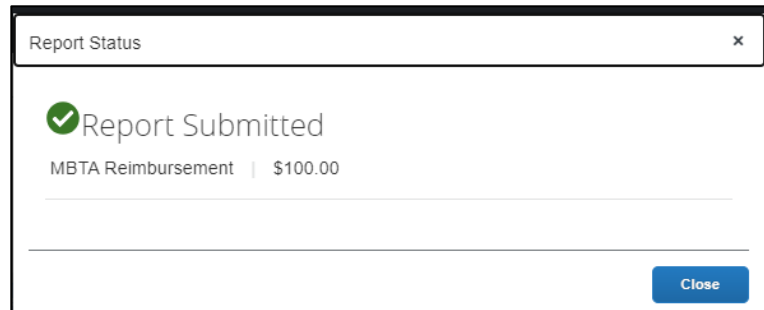
Company Payments		Employee Payments	
Amount	\$100.00	Amount	\$0.00
Due To	Employee	Due To	Company

Amount Total:	Due Employee:	Owed Company:
\$100.00	\$100.00	\$0.00

Requested Amount:	Total Paid By Company:	Total Owed By Employee:
\$100.00	\$100.00	\$0.00

Buttons: Cancel, **Submit Report**

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



The 'Report Status' window shows a green checkmark icon and the text 'Report Submitted'. It also displays 'MBTA Reimbursement | \$100.00' and a 'Close' button at the bottom right.

Report Submitted

MBTA Reimbursement | \$100.00

Close