Managing Receipts in Concur

Overview: This guide explains the various methods available to get your receipts into your Concur profile so they may be attached to expenses in trip reports you've created. It is up to you to decide which method to use, or you may use a combination of the different methods depending on the type of receipt, how you received it, and your preferences.

General Tips:

- If you use multiple methods for the same receipt, this will result in duplicated receipts in your profile.
- Keep your physical receipts until your expense report is approved, in case any questions arise due to legibility of your receipt image.

Methods Available For Managing Receipts*:

- Use ExpenseIt in the **SAP Concur mobile app** to take a picture and export to your Concur profile.
- Activate **E-Receipts** to automatically get receipts in your profile from most hotel and car rental vendors, and for airfare when the flight was booked in Concur.
- **Email receipts** from your Trinity email to your Concur profile.
- **Scan receipts** to your computer and attach them individually to transactions in a report.

*The following pages will detail how to use each of the methods listed above.

ExpenseIt in the SAP Concur Mobile App

How it Works: The ExpenseIt feature in the SAP Concur mobile app is a quick and convenient way to get receipts into your Concur profile. This feature uses optical character recognition technology to automatically turn receipt images into expenses for you, meaning it creates a transaction line item for the expense in the system and attaches the receipt image to it.

Good to Know:

- Works with Android and iOS devices.
- Ensure your SAP Concur mobile app is updated to the latest version.
- Take a picture of the receipt when you receive it.
- Receipts received digitally may be forwarded to **receipts@expenseit.com** from your verified work email.
- If the expense was charged to a university Travel Card, the ExpenseIt-created transaction will automatically combine with the card transaction once it posts in Concur (if the data matches).
- May also be used for expenses paid out-of-pocket to avoid manually entering all the transaction data.
- **Combining** of ExpenseIt-created transactions to posted university Travel Card transactions:
    - ExpenseIt must have accurately captured the **Vendor Name, Transaction Date, and Amount** in order for it to automatically combine with the card transaction.
    - If your expenses don't automatically combine (due to reasons above), you will need to combine them yourself. Move all applicable Expense-it created and posted card transactions that need to be combined to a report **before combining them**.
        - To combine, simply select the two line items and click "Combine Expenses."

Step-by-Step:

1. Open / log into the SAP Concur mobile app and click ExpenseIt.
2. Lay the receipt you wish to capture on a flat surface. Point your camera at the receipt until the auto-crop box appears around the edges. You may turn off auto-crop by tapping the receipt image in the bottom-right corner of the screen.
3. Take a photo and once you've captured a quality photo select ***Use***.
4. ExpenseIt will analyze the image, but you do not need to keep the app open while this is taking place.
5. Once the receipt has been analyzed, the transaction will appear in your available expenses list with the receipt image attached, and may be moved to a report. If the expense was charged to a university Travel Card, ensure the ExpenseIt-created transaction combines with the posted travel card transaction (see information above in "Good to Know" if they do not automatically combine).

Additional Resource Links:

- **iOS Devices**
    - Tip Sheet w/ Screenshots
    - Video
- **Android Devices**
    - Tip Sheet w/ Screenshots
    - Video

E-Receipts

How it Works: E-receipts are electronic receipt images sent to Concur directly from the vendor. E-receipts help to eliminate paper receipts and make it easier for you to complete your expense reports. E-receipts only exist for certain vendors, namely most major **car rental** and **hotel** vendors. If the reservation is paid for with a university Travel Card, the e-receipt will attach itself to the travel card expense once it posts in your Concur profile.

- **Please Note:** For hotels (and some other vendors), the vendor may provide e-receipts for some properties but not others. In order to know if a property provides e-receipts, look for "E-Receipt Enabled" when booking in Concur Travel.

Important Note for Airfare E-Receipts: E-receipts for airfare expenses are ONLY generated if the booking was made in Concur travel. **Users cannot receive an e-receipt for airfare if they do not book in Concur.** Vendors do not send these, they are created by Concur using the itinerary data in the system. Therefore, if you book airfare in Concur and subsequently cancel the ticket, you will no longer have an itinerary from which Concur can create an e-receipt.

Activating E-Receipts:

- If you are a new user, you may see a notice to sign up for e-receipts in the Alerts section of your Concur home screen. Click **Sign up here**, and follow the steps.
- If you do not have an alert on your home screen, you can check to ensure you are signed up for e-receipts in your Concur profile at the following path: **Profile —> Profile Settings —> E-Receipt Activation**
- Once you are on the E-Receipt Activation screen,
    1. Click the **E-Receipt Activation** link
    2. Read through the **E-Receipt Activation and Use Agreement**
    3. Click **I Accept**

Additional Resources:

- Activating E-Receipts Tip Sheet w/ screenshots
- E-Receipt Coverage document includes listing of vendors that currently provide e-receipts.

Email Receipts

How it Works: Have travel receipts in your Trinity email? You can forward them to Concur to get them in your profile & ready to attach to expense reports! Just ensure that your Trinity email address listed in your Concur profile settings is verified, and emailed receipts will work when forwarded from that email address. There are two email addresses to which you can forward your receipts:

- **Receipts@expenseit.com:** Sending to this email address will put the receipt through the same optical character recognition (OCR) process that receipts imaged in the SAP Concur Mobile app go through. An expense is created from the receipt and when the dates, vendor name, and amounts match a travel card transaction in your available expenses, they will automatically match. Otherwise, you will need to move the card transaction and ExpenseIt transaction to a report and combine them manually. See the ExpenseIt section of this guide for more information.
- **Receipts@concur.com**: Sending to this email will put the receipt in the "available receipts" section of your Concur Expense page, so you can then select them to manually attach to transactions. The only difference here is the receipt doesn't go through OCR and create an expense line item, so it won't automatically attach to a transaction.

Scan Receipts To Your Computer

How it Works:

1. Use a scanner to send receipt images to a folder on your computer in PDF format.
2. Create an expense report and attach your travel card transactions to it, as well as create expenses for any out of pocket transactions.
3. Within the report, select the transaction for which you are ready to attach a receipt and then click "**attach receipt.**"
4. Click "**Browse**" next to "File Selected for uploading" and then find and select the correct receipt image in the folder you saved it to on your computer.
5. Click "**Attach**" and you're done!