

Concur Expense: Receipt Handling – Approved Senders

Setup Guide

Last Revised: July 1, 2020

Applies to these SAP Concur solutions:

- ☒ Expense
 - ☒ Professional/Premium edition
 - ☐ Standard edition
- ☐ Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Invoice
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes / Comments / Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
January 7, 2021	Updated the copyright; no other changes; cover date not updated
July 1, 2020	Added information about the NextGen UI; made modifications throughout; cover revision date updated
April 9, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 2, 2020	Updated the copyright; no other changes; cover date not updated
January 4, 2019	Updated the copyright; no other changes; cover date not updated
October 18, 2018	Added information about the existing UI and NextGen UI; cover revision date updated
April 4 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 8 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
October 7 2016	The Approved Senders tab is new to the Receipt Handling page.

Receipt Handling – Approved Senders

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view but not create or edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP. In this case, the client must initiate a service request with support.

Section 2: Overview

This feature saves time for expense report submitters because they can skip the step of adding receipts from approved senders.

NOTE: Registered SAP email addresses cannot be used as approved senders.

On behalf of your company, you may approve a central source to email receipts into SAP on behalf of your employees. This feature is ideally suited to an internal service group that provides scanning services for paper receipts. A client administrator may also use this feature to allow a 3rd-party supplier, such as a Travel Management Company (TMC), to email receipts to an employee's receipt store on behalf of the user purchasing travel tickets.

Key elements of this feature:

- The sender must be on the **Approved Senders** list. The approved senders list in SAP accommodates up to twenty (20) senders.
- The sender must put the user's verified company email address as the first text in the subject line of the email. SAP uses only the first recipient email address; other words and potential email addresses are ignored.
- The sender must email the receipt to receipts@concur.com.
- For ExpenseIt users, if the sender instead emails the receipt to receipts@expenseit.com, and has the user's verified company email address in the subject line, then the receipt will go through Receipt Recognition.

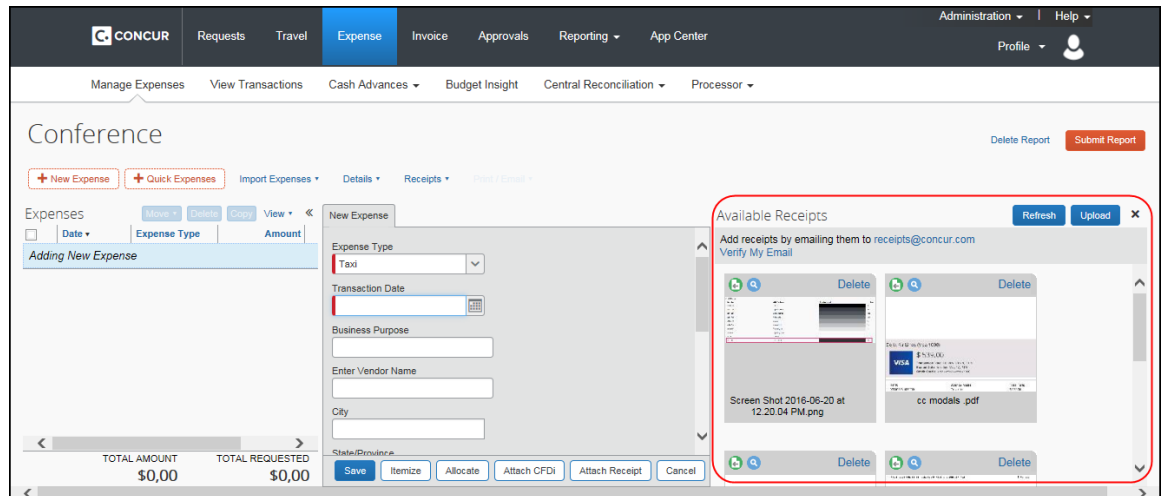
Section 2: Overview

- The types of email receipts supported are the same as are currently supported for user-sent email receipts.

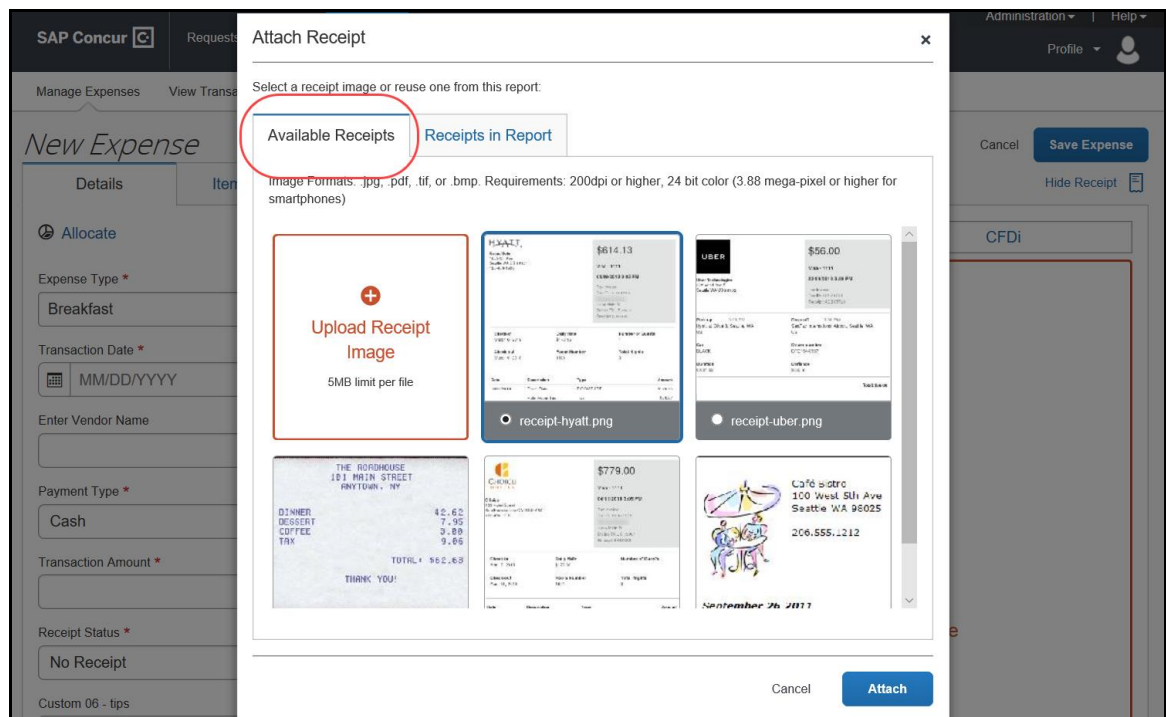
User Experience

Receipts successfully emailed into SAP from approved senders, display in **Available Receipts**.

This sample shows the existing UI:

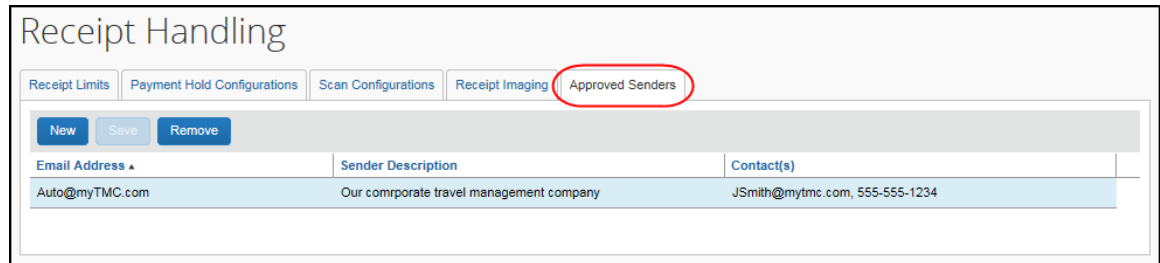


This sample shows NextGen UI:



Admin Experience

The **Receipt Handling** page has a new tab, **Approved Senders**.



The screenshot shows the 'Receipt Handling' page with several tabs: 'Receipt Limits', 'Payment Hold Configurations', 'Scan Configurations', 'Receipt Imaging', and 'Approved Senders'. The 'Approved Senders' tab is highlighted with a red circle. Below the tabs are buttons for 'New', 'Save', and 'Remove'. A table lists approved senders with columns for 'Email Address', 'Sender Description', and 'Contact(s)'. One entry is visible: 'Auto@myTMC.com' with the description 'Our corporate travel management company' and contact 'JSmith@mytmc.com, 555-555-1234'.

Email Address	Sender Description	Contact(s)
Auto@myTMC.com	Our corporate travel management company	JSmith@mytmc.com, 555-555-1234

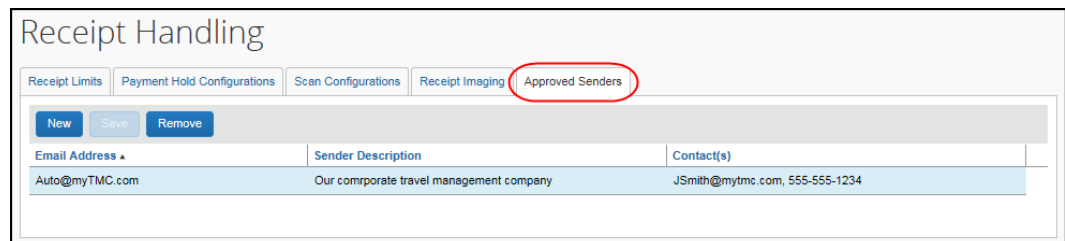
The **Approved Senders** tab is editable by global-level client administrators. Group-level client administrators can view, but not edit, this tab.

Section 3: Configuration

To begin using this feature, enter up to 20 email addresses on the **Approved Senders** tab of the **Receipt Handling** page. You will also need to coordinate with the sender to provide them the information on the email address to which they must send receipts and the expected data (recipient email address) for the subject.

► Add approved senders for direct access to Receipt Store

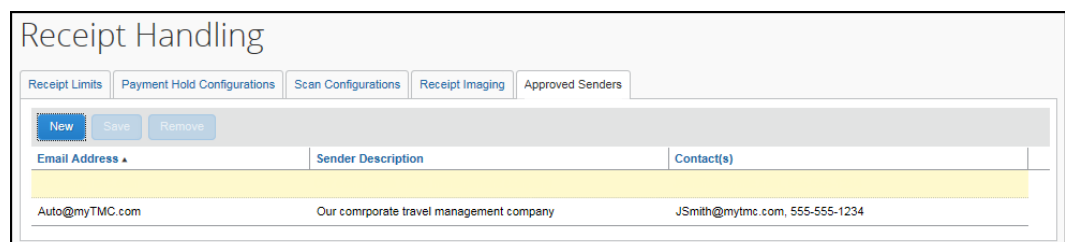
1. Log in to SAP as a global-level administrator and click **Administration > Expense > Receipt Handling**.



This screenshot is identical to the one above, showing the 'Receipt Handling' page with the 'Approved Senders' tab selected and one entry in the table.

Email Address	Sender Description	Contact(s)
Auto@myTMC.com	Our corporate travel management company	JSmith@mytmc.com, 555-555-1234

2. Click **New**. A new row displays in the list.



This screenshot shows the 'Receipt Handling' page with the 'Approved Senders' tab selected. The 'New' button is highlighted. A new row is added to the table and highlighted in yellow, with empty fields for 'Email Address', 'Sender Description', and 'Contact(s)'. The existing entry remains below it.

Email Address	Sender Description	Contact(s)
Auto@myTMC.com	Our corporate travel management company	JSmith@mytmc.com, 555-555-1234

Section 3: Configuration

- Click in the **Email Address** column of the new row. The row becomes editable.

Email Address ▾	Sender Description	Contact(s)
<input type="text"/>		
Auto@myTMC.com	Our corporate travel management company	JSmith@mytmc.com, 555-555-1234

- Complete the following fields:

Field	Description
Email Address	Enter the email address of the 3 rd party receipt sender, vendor. NOTE: The email address for this feature must not belong to a registered SAP user.
Sender Description	Enter a description for this sender.
Contact(s)	Enter the contact information of your employee who manages your company's relationship with this sender. When needed, use commas to separate the information for multiple contacts.

- Click **Save**.

